



SUMMARY OF INITIAL CONSULTATION AND REVIEW

PROCESS FOR CONSTRUCTION, RENOVATIONS AND MAJOR REPAIRS

This summary does not purport to state all of the components of the related Policy. It is meant to be a guide to assist you in efficiently accomplishing the process.

1. Pastor contacts the Office of Construction and Real Estate to discuss the project concept.
2. Pastor must create an Entity Building Committee if the project is over \$100,000.
3. Advance approval by the **Diocese** is required for capital improvements or repair/renovations greater than \$100,000. Pastor requests Diocesan approval for the project in the form of an email which will be directed to the Diocesan Chief Operating Officer (COO), Chief Financial Officer (CFO), Director of Construction and Real Estate, and Manager of Construction and Real Estate. *(Please see the Policies and Procedures for Construction, Renovations and Major Repairs, page 5 for direction on what to include in the email.*
4. Diocesan legal counsel review may be required for all contracts.
5. The Bishop will sign all final construction Diocesan documents
6. Entity Building Committee must engage a Project Manager for any project in excess of \$500,000.00:
 - Project Manager and Entity Building Committee should solicit three architectural bids.
 - Project Manager and Entity Building Committee should solicit three general contractor bids.
 - Project Manager, throughout the project, provides Diocese with written budget and status reports.
7. Review and approval by the Diocesan Building Commission may be required for capital improvements and/or renovations.
8. If worship space is involved, the review and approval by Diocesan Committee for Sacred Places is also required for new construction, renovation and capital improvements.



**DIOCESE OF DALLAS
CONSTRUCTION PROJECT TRACKING CHECKLIST**

Parish Name:		
Project Name:		
Date of Commencement:		
Action	Responsible	Date
1. Contact with the Diocesan Office of Construction and Real Estate has been made.	<input type="checkbox"/> Pastor	
2. The Pastor creates a Building Committee for projects over \$100,000.	<input type="checkbox"/> Pastor	
3. Architect is hired to draw a design, providing elevations, floor plan, and site plan if determined by the Diocesan Office of Construction and Real Estate.	<input type="checkbox"/> Pastor	
4. If required, Pastor requests approval for the project in the form of an email to the Chief Operating Officer (COO), Chief Financial Officer (CFO), the Office of Construction and Real Estate (DC). Parish Finance Council consent for expenditures (refer to #3 on Summary of Review).	<input type="checkbox"/> COO, CFO, DC	
5. Parish has met with the Diocesan Parish Financial Committee and has received approval in writing from the Chief Financial Officer to proceed.	<input type="checkbox"/> Pastor	
6. Entity Building Committee engages a Project Manager for any project in excess of \$500,000.	<input type="checkbox"/> EBC	
7. Draft of the Diocesan Project Manager Contract is sent to the Diocesan Office of Construction and Real Estate in a redline Word Document. (Contact the Diocesan Office of Construction and Real Estate for current Diocesan Project Manager Contract).	<input type="checkbox"/> DC	
8. Project Manager Contract reviewed by Diocesan Legal Counsel, approval from all parties, final execution of the contract.	<input type="checkbox"/> DLC	
9. Entity Building Committee and Project Manager solicits three architectural firms.	<input type="checkbox"/> Pastor	
10. Draft of the Diocesan Architect Contract is sent to the Diocesan Office of Construction and Real Estate in a redline Word Document. (Contact the Diocesan Office of Construction and Real Estate for current Diocesan Architect Contract).	<input type="checkbox"/> DC	
11. Architect contract reviewed by Diocesan Legal Counsel and approval, approval from all parties, final execution of the contract.	<input type="checkbox"/> DLC	
12. Conceptual/Schematic review and approved by the Diocesan Building Commission if required.	<input type="checkbox"/> DC	
13. Design and Development reviewed by Sacred Places. (Only if worship space is involved).	<input type="checkbox"/> DC	
14. Final Construction plans reviewed by Diocesan Building Commission if required.	<input type="checkbox"/> DC	
15. Entity Building Committee and Project Manager solicits three General Contractors.	<input type="checkbox"/> Pastor	
16. Draft of the Diocesan General Contract is sent to the Diocesan Office of Construction and Real Estate in a redline Word Document. (Contact the Diocesan Office of Construction and Real Estate for current Diocesan General Contract).	<input type="checkbox"/> DC	
17. General Contractor contract reviewed by the Diocesan Legal Counsel, approval from all parties, final execution of the contract.	<input type="checkbox"/> DC <input type="checkbox"/> DLC	
18. Payment and performance Bonds reviewed and signed	<input type="checkbox"/> DC	
19. Memorandum of Contract signed and filed with County	<input type="checkbox"/> DC	
20. Payment bond filed with County	<input type="checkbox"/> DC	

KEY OF RESPONSIBLE PARTIES

- CFO: Chief Financial Officer of the Diocese
- DBC: Diocesan Building Commission
- DC: Director of Construction and Real Estate
- DCSP: Diocesan Committee for Sacred Places
- DLC: Diocesan Legal Counsel
- DFC: Diocesan Finance Committee EBC- Entity Building Committee
- PFC: Parish Finance Committee