

## **SECTION 18: BUILDING**

The following policies shall be followed in regard to building projects.

### **18.1 PROCEDURES FOR BUILDING, RENOVATION, AND REPAIR PROJECTS**

#### **18.1.1 GENERAL DEFINITIONS AND EXPLANATIONS**

**Building Office:**

The office of the Archdiocese charged with the responsibility of administering construction projects. Services are available at all times during planning and construction of facilities.

**Worship Office:**

The office of the Archdiocese charged with the responsibility of consultation on all liturgical matters. Services are available at all times during the planning and construction of worship spaces.

**Owner:**

Parish, school, or institution responsible for the project.

**Building Committee:**

The group of individuals selected to represent the owner in the construction process (strongly recommended over representation by a single-person, such as a pastor or principal).

**Design-Bid-Build:**

The Archdiocesan-approved process for construction projects: the owner contracts with two separate entities, the design firm and the general contractor. The design firm is selected by the building committee and the contractor is selected by competitive bidding. Other methods of project delivery, such as design-build (designer and contractor are one entity) and negotiated contracts (selection of a contractor without a bid process) must receive specific written approval from the Vicar General.

**Design Firm:**

Architectural or engineering firm licensed by the state and hired by the owner to provide design services. All design firms must be approved in advance by the Building Office.

**Design Fees:**

Fees paid by the owner to the designer for the preparation of drawings and specifications necessary to bid the project. The Archdiocese uses a fee schedule that matches the State of Louisiana fee schedule. Design firms do not compete on the basis of fees.

**Design Contract:**

The written agreement between the owner and design firm that states the conditions of service, fees, and schedule. The Building Office prepares the design contract after the schematic design

phase has been completed and the project approved.

**Schematic Design:**

The initial phase of project design in which the design firm prepares simple drawings of the project, along with a preliminary cost estimate.

**Project Budget:**

All costs associated with the project including construction, design firm fees, surveys, permits, testing lab services, furnishings, landscaping, miscellaneous costs, Building Office fee (1% of construction cost), plus a 5% contingency on the total.

**General Contractor:**

State-licensed firm chosen by the competitive bid process and hired by the owner to construct the project. All general contractors must be approved in advance by the Building Office.

**Competitive Bids:**

The process used to select the general contractor. Sealed bids are opened at the Building Office and read in public. The bidder submitting the lowest bid within budget is awarded the construction contract.

**Construction Contract:**

The written agreement between the owner and contractor for the construction of the project. The Building Office is responsible for the preparation of the construction contract.

**Liturgical Consultant:**

Either a member of the Office of Worship or a separate consultant approved by the Archbishop through the Office of Worship. Services of the Office of Worship are available to the owner at no charge. Outside consultant fees shall be determined and agreed upon in advance and shall be considered a part of the project budget.

The role of the liturgical consultant is to:

- provide the owner's parish with sessions on liturgy and the impact of liturgy on church design, furnishings, and the placement of furnishings
- provide, as part of this information process, any Archdiocesan policies that relate to church design, art, or furnishings
- assist in the selection of an architectural firm
- assist in the selection of a liturgical artist, if needed
- participate in all planning meetings with the parish building committee or pastor
- be available to the architect for consultation throughout the design process
- (if an outside consultant) provide the Office of Worship with schematic design drawings for review and approval, which are then sent on by the office to the Archbishop
- (if an outside consultant) provide the Office of Worship with final construction documents for review and approval before these are sent by the office to the Archbishop

for his review and approval

## **18.1.2 PROCEDURE**

### **18.1.2.1 STEP ONE: INITIAL REQUEST**

The owner shall make a request for conditional approval of a project by letter or email to the Chief Operating Officer if the total anticipated project budget is below \$100,000 and to the Vicar General (with copy to the chief operating officer) if the anticipated project budget is above \$100,000. Assistance with initial determination of the project budget is available from the Building Office. The request is to include the following information:

- a) The pastoral or institutional need for the project
- b) The nature of the project and a description of how it meets the pastoral or institutional need
- c) Approximate cost of the project
- d) How the project will be financed (e.g., funds on deposit, building campaign, or archdiocesan loan)

If all or part of the project will need to be financed by an archdiocesan loan, the criteria for granting the loan will be based on need, ability to service debt, and the current financial state of the Archdiocese.

Projects costing less than \$10,000 need no formal approval from the Archdiocese; however the attached four-page contract form is to be used for all small construction and repair projects and work shall not begin until receipt of appropriate insurance certificates. Owners are encouraged to not sign vendor proposals. Assistance in review of certificates of insurance is available from the Building Office and Catholic Mutual.

### **WORSHIP SPACES**

If the project is a new church or renovations to an existing church resulting in a change in seating capacity, the owner, represented by the pastor, shall meet with the Archdiocesan Parish Sites and Boundaries Committee to obtain the committee's assessment regarding the appropriate seating capacity of the space.

When a project involves a worship area, whether a church or any kind of chapel, the owner shall first retain the services of a liturgical consultant, who shall be involved in the entire planning process, including the selection of the design firm. Final approval of the design of all worship areas rests with the Archbishop and is obtained through the Office of Worship.

### **18.1.2.2 STEP 2: DESIGN FIRM SELECTION**

All projects other than minor alterations which do not involve life safety require services of a design firm. Minor alterations which involve moving of walls or other architectural alterations shall not be done without drawings that show the scope of work.

The owner's building committee shall interview several design firms (three or more) and make a selection based upon the firm's qualifications and suitability for the project. If the owner's building committee prefers to work with a firm that has been previously engaged on other projects, and this firm is approved by the Building Office, the interview process may be eliminated after consultation with the Building Office. The interview process shall always take place for projects involving worship areas.

With the selection of the design firm finalized, the owner shall then employ the firm to provide schematic design services as necessary to determine the scope and the budget of the project. The owner shall pay for these services on an hourly basis not to exceed 15% of the anticipated design fee and these payments shall be credited against the total design fee.

### **SCHOOLS AND CAFETERIAS**

Projects which involve additions/alterations to or construction of educational spaces shall be reviewed by the Office of Catholic Schools at the conclusion of the schematic design phase.

Projects which involve additions/alterations to or construction of school food service spaces shall be designed in concert with the School Food & Nutrition Services Department. Where required, the design firm shall employ a food service consultant to assist in the design of kitchens.

### **18.1.2.3 STEP 3: PROJECT BUDGET APPROVAL**

The owner shall submit the schematic design drawings and construction budget to the Building Office, for assistance in establishing a total project budget. This project budget shall be used to determine the next step in the project approval process, as follows:

<i>Budget</i>	<i>Approval Authority</i>
Project budget between \$10,000 and \$100,000:	Chief Operating Officer
Project budget between \$100,000 and \$500,000:	Vicar General
Project budget above \$500,000:	Archbishop, usually after consulting the Archdiocesan Finance Council

The request for final budget approval, in the case of projects exceeding \$500,000, must be accompanied by the attached form and a statement of pastoral or educational needs. In the cases of parishes, the parish pastoral council and finance council shall submit a written statement expressing their opinion of the project and describing both the pastoral needs to be addressed by the project and the manner in which the parish will meet the expenses. The written statements from these two councils are to state if there are differing opinions on the councils.

Similar documentation must be provided by non-parish schools and other institutions.

## **FUND-RAISING CAMPAIGNS**

If it is anticipated that a fund-raising campaign will be necessary, approval of the Archbishop through the Vicar General must be obtained. The Office of Development shall also be consulted.

### **18.1.2.4 STEP 4: CONTRACT WITH THE DESIGN PROFESSIONAL**

Upon receipt of the approvals described above, the Building Office will prepare a design contract for complete design services. Pastors, principals, and agency heads shall not sign contracts prepared by others. Upon signature, copies of the design contract shall be distributed to the owner, the design firm, and the Building Office.

- a) The owner is not obligated to the design firm, other than to pay its hourly rate through the schematic design phase, until the design firm is commissioned by a fully executed contract.
- b) The Building Office reserves the right to approve the consulting engineers for the structural, mechanical, and electrical disciplines. The design firm shall submit a list of consulting engineers for approval to the Building Office prior to signing the contract for design services.
- c) Movable equipment and furnishings are not to be included in the design firm's contract unless approved by the Building Office.
- d) The contract with the design firm shall list the approved construction budget.

### **18.1.2.5 STEP 5: FINAL REVIEW AND BIDDING**

Upon completion of the bidding documents (drawings and specifications) but prior to issuance for bids, the design firm shall submit one complete set to the Building Office and one set to the owner for final review. The Building Office will communicate its review comments directly to the design firm with copies to the owner. The design firm shall complete revisions to the documents as requested, and at that time the project will be issued for bids.

A list of potential bidders shall be submitted to the Building Office by the owner and the design firm, or the Building Office, if requested, will provide a list of potential bidders. The Building Office must approve all bidders in advance of invitations to bid.

Upon a date and time determined by the Building Office, bids shall be opened at the Archdiocese in the presence of the owner and all other interested parties. If the lowest responsible bid is within 5% of the previously approved budget, it shall be accepted. A contract for construction shall then be prepared by the Archdiocesan attorneys or the Building Office.

### **18.1.2.6 STEP 6: CONSTRUCTION PHASE**

The Building Office will assist the owner by serving as its representatives during the construction of the project. The owner is encouraged to designate a person from its building committee to serve also as its representative during the construction.

**PAYMENT PROCEDURE**

Schedules of payments to the design firm and to the general contractor are specified in the contracts. The design firm submits its requests monthly for payment to the owner who in turn submits a withdrawal form along with a copy of the invoice to the Building Office. The general contractor submits its requests for payment monthly to the design firm for certification and submission to the owner. Upon receipt of the approved pay request, the owner in turn submits a withdrawal form along with a copy of the invoice to the Building Office.

The Building Office processes the requisitions through the Accounting Office. Funds are wired or checks are sent to the owner for deposit in the owner's account, for payment to the design firm or general contractor. The owner may opt to have the Accounting Office pay the various entities directly.

**18.1.2.7 ATTACHMENTS**

Building Form Four-page contract for small projects

*Archdiocese of New Orleans Policy Handbook  
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