

STEP BY STEP PROCESS TO BEGIN AND COMPLETE A DIOCESAN FACILITIES PROJECT

- 1) The Parish contacts the Director of Facilities & Maintenance (DFM) in order to determine if a “Design Professional” is required by the Commonwealth of Massachusetts Building Code for “Controlled Construction.”
- 2) The DFM will notify both the Vicar General (VG) and the Chairman of the F&M Commission (CFM) of the determination for either Controlled Construction or non-Controlled Construction.
- 3) If the Parish wishes to proceed with the aforementioned project, then a letter about the project is written to the VG with a copy to both the CFM and the DFM for permission to obtain Designer proposals. If the project is approved, then the DFM will assist the Parish in sending out Request for Proposals (RFP). The following two criteria should be included in the Pastor/Administrator’s letter for approval:

Firstly, the Pastor/Administrator will need to inform both the Parish Council and the Finance Council of the expenditure. Canon Law requires that the Pastor/Administrator needs the concurrence of the Finance Council Chair and Finance council for any project exceeding \$25K. As a result, the concurrence of both these respective councils are to be included in the Pastor/Administrator’s letter for permission to begin the process for the project. As a result, this process provides transparency at the parochial level and gives full knowledge to both councils of what is being done within the parish and provides an opportunity for the councils to advise the Pastor on these matters.

Secondly, the Parish must have the financial resources to begin and complete the project, which will be confirmed by the Diocesan Chief Financial Officer. The plan to fund the project in its entirety and is to be included in the letter requesting permission to begin the project.

- 4) Upon the return of the RFP’s, the Parish selects a Design Professional and then a letter requesting to hire the Design Professional is written to the VG with copies to both the CFM and the DFM. If the Design Professional is approved, then an AIA contract is written to the selected Design Professional and signed by all parties. However, if either the project itself or in aggregate is over \$25K, then either the VG or the Diocesan Bishop will sign the AIA contract in addition to the Pastor/Administrator.
- 5) The Design Professional RFP will include cost estimates for the project. If the Parish has the financial resources to complete the project, which will be confirmed with our CFO; then, the Parish will utilize the RFP to go out bid for the project. The bids will be solicited from approved contractors with the DFM overseeing the entire process. Unapproved contractors can easily apply to be an approved contractor by following the approval process as listed below.
- 6) The Parish in conjunction with the DFM will open all bids and then the Parish will make a contractor selection. Next, the parish will seek approval from either the VG or the Diocesan Bishop via letter with copies to both the CFM and the DFM for permission to award an AIA contract to the selected contractor. Also, included in the approval letter request are copies of all of the bids received for this project.
- 7) If Parish receives approval for the project, then the DFM will write an AIA contract, which requires a legal review, and upon completion of the legal review, the AIA contract will be sent out to contractor for

signature, then the Pastor/Administrator's signature, and then either the VG or the Diocesan Bishop, if the project exceeds \$25K.

8) The DFM will be the Diocesan representative during all stages of construction and providing the Parish with advice on all construction related items and issues that arise during this project.