



ARCHDIOCESE OF BALTIMORE
PROJECTS LIFECYCLE
(TPC IS \$300,000 OR MORE)

**CATEGORY
IV**

	<i>Action</i>
CONCEPT/FEASIBILITY	
1. Need Identified by Parish	Through its own internal processes, Parish identifies and defines, to the extent possible and <u>without</u> hiring any outside consultants or other resources, potential need for work. DFM may provide consultation.
2. Concept Approved by Pastor, Parish Council and Vicar Bishop	After the need is identified, the Pastor and pastoral staff review the need and feasibility with the Parish Council and Vicar Bishop.
3. Pastor Writes to Archbishop	Parish writes to Archbishop describing the potential need. The request should include all information necessary to evaluate the request, i.e. nature of the project, research data, expected cost and financial status. A copy of this request should be sent to the Executive Director of the DMS.
4. Initial Response and Review	An initial meeting will occur between the DMS and the Parish to review concepts, objectives, development parameters, preliminary costs, financial resources, timing, annual operating impacts and alternatives. Building condition assessment and hazardous material survey completed as required. If additional input is required/appropriate from external sources, the DMS may assign selected third-party consultants (architects, planners, etc.) to work with the Parish to better define its potential need. These consultants will be pre-approved. A PM from the DFM who will oversee the third-party services will be assigned.
5. Building Assessment	Parish or outside third-party conducts a condition assessment for each building identified with the Parish.
MASTER PLAN	
6. Development of Master Plan	Following approval by the Archbishop, the DFM will select and assign contracted third-party resources to assist the Parish in preparing a master plan and associated schedule and budget. The ABC and Vicar Bishop will review the master plan at various stages, coordinated by the DFM.
7. Development of Business Plan	Using the master plan as a base, the Parish will prepare and submit to the Archbishop a detailed business plan for the proposed project. The plan will address demographics, long-range planning, funding, annual operating impacts and other topics necessary for thoughtful consideration.
8. Review and Approval of Master Plan and Business Plan	Review and approval the of master plan and business plan.

SCHEMATIC DESIGN	
9. Selection of Architect	<p>Working with the Parish, the DFM will select an architect to provide schematic design services only. The design firms will be selected from a list of pre-qualified professional firms experienced in Archdiocesan projects and maintained by the DFM.</p> <p>The DFM will assign a PM, on the Parish's behalf, to oversee the provision of services and to act as the Parish's owner's representative during this phase. Designs will reflect the Parish's preferences, style and character, but will be consistent with AOB quality and technical standards.</p>
10. Review of Schematics	<p>The ABC will review the schematic design, coordinated by the DFM. Method of delivery is confirmed.</p> <p>In selected circumstances, and subject to the specific approval of the Archbishop, the Construction Management method may be utilized to deliver construction services. Selection procedures will be identical to those for general contractors.</p>
11. Finalization of Schematics	<p>Schematic design documents, including updated schedules, budgets and funding sources, will be submitted to the Archbishop for approval.</p>
DESIGN DEVELOPMENT	
12. Design Process	<p>The DFM will negotiate a contract to complete the design and construction administration process. The DFM will, on the Parish's behalf and in consultation with the Parish, oversee the process to insure timely completion within budget parameters.</p> <p>Documents will be forwarded to the DFM for review by the ABC upon completion of design development.</p>
CONSTRUCTION DOCUMENTS	
13. Review Design	<p>Documents will be forwarded to the DFM for review when construction documents are 50 percent and 95 percent complete. Each submission will include updated schedules, budgets and funding information.</p> <p>Selected bidder list is developed by DFM from pre-qualified list of general contractors.</p> <p>Documents submitted to local jurisdiction for review and permitting.</p>
CONSTRUCTION	
14. Bid-Award Contract	<p>In consultation with the Parish, the DFM will secure bids from at least three general contractors from a pre-qualified list of firms.</p> <p>Project awarded to lowest, qualified bidder.</p> <p>Contract prepared by DFM, ALC.</p>