

PROJECT PHASES

PHASE I – MASTER PLAN/FEASIBILITY

The DFM will select an architect (or architects) from an approved list to develop and complete this phase of the Work. After the necessary contract is prepared and executed by the Archbishop, the Architect(s) will:

1. Meet with the DFM, Pastor and Parish Building Committee about policies of the AOB and the experience and expectations of the DMS.
2. Develop a site plan showing existing conditions to include boundaries, land contours, zoning/development restrictions (e.g. wetlands, steep slopes, woodland, soils, cemeteries, etc.), all utilities (water, sewer, electric, gas, cable) and all existing improvements (buildings, paving, etc.) Special considerations such as historic designations must also be identified.
3. Based on the Needs Analysis Report, prepare a spatial program for approval by the Pastor, Parish Building Committee and the DMS.
4. Based on the approved spatial program, prepare a master plan of the entire campus for approval by the Pastor, Parish Building Committee and the DMS.
5. A building condition assessment and a hazardous material survey, per OSHA requirements, must be completed for any/all buildings before any project is planned or undertaken.
6. The ABC shall review and approve the final plan.

PHASE II – SCHEMATIC DESIGN

The DFM shall select for consideration no more than three architects from the AOB-approved list using a Request for Proposal (RFP) method. The final selection shall be made by an interview committee chaired by the DFM and composed of the Pastor, Parish Building Committee Chair and two representatives of the ABC. The Architect's services shall be secured using the standard AOB contract, reviewed by ALC and signed by the Archbishop.

Based on the approved spatial program and master plan, schematic drawings for the Work contemplated shall be prepared by the Architect. The DFM and Parish shall review these documents and schedule a review by the ABC. The Pastor must be present at the meeting at which this review is performed. Following DMS and ABC approval, and any necessary revisions, the project will be recommended to the Archbishop for his approval.

Required deliverables for this phase of the Work are:

1. Design documents including the approved master plan, detailed site plan showing all existing conditions and restrictions, floor plans, and building elevations.
2. Project Cost Estimate Worksheet prepared by the DFM in consultation with the Parish and Architect. An approved contractor may be used for estimating construction costs at this time.

PHASE III – DESIGN/DEVELOPMENT

Following approval by the Archbishop, the DFM shall prepare a contract for the design/development plans, construction documents, bid services, construction administration and project closeout by the Architect on a standard AIA form as modified by ALC, approved by the DFM and signed by the Archbishop. The Architect shall prepare design/development plans and an outline specification for the project.

These documents, together with a revised Project Cost Estimate, shall be submitted to the DFM for review and approval with the ABC in a meeting at the Catholic Center. The estimate must be obtained from a general contractor or professional estimator approved by the DFM. This estimate, together with the Capital Project Cash Budget Form, must be submitted to the DMS for approval. In the case of liturgical space, a color rendering or elevation of the interior is required. The rendering shall show such features as site lines, key liturgical furnishings and artwork elements (altar, tabernacle, crucifix, baptismal font, ambo, lectern, celebrant seating, altar server seating, gifts table, reredos screen, choir, stations of the cross, stained glass, etc.).

Required deliverables for this phase of the Work are:

1. Design documents including detailed site plan (existing and proposed), floor plans, building elevations, building sections, material/color selection board;
2. Preliminary mechanical, electrical, plumbing and structural plans;
3. Complete outline specifications; and
4. Revised Project Cost Estimate.

PHASE IV – CONSTRUCTION DOCUMENTS

With DMS approval, the design/development plans shall be expanded into construction documents (working drawings and specifications).

At the time the construction documents are 50 percent complete, the DFM must have the estimates of TPC updated, and documents and estimate submitted to the DMS for approval. One set of the contract documents must be filed with the DFM for review.

Any changes identified during this review shall be forwarded to the Architect through the DFM for inclusion in the construction documents prior to soliciting bids.

The DFM shall identify not less than three bidders, who have agreed in advance to submit a bid if invited. The DFM will pre-qualify general contractors and certain principal trade contractors, (e.g. mechanical, electrical, masonry, roofing, etc.) for all Category I & IV projects. Contractors who are determined by the DMS to have discriminated in any way with respect to race, sex or national origin or to have failed to provide a living family wage reflective of the principles of social justice shall not be qualified to bid.

When the construction documents are 95 percent complete, the Architect shall submit a complete set of plans and specifications to the DFM for final review and approval prior to release for bids. Specifications shall include standard AOB General Conditions, Front-end Documents and form of contracts.

Trade packages shall include reference to any Corporate Purchasing Participants as identified by the DFM subject to the project requirements.

Construction Documents must include:

1. Statement of the right to accept/reject any and all bids;
2. AOB Standard General Conditions;
3. Statement of Owner's right to approve all principal subcontractors; and
4. Requirement for Bid-Bond equal to 5 percent of the Contractor's bid.

A pre-bid meeting shall be held by the DFM with the Architect and Parish for the benefit of all bidders to clarify the scope of work and answer any questions.

Contractors must furnish a Performance Bond and a Labor and Material Payment Bond in the total amount of the contract. The name of the bonding company must be submitted to the DFM and the Insurance Office for review and approval.

PHASE V – BIDDING

Bids shall be received and opened at the Parish, the School, the Catholic Center or other location approved by the DFM. Parishioners or related parties shall not bid on projects for their own Parish to avoid conflict of interest. Requests for exception must be submitted to and approved by the DMS.

The bids shall be evaluated by the DFM, Architect and Parish Project Team. The project shall be awarded to the lowest, qualified bidder. The ALC shall prepare for execution an agreement in quadruplicate using the appropriate amended AIA form for review and approval by the DFM.

Before the contract is signed, the DFM and Architect shall review the bid proposal in detail with the successful bidder to insure that everything in the specifications is covered by the bid. Copies of the executed agreement shall be distributed as follows:

1. One original to the Pastor or Head of the Institution;
2. One original to the Contractor;
3. One original to the Archdiocesan Legal Counsel;
4. One original to the DFM;
5. One photocopy to the Design Team.

PHASE VI – CONSTRUCTION

After the contract is signed and prior to construction, a meeting of the General Contractor, all Principal Subcontractors, the Architect, DFM, the Pastor and designated Parish representative shall be held to review all aspects of the contract.

Progress meetings shall be held at least every two weeks at the job site with the Contractor, Architect, DFM and Parish representative. Minutes of all meetings shall be recorded by the Architect and copies submitted to all present and interested parties.

Copies of all Change Orders shall be submitted to the DFM for its records. All Change Orders shall be documented and processed in a timely manner, following AOB policy with regard to approval. Any adjustments/changes to the authorized budget shall be approved in advance by the DMS.

Payments to the Contractor shall be made upon monthly requisitions in which the amounts to be paid are certified by the Architect and forwarded to the Project Manager. Ten percent shall be withheld from each monthly requisition until the project is substantially complete.

Professional fees shall be paid in stages as set forth in the agreement between the Architect and the AOB. Professional fees for construction administration shall be paid monthly.

Prior to AOB acceptance of the Work, the Parish, Contractor, Architect and DFM shall conduct an inspection of the Work and the Architect shall prepare a "Punch List" of all non-compliant work; the Contractor shall obtain all Use and Occupancy Permits; and the Architect shall issue the Certificate of Substantial Completion identifying the date on which the AOB was able to take beneficial occupancy and the Contractor Warranty Period initiation date for all satisfactorily completed work.

Prior to this acceptance of the Work, the Contractor shall submit all Operating and Maintenance manuals; shall train the Owner in the operation and maintenance of all systems; and shall submit to the Owner all warranties, permanent keys, and all special tools.

PHASE VII – COMPLETION AND CLOSEOUT

Final inspection is to be conducted jointly with the Design Team, PM, Pastor and Parish Representative.

Final payment to the Contractor will be made upon 100 percent completion of all punch list work including: punch list items; submission by the General Contractor and all subcontractors the Release of Liens, the Consent of Surety to Reduction in Retainage, and Consent of Surety of Final Payment; submission of record drawings to the Design Team and completion of any other requirements of the contract documents.

Final payment to the Architect is to be made following completion of all aspects of the project by the Contractor as described above, submission of record documents to the Parish and, one electronic copy and completed final Project Cost Data Form to the DFM.

Record Documents must be provided for all Category I, III and IV projects. Final as-built drawings shall be provided by the various design consultants per the terms of their contract. The Consultants shall continuously maintain and provide these documents to the Parish and DFM as a part of their basic services. The as-built drawings shall be provided in hardcopy and electronic form. The electronic form of the documents shall be in the format of AutoCAD *.dxf files compatible with AutocadLite software applications per AOB instructions. All cross-referenced files and blocks shall be bound thereto and all files purged of unused layers and objects.

Drawing Execution shall conform to The U.S. National CAD Standard Version 2 for Layering, Drafting, Schedules, Organization, Symbols, Referencing, Terms, and Code Conventions.

PHASE VIII – PROJECT WARRANTY PERIOD

Latent (hidden) defects in the Work of the contract discovered within 12 months after the Architects' issuance date on the Certificate of Substantial Completion and Punch List are considered warranty defects that the Contractor is required to correct at no additional cost to the Parish. Upon discovery of such defects in the Work, the Parish shall notify the Contractor of the problem in writing with copies to the design consultant and DFM.