



CONSTRUCTION PROJECT POLICY

Planning, Design, Construction & Maintenance

Updated February 2016

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1. INTRODUCTION

The building or renovation of any facility is a major undertaking for a parish. It has long range effects not only on the life of the parish, but also on the Diocese as a whole.

Canon 1276, paragraph 2, urges bishops to “take care of the ordering of the entire matter of the administration of ecclesiastical goods by issuing special instructions within the limits of universal and particular law.” As such, these procedures have been established to assist the parish in this process.

The Diocesan Building Committee was established to serve as the Bishop’s advisor in facility and construction matters. The Facilities & Construction Department along with the Diocesan Building Committee will assist with guiding the parish through the building process and to review plans and specifications as they are developed, while ensuring technical continuity of the facilities throughout the Diocese.

2. GENERAL PROCEDURES

- 2.1 Diocesan guidelines require that before any project may be contracted for construction services, the parish must have 50% of the total cash needed on deposit and the balance covered by written plan. This plan is subject to a review by the Diocesan Office of Finance.
- 2.2 Any project, regardless of cost, requiring a loan must be approved by the Diocesan Finance Council before work may be contracted. NOTE: The Diocesan Finance Council only meets quarterly.
- 2.3 A written contract is required for all projects. All contracts, or amendments to contracts, must be reviewed by the Facilities & Construction Department BEFORE they are signed.
- 2.4 The Diocese of Fairbanks recognizes several construction delivery methods including, Design-Bid-Build with a General Contractor, Construction Manager At Risk (CMR) and Design/Build. Any and all methods of construction for a project must be reviewed in advance by the Facilities & Construction Department.
- 2.5 All construction projects shall conform to the applicable ADA guidelines as much as possible within the constraints of the building, budget and the site.
- 2.6 All work involving an area of worship (nave and/or sanctuary) must be reviewed and approved by the Bishop.
- 2.7 At the end of each project, submit a set of reproducible record (as-built) drawings and an electronic set of record drawings for the Facilities & Construction Department’s building files. A second set of reproducible drawings and electronic files should be maintained at the parish.

3. EMERGENCY PROCEDURES

- 3.1 Contact the Facility & Construction Department immediately after discovery of damage to any diocesan building, at 907 374-9500 ext 121 or 907 374-9521.
- 3.2 Begin gathering information on the extent of the damage and photos of the damage. Photos on a phone that can be sent to the Facility & Construction Department are useful for determining scope of damage initially.
- 3.3 The Facility & Construction Department along with the Diocesan Finance Office will work with the insurance company to determine coverage.

4. PRELIMINARY PARISH PLANNING

- 4.1 Vital information is needed before Preliminary Project Approval may be given.
 - a. What do you like about the present facility? What is the current condition of the building? When was it built? What renovations or additions have happened since it was originally built?
 - b. What are the needs and wants for the renovation / construction project? How many people/offices/bedrooms/meeting rooms, etc. does the facility need?
 - c. What is absolutely needed in the facility that would be a detriment to ministry if it is not included? If funding is not available, what alternatives are there to continue this ministry without this project?
 - d. Are there major safety risks that require the project to happen sooner?
 - e. Who is using the building (children, adults, elders, youth groups, exercise class)? How many people are attending each activity or event in the building? What equipment is necessary for these activities or events?
 - f. What other criteria needs to be considered? Direction of the sun? Wind direction? Accommodation for accessibility both inside the building and getting into the building? Energy usage and how to reduce both utility and heating costs.
 - g. Consider growth in the number of activities or events as well as the number of people attending each event.
 - h. Is the site large enough for the new building or addition? Where are the lot lines? Where are the utilities, will they impact the project? Does the site provide for fire-separation setbacks, snow removal, drainage, and parking? Ensure the property is owned by the Catholic Bishop of Northern Alaska? The Facilities & Construction Department has access to many deeds, plats and maps. If unsure about property, contact the Facilities & Construction department.
 - i. Project budget summary
- 4.2 The following questions will assist in scoping the project and ensure everyone is included in all phases of the project. At each step along the design process it

would be helpful to return to these questions to ensure the project will fulfill the needs of the parish.

- a. Why do this project?
Who's served, where, why, how? Who ministers here? What if there's NO project?
- b. Why do this project now?
What are the unmet needs, the detriments to ministry, and the critical safety items? Who pays for the design, construction, and maintenance?
- c. Why do this project this way?
What alternatives have been explored, that may also provide the needs.
- d. Are all users of the building included?
What groups of people have been left out of the brainstorming and decision process? Persons with disabilities? Young? Old?
- e. What's left out, will it affect the ministry?
Repeatedly come back to the question: "Does this work for _____?" Elders? Children? Religious education? Snow drifts? Wind? Accessibility? Parking? Specific ministry tasks? Storage? Meetings & conferences?

4.2 Master Plan Information - The Facilities & Construction Department acknowledges that a master plan is optional, but encourages the development of a master plan to serve as a bridge between the program and the preliminary design. Master plans are extremely beneficial toward:

- a. Developing a long term vision that inspires consensus and the stewardship required to implement.
- b. Enabling the proper implementation of interim improvements consistent with a long term vision.

4.3 Design may necessitate spending money for design professionals, either geotechnical for soils, architect or engineers. If professional services are necessary prior to Preliminary Project Approval, Bishop approval is required.

4.4 Parish Council shall review and approve the preliminary planning information. Parish Finance Council shall work with the Parish Council to develop a budget and plan for financing the project.

4.5 Construction may not start until proper reviews and approvals have been received.

4.6 Maintenance is vital. When the project is completed, the building or added feature will require additional maintenance in order to keep it fully functioning and safe. Who, specifically, is committed to doing the maintenance?

5.0 PROJECTS UNDER \$25,000

5.1 Preliminary Parish Planning

- a. Complete Preliminary Planning step to define purpose of project
- b. Develop written financial plan for funding this project, see section 5.3.

- 5.2 Projects with a projected cost under \$25,000 are generally handled on the local level with the following exceptions
 - a. Roof work;
 - b. Heating and ventilation work;
 - c. Work involving the area of worship (nave and/or sanctuary);
 - d. Any project within a subsidized parish will require approval from the Diocese;
 - e. Any project requiring financing or financial assistance from the Diocese.

- 5.3 Financial Plan
 - a. Preliminary review and approval by the Diocesan Finance Office if cash is on hand for project and no capital campaign is required.
 - b. If local/parish capital campaign is required, consult with the Office of Stewardship and Development.
 - c. Complete local/parish capital campaign drive.
 - d. Parish Finance Council and Pastor review funds available and get approval from Diocesan Finance Office for use of funds.

- 5.4 Parish works with Facilities & Construction Department, as needed, to develop
 - a. Project scope;
 - b. Contract for professional services if needed;
 - c. Bidding documents including narrative, specifications and drawings; as needed even if using volunteer labor

- 5.5 Facilities & Construction Department will coordinate
 - a. Review and recommendation of project by Bishop
 - b. Approval of Bid, if bidding the project
 - c. Preparation of Construction Contract with either a contractor or local government entity for labor

- 5.6 Closeout of the project includes sending the following information to the Facilities & Construction Department for the diocesan building files.
 - a. as-built drawings or sketches;
 - b. product information, ex. What brand of boiler was installed, what type of roofing was used, window manufacturer, flooring manufacturer along with maintenance and care instructions.

6.0 PROJECTS AT \$25,000 AND UP TO \$75,000

- 6.1 Preliminary Parish Planning
 - a. Complete Preliminary Planning step in order to scope and define purpose of project.
 - b. Develop written financial plan for funding this project, see section 6.3.

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- 6.2 Projects with a projected cost under \$75,000 can generally be handled on the local level with the following exceptions
 - a. Roof work;
 - b. Heating and ventilation work;
 - c. Work involving the area of worship (nave and/or sanctuary);
 - d. Any project within a subsidized parish will require approval from the Diocese.
 - e. Any project requiring financing or financial assistance from the Diocese.

- 6.3 Financial Plan
 - a. Preliminary review and approval by the Diocesan Finance Office if cash is on hand for project and no capital campaign is required.
 - b. If capital campaign is required, consult with Office of Stewardship and Development.
 - c. Complete capital campaign drive.
 - d. Parish Council and Pastor review funds available and get approval from Diocesan Finance Office for use of funds.

- 6.4 Parish works with Facilities & Construction Department, as needed, to develop
 - a. Project scope;
 - b. Contract for professional services if needed;
 - c. Bidding documents including narrative, specifications and drawings.
 - Will this work be completed by a contractor; volunteer labor; or labor provided by the City, Tribal Council or other local entity?
 - Depending on the scope of the project, the desired quality of the finished product, the timeline and budget will dictate how the project will be completed.
 - A high quality finished project may cost more but will last longer and be completed within timeline. Use of volunteer labor will reduce cost but generally takes longer to finish.

- 6.5 Facilities & Construction Department will coordinate
 - a. Review and recommendation of project by Bishop prior to solicitation of bids or quotes.
 - b. With other Diocesan Committees and Councils to assist with approval of budget and financial support.
 - c. Approval of bid and authority to award contract with Bishop
 - d. Preparation of Construction Contract

- 6.6 Closeout of the project includes sending the following information to the Facilities & Construction Department for the diocesan building files.
 - a. As-built drawings or sketches;

- b. Product information, ex. What brand of boiler was installed, what type of roofing was used, window manufacturer, flooring manufacturer along with maintenance and care instructions.

7.0 Projects At or Over \$75,000

7.1 Preliminary Parish Planning

- a. Complete Preliminary Planning step in order to scope and define purpose of project
- b. Develop written financial plan for funding this project, see Section 7.3.

7.2 Preliminary Design Phase

- a. Floor plan – it may take several iterations for parish representatives to agree upon a conceptual floor plan. This floor plan may be altered but it should show what functions need to be near each other and how the building should function.
- b. Site Review – site selection includes considerations for parking, drainage, deliveries and number of people using the facility; is the site near village core, wetlands, soil type? Who owns the property?
- c. Budget Estimate Range – using local knowledge and standardized pricing data determine a budget range for the project; as the project is refined the estimate will change but this will provide as a guide for developing a financial plan. Will fundraising or a capital campaign be required to fund this project?
- d. Prepare a Project Approval document for review by the Bishop and other committees or Councils as needed. Format of the Project Approval document shall include the following information.
 - Brief Background regarding the building and the need for the project,
 - Scope of Work,
 - Proposed Cost and Funding Source,
 - Estimated Maintenance and Operating Costs for this new facility or expansion, and
 - Timeline or schedule.
 - Any other relevant information or photos can also be included to further explain the project.
- e. Bishop approval required prior to moving forward with full design.

7.3 Financial Plan

- a. Preliminary review and approval by the Diocesan Finance Office if cash is on hand for project and no capital campaign is required.
- b. If capital campaign is required, consult with Office of Stewardship and Development.
- c. Complete capital campaign drive.

- d. Parish Finance Council and Pastor review funds available and get approval from Diocesan Finance Office and/or Diocesan Finance Council for use of the funds. NOTE: Diocesan Finance Council only meets quarterly.

7.4 Final Design Phases

- a. Schematic Design documents (~ 35%) and Design Development documents, (~ 65%), review with parish council, other affected parish groups, Facilities & Construction Office and Diocesan Building Committee. See section 8 for additional details of expected deliverables or work product for this phase of design.
 - Does the floor plan still provide the program requirements?
 - Doors will not be caught by the wind? Large enough to get caskets in and out of building?
 - Windows appropriate for the location and wind conditions?
 - Is the heating system able to be maintained locally?
 - Is electrical equipment and lighting energy efficient and easily maintained?
- b. Contract Documents, approximately 95% complete, review with parish council, other affected parish groups Facilities & Construction Office and Diocesan Building Committee. See section 9 for additional details of expected deliverables.
- c. Work with design professionals and Facilities & Construction office to submit documents for required building permits. Depending on the complexity of the project and its location this could take 1 – 3 months.
- d. Prepare an updated Project Approval and Request to Bid document for review by the Bishop and other committees or Councils as needed. Format of the Project Approval and Request to Bid document shall include a
 - Brief Background regarding the building and the need for the project,
 - Scope of Work along with relevant drawings of the project,
 - Cost Estimate and Funding Source,
 - Estimated Maintenance and Operating Costs for this new facility or expansion, and
 - Timeline or schedule for bidding, award and construction,
- e. Approval from Bishop to bid the project.
- f. Complete 100% Construction Documents including Procurement & Contracting Requirements (Division 00) and General Requirements (Division 01). Division 00 shall include a copy of the construction contract for potential bidders to review and become familiar with. Diocesan Building Committee and Facilities & Construction Office can assist with the preparation of these documents.

7.5 Bidding and Award of Construction Contract

- a. Approval of Bidders List by Parish.
- b. Approval of Bidders List by Facilities & Construction Office.
- c. Provide project's bid documents to bidders.
- d. Once bids have been accepted, Parish is to review, including checking references if not already done during creation of bidders list, and provide a written recommendation of award to the Facilities & Construction Office.
- e. Bidding documents including narrative, specifications and drawings.
 - Will this work be completed by a contractor; volunteer labor; or labor provided by the City, Tribal Council or other local entity?
 - Depending on the scope of the project, the desired quality of the finished product, the timeline and budget will dictate how the project will be completed.
 - A high quality finished project may cost more but will last longer and be completed within timeline. Use of volunteer labor will reduce cost but generally takes longer to finish.
- f. Permission granted by Bishop for signing of the Construction Contract.
- g. Refer to section 10 for construction phase policies.

8.0 DESIGN DELIVERABLES

- 8.1 Schematic Design, 35%
 - a. Overall site survey, if applicable;
 - b. Overall demolition plan, if applicable;
 - c. Overall site plan;
 - d. Dimensioned floor plans;
 - e. Roof plan;
 - f. Elevations with full dimensions;
 - g. Exterior rendering(s)
 - h. "Basis of Design" narrative outlining design intent for all building systems;
 - i. Cost Estimate
- 8.2 Design Development, 65%
 - a. Site survey, if applicable;
 - b. Demolition plan, if applicable;
 - c. Site plan;
 - d. Dimensioned floor plans;
 - e. Roof plan;
 - f. Elevations with full dimensions;

- g. Door and window details;
- h. Exterior rendering(s)
- i. “Basis of Design” narrative outlining design intent for all building systems;
- j. Cost Estimate

9. FINAL DESIGN DELIVERABLES

9.1 Site

- a. Site survey
- b. Site demolition plan, if applicable
- c. Site plan
- d. Grading/drainage plan
- e. Site utility plan, including electrical, water and sewer lines
- f. Erosion control
- g. Entrance/driveway plans

9.2 Structural

- a. Demolition plan, if applicable
- b. Foundation plan
- c. Floor framing plans
- d. Roof framing plans
- e. Sections
- f. Details
- g. Schedule

9.3 Architectural

- a. Demolition plans, if applicable
- b. Over plan(s)
- c. Fire and life safety plans
- d. Wall types
- e. Enlarged floor plan(s)
- f. Reflected ceiling plan(s)
- g. Roof plan(s)
- h. Exterior elevations
- i. Building sections

- j. Exterior details
 - k. Wall sections
 - l. Door and window schedules
 - m. Door and window frame elevations and details
 - n. Room finish schedule, prefer on drawings
 - o. Interior elevations and details
 - p. Equipment plans
 - q. Signage plans, if applicable
- 9.4 Mechanical
- a. Plumbing
 - Demolition plans, if applicable
 - Plans
 - Details
 - Fixture schedule
 - b. Heating and ventilation
 - Demolition plans, if applicable
 - Plans
 - Details
 - Equipment schedule
- 9.5 Electrical
- a. Demolition plans, if applicable
 - b. Power plans
 - c. Lighting plans
 - d. Details
 - e. Fixture schedule
 - f. Panel schedule
- 9.6 Specifications – Procurement and Contracting Requirements, division 00 and General Requirements, division 01, as well as applicable technical sections 02 through 33.
- 9.7 Cost estimate – refined from original cost estimate at 65%, should more accurately reflect the actual cost of completing the project.

10. CONSTRUCTION

- 10.1 Construction begins after entering into a contract with the selected contractor.
- a. The contractor maybe providing all materials, equipment and labor to complete the project or

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- b. The contractor, or other agency, is providing labor only and the Owner is expected to provide the materials and some equipment/tools to complete the project.
- c. Who will be watching or supervising the project to ensure plans are followed; will this be a paid or volunteer position?
- d. During construction the quality of the work, price of the project and the schedule must be closely monitored.
 - A high quality product may cost more however the building will last longer.
 - Volunteer labor will take longer but the cost will be less and if carefully instructed can provide a quality building.

10.2 Building Milestones

- a. Out of the Ground
 - any dirt work to provide a building surface is completed;
 - foundation is installed and/or built
- b. Framed Up
 - Walls framed and standing up, including blocking
 - Exterior sheathing hung
 - Roof trusses installed and roof sheathed
 - Structural members installed
 - Not installed – windows, doors, insulation, building not secure
- c. Closed In
 - Air infiltration barrier installed (exterior Tyvek or similar product)
 - Roofing felt is on
 - Doors and windows installed
 - Building can be secured but is not wind- and water-tight
- d. Building is Dry
 - Siding and roofing is on
 - Plumbing and electrical rough-in
 - Note if this is new building, at this point a Catholic Extension Grant may be requested
- e. Building is Warm
 - Insulation installed and vapor barrier sealed
 - Heating equipment is installed and operational, note equipment still needs to be protected from construction dust and filters replaced after building completed.

- Furnishings and liturgical items needed to complete the building have been selected and ordered. This includes chairs or pews if additional are needed for the new building, locally made items to furnish the church have been 'ordered' from the artist,
- f. Building is Substantially Complete
- Life safety items completed
 - Mechanical and electrical fixtures installed and operational
 - Interior finishes completed, including door and window trim
 - Cabinets and countertops installed
 - Flooring and cove base installed
 - Note there will still be punchlist items remaining, but these should be minor. If major items are missing or not completed satisfactorily then the building is not substantially complete
 - Receive book with information on materials installed and how to maintain them. This will include manufacturer and color of flooring, cabinets, roofing, siding, warranty information for roofing and fixtures, etc.
 - Contractor or installer of specialty items should provide training on the maintenance and operation of the item for the Owner and anyone else that will be using the equipment
- g. Final Completion
- All punchlist items completed or there is a schedule for their completion
 - Building can be safely occupied at this phase
 - Final payment is made to contractors upon receipt of as-built drawings, operation and maintenance information and completion of punchlist items.
- h. Dedication
- Schedule with Bishop's office for dedication of building
 - Furnishings and liturgical items needed to complete the building have been delivered.
- 10.3 Final Analysis –
- a. what was the actual cost of construction,
 - b. how did the use of volunteers affect the project's budget, schedule and quality of finished product,
 - c. what was parishioners participation in the construction and/or monitoring of the project
 - d. what could have been done differently

11. MAINTENANCE

- 11.1 Set-up a schedule for routine maintenance of mechanical equipment, floor cleaning, life safety items (smoke detectors, CO detectors and emergency lights), and other items as outlined in the Operation and Maintenance (O&M) manual. Some items may not be yearly, others may require maintenance more than once a year.
- 11.2 Who will be responsible for ensuring maintenance is performed?
- 11.3 Anticipate about 3% of the cost of the building or addition will be used for annual utilities and maintenance. This needs to be budgeted to ensure the building stays in good condition.