

**A Guidebook for Diocesan Administration
Catholic Parishes, Schools & Institutions**

**POLICIES
AND
GUIDELINES
FOR
CONSTRUCTION,
REMODEL
AND
REPAIR
PROJECTS**



**Corporation of the Catholic Bishop of Yakima
5301-A Tieton Drive
Yakima, Washington 98908**

**Please direct your questions and/or concerns to the
Diocesan Finance Office at (509) 965-7117.**



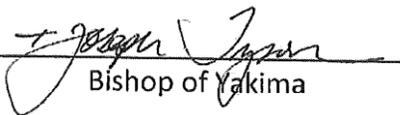
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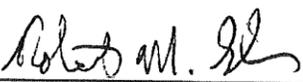
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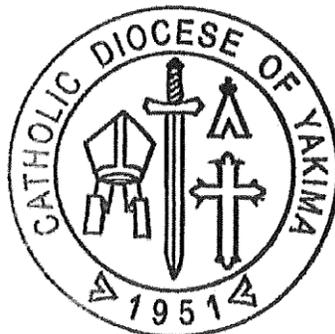
POLICIES and GUIDELINES FOR CONSTRUCTION, REMODEL and REPAIR PROJECTS

By the authority granted to me by Canon 31 of the 1983 Code of Canon Law, I promulgate that the Diocese of Yakima Policies and Guidelines for Construction, Remodel and Repair Projects will become particular law for the Diocese of Yakima thirty days after July 1, 2013 in accordance with Canon 8 § 2. From July 31, 2013, the guidelines set in the Policies and Guidelines for Construction, Remodel and Repair Projects are to be followed by all parishes and institutions of the Diocese of Yakima.

Given this First day of July, 2013 at the Pastoral Office of the Diocese of Yakima.


Bishop of Yakima


Chancellor



GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

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These procedures are intended to serve as a complete guideline for major building and construction projects. Each section may also be distributed independently as needed. Therefore, the section page numbers (upper left margin) are different than the page numbers in the complete version. In locating specific sections in the guidelines from the Table of Contents, use the page numbers on the bottom of the page.

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GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

CONTACT LIST

The individuals below are available to address your questions and/or concerns regarding building and construction projects. We encourage you to contact them.

	<u>Phone Number</u>	<u>FAX Number</u>
Rev. Robert Siler Chief of Staff	509-965-7117	509-966-8334
Jim Perko Chief Financial Officer	509-965-7117	509-966-8019
Rev. Juan Flores Liturgy Leader Plus 2 additional priests to be named by the Bishop	509-865-4725	509-865-7882

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

CONSTRUCTION CATEGORIES

Introduction

Construction projects in the Diocese of Yakima are divided into 3 categories:

1. Small Projects (Under \$15,000)
2. Medium Projects (Between \$15,000 - \$100,000)
3. Large Projects (Over \$100,000)

Project Summary

I. Small Projects (Under \$15,000)

Any project that is under \$15,000 is considered a small project. Small projects can be done at the pastor's digression without the need for the Bishop's signature. The requirements for a small project are listed in "*Select Sections for Small Projects*" on pages 106 through 109. Be sure to pay special attention to sub-section IV "*Legal Requirements*" to understand the exceptions to the pastor's ability to sign contracts.

II. Medium Projects (Between \$15,000 - \$100,000)

Any project that is between \$15,000 and \$100,000 is considered a medium project. Medium projects will require the Bishop's signature on all contracts and appropriate documents. The requirements for medium projects will vary from project to project, however they follow most of the sections in this policy book.

III. Large Projects (Over \$100,000)

Any project that is over \$100,000 is considered a large project. Large projects will require the Bishop's signature on a variety of documents as the project enters different phases. This policy book contains all the requirements and steps a parish, school or institution with will need to take to complete a large project.

Note: If you have any questions on your projects, please contact the Chief Financial Officer (see "*Contact List*")

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

Diocesan Finance Office

Executive Summary

MEDIUM & LARGE PROJECT GUIDELINES

The following guidelines are for building and construction projects between \$15,000 and \$100,000 as well as projects over \$100,000. These guidelines provide a step-by-step outline of pertinent phases which should be followed. A graphic flow chart of these steps is included herein.

EXPLORATION

The parish leadership identifies parish goals, reviews the current physical plant, and describes how a new or renovated facility would further the spiritual mission of the parish.

Diocesan Requirements: The parish sends a letter of intent to the Bishop with a copy to the Chief Financial Officer and the Diocesan Building Commission. The letter should address the question: "How will this project further the spiritual mission of the parish?"

Approval Before Proceeding: The Bishop grants written approval to move on to the next phase.

DISCERNMENT

The parish forms a Building Committee and prepares a Discernment Report which includes the following information:

1. Description of parish ministries;
2. Demographic information about the parish;
3. Needs assessment
4. Parish master plan; and
5. Identification of proposed project(s)

To gather data for this report, the parish can research its history and traditions, take an opinion survey of parishioners, call neighborhood meetings or listening sessions, etc. (see "*Discernment Report Preparation*").

The master plan for the parish should identify the location and size of existing facilities, any needed repairs and any zoning or related restrictions on the use of the parish property (see "*Master Planning Phase*").

If the proposed project involves a change in the worship space, the parish **must engage a diocesan certified or approved Liturgical Consultant** and institute an educational program to the parish community regarding current worship norms (see "*Liturgical Requirements*").

MEDIUM & LARGE PROJECT GUIDELINES

PAGE TWO

This phase is also the point during which the parish forms a Project Financing Committee to calculate initial financial projections, to consider sources of funding, and to develop a funding plan (see "*Developing a Funding and Financing Plan*").

Diocesan Requirements:

1. A parish Building Committee is formed;
2. The Chief Financial Officer or members of the Diocesan Building Council meets with the parish Building Committee.
3. A Liturgical Consultant is appointed (if changes in the worship space are contemplated);
4. The parish Project Financing Committee, the parish Building Committee, and the Pastoral Council meet with the Diocesan Chief Financial Officer;
5. **Prior to beginning the process for creation of the Discernment Report, parishes are required to contact the Bishop or Chief Financial Officer to clarify any specific planning issue or considerations which may be applicable to the parish's situation.**
6. The parish leadership meets with the Diocesan Building Council to review a written Discernment Report and master plan; and
7. The parish leadership meets with the Bishop and Chief Financial Officer to review the initial funding and financing plan.

Approval Before Proceeding: The Diocesan Building Council and the Chief Financial Officer grant written approval after reviewing the Discernment Report and makes recommendations to the Bishop and the Executive Committee of the Council of Priests.

REFINEMENT OF DESIGN AND FUNDING PLAN

The parish Building Committee identifies the specifics of the project – activities that will take place in the space, desired occupancy, size and relationship of various rooms, local governmental building codes, etc.

The parish Building Committee may select an Architect for basic design work and knowledge of building codes. The Architect and Liturgical Consultant (if appropriate), together with the Building Committee, produce basic square foot cost estimates and a basic conceptual design (see "*Selection of an Architectural Firm*").

The Chief Financial Officer of the Diocese is available throughout this phase for consultation.

MEDIUM & LARGE PROJECT GUIDELINES

PAGE THREE

Diocesan Requirements:

1. The Architect must meet with the Chief Financial Officer before the contract is signed (if the firm is new to diocesan work);
2. The Chief Financial Officer review the project;
3. The parish Project Financing Committee completes the Diocesan Project Funding and Financing Form and submits it to the Diocesan Chief Financial Officer for his review and the review by the Bishop;
4. The Bishop and Chief Financial Officer approve the fundraising goal;
5. The Bishop approved the Architect's contract;

Approval Before Proceeding: The Diocesan Building Council review the basic concept design square foot cost estimates; the Bishop grants written approval of both the design and the funding plans.

FUNDRAISING

The parish conducts a fundraising drive

During this phase, **no further architectural work can proceed.**

Diocesan Requirements:

1. Once the drive is complete, the parish submits a revised "*Project Funding and Financing Form*" to the Diocesan Chief Financial Officer.
2. The parish meets with the Bishop, Chief Financial Officer and Executive Committee of the Priest' Council.

Approval Before Proceeding: The Bishop grants approval based on a review of the results of the fundraising drive and the revised Project Funding and Financing Form. Approval includes a maximum dollar limit for the loan and the project (see "*Evaluation Form to Gauge Fundraising Activities*").

SCHEMATIC DESIGN

The Architect works with the Building Committee and the Liturgical Consultant to produce schematic drawings based on the maximum dollar limit set for the project. Parish comments on the design are solicited.

MEDIUM & LARGE PROJECT GUIDELINES

PAGE FOUR

Diocesan Requirements:

1. The parish collects pledges and deposits them in the Capital Revolving Program and revised the “*Project Funding and Financing Form*” as required;
2. The Diocesan Building Council reviewed the schematic design and project budget.

Approval Before Proceeding: Projects costs must stay within the approved maximum dollar limit; the Bishop approves the schematic design drawings.

DESIGN DEVELOPMENT/CONSTRUCTION DRAWINGS

The Architect and the parish Building Committee develop the schematic drawings into construction drawings. The parish continues to collect pledges and deposits them in the Capital Revolving Program.

Diocesan Requirements:

1. The parish visits the Diocesan Building Council to review the construction drawings and requests approval to apply for a building permit (if applicable);
2. The Diocesan Chief Financial Officer reviews cost estimates and parish cash flows in the Project Funding and Financing Form to determine if the project cost and maximum project dollar limit are in balance. If necessary, the parish returns to the Executive Committee of the Council of Priests to review the loan commitment.

Approval Before Proceeding: The Diocesan Chief Financial Officer approves the project cost estimate, parish cash flows, and the funding and financing plan.

BID OPENING

After a building permit is issued, the project is bid unless the Contractor is selected by other means (see “*Selecting of a Contractor*”).

Diocesan Requirements:

1. The bids are opened at a meeting with the Diocesan Building Council, and
2. The Project does not exceed the approved funding plan.

Approval Before Proceeding: The parish has raised sufficient funds to meet the Capital Revolving Fund guidelines for obtaining a loan; the Bishop reviews and signs a contract that is within the project budget and maximum dollar limit set in the approved project's funding plan.

MEDIUM & LARGE PROJECT GUIDELINES PAGE FIVE

CONSTRUCTION

Diocesan Requirements:

1. The parish Building Committee identifies a Parish Representative who works with the Architect and Contractor (see "*Selection of a Parish Representative*");
2. The Chief Financial Officer will be contacted to attend a preconstruction conference with the parish and the Contractor;
3. All change orders **must be signed by the Chief Financial Officer.**
4. Funds for payment of the contract are held in the Capital Revolving Program in the Parish Building Fund; and
5. Payments on the contract are requested by the parish after review by the Architect and receipt of lien waivers from the Contractor, subcontractors, and major suppliers (see "*Making Payments during Construction*").

COMPLETION

Diocesan Requirements:

1. Payment of all contracts and release of all liens mark the completion of the project;
2. The Bishop dedicates the new facility (see "Planning the Dedication"); and
3. "As-built" drawings are obtained for the diocesan archives (see "*Completing the Post-Construction Walk-Through*").

Note: The flowchart on the following page graphically outlines the Medium & Large Project Guidelines. Following the steps above has saved parishes a great deal of time, energy and dollars.

END OF SECTION (Last updated July 1, 2013)

PROCESS FOR CONSTRUCTION PROJECTS (OVER \$15,000) FLOW CHART

(Last updated July 1, 2013)

EXPLORATION

Pastor Sends Letter of Intent to the Bishop for Approval to Proceed

Written Approval to Proceed from the Bishop

DISCERNMENT

Finance & Building Councils Action(s)

Building Council

Preparation of Discernment Report
Appointment of Liturgical Consultant (if necessary)
Selection of Architect
Meeting with Diocesan Building Commission (DBC) to Review Discernment Report/Master Plan
The DBC & CFO Review the Architect Contract

Finance Council

Preparation of Initial Financial Projections and Funding Plan
CRP Loan Requirements Identified (if necessary)
ACA and/or Capital Campaign Goals are Complete
Meeting with Chief Financial Officer (CFO) to Review Initial Funding Plan

Approval from the DBC and CFO

Bishop Signs Architect Contract

CONCEPTUAL DESIGN AND FUNDING PLAN

Identification of Project Specifics
The DBC Reviews the Basic Concept Design, Square ft. Cost Estimate, etc.
Develop and Submit a 5 year Operational Plan for Review by the DBC (if necessary)

Further Development of Fundraising Projections & Loan Requirements (if necessary)
Selection of Fundraising Consultant (if desired)
Completion of Funding & Financing Plan for Review by the CFO
Review & Recommendation of Fundraising Goal by the CFO

Written Approval from the Bishop of Both the Concept Design and Funding Plans

FUNDRAISING PLAN IS IMPLEMENTED

FUNDRAISING

Fundraising Drive (if necessary)
Revised Project Financing Form Submitted (if necessary)

Approval from the Bishop to Proceed with Schematic Design

SCHEMATIC DESIGN

Building Council, Architect and Liturgical Consultant
Produce Schematic Drawings
Parish Comments on Schematic Drawings
DBC Reviews Schematic Design and Project Budget

Parish Collects Pledges and Deposits in CRP Account

Approval of Schematic Drawings by the Bishop

DESIGN DEVELOPMENT & CONSTRUCTION DOCUMENTS

Building Council and Architect Proceed to Design Development Phase
Complete Construction Documents
DBC Reviews Construction Documents
Develop Construction Delivery Method

Parish Continues to Collect Pledges and Deposits in CRP Account
The CFO Reviews and Recommends Project Cash Flows
CRP Board Takes Required Action(s)

Bishop Approves Detailed Cost Estimates, Cash Flows and Funding and Finance Plan

COMPETITIVE BIDS ARE RECEIVED

The DBC & Parish Leadership Review and Recommend the Bids

FINALIZE GENERAL CONTRACT WITH CONTRACTOR

BISHOP SIGNS CONSTRUCTION CONTRACT

Construction Begins at Site

CONSTRUCTION COMPLETATION

CONSTRUCTION WARRANTY

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

DISCERNMENT REPORT PREPARATION

If one of you decides to build a tower, will he not first sit down and calculate the outlay to see if he has enough money to complete the project? He will do that for fear of laying the foundation and then not being able to complete the work; for all who saw it would jeer at him, saying, "That man began what he could not finish."

Luke 14, 28-30 (NAB)

In advising his followers to stop and count the cost, Jesus was speaking of more than the dollars and cents of the project. He was pointing out that careful thought and consideration are necessary prerequisites to any major undertaking. That is the purpose of the discernment process. It is discerning the needs and priorities of the parish and developing a building project to match.

It is appropriate, if the circumstances permit, for the Bishop to be informed as the discernment process is about to begin. He can then meet with the parish leaders, and, if possible, with the whole parish community to share his own vision of the importance of the undertaking, not only to the parish, but to the diocese.

Completing the process involves gathering extensive information about the parish and then determining the most appropriate type of building project. It is vital that every member of the parish have a chance to participate in this process.

The information gathered, the education gained, and the decisions reached are all part of the Discernment Report, a booklet of detailed information about the parish and the proposed building project. The Architect relies heavily on the information in the Discernment Report to design the project. The discernment is often a part of the master plan and vice versa.

I. GETTING TO KNOW THE PARISH

Who is the parish? Where is it going? Where has it been? How does it view itself as part of the Church in Central Washington?

Answering questions like these requires gathering a great deal of information. Some of it is factual, some more objective.

The factual information comes from sources such as parish records, school districts, census data, utility companies, banks, city and county planning offices, and federal and state governmental agencies. Subjective information comes from parish members through self-understanding processes.

DISCERNMENT REPORT PREPARATION PAGE TWO

A. Parish Membership

Collecting the factual data needed to answer the following questions is the first step toward learning about the parish. For discerning trends, answers to each question should be given for the last full year, five (5) years from now, ten (10) years from now, and twenty (20) years from now.

1. How many registered families does the parish have? How many non-registered families are assumed to belong? What is the average family size? What percentage of the membership regularly supports the parish? What percentage of the membership is involved in parish activities?
2. How many attend Sunday mass? How many receive communion? How many first communions, baptisms, confirmations, marriages, and burials are celebrated?
3. How many children are in Christian education classes? If the parish has a school, how many students are enrolled?
4. What are the social and economic characteristics of parish members? What are their income and education levels? What is their marital status? What are their working vocations, e.g., blue collar, white collar, retired, etc? Are both husband and wife employed?
5. What is the projected growth in population for your parish? Can you extrapolate the number of members in five (5), ten (10), etc., years?

B. The Parish Community

We are instructed to love our neighbors, but so often we do not even know who they are. Considering the following questions may help clarify the relationship of the parish to its neighbors:

1. Where are the parish's geographical boundaries? What types of neighborhoods are contained within those boundaries, e.g., urban, suburban, rural, commercial, residential, industrial, etc.? What types of living or working units make up the neighborhoods, e.g., owned, single-family, multi-family, mobile home, etc.?
2. Where is the parish site or proposed building site? (Inclusion of a site map with the report will help locate the parish and property.) Who are the immediate neighbors? How has the surrounding community changed? How does the parish relate to its neighbors and to the community as a whole?
3. Has a community and neighborhood long-range planning study and proposal been made? If so, the parish should be familiar with its provisions. Is community development progressing in accordance with proposed planning?

**DISCERNMENT REPORT PREPARATION
PAGE THREE**

4. What are the zoning regulations? Are they in the process of change? What is the potential density of the area as allowed by the zoning regulations?

C. Parish History

Examining where the parish has been helps the community to understand not only where it is today, but also where it is going. Answering the following questions may provide the beginning of a parish history:

1. How old is the parish?
2. How many Pastors has the parish had? What style of leadership has characterized it?
3. What is the pattern of baptisms, marriages, funerals, and other forms of pastoral care over the last five (5) years? Have there been any significant changes?
4. What were the major turning points, i.e., crises or celebration, in the life of the parish over the last five (5) or ten (10) years?

D. Parish Traditions

Many parish activities are handled in a certain way largely because that is the way things have always been done. These traditions become a significant part of the parish identity. Considering the following questions may reveal parish traditions:

1. What dominant mood identifies parish life, e.g., friendly, formal, etc?
2. How do members experience the parish? How is it known among other members of the Diocese? How is it known among churches or other groups outside of the Roman Catholic traditions?
3. Are there any traditions, i.e., social, educational, liturgical, etc., which the parish considers particularly important?
4. Are there any special joys or tensions (past or present) that have left an imprint on parish traditions?

E. Parish Worship

Identifying the style of worship is more than counting the number of masses celebrated each week. It is identifying those elements in the worship experience that the parish particularly values. As the parish grows and changes, worship changes too. A successful building project should reflect the parish's present style of worship and anticipate the way the parish may worship in the future.

DISCERNMENT REPORT PREPARATION PAGE FOUR

F. Surveys

Surveys can be useful for determining the parish's future needs. The Diocesan Finance Office can help the parish develop a document that identifies parish needs and/or attitudes.

G. Discernment Report

A sample discernment report is available from the Finance Office.

H. Additional Information

Below is additional information which may be included in the Discernment Report:

1. Photograph(s) of site;
2. Photograph(s) of existing conditions, e.g., building;
3. Location map;
4. Survey; and
5. Projection of future growth from the county, local school district, city, etc.

NOTE: Once the parish has completed the Discernment Report, contact the Finance Office to schedule a time to meet with the Diocesan Building Commission (DBC). Generally, the pastor, and/or his representatives, and the architect attend to discuss the parish's goals. DBC meetings are usually held as needs arise. Please contact the Finance Office at least forty-five (45) days prior to your proposed meeting date. This will allow ample time to forward any pertinent information to the DBC members prior to the meeting.

II. DISCERNMENT REPORT CONTENTS

Some or all of the information below is gathered by the planning committee(s):

A. Analysis Of Parish Community And Its Needs

1. Community membership
 - a.) census of registered households;
 - b.) estimate of nonregistered households;
 - c.) religious education – present and future projections;
 - d.) number of baptisms; and
 - e.) number of funerals.
2. Societal and economic membership
 - a.) average income in the community;
 - b.) average family size;
 - c.) demographic spread;
 - d.) growth over the past five (5), ten (10) years; and
 - e.) growth projections for the next five (5), ten (10) years.

**DISCERNMENT REPORT PREPARATION
PAGE FIVE**

3. Parish history
4. Parish traditions
 - a.) worship and liturgy;
 - b.) social; and
 - c.) pastoral.
5. Self-image
6. Goals and objectives
7. Financial condition of the parish
 - a.) past Capital Revolving Program (CRP) loans, payments;
 - b.) ordinary income for the past five (5), ten (10) years; and
 - c.) CRP savings balances for the past five (5), ten (10) years; and
 - d.) comparison of parish collections with potential.

B. Analysis Of Existing Parish Facilities

Each existing building should have a physical assessment to determine the condition of its systems. A report of the findings is prepared as a result of the assessment. The assessment can be performed by a hired inspection firm, professionals in each discipline, or parishioners with professional expertise. A cost estimate for the repair and/or replacement in current dollars is included with a fifteen to twenty percent (15-20%) contingency plus a three to five percent (3-5%) annual inflation factor. The facility (site) and individual buildings should be assessed for the following:

1. Land use
2. Zoning
3. Governmental regulations
4. Site problems
5. Barrier-free design and accessibility
6. Asbestos-containing building materials
7. Plumbing
8. Roofs and gutters
9. Sidewalks and parking
10. Energy conservation
11. Electrical
12. Heating and air conditioning
13. Lighting
14. Interior surface conditions
15. Exterior surface conditions
16. Safety hazards
17. Earthquake hazards - structural and nonstructural
18. Functional obsolescence

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

MASTER PLANNING PHASE

I. PLANNING DEFINED

The master planning process (often referred to as a "needs assessment" or "feasibility study") seeks to provide the church with a long-term plan for their facilities. The master plan embodies, reflects, and supports the long-term ministries plan for the church-the parish's or church's mission and vision statements.

The master plan should be tailored to match the parish's ministerial needs. Whether the church is a small inner-city facility or a new free-standing building on an empty site, a master plan establishes a comprehensive pattern for all future development.

There have been many parishes that have not had the advantage of an early master plan. Over time, many additions have been made to the first unit, creating a hodgepodge of buildings and styles. Often, they suffer from a lack of clarity of circulation, lack of access to parking, or are limited in their ability to expand existing spaces adequately.

Master planning provides for controlled growth which provides for expandability as church attendance and resources grow.

A. Advantages To Master Planning

1. Proper functioning of the facility as a whole:
 - a.) A review of the physical structure;
 - b.) A review of past development;
 - c.) A definition of goals and objectives (current and future);
 - d.) Proposal supporting health, education, and welfare of the community at-large;
 - e.) Specific intentions that delineate the plan and standards in support of it.
2. The ability to divide a larger project into smaller phases, built as the community (parish) grows;
3. Balancing of resources and ministry needs;
4. A process that encourages discussion regarding the current and future services and ministries of the parish;
5. A tool for sharing the leadership's vision with the body; and
6. Governmental approvals for long-term conditional use permits/master site development approvals:
 - a.) Current land-use regulations; and
 - b.) Governmental requirements.

**MASTER PLANNING PHASE
PAGE TWO**

B. Balanced Site

The master plan process involves investigating the current or proposed site to determine its optimal use based on what it called a balanced site. A *balanced site* is one that maintains a good ratio between all anticipated uses, i.e., worship, education, office parking, and recreation. The process starts by looking at current attendance levels and projecting future growth until the use of the site is maximized. The process is tempered by the parish's philosophy regarding ministry functions, potential acquisition of adjacent sites, financial concerns, and ultimate desirable size.

Once the optimum use is determined, the project can be broken down into phases, allowing for controlled growth as the parish grows. Care should be taken in the process to build consensus and to be certain that enough alternatives and options are studied.

II. PLANNING SPECIFICS

The following information outlines the master planning effort:

- A. Programming (determining spatial needs) includes projected square footage needs. This includes an analysis of current attendance of each parish ministry and projecting such attendance to accommodate total facility and site needs. This study can be accomplished by examining different projected scenarios of parish growth and phasing of construction.
- B. Programming projections can then be translated into phases of construction, and/or additions to the facility site. Such phases of construction are designed according to the programming analysis.
- C. Feasibility includes preliminary and rough floor plan designs of each designated phase. Floor plans are not exhaustively detailed, but give overall planning for all rooms, circulation, connection to existing buildings, revised or remodeled configurations at the existing facility, and future phases of construction.

The final results of such plans and studies include:

- 1. Preliminary floor plans;
- 2. Preliminary site plans;
- 3. Designated phases of construction;
- 4. Cost estimates of each phase (include a contingency amount and rates for inflation); and
- 5. Programming projections for space needs.

The architect can then produce final plans which are colored and displayed on boards ready to be presented to the parish community. Such plans indicate the existing facility as well as designated future structures.

**MASTER PLANNING PHASE
PAGE THREE**

- D. During the actual planning phases of this work effort, the architect should meet with the parish community and parish leadership to determine the parish's needs. During these planning sessions, several design options should be explored so that the leadership has explored most of the options possible. The pros and cons of each scenario are developed and a final approach is decided by the committee(s) with the architect's guidance.
- E. Designated phases of construction shall include preliminary cost estimates for each phase of construction.

III. WHAT TO DO WITH THE INFORMATION

Once the master planning phase is completed, the data is gathered, summarized in a report, and incorporated into the Discernment Report. Deliver/send a copy of the master plan materials (including preliminary cost estimates) to the Chief Financial Officer.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

BARRIER-FREE DESIGN

I. AMERICANS WITH DISABILITIES ACT (ADA)

The Americans with Disabilities Act (ADA), P.L. 101-336, mandates equal access for people with disabilities to employment, state and local government services, transportation, public accommodations and services by private entities and telecommunications.

A. Disability Is Defined As Follows:

1. A physical or mental impairment that substantially limits one (1) or more of the major life activities of an individual such as walking, speaking, and breathing;
2. A record of such impairment; or
3. Being regarded as having such an impairment.

B. Percentage of Disabled Persons

1. As is true with the general public, seventeen percent (17%) of parish members have one (1) or more disabilities. For purposes of the ADA, the definition is very broad-based, and includes among others, mobility and sensory impairments, mental illness, mental retardation and learning disabilities, as well as disabilities caused by illnesses such as diabetes, cancer, arthritis, respiratory and cardiac conditions, and chronic back pain.
2. A survey indicates that one (1) family in three (3) has a member with a disability. The National Catholic Office for Persons with Disabilities (NCPD) estimates that ten (10) million Catholics in the United States have a disability. In any given parish or diocese, it can be expected that fifteen to twenty percent (15-20%) of the Catholic population has a disability significant enough to warrant accommodations to increase the individual's ability to participate more fully. In addition, aging individuals who may not report themselves as having a disability often experience diminished mobility, vision, and hearing which can be greatly enhanced by adequate lighting, hearing impairment systems, railings, and ramps. These significant statistics demonstrate the need for accommodating the faith community through an increase and in more meaningful participation of all its members.

II. CATHOLIC RESOLUTION REGARDING AMERICANS WITH DISABILITIES ACT (ADA)

The National Catholic Office for Persons with Disabilities (NCPD) subscribes to the following resolution, prompted by the passage of the Americans with Disabilities Act (ADA), and urges the promulgation and implementation of this resolution by diocese and parishes throughout the nation.

**BARRIER-FREE DESIGN
PAGE TWO**

Whereas the separation of church and state renders religious organizations exempt from some requirements of law;

Whereas this law mandates secular society to provide equal opportunity for people with disabilities to participate with the community-at-large in the life of the nation;

Whereas the faith and teachings of the Catholic Church, including the Pastoral Statement of U.S. Catholic Bishops on People with Disabilities move us to respect the dignity and uphold the religious and civil rights of all persons; and

Whereas physical and attitudinal barriers to full participation in liturgies and in other church activities and programs alienate people with disabilities, and the removal of such barriers significantly enhances the lives of all people.

BE IT, THEREFORE, RESOLVED BY THE BOARD OF DIRECTORS OF NCPD ON THIS 9TH DAY OF NOVEMBER, 1990, THAT:

...NCPD affirms the right of persons with disabilities to inclusion in the faith community of the Church as full participants, as stated in the Pastoral Statement;

...At this momentous time in the history of the civil rights of people with disabilities, NCPD calls upon dioceses and parishes to examine, with the assistance of people with disabilities, their facilities, programs and liturgical practices and make those adaptations necessary to ensure accessibility for all people, so that no person, by reason of disability, will be denied the opportunity to worship, to minister, to receive religious education, to be employed in those diocesan and parish jobs for which they qualify, and to participate in all aspects of parish and diocesan life;

...NCPD calls upon Catholics with responsibilities under the new law (employers, business owners, state employees, and transit and communications personnel) to affirm and actively implement the Americans with Disabilities Act (ADA) in the public and private sectors.

BE IT FURTHER RESOLVED THAT:

NCPD calls upon U.S. Catholics, at all levels, by their example and by direct advocacy, to work for full implementation of the Americans with Disabilities Act (ADA) wherever it applies.

III. ASSESSING MODIFICATIONS

Assessing parish and diocesan facilities identifies one-time renovations needed to create environmental access. Depending on the age and condition of the physical plant, i.e., church, rectory, school, social hall, office, etc., such renovations might include any of the following:

BARRIER-FREE DESIGN
PAGE THREE

- A. Ensuring that doors are at least thirty-two inches (32") wide and can be opened with minimal effort.
- B. Modifications of bathrooms to include grab bars, toilet seats seventeen to nineteen inches (17-19") from the floor, lever-type faucets and door handles, wall-mounted urinals with the opening of the basin no higher than seventeen inches (17") from the floor, towel racks and mirrors mounted no higher than forty inches (40") from the floor, and the creation of a unisex bathroom which may be entered by the disabled person and a spouse or assistant is optimal.
- C. Installation of the following equipment:
 - 1. Ramp, lift, or elevator;
 - 2. Permanent (or portable) hearing enhancement system;
 - 3. Additional lighting to enhance visibility;
 - 4. Braille and raised letter signage;
 - 5. Accessible playground equipment;
 - 6. Teletypewriter (TTY) to communicate with the deaf;
 - 7. Amplified telephone;
 - 8. Visual-alert systems; and
 - 9. Audio-alert systems.
- D. Designation of reserved parking spaces near the accessible entrance (minimum width of twelve feet six inches (12'-6") wide with a five foot (5') access aisle between them.
- E. Creation of wheelchair accessible seating in designated areas and dispersed throughout the sanctuary or auditorium.
- F. Creation of accessible space for the altar and choir areas.

IV. SPECIFIC INFORMATION

Specific information on access requirements and ADA (barrier-free) design can be obtained from the Chief Financial Officer.

If the parish is planning a renovation to incorporate barrier-free design, the architect will be able to assist with specific information during the schematic and design development phases.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

THE BAPTISMAL FONT

I. BAPTISMAL FONTS

The renewed interest in the Baptismal Font as a central architectural feature has brought about some serious construction problems to warrant this new section to the building guidelines. The nature of a Font has been described this way:

"A baptistry separated from the body of the church is to be worthy of the sacrament celebrated there and is to be set aside exclusively for baptism, as befits the place where the womb of the Church, so to speak, Christians are reborn through water and the Holy Spirit."

All too often, parishioners have been greeted by leaking or empty fonts that are just a few months old. The problem can usually be traced back to an indeterminate leak in the containment vessel. Usually the leak is covered by building materials like cement, wire, plastic, copper, or tile. Finding the leak is then nearly impossible without taking the font apart. Containment materials like copper, plastic or cement are prone to undetected site damage or from just plain incompetence by the many trades needed to construct the font.

II. BAPTISMAL FONT DESIGN

Most fonts have been site-designed (and produced). The Chief Financial Officer has a database of designers for both site-produced and single source (prefabricated) fonts.

A. The data below provides some technical recommendations for permanent fonts using flowing water:

1. Locate the pump, filters, heater, and drain sump in a remote closet, for sound proofing and ease of maintenance. If someone is proposing equipment that fits in the font, the equipment is too small and too noisy.
2. Electric spa or pool heaters work well for warming the water. Heaters do not need to be high wattage. The recirculating water can be heated over a period of several hours or overnight before a baptism is scheduled. Include an on-off switch for the heater.

Include a seven (7) day time clock for controlling pump operation for water recirculation.

3. Make sure the heater wiring has fail-safe provisions so that the heater cannot be turned on unless the water is circulating. If the pump is not on, the heater should not be able to turn on.

THE BAPTISMAL FONT

PAGE TWO

4. Use flush-recessed fittings for inlets, drains, and overflow drains. Bronze or PVC work well; cast iron is good if fully submersed and finished with a powder-coat epoxy paint system; the inlet may need to be raised; spa inlets work.
5. Include a drain and an overflow drain in the pool with separate drain lines back to the sump.
6. Consider a high and a low outlet for recirculating water to help take high and low floating debris back to the filters. Alternatively, have a low overflow pipe (1-1/2") and wash the top layer out.

If an "ozoneator" or "oxygenator" is specified, use PVC pipe since their use corrodes metal pipe quickly.

7. Include shutoff valves for each pumping line and the pump.
8. Oversize the pump somewhat and include a valve which will permit fine-tuning of the water flow to achieve the desired effects.
9. Plumbing lines should be of sufficient size so that they do not trap soap suds from cleaning (this is one reason many fonts have soap bubbles in them).
10. The upper basin may have flowing water, or may be a separate basin that is filled by hand. If it has flowing water, it should be carefully designed to flow without drizzling or splashing into the pool below. This will be a more expensive installation to design, build, and maintain. If it is a separate basin, consider making it removable for cleaning, although security of the basin may make that difficult. Usually, it is filled from pitchers and drained by siphon or pouring the water out and sponging.
11. Fonts require a high level of maintenance to keep them looking good and to prevent algae and mold growth; they need at least as much cleaning as the restrooms; small basins need at least weekly draining and cleaning; large pools may need draining and scrubbing every week in hot weather.

Use gentle cleaning methods to avoid damaging pool finishes; strong cleaners may etch tiles or bleach out colors; bristle brushes are usually good; obtain recommendations of the contractors and finish material manufacturers; test cleaning methods on small areas first; train personnel.

If a parish is too small to have a custodian or active volunteer maintenance person, or does not have a maintenance budget, they should not build a plumbed font with flowing water; it would be better to use a pool which is filled only for baptism, and drained afterwards; this could be temporary or permanent; it should have a drain or hose connection for ease of drainage.

12. Keep the water cold except when baptisms are scheduled.

**THE BAPTISMAL FONT
PAGE THREE**

13. Do not use clear waterproofing coatings on concrete, brick, tile, or marble that will be under water. None of them investigated are rated for constant submersed use. Using them under water may trap efflorescence (white salts from the mortar or concrete) and the coating itself may turn filmy or start peeling or bubbling. Such coatings may be impossible to remove without damage to the surfaces they were intended to protect.
14. Instead of surface coatings, choose pool finishes that are proven water-resistant; use proven integral water-proofing additives in concrete and mortar and grout for tile. Granite, not marble, is preferred since it is harder and more resistant to cleaning chemicals, brushes, etc. Gunitite is an alternative since it can be repaired easier and molded into different shapes.

Be cautious when using tile for font floors; the mortar may have spaces underneath where bacteria and mold might grow.

15. Tile and marble companies have recommended sprinkling a small amount of swimming pool chlorine into the font on occasion only if the water seems to need it, e.g., in hot weather. There is no plumbing or health regulation requiring it since it is not used for bathing or swimming.
16. Use a water-proofing membrane under the basin finish on the concrete substructure of the pool. A thick polymer-modified-bituminous trowel-applied membrane is recommended. The membrane should be installed on surfaces sloped toward the drain. Careful attention to sealing pipe penetrations is needed. This is generally the likeliest source of leaking.

If a Laticrete system is used, a three (3) application method is recommended. An alternative to Laticrete is a NobelSeal® and Chlorloy® system.

17. Use a structural engineer for design of the font basin support. It will be heavy! A soil investigation is also needed to design proper foundations. If the font is for an existing church with concrete slab on grade and no information about the soils is available, you may need to have a concrete core-drilling company drill a test hole. A geotechnical engineer should check the soil to help decide if conventional footings are adequate or if small pilings are needed.
18. The upper basin is a vessel for your hands and an infant's body. It ought to be smooth and rounded and shaped for that purpose, at a comfortable height for dipping hands and a safe height for holding a wet, squirmy infant.
19. Steps into a large pool, if steps are used, should be straight across (not curved or at an angle to the wall) and comfortable dimensions meeting code. Access for people with mobility disabilities should be by personal assistance, not be obtrusive, space-consuming ramps, rails, hoists, or other devices.

**THE BAPTISMAL FONT
PAGE FOUR**

20. The large pool surface should have some tooth or texture for slip resistance. Do not use abrasive grit or other texture that is impossible to clean. Be aware but do not be carried away with fear that someone will slip. Candidates can be assisted into and out of the pool by people holding their elbows. Dry towels or mats can be placed on the floor for each person coming out.
21. Use visual or texture contact in the floor and/or font walls to call attention to a font in the processional or exit path, so people are less likely to bump into it.
22. Do not put lights in the pool. No one will be swimming under water and it is not in a shopping mall.
23. The parish should not drain the font or put in grids or Plexiglas to keep children from drowning. A font is potentially hazardous, but no more than other risks in and around the church.

Note: Refer to the Guidelines for Building and Renovating Liturgical Space herein for additional information on baptismal fonts.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

SEISMIC (STRUCTURAL) IMPROVEMENTS

I. SEISMIC IMPROVEMENTS TO NONSCHOOL BUILDINGS

Facilities owned and operated by the Corporation of the Catholic Bishop of Yakima will include a review of the structural condition of the facilities that will undergo future renovation and remodel in the Architect's Basic Services. The Architect will adhere to current municipal building codes for the correction of structural life-safety concerns. Subsequent renovations and remodeling efforts will run concurrent with seismic improvements.

Any seismic corrections to the building(s) shall be reviewed by the Diocesan Building Commission (DBC) at the parish's initial meeting with the DBC.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

DEVELOPING A FUNDING AND FINANCING PLAN

The Project Funding and Financing Plan is an integral part of the building process. This plan provides the financial blueprint for the project. The elements of the plan are outlined below. Normally, the diocesan Chief Finance Officer works with the parish to complete this plan.

I. PROJECT COST

The project cost is the total cost of the contracted work. This amount includes not only construction costs (referred to as "hard costs") but also "soft costs," e.g., Architect's fees, off-site improvements, fundraising costs, interest on construction loan draws, etc. In most cases, construction hard costs equal approximately seventy percent (70%) of the total project cost while soft costs equal approximately thirty percent (30%) of the total project cost (see "New Construction/Major Renovation Budget Worksheet").

II. SOURCES OF FUNDS

Most projects are funded from several sources. To begin construction, the parish normally must accumulate at least fifty percent (50%) of the project cost and have diocesan approval of the total Funding and Financing Plan. The document titled "Capital Revolving Program (CRP)" provides more details of diocesan requirements.

Several funding sources are listed below. By working with the diocesan Chief Finance Officer, each parish community decides which sources are best suited to its needs and circumstances.

A. Parish Savings

If the project has been planned for some time, funds may have been deposited in the CRP for use on the project. If a parish plans to fund a project through Stewardship Giving, it may take several years to accumulate sufficient funds to begin construction.

B. Fundraising Proceeds

Usually, a fundraising drive is necessary to fund a project. Based on recent history throughout the diocese and depending on the nature of the project, a parish can expect to raise between one point five (1.5) and two point five (2.5) times its annual ordinary income with a professionally conducted fundraising drive based on three-year pledges. The diocesan Chief Finance Officer can provide a specific estimate (see fundraising section).

**DEVELOPING A FUNDING AND FINANCING PLAN
PAGE TWO**

C. Sale of Parish Assets

If the parish plans to sell property to fund the project, the process of working through the diocesan Finance Office must be followed. **Note that the Bishop holds title to all diocesan property. No sales transaction can be conducted by the parish since the parish is not a legal entity.**

D. Loan Proceeds

If a loan is required to complete the building project, the CRP is the only approved source. Sources of funds for loan repayment are an integral part of the Funding and Financing Plan. By working with the diocesan Chief Finance Officer, the parish addresses the loan repayment plan early in the process. The repayment plan must be based on the parish's financial history and long-range financial plan (see the document titled "The Capital Revolving Program (CRP)" for the criteria and policies of the CRP).

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

THE CAPITAL REVOLVING PROGRAM (CRP)

PREAMBLE

The Capital Revolving Program (CRP) was established on October 22nd, 2010 as a separate non-profit corporation. Its governance structure is a Board of Directors with five members, consisting of three priests and two lay people. The Bishop is the Chair of the Board of Directors.

I. FUNCTIONS OF THE CRP

The Diocese of Yakima CRP receives deposits from parishes, schools and institutions. In turn, these funds are invested and are available for loans to parishes, schools and institutions. The program operates as an investment and loan program for the mutual benefit of the parishes, schools and institutions (the depositors bear the loan and interest rate risks and receive the interest, dividends and gains/losses on investments).

A. Standard Term Loans

The CRP will loan a **maximum of fifty percent (50%) of the project cost, subject to the availability of funds and the parish's ability to maintain the payment schedule.**

The parish is required to provide a minimum of fifty percent (50%) of the project cost which must be deposited or invested in the project* prior to the start of construction.

**All of these funds must be on deposit in the CRP, except for funds expended for the Architect's and Liturgical Consultant's fees, fundraising expenses, survey and permit fees, etc.*

II. CRP LOAN CRITERIA

A. Standard Term Loans

CRP loans are granted based on specific criteria developed to ensure sound management of the CRP and realistic repayment terms for the parishes. CRP loan approval is subject to the availability of funds and substantial compliance with the following criteria:

1. The applicant has a positive cash flow from operating income after setting aside reserves for plant maintenance.
2. Current building(s) is/are well-maintained; and there is no excessive deferred maintenance;

**THE CAPITAL REVOLVING PROGRAM (CRP)
PAGE TWO**

3. Funds are reserved annually for major maintenance;
4. Diocesan bills are paid on time;
5. The parish has good consultative structures and a fundraising process in place;
6. An acceptable plan is in place for loan payments after initial fund drive; and
7. As a part of project planning, a parish desiring a loan must be current on its ACA goal and past capital campaigns before initiating its new capital campaign.
8. Fifty percent (50%) of the project cost must be deposited in the CRP or invested in the project prior to the start of construction.

NOTE: The parish's loan repayment plan must be substantiated by a history of operating surpluses between the approval of project fundraising and the start of construction OR the commitment to begin a second fund drive within 2-3/4 years of the start of the initial drive.

III. CRP INTEREST RATES AND TERMS

A. Standard Term Loans

1. CRP LOAN. The interest rate on all CRP loans is reviewed in March of each year, and is subject to change on July 1.

The term of the CRP loan will be a maximum of ten (10) years for large projects. Monthly payments on interest (on the loan draw) are due during construction. Monthly payments of principal *and* interest will begin at the end of construction.

IV. CRP FORMS

Forms used by the diocesan Building Commission to evaluate parish loan applications are included herein. The diocesan Chief Finance Officer will assist the parish in completing the forms and preparing for meetings with the diocesan Building Commission.

V. CRP FORMS

Forms used by the Diocesan Building Commission to evaluate parish loan applications are included herein. The diocesan Chief Finance Officer will assist the parish in completing the forms and preparing for meetings with the Diocesan Building Commission.

END OF SECTION (Last updated January 14, 2014)

INITIAL PROPOSAL – FUNDING AND FINANCING PLAN

(Last updated July 1, 2013)

Date: _____ Project Budget for _____ Phase

Parish/Agency: _____

Address: _____ City: _____

Building Project: _____

A. Cost of Project

- 1. **Total Project Cost** (must equal total from Project Budget Worksheet. See next page for items included in total project cost): _____
- 2. Expenses paid to date: < _____ >
- 3. Remaining cost of project: _____

B. Source of Funds (Note: Not All Sources Are Required)

- 1. Current funds in CRP to be used for the project: _____
- 2. Funds from Ordinary Income that will be used for the project between now and the completion of construction (includes impact of Stewardship Giving): _____
- 3. Fund Drive:

Total funds raised and pledged in the Building Drive (attach an outline of the pledge payment schedule): _____

Amount expected to be collected from the Building Drive prior to the completion of construction (make allowances for unfulfilled pledges): _____
- 4. Other funds available prior to or during the construction of the project and specify source: _____
- 5. Amount of loan that the parish is planning to request (see CRP policy regarding loans): _____

TOTAL SOURCES OF FUNDS \$ _____

NOTE: Source of funds must equal the "Remaining cost of project."

TOTAL PROJECT COST includes the following items:

Building

Site Improvements

Landscaping

Contingency

Architect's Fee

Inspections/Permits/Fees

Cost Estimates

Off-site Improvements

Equipment

Furnishings

Interest on Loan Draws during Construction

Sales Tax

Fundraising

Other

END OF SECTION (Last updated July 1, 2013)

CRP LOAN POLICY

The CRP will loan a maximum of fifty percent (50%) of the cost of a project subject to the availability of funds and the parish's ability to maintain the payment schedule.

This policy will be evaluated annually.

FOR PARISHES RECEIVING A CRP LOAN: The parish will be required to provide a minimum of fifty percent (50%) of the project cost which must be deposited or invested in the project* prior to the start of construction and must be current on its ACA goal and past capital campaigns before initiating its new capital campaign.

In order to qualify for the loan, the parish must have in place a capital campaign to raise the additional 50%.

LOAN RATES AND TERMS

CRP LOAN: The interest rate on all CRP loans is reviewed each year. Consult with the diocesan Chief Financial Officer for the current rate.

The term of the CRP loan will be a maximum of ten (10) years. Monthly payments on interest on the loan will be due during construction. Monthly payments of principal and interest begin at the end of construction.

**All of these funds must be on deposit in the CRP except for funds expended for the Architect's and Liturgical Consultant's fees, fundraising expenses, survey and permit fees, etc.*

END OF SECTION (Last updated November 18, 2013)

LOAN REQUEST WORKSHEET

(Last updated July 1, 2013)

Date: _____ **Project Budget for** _____ **Phase**

Parish/Agency: _____

Address: _____ City: _____

Building Project: _____

Total loan the parish is planning to request: _____

Monthly loan payments (see CRP policies on next page for terms and interest rates): _____

First full loan payment due date (one month after construction is complete): _____

SOURCES OF FUNDS FOR MONTHLY LOAN PAYMENTS:

<u>YEAR</u>	<u>FY END 6/30</u>	<u>SOURCE</u>	<u>AMOUNT</u>
1	_____	_____ _____	_____ _____
2	_____	_____ _____	_____ _____
3	_____	_____ _____	_____ _____
4	_____	_____ _____	_____ _____
5	_____	_____ _____	_____ _____
6-10	_____	_____ _____	_____ _____

PROPOSED TIMELINE

(Last updated July 1, 2013)

Date: _____ Project Budget for _____ Phase

Parish/Agency: _____

Address: _____ City: _____

Building Project: _____

A. Fund Drive (If Applicable)

1. Start of fundraising drive: _____

2. End of fundraising drive: _____

B. Estimated Construction Dates

1. Projected date that fifty percent (50%)* of the total project costs will be collected (this is the earliest date that construction can begin): _____

**These percentages are based on the amount of funds the CRP will loan per project. The maximum loan from the CRP is 50% of the total project costs.*

See CRP Loan Policy.

FINAL PROPOSAL – FUNDING AND FINANCING PLAN

(Last updated July 1, 2013)

Date: _____ Project Budget for _____ Phase

Parish/Agency: _____

Address: _____ City: _____

Building Project: _____

A. Cost of Project

- 1. **Total Project Cost** (must equal total from Project Budget Worksheet. See next page for items included in total project cost): _____
- 2. Expenses paid to date: < _____ >
- 3. Remaining cost of project: _____

B. Source of Funds (Note: Not All Sources Are Required)

- 1. Current funds in CRP to be used for the project: _____
- 2. Funds from Ordinary Income that will be used for the project between now and the completion of construction (includes impact of Stewardship Giving): _____
- 3. Fund Drive:

Total funds raised and pledged in the Building Drive (attach an outline of the pledge payment schedule): _____

Amount expected to be collected from the Building Drive prior to the completion of construction (make allowances for unfulfilled pledges): _____
- 4. Other funds available prior to or during the construction of the project and specify source: _____
- 5. Amount of loan that the parish is planning to request (see CRP policy regarding loans): _____

TOTAL SOURCES OF FUNDS \$ _____

NOTE: Source of funds must equal the "Remaining cost of project."

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

5 YEAR OPERATIONAL PLAN

When a parish, school or institution plans to build a new, permanent facility they must, at minimum, prepare a 5 year financial operating plan for the facility. This 5 year operational plan will be reviewed and approved by the Diocesan Building Council.

I. Requirements

1. The Finance Council must review the facilities operating plan each year and incorporate the cost into the annual budget.
2. The parish must establish a depreciation fund to fund future building maintenance.
3. The parish must budget the annual depreciation of all building and place the dollars in their building and maintenance account in the CRP.

II. Cost Considerations

- A. Utilities
- B. Annual Maintenance
- C. New Staff Salaries and Benefits
- D. Furniture
- E. Insurance
- F. Cleaning Costs
- G. Landscaping

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

NEW CONSTRUCTION/MAJOR RENOVATION BUDGET WORKSHEET

Date: _____ **Project Budget for Phase** _____

Parish/Agency: _____ City: _____

Building Project Description: _____

Parish Representative: _____ Phone: _____

Architect: _____ Contractor: _____

Start Date: _____ Finish Date: _____

I. CONSTRUCTION (HARD) COSTS (Two-Thirds of Total Project Cost)

	<u>ESTIMATED SF</u>	<u>COST/SF</u>	<u>TOTAL</u>
A. Building:	_____	_____	_____
B. Site Improvements:	_____	_____	_____
C. Landscaping:	_____	_____	_____
D. Contingency:	_____	_____	_____
E. Change Orders (include with final project cost):	_____	_____	_____
Total Construction (Hard) Costs			\$ _____

II. CONSTRUCTION (SOFT) COSTS (One-Third of Total Project Cost)

	<u>TOTAL</u>
A. Architectural Fees:	
Preschematic Phase:	_____
Schematic Design Phase to Completion:	_____
B. Land Use Expenses:	_____
C. Inspections/Permits/Fees:	_____
D. Additional Cost Estimates:	_____
E. Off-Site Improvements:	_____
F. Equipment:	_____
G. Furnishings:	_____
H. Interest:	_____
I. Sales Tax:	_____
J. Miscellaneous Expenses:	
Surveys/Studies:	_____
Liturgical Consultant:	_____
Fundraising Consultant/Expenses:	_____
Geotechnical/Testing Consultants:	_____
Hazardous Materials	_____

**NEW CONSTRUCTION/MAJOR RENOVATION BUDGET WORKSHEET
PAGE TWO**

K. Other Fees/Expenses:

Total Construction (Soft) Costs

\$ _____

Total Project Costs (Hard + Soft Costs)

\$ _____

Inflation Escalation (3-6% per year)

\$ _____

TOTAL PROJECT COST

\$ _____

END OF SECTION (Last updated July 1, 2013)

NOTE: Please see "Attachment to New Construction/Major Renovation Budget Worksheet".

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

ATTACHMENT TO NEW CONSTRUCTION/ MAJOR RENOVATION BUDGET WORKSHEET

PURPOSE

The purpose of this Attachment is to assist you in completing the New Construction/Major Renovation Budget Worksheet. Upon completion of the Worksheet, please forward to the diocesan Finance Office.

I. CONSTRUCTION (HARD) COSTS

- A. Building: The cost of construction of the building.
- B. Site Improvements: Includes the onsite cost of parking, grading, sidewalks, french drains, surface water retention systems, exterior sprinkling systems, etc.
- C. Landscaping: Includes the cost of grass, lawn, shrubs, trees, etc. (most local governing jurisdictions require a landscape plan).
- D. Contingency: The contingency amount is generally five to ten percent (5-10%) for new construction projects and ten to twenty percent (10-20% for remodel or renovation projects).
- E. Change Orders: Includes the cost of all COs throughout the construction phase; no dollar amount should be entered unless this worksheet is the final project cost.

Please complete the square footage entries for A, B, and C; add A through E to calculate the expenses of all "Hard" costs.

II. CONSTRUCTION (SOFT) COSTS

- A. Architectural Fees:
 - Preschematic Phase: Includes the fixed cost of the master plan or feasibility study
 - Schematic Design Phase to Completion: Includes the cost of architectural Basic Services, Additional Services, Other Services, and Reimbursables from the Schematic Design Phase through project Completion.
- B. Land Use Expenses: Includes the cost of a Land Use Attorney and/or any costs associated with land use issues to move the project forward.
- C. Inspections/Permits/Fees: Includes the cost of inspections, permits, and fees set by the local governing jurisdiction.

**ATTACHMENT TO NEW CONSTRUCTION/MAJOR RENOVATION BUDGET
WORKSHEET
PAGE TWO**

- D. Additional Cost Estimates: Includes the cost of detailed cost estimates (it is highly recommended that you have an independent cost estimate completed).
- E. Off-Site Improvements: Includes the off-site cost of sidewalks, traffic lights, etc.
- F. Equipment: Includes the cost of acoustical system, phone equipment, security systems, organ, piano, etc.
- G. Furnishings: Includes the cost of pews, altar, ambo, lectern, font, presider's chair, chairs, stations of the cross, statues, crucifixes, stained glass windows, etc.
- H. Interest: Includes the cost of interest on a CRP loan (generally nominal).
- I. Sales Tax: Sales tax is computed on I-A, I-B, I-C, I-E, II-F, and II-G.
- J. Miscellaneous Expenses:
 - Surveys/Studies: Includes the cost of boundary surveys, topographic surveys, traffic studies, etc.
 - Liturgical Consultant: Includes the cost of retaining a Liturgical Consultant.
 - Fundraising Consultant/Expenses: Includes the cost of retaining a Fundraising Consultant and other associated expenses.
 - Geotechnical/Testing Consultants: Includes the cost of geotechnical services, testing services, etc. retained during the Construction Phase.
 - Hazardous Materials: Includes the cost of asbestos surveys, testing, abatement and other hazardous materials mitigation.
- K. Other Fees/Expenses: Includes the cost of all other fees and expenses.

Add A through K to calculate the expenses of all "Soft" costs.

Add "Total Construction (Hard) Costs" and "Total Construction (Soft) Costs" to calculate the "Total Project Costs (Hard + Soft Costs)." Include a factor for inflation; add "Inflation Escalation" to "Total Project Cost (Hard + Soft Costs)" to calculate a "TOTAL PROJECT COST."

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

FORMING COMMITTEES

One of the first steps for a parish considering a building project is to form a Project Committee. The Project Committee includes a Building Committee and a Project Finance Committee. The Building Committee makes recommendations to the Pastoral Council. The Project Finance Committee makes recommendations about funding the project to the parish Finance Council. The Pastor, in consultation with the Pastoral Council and the Finance Council, makes decisions on the project. The following information can serve as a useful guide in forming these and other committees for building and construction projects:

I. BUILDING COMMITTEE

A. General Description

The Building Committee is responsible to the Pastoral Council. During the building process, the Building Committee makes recommendations to the Pastoral Council. The Pastoral Council advises the Pastor.

The Building Committee represents the parish during the entire design and construction process. In addition to a core committee of five (5) to seven (7) members, there are many subcommittees working at various times during the project. At least one (1) member of each subcommittee usually is a member of the Building Committee.

B. Membership

The Building Committee includes members with varied life experiences. Members should be active in the parish. One (1) or two (2) members should have some construction background. The Parish Administrator may serve on the committee. Construction or renovation of liturgical space should include members of the parish Liturgy Committee.

C. Duties and Responsibilities

The duties of the Building Committee include working with consultants as a team, e.g., diocesan Office of the Chief of Staff, diocesan Chief Financial Officer, Architect, Liturgical Consultant, Contractor, etc., to identify the design and/or scope of the project.

Additionally, the Building Committee recommends to the Pastor, Parish Council, diocesan Chief of Staff, diocesan Chief Financial Officer and Bishop the following:

1. Selection of the Architect;
2. Selection of the Liturgical Consultant;
3. Discernment report;
4. Design and construction process/method;

**FORMING COMMITTEES
PAGE TWO**

5. Selection of the Contractor; and
6. Project budget.

II. PROJECT FINANCE COMMITTEE

A. General Description

The Project Finance Committee identifies resources available to the parish to construct/renovate the needed facilities. Furthermore, they recommend a funding and financing process that is carried out during construction. This committee is in regular contact with the Pastor, Finance Council, and diocesan Finance Office.

B. Membership

Membership for the Project Finance Committee would consist of some members of the Finance Council and one (1) or more members of the Building Committee. The Finance Council Chairperson of the parish should serve as either a member or staff the committee.

This committee has continuous responsibility throughout the entire project. It should be headed by someone with a strong budgeting and accounting background.

C. Duties and Responsibilities

The following duties and responsibilities apply to the Project Finance Committee:

1. Review parish income sources to determine parish's ability to fund the project;
2. Prepare a financial feasibility study for the Building Committee;
3. Identify fundraising potential;
4. Interview and select a fundraising firm/consultant;
5. Manage fundraising process;
6. Liaison with Building Committee;
7. Prepare Capital Revolving Program (CRP) applications; and
8. Recommend funding to the Pastor, Parish Finance Council and diocesan Office of the Chief of Staff and Chief Finance Officer.

III. SUBCOMMITTEES

A. Finance Liaison

The Finance Liaison provides the Building Committee with an estimate of the amount of funds that can be spent on the project. Additionally, he/she coordinates information

FORMING COMMITTEES
PAGE THREE

between the Building and Project Finance Committees and monitors the budget and cash flow during the construction phase.

The Finance Liaison should consist of one (1) or two (2) members of the Building Committee who have financial and/or accounting expertise. They will have continuous responsibility throughout the project. Moreover, they should sit on the Project Financing Committee as well as the Building Committee.

B. Architect/Contractor Selection Committee

This committee recommends the selection of an Architect and/or Contractor. Interviewing of the Architects and Contractors is a vital part of this committee in order to select the "best-fit" for the parish community.

The Architect/Contractor Selection Committee is also required to work closely with the diocesan Finance Office in order to review cost estimates and to negotiate the construction contract.

Oftentimes, one (1) member of this committee acts as the Parish Representative during the actual construction. That is, he/she represents the parish as well as the diocese in the day-to-day, on-site construction operations.

C. Discernment Committee

The Discernment Committee is responsible for writing the Discernment Report and presenting it to the diocesan Building Commission. The report includes demographic data, parish membership, sacramental data, parish history, traditions, and other unique parish data.

The Discernment Committee also conducts surveys, listening sessions, or other parish-wide, information-gathering techniques in collaboration with the Communications Committee.

Membership includes at least one (1) member from the Building Committee and/or several other members from the parish who work on this subcommittee for several months.

D. Liturgy, Art, Furnishing and Music Committee

This committee acts as consultant to the Architect and/or Contractor. Members interview and select a Liturgical Consultant and research current liturgical practices. This may include the selection of an organ, interior furnishings, or art pieces.

This specialized committee also plans the ground-breaking and dedication celebrations.

FORMING COMMITTEES
PAGE FOUR

Membership consists of parishioners of the community with knowledge and experience in the appropriate field(s). This committee also includes one (1) or more members of the Building Committee.

E. Communications Committee

The Communications Committee is responsible for communicating Building Committee progress to the parish. They report the minutes of the committee's meetings to the parish and/or neighborhood.

Membership includes one (1) member of the Building Committee. Additional members may be needed to coordinate information in the parish bulletin and/or newsletter.

F. Logistics/Hospitality Committee

This committee arranges for and secures meeting space for the various committees. Members should also arrange tours for the parish community.

Membership does not require a previous committee member.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

SELECTION OF A PARISH REPRESENTATIVE

The Parish Representative can either be an experienced volunteer or a paid consultant. In some instances, the Pastor or Parish Administrator functions as the Parish Representative. The Parish Representative reports to the Pastor, parish (and committees), and diocesan Chief Financial Officer on the day-to-day construction operations.

I. PARISH REPRESENTATIVE

A. General Description

The Parish Representative functions as a representative of the Bishop, the Corporation, and the parish. The Bishop holds title to all diocesan property, therefore, the Parish Representative works for the Corporation and is responsible to the Chief Financial Officer and the parish. He/she shall perform due diligence regarding issues relating to the Catholic diocese and matters of construction.

The Parish Representative should sign a personal services or consultant contract if he/she is being compensated to serve as the Parish Representative. That contract shall list the specific scope of services, the rate of compensation (hourly fee or a fee based on the entire project), the contact person to whom the Parish Representative reports and any special conditions directly related to the project. It should include a termination clause. The Parish Representative is considered a consultant. Social Security and income taxes usually are **not withheld** from compensation.

If the Parish Representative is a volunteer, the appropriate *Volunteer Agreement Application* (Appendix E) should be executed.

B. Responsibility Clarifications

The Architect's contract usually includes the responsibility of being a representative on the job, advising and consulting with the parish and the diocese during construction. The Parish Representative consults regularly with the Architect, Contractor, and diocesan Chief Financial Officer. The diocesan Chief Financial Officer (called the Owner's Representative or Construction Manager) oversees all construction projects for the Diocese of Yakima. The Chief Financial Officer approves and signs all payment requests and change orders and facilitates the construction phase in conjunction with the parish.

C. Parish Representative Scope of Services

1. Become familiar with the site, survey, construction drawings, specifications, contractor's agreement, and other project documents.

SELECTION OF A PARISH REPRESENTATIVE

PAGE TWO

2. Together with the Architect and Contractor, attend the preconstruction conference and all future site meetings. Provide minutes of these meetings to the Building Committee and the Pastor/Parish Administrator, along with any suggestions or questions from the meetings. Keep the diocesan Chief Financial Officer informed of any pertinent issues, including change order actions and review of draw (payment) requests.
3. Visit the site regularly (daily or weekly, depending upon progress). Review the work in progress for compliance with the specifications. Comment to the Architect on any Contractor or subcontractor quality control issues, safety issues, or inefficient labor or material usage that may be observed. Using dated film, take both still and/or video tape records of the progress of the project.
4. Consult with the Architect and Contractor on routine questions that occur during construction. Provide parish input on all minor changes to the project (i.e., dollar amount or other definition of minor change).
5. Monitor the Change Order labor, material, and scope of change.

The Parish Representative has a set dollar amount (\$1,000 or less) that he/she is able to authorize without Building Committee or diocesan review. Preparation of change order documents are the responsibility of the Architect and all change orders shall be discussed with the Chief Financial Officer before the work on the change commences.

A "fixed" dollar amount should be received from the Contractor prior to the commencement of the change. The Architect should expeditiously (i.e., bimonthly or monthly) process all changes (additives, deducts and time changes) into change order documents. Note that change order documents change the original contract amount of the project.

Consult with the Building Committee when substantial changes are proposed or required. Contact the diocesan Chief Financial Officer when decisions on substantial changes to the contract are proposed.

6. Meet regularly with the Building Committee to discuss the progress of the project.
7. Review with the Architect and Contractor proposed payments to the Contractor. Advise the Pastor/Parish Administrator/Bookkeeper of appropriateness of the payment. Send payment requests with backup, along with the Capital Revolving Program (CRP) Draw Request form to the diocesan Chief Financial Officer.
8. Review the project budget with the Pastor/Parish Administrator (or Bookkeeper) regularly. Make a monthly report to the Building Committee, reviewing the project budget contingency and change orders.

**SELECTION OF A PARISH REPRESENTATIVE
PAGE THREE**

9. The Parish Representative shall work in conjunction with the parish, the Architect and/or Contractor, and the diocesan Chief Financial Officer in matters relating to communication with local governing agencies.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

USE OF VOLUNTEER LABOR AND/OR DONATIONS OF LABOR AND MATERIALS BY BONAFIDE CONTRACTORS

I. Volunteer Labor

Many minor repairs and maintenance projects can be completed using parish volunteer labor. The type or projects done with volunteer labor should not be hazardous or require work at above-ground level. Competent supervisors should be on site at all times.

Volunteers should not be asked to work on or with any equipment that they have not been trained to operate.

All electrical and plumbing work must be performed by licensed, bonded workers and electrical or plumbing permits must be obtained.

The *Volunteer Application Agreement* (Appendix E) must be signed **before** the commencement of any work.

If the volunteers are performing work as part of a project done under contract with a contractor, the use of volunteers should be scheduled only before or after the contractor's work is fully completed.

If a parish combines a General Contractor and volunteer labor, care should be taken that volunteer labor not cause a General Contractor delay.

Despite the best intentions, the work of volunteers rarely is as good as work performed by professional workers.

II. Donation of Labor and Materials

If a bonafide (licensed, bonded and insured) contractor or subcontractor wishes to partially or completely donate either material or labor for a project, the project budget should still include payment for the donated work. If the donated work can be performed without impacting the work of the General Contractor, the architect should prepare an AIA contract for execution by the Corporation. The usual insurance requirements, prevailing wage, and sales tax should be included. After completion of the project, the contractor can donate the agreed upon portion of the contract back to the parish.

It is not advisable to hire under a separate contract a subcontractor for work that will impact the General Contractor.

If a subcontractor wants to donate work that is normally supervised or impacts a General Contractor, the following process can be used:

USE OF VOLUNTEERS
PAGE TWO

1. Specifications and instructions to the bidders should include the statement that the General Contractor should accept sub-bids from the donating subcontractor.
2. When the work is bid, the donating subcontractor submits a bid. If the donating subcontractor submits the lowest bid, the General Contractor qualifies subcontractor. The General Contractor hires the subcontractor under his usual contracting procedures (insurance, prevailing wage clause, sales tax, and warranty). The General Contractor supervises the donating subcontractor during the construction.

While donating contractor or subcontractor may have the best of intentions during the planning stages of the project, the donation is often withdrawn when it comes time to do the work. Reasons include: the principle died and the heirs would not honor the donation, the subcontractor has paid work and cannot fit the donated work into the schedule, the subcontractor cannot do the work when the General Contractor has it scheduled, the subcontractor is unable to perform the work to commercial standards, or the subcontractor cannot get insurance for the job.

If the subcontractor wishes to take a tax exemption on his donation, a letter should be sent to the contractor advising him to consult with his tax advisor. All letters acknowledging donations of "non cash" items should be sent to the diocesan Chief Finance Officer.

END OF SECTION (Last updated July 1, 2013)

Diocese of Yakima Volunteer Application Agreement

We want to thank you for your offer to volunteer. We have the responsibility to advise you of the constraints under which you volunteer.

The undersigned acknowledges and agrees that he/she is a volunteer worker on a project for _____ . All of the work to be performed by the undersigned is a free will donation of time and energy and no payment or value of any kind is to be received for the services.

As a volunteer, the undersigned agrees to work under the supervision of _____ for the project. The undersigned has no authority to represent the project coordinator or the Diocese of Yakima in dealing with any other person, business, or firm, and the undersigned agrees to indemnify and hold harmless the parish and the Diocese of Yakima for any claim, liability, or expense arising from any contractual liability incurred or alleged to have been incurred by the undersigned.

The undersigned further agrees that he/she is not entitled to any wages, reimbursements, or benefits from the volunteer work, including without limitation worker's compensation, unemployment benefits, medical and overtime.

The undersigned acknowledges that he/she could be injured on the construction site, but agrees to seek compensation therefore from his/her own personal insurance and agrees to pay his/her own medical bills. The undersigned agrees to make no claim for any injury, harm or consequential damages for work-related injury and releases the parish and the diocese from all claims, demands, or causes of action arising there from.

This Agreement entered into as of the _____ day of _____ 20_____.

Pastor/Authorized Signer

Volunteer

Project Manager

(Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

SELECTION OF AN ARCHITECTURAL FIRM

I. FORMATION OF AN ARCHITECTURAL SELECTION COMMITTEE

Members of this committee come from the parish Building Committee (see previous section).

II. DISCUSSIONS WITH THE BUILDING COMMITTEE

The Architectural Selection Committee meets with the Building Committee to discuss the most important criteria for hiring an Architect.

III. PREPARATION OF A WRITTEN LIST OF CRITERIA

This is the criteria used for selecting Architects to interview (see "Criteria for Selection of an Architectural Firm").

IV. QUALIFYING THE ARCHITECTS

A. Letters to the Long List (Architects)

A sample letter is included herein.

Suggestions for this long list are available from:

1. Diocesan Finance Office; and
2. Lists/referrals from other parishes.

B. Eliminating Respondents

Respondents can be eliminated for the following reasons:

1. They did not supply sufficient information to determine their appropriateness;
2. The scope of the project(s) they provided as references was either significantly larger or smaller than the parish project; and
3. Personal knowledge from one (1) of the members of the Building Committee members or parish staff indicates that the Architect would not be acceptable.

SELECTION OF AN ARCHITECTURAL FIRM PAGE TWO

C. Checking References

For Architects whose proposals are selected for consideration, the next step is telephoning references. A sample of questions to ask is included. Proposals can be divided among members of the Building Committee and shared at the next meeting. A call can be made to the diocesan Chief Financial Officer to see if any other parishes have used a particular firm.

After the reference check, eliminate those firms that:

1. Do not fit the project criteria; and
2. Elicit negative responses.

D. Narrowing the Field to Two Firms

In choosing the top two (2) architectural firms for the project, the Pastor and the Building Committee first agree on the criterion that is most important. Secondly, the firm is chosen through consensus.

E. Interviews with the Final Two Architects

These interviews can be done with the entire Building Committee and Pastor or with the Architectural Selection Committee and Pastor. The diocesan Chief Financial Officer is available to sit in during these interviews. A sample letter for setting up the interviews is included herein.

1. Questions and evaluations should be the same for each firm. A sample is included herein;
2. The Architectural Selection Committee visits some of the buildings designed by the firm; and
3. The Committee contacts the diocesan Chief Financial Officer with the names of the two (2) finalists.

F. Final Selection

Selection of the Architect is done by consensus; it is affirmed by the Building Committee at large either by a second interview or by including the whole committee in the first interview.

The recommended firm is interviewed by the diocesan Chief Financial Officer prior to notification (if the firm is new to diocesan work). **A contract is signed between the Corporation and the architectural firm.**

**SELECTION OF AN ARCHITECTURAL FIRM
PAGE THREE**

G. CONTRACT AND FEES

1. Fees and contracts are negotiated by the Architectural Selection Committee.
2. A contract audit is performed by the diocesan Chief Finance Officer; and
3. The contract is signed by the Bishop.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

CRITERIA FOR SELECTION OF AN ARCHITECTURAL FIRM

Please review and select criteria you feel fits your parish project and committee needs. Develop questions and an evaluation form using the following criteria:

1. Experience designing a facility like ours;
2. Good track record with General Contractors with whom they have worked;
3. Previous client's report regarding Architect's adherence to parish's budget;
4. Experience or demonstrated ability to design a 'phased' project;
5. Previous designs have been too elaborate;
6. Projects have been too small;
7. Specialty in similar design and construction;
8. References say they were available, easy to contact, and accessible;
9. Experience in working with committees;
10. Schedule fits with the parish's timeline;
11. Ability to listen to the committees – someone who designs to client's needs;
12. Knowledge of Catholic liturgy (for worship space project);
13. Size and financial viability of the architectural firm; and
14. Experience of the firm with the city/county permit process.

END OF SECTION (Last updated July 1, 2013)

**CRITERIA FOR SELECTION OF AN ARCHITECTURAL FIRM
PAGE TWO**

LETTER TO ARCHITECTURAL FIRM ASKING FOR INFORMATION

Dear _____ (*Architect*):

Our parish, _____ (*Name of parish*), in _____ (*City*), plans to construct _____ (*Building Project*).

If your firm would like to be considered for this project, please forward any information regarding your qualifications. This information should be similar to the information in AIA Document B431. We are especially interested in having the telephone numbers of references on projects similar in scope.

In addition, we would like to have the following information:

1. Your experience in designing a project with a committee;
2. Examples of previous work; and
3. Other information.

We intend to interview four (4) or five (5) firms from the total number of respondents to this letter. Please mail your information to _____ (*Contact Name*) before _____ (*Date*).

Sincerely,

Pastor or Committee Member

NOTE: Give the firms at least three (3) to four (4) weeks to respond.

END OF SECTION (Last updated July 1, 2013)

**CRITERIA FOR SELECTION OF AN ARCHITECTURAL FIRM
PAGE THREE**

LETTER TO ARCHITECTURAL FIRMS TO SCHEDULE INTERVIEW

Dear _____ (*Architect*):

Thank you for the information about your firm and for your interest in working on our
_____ (*Building Project*).

We would like to meet with your firm as well as the Project Architect.

We have scheduled your interview for _____ (*Date two weeks in future*) at _____ (*Time*).
The interview will be held at _____ (*Location*). Please call
_____ (*Contact Person*) at _____ (*Number*) if you cannot meet our
committee at the scheduled time.

We have enclosed a map of the location of our project which is at _____ (*Address*) if you
would like to visit the site prior to our scheduled interview (*enclose a copy*).

You will have about thirty (30) minutes to review your design philosophy and discuss previous
projects. Please contact _____ (*Contact Person*) at _____ (*Number*) if you will
need a slide projector or screen. The remainder of the interview will be spent in asking and
answering questions about our project.

We look forward to meeting with you!

Sincerely yours,

Pastor or Committee Member

END OF SECTION (Last updated July 1, 2013)

**CRITERIA FOR SELECTION OF AN ARCHITECTURAL FIRM
PAGE FOUR**

QUESTIONS TO ASK ARCHITECTURAL FIRM'S REFERENCES

Name of Reference Telephoned: _____ for *(Firm Name)* _____.

Previous Project(s): _____

1. Who was the Project Architect?
2. Would you hire this Architect again?
3. Has this firm done more than one (1) job for you?
4. How would you describe the working relationship between the members of the Architect's consultants, your design team?

Probe: Easy to work with?
Probe: Returns phone calls?
Probe: Responds in a reasonable time?
5. Tell me about their ability to work with committees.
6. Describe the relationship between the Architect and Contractor.
7. Were there any complaints from the Contractor about the drawings, turnaround time, etc.?
8. Was the project completed on time?
9. If not, who was responsible?
10. Were there many change orders?
11. I am interested in your response to their design work.

Probe: Integrity – no deceit or affections?
Probe: Extraordinary ability?
Probe: Creativity?
Probe: Cost effective?
12. What can you tell me about their ability to design to your budget?
13. How did the estimated construction cost compare with the actual cost?
14. What else is there about the firm (good or bad) that you think we should know?

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

SELECTION OF A FUNDRAISING CONSULTANT

I. SELECTION PROCESS

The diocese recommends that parishes engage an independent firm to conduct the fund drive. Drives conducted by outside firms have been more successful than self-directed drives, especially in the area of major gifts. When selecting an outside consultant, it is very important to check any local references and meet or at least call the actual person who will be conducting your drive.

The diocesan Chief Finance Officer (CFO) can provide a list of fundraising consultants and references from local parishes. The diocese will not recommend any one (1) particular firm.

II. BUILDING DRIVE GOAL

It is very important that the Fundraising Consultant not pressure the parish into setting an unrealistic goal. Based on the recent history of building drives throughout the diocese, the goal should be set between one point five (1.5) and two point five (2.5) times the parish's annual ordinary income, depending on the popularity of the project within the parish community and economic factors. The most successful drives are made up of three-year pledges. The diocesan CFO will review parish finances and assist the parish in setting the preliminary goal.

III. BISHOP'S ENDORSEMENT LETTERS

The Bishop has asked that parishes follow the procedure below when requesting an endorsement letter for a capital campaign:

- A. Provide at least two (2) months notice;
- B. Provide background on the parish, the project, and a copy of the Discernment Report;
- C. Provide the date that will go on the letter; and
- D. Provide suggestions for content.

A copy of the request for the Bishop's letter should be sent to the Chief of Staff and the Chief Financial Officer.

**SELECTION OF A FUNDRAISING CONSULTANT
PAGE TWO**

EVALUATION FORM TO GAUGE FUNDRAISING ACTIVITIES

Parish: _____ City: _____

Contact Person: _____ Phone: _____

Purpose of Project: _____

Name of Fundraising Firm: _____

Contact Person: _____ Phone: _____

Fund Drive Dates: _____

Fundraising Campaign Preparation Time: _____

Pledge Amounts

Quoted goal: _____
Actual: _____
Pledges when fundraising firm left: _____
Total pledges: _____

Major Gifts (over \$5,000)

Number: _____
Percentage of total: _____
Person who solicited gifts: _____

Grants from Foundations, etc.

Number: _____
Percentage of total: _____
Person(s) who applied to foundations, etc.: _____

Total Pledges/Gifts/Grants

Cost of Campaign

Cost incurred to fundraising firm: _____
Other (supplies, employees, etc.): _____
Total costs incurred: _____

NET FUNDRAISING AMOUNT: \$ _____

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

SELECTION OF A CONTRACTOR

I. CONFORMING TO THE BISHOP'S GUIDELINES

In a commitment to social justice, the Bishop requires that all vendors, professionals, and Contractors doing business with the Diocese of Yakima or its subdivisions meet the following conditions:

A. Underutilized Groups

Evidence must be shown of efforts made to seek out individuals or firms who are members of underutilized groups or organizations and make available to them on a competitive basis the opportunity to bid on the project.

B. Nondiscrimination

Employers shall not discriminate against any employee or applicant for employment or applicant on the basis of race, age, color, religion, gender, or national origin.

C. Affirmative Action

Employers shall agree to take affirmative action to ensure applicants are employed and employees are treated during employment without regard to race, age, color, religion, gender, or national origin.

D. Wage Guidelines

1. The rate of wages for all work performed for all diocesan entities shall in no way prohibit any qualified contracting firm from submitting competitive bids for construction projects.
2. If the construction contracts are of an emergency nature to protect the diocesan entity from further damage, it shall be determined that any qualified contracting firm may be utilized.

E. The Above Requirements Cannot Be Waived.

II. DETERMINING THE METHOD OF SELECTION

The parish Building Committee should decide the method of selecting a Contractor during the schematic design phase. All Contractors must be licensed, bonded, and insured. The Contractor must be selected by bidding from a select bid list or by negotiation when approved by both the Chief Financial Officer and the Bishop.

SELECTION OF A CONTRACTOR

PAGE TWO

Usually, a subcommittee of the parish Building Committee makes recommendations of both the type of Contractor selection and the individual firms to be considered.

A. By Bid

If the parish wishes to put the project out to bid, Contractor selection can wait until the completion of the construction documents.

1. The Architect, diocesan Chief Financial Officer, and members of the Building Committee suggest Contractors who are qualified to bid on the project. Recommended firms are placed on a long list of Contractors who are licensed, can get a bond for the construction amount of the project, and have worked on similar jobs. The long list of Contractors should include both underutilized and minority firms and other firms who will agree to follow the diocesan construction policies;
2. The Contractor Selection Committee writes each Contractor, inquiring about their interest in the project. A sample letter is included herein. Contractors should be asked to provide AIA Document A305, Contractor's Qualification Statement, or similar information about their firms;
3. The Contractor Selection Committee reviews information sent from each Contractor. From this review, the Contractor Selection Committee picks five (5) to seven (7) firms for further exploration;
4. The Contractor Selection Committee members call each Contractor's references. Sample questions are included;
5. The Contractor Selection Committee members visit some of the Contractor's completed projects or current projects under construction;
6. The Contractor Selection Committee members perform a financial analysis of each Contractor's financial statements. Involving members of the Finance Committee is useful during this phase of review;
7. The Contractor Selection Committee members interview the principal of the firm, the proposed Project Manager, and/or Superintendent. The diocesan Chief Financial Officer is available to sit on interview panels and make comments to the Building Committee;
8. The Contractor Selection Committee sends the list to the diocesan Building Commission for review;
9. With comments from the diocesan Building Commission, the Contractor Selection Committee reduces the Contractor list and invites two (2) or three (3) firms to bid. Included should be both underutilized and minority firms. Firms are

SELECTION OF A CONTRACTOR PAGE THREE

notified in writing that they will be asked to bid and given the estimated date of the bid.

10. **After a permit is issued, the project can go out to bid.** Plans are usually placed in plan centers so subcontractors can review them for sub-bids;
11. The bids are opened at a regularly scheduled meeting of the diocesan Building Commission;
12. If project bids are under the project estimate, the contract is prepared by the Architect. The contract is signed by the Bishop after approval by the Pastor and contract audit by the diocesan Chief Financial Officer.
13. If the low bid exceeds the project estimate, the Architect, Contractor, and Building Committee will work together to determine if any changes can be made in the project to reduce the cost.
14. When the cost of the project is within the parish budget, AIA Document A101, Standard Form of Agreement Between Owner and Contractor Where the Basis of Payment is a Stipulated Sum contract, or another contract form that is pre-approved by the Bishop, is prepared by the Architect and executed by the Corporation.

Work cannot proceed until the project funding and financing and project construction budgets are in agreement.

B. By Negotiation

If the parish wishes to negotiate with a Contractor, the Contractor selection should be during design development so the Architect and parish will have the benefit of the Contractor's input during the design development phase.

A Contractor Selection Committee is formed from members of the Building Committee:

1. The Architect, the Chief Financial Officer, and members of the Building Committee suggest Contractors who are qualified to bid on the project. Recommended firms are placed on a long list of Contractors who are licensed, can get a bond for the construction amount of the project, and have worked on similar jobs. The long list of Contractors should include both underutilized and minority firms and other firms who will agree to follow the diocesan construction policies;
2. The Contractor Selection Committee writes each Contractor, inquiring about their interest in the project. A sample letter is included herein.

SELECTION OF A CONTRACTOR PAGE FOUR

Contractors are asked to provide AIA Document A305, Contractor's Qualification Statement, or similar information about their firm;

3. The Contractor Selection Committee reviews information sent from each Contractor. From this review, the Contractor Selection Committee picks five (5) to seven (7) firms for further exploration;
4. The Contractor Selection Committee members call each Contractor's references. Sample questions are included herein;
5. The Contractor Selection Committee members visit some of the Contractor's completed projects or current projects under construction;
6. The Contractor Selection Committee members perform a financial analysis of each Contractor's financial statements. Involving members of the Project Finance Committee is useful during this phase of review;
7. The Contractor Selection Committee members interview the principal of the firm, the proposed Project Manager, and/or Superintendent. The diocesan Chief Financial Officer is available to sit on the interview panel and make comments to the Building Committee;
8. The Contractor Selection Committee sends the list to the diocesan Building Commission for review;
9. With comments from the diocesan Building Commission, the Contractor Selection Committee reduces the Contractor list to two (2) or three (3) finalists;
10. The Contractor Selection Committee schedules a second interview, which can be held at the Contractor's office. The costs included in the Contractor's fee, labor burden, and change order markup should be discussed. All projects currently under contract should be discussed to identify any potential emerging problems;
11. The Contractor Selection Committee selects the Contractor with whom to negotiate, using the consensus method of decision-making. Information is available from the diocesan Finance Office;
12. The diocesan Chief Financial Officer meets with the Contractor Selection Committee and the Contractor to finalize the agreement. The agreement allows the Contractor to work with the parish Building Committee and the Architect to develop a project within the diocesan-approved parish budget;
13. Before the permit application, the parish has a professional cost estimate completed using the construction drawings. If the cost estimate indicates the project can be completed within the parish budget, the permit application is made.

**SELECTION OF A CONTRACTOR
PAGE FIVE**

14. When the permit is received, the Contractor uses construction drawings to solicit subcontractor bids. If there have been many changes because of the permit process, or if the cost estimate was completed more than six (6) months previously, a new cost estimate must be completed; and
15. When the cost of the project is within the parish budget, AIA Document A111, Standard Form of Agreement Between Owner and Contractor Where the Basis of Payment is the Cost of the Work Plus a Fee with or without a Guaranteed Maximum Price, or another contract form that is pre-approved by the Bishop, is prepared by the Architect and executed by the Corporation.

Work cannot proceed until the project funding and financing and project construction budgets are in agreement.

**SELECTION OF A CONTRACTOR
PAGE SIX**

LETTER TO CONTRACTOR ASKING FOR INFORMATION

Dear _____ *(Contractor)* _____:

Our parish, _____ *(Name of Parish)* _____, in _____ *(City)* _____, is preselecting Contractors for construction of a _____ *(Building Project)* _____.

If your firm would like to be considered for this project, we ask that you respond to this letter by 5:00 p.m. on _____ *(Date)* _____.

We ask that you respond by returning AIA Form A305, or equal information. In addition, you may want to include any material that you believe would be useful to our committee in making a decision.

Scope of Work: (Example: The parish intends to construct a church of 3,200 square feet on the existing parish site. Construction is scheduled to commence in September, assuming timely issuance of a building permit. We expect to bid the project during the month of July. A private bid opening will be held during a diocesan Building Commission meeting).

Plans and specifications will not be available until the Building Committee has selected the Contractors to bid on the job.

You may review the site by calling _____ *(Contact Person)* _____ at _____ *(Number)* _____.

_____ *(Architect)* _____ is the Project Architect for the project. You may reach the Architectural firm at _____ *(Number)* _____.

After review of the information you provide, the Building Committee will contact your references. The committee will be interviewing Contractors during the month of _____ *(Month)* _____. The committee intends to select five (5) Contractors to bid on the project.

You will be notified by mail if we select your firm to bid on this job.

Sincerely yours,

Pastor or Committee Member

**SELECTION OF A CONTRACTOR
PAGE SEVEN**

CONTRACTOR INTERVIEW QUESTIONS/STATEMENTS

1. If you have worked for a Catholic parish before, could you tell us the name of the parish, the Pastor, and the Building Committee representative?
2. How many jobs do you currently operate at the same time? What will you do to ensure that you have sufficient staff to manage our job if you have several jobs underway when we are ready to begin construction?
3. Explain what work you perform with your own crew and what work you will subcontract.
4. Explain how you select subcontractors.
5. What is your usual fee for a job the size of ours?
6. Please tell us what items are included in your fee for this job.
7. Our specifications limit markup on change orders. If you take this job, please note that we must agree to the markup before a contract is signed.
8. Who will you assign to be the Project Manager and Superintendent on our job? Can we interview him/her?
9. Explain any and all of your experiences with litigation and arbitration.
10. We are interested in working with a firm that is financially stable. What is the net worth of your firm? Do you have financial statements that you will provide?
11. Do you usually retain escrow?
12. How do you resolve conflict on the job? With subcontractors? With Architects? With employees?
13. What can the Owner/parish do to make a project successful?
14. Explain your scheduling process.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

ARCHITECT/CONTRACTOR INTERVIEW EVALUATION

Architect/Contractor Name: _____ Date: _____

This evaluation form is only a quantitative tool to help in qualifying each firm. Provide a separate evaluation form for each firm (for each interviewer). After each interview, the Selection Committee should discuss each firm. Total each column and then add together for a "Grand Total." Scoring should be based on your interpretation of the firm's/company's response to the following:

ITEM	QUESTION	10 POINTS	8 POINTS	6 POINTS	4 POINTS
1	Firm gave good background on his/her firm/company				
2	Architect/Contractor was well organized and well prepared				
3	Architect/Contractor has been in business under the same name				
4	Architect/Contractor has worked with committees in the past				
5	Architect/Contractor has completed similar projects				
6	Architect/Contractor has negotiated contracts				
7	Architect/Contractor schedule fits with parish's timeline				
8	Architect/Contractor understands parish's project				
9	Architect/Contractor has ideas to improve the process				
10	Architect/Contractor will assist in cost containment				
11	Architect/Contractor understands budget constraints				
12	Architect/Contractor has experience in expediting COs				
Total Points (Each Column)					

GRAND TOTAL (COLUMN SUM) _____

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

MAKING PAYMENTS DURING CONSTRUCTION

Contractors are paid according to generally accepted construction and lending practices. The Architect and the Contractor should be familiar with these practices.

I. GENERAL CONDITIONS

The General Conditions of the specifications identify conditions for payment to the Contractor. They are as follows:

A. Contractor Invoice

The Contractor submits his/her invoice for work completed as of the date of the invoice. All Contractor payment requests shall be on AIA G702 Application and Certificate of Payment or equivalent. **The Contractor and all subcontractors who have made application for payment will submit a conditional lien release with the application.**

B. Architect Review

The Architect will review the payment request and determine if the work for which the Contractor is making payment application has been completed. The Architect signs the payment request and submits it to the parish for payment.

C. Capital Revolving Program (CRP) Withdrawal Form

The parish completes a CRP savings or loan withdrawal form and sends the form, along with the Contractor's application for payment and all lien releases to the diocesan Chief Finance Officer for payment.

D. Property and Construction Review

The diocesan Chief Finance Officer reviews the Contractor's application for payment and forwards it to the CRP bookkeeper for payment. The CRP bookkeeper sends a check for the amount of the Contractor's application to the parish. The parish distributes the funds to the Contractor.

II. CHANGE ORDERS

Contractors will not make application for payment for change orders that have not been executed.

MAKING PAYMENTS DURING CONSTRUCTION

PAGE TWO

Change Order Pricing - Fixed Price

When the fixed price method is used to determine the value of any Work covered by a Change Order, the following procedures shall apply:

- Contractor's Change Order proposal shall be accompanied by a complete itemization of the costs, including labor, material, subcontractor costs, and overhead and profit. The costs shall be itemized in the manner set forth below, and shall be submitted on cost detail sheet or other form approved by Owner.
- All costs shall be calculated based upon appropriate industry standard methods of calculating labor, material quantities, and equipment costs.
- If any of Contractor's pricing assumptions are contingent upon anticipation actions of Owner, Contractor shall clearly state them in the proposal.
- The cost of any additive or deductive changes in the Work shall be calculated as set forth below. Where a change in the Work involves additive and deductive work by the same Contractor or Subcontractor, overhead and profit will apply to the net difference.

Any request for adjustment of Contract Sum based upon the fixed price method shall include only the following items:

- Craft Labor Costs: These are the labor costs determined by multiplying the estimated or actual additional number of craft hours needed to perform the change in the Work by the hourly labor costs. Craft hours should cover direct labor.
- Material Costs: This is an itemization of the quantity and cost of materials needed to perform the change in the Work. Material costs shall be developed first from actual known costs, second from supplier quotations or if these are not available, from standard industry pricing guides. Material costs shall consider all available discounts. Freight costs, express charges, or special delivery charges, shall be itemized.
- Equipment Costs: This is an itemization of the type of equipment and the estimated or actual length of time the construction equipment appropriate for the Work is or will be used on the change in the Work. Costs will be allowed for construction equipment only if used solely for the changed Work, or for additional rental costs actually incurred by the Contractor. Equipment charges shall be computed on the basis of actual invoice costs.

MAKING PAYMENTS DURING CONSTRUCTION

PAGE THREE

- Subcontractor Costs: This is defined as payments Contractor makes to Subcontractors for changed Work performed by Subcontractors of any tier. The Subcontractors' cost of Work shall be calculated and itemized in the same manner as prescribed herein for Contractor.
- Allowance for overhead: This is defined as costs of any kind attributable to direct and indirect delay, acceleration, or impact, added to the total cost to Owner of any change in the Contract Sum. This allowance shall compensate Contractor for all non craft labor, temporary construction facilities, field engineering, schedule updating, as-built drawings, home office costs, Business & Occupation Taxes, office engineering, estimating costs, additional overhead because of extended time, and any other cost incidental to the change in the work. It shall be strictly limited in all cases to a mutually acceptable reasonable amount.
- Allowance for profit: This is an amount to be added to the cost of any change in contract sum. It shall be limited to a mutually acceptable reasonable amount.

Note: See Appendix A: *Cost Breakdown Form (Sample)* for additional info.

III. HOLDING OF RETAINAGE

Unless otherwise noted in the specifications and/or construction contract, the retainage is held in the CRP savings/loan until completion of the project [usually thirty (30) days].

IV. RELEASE OF RETAINING

The diocesan Chief Financial Officer will visit the project with the Architect, Parish Representative, and Contractor prior to the release of the retainage. The retainage is held until all work is satisfactorily completed [usually thirty (30) days].

V. SYSTEM FOR MANAGEMENT OF PAYMENTS

The parish may contact the diocesan Chief Finance Officer for help in developing an accounting system for managing construction payments.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

PLANNING THE DEDICATION

Planning for the dedication of a new facility starts at the time of construction. Please write the Bishop at least six (6) months before the date of the dedication. Request a time for him to come to the community to dedicate the building(s). Because many projects are not completed on time, schedule a time at least a month after the Contractor is scheduled to complete the work. In general, do not tie the completion of the work to a holy day, i.e., Easter, Christmas, etc. Further, do not rush the completion of construction activity based on when the Bishop is scheduled to visit the parish. Reschedule if necessary.

There are two (2) main types of rituals:

I. THE RITE OF DEDICATION FOR NEW CHURCH BUILDINGS/ALTARS

Baptismal theology reminds us that the dwelling place of God is the human person and that the primary act of dedicating a church building is assembling the faithful for the Eucharist. The Rite of Dedication is to be followed.

The Bishop requires that the parish and its Liturgical Consultant consult with the Office of Liturgy for assistance in planning the dedication.

II. SOLEMN BLESSING OF A RENOVATED/ALREADY DEDICATED BUILDING

The Book of Blessings (the Roman Ritual, revised by Decrees of the Second Vatican Ecumenical Council and published by the Authority of Pope John Paul II, prepared by the International Commission on English in the Liturgy, Catholic Book Publishing Co., 1989) can be used to identify an appropriate blessing of a facility.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

COMPLETING THE POST-CONSTRUCTION WALK-THROUGH

Congratulations! The completion of a building project is an exciting and important time for the parish. Please contact the diocesan Finance Office when the building is nearing completion. A representative from the Finance Office will walk through the building with the Architect, Parish Representative, and Contractor.

I. CERTIFICATE OF SUBSTANTIAL COMPLETION

The Architect will issue a Certificate of Substantial Completion (AIA Document G704). This document indicates that the work included in the contract is substantially complete and the warranty period begins. There usually will be a list of minor items which remain incomplete.

The parish usually releases the retainage held during construction thirty (30) days after the date of substantial completion. However, the parish should hold back sufficient funds to ensure completion of any items remaining to be completed.

II. NINE-MONTH WALK-THROUGH

Nine (9) months from the date of substantial completion, the Architect, Contractor, and a representative of the parish should walk through the building and review all components of the building. If there are any items requiring repair, please send the Contractor written notification of the items needing correction.

III. ONE-YEAR WARRANTY

State laws require that all Contractors provide a one (1) year warranty on workmanship and materials. If any items are not satisfactory during the year after substantial completion, a letter should be sent to the Architect and the Contractor identifying the item(s) needing correction. Please send a copy of the letter to the diocesan Finance Office. The department can assist with warranty problems.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

CLOSE-OUT DOCUMENTS CHECKLIST

The purpose of this checklist is to ensure the proper close-out of diocesan construction projects in Central Washington.

This document will be included with all Architect, Contractor, or Vendor contracts. The criteria below will be considered "close-out" material for diocesan construction projects. These materials will be forwarded to the Diocesan Finance Office, Diocese of Yakima, 5301-A Tieton Drive, Yakima, Washington 98908-3493, at the appropriate time.

- Final Change Order Log: The Architect and Contractor will formalize all outstanding change orders in a timely fashion.
- Punch List Documents: The Architect will submit a final punch list for the project; upon completion of all punch list items (or until the parish/agency is satisfied with the work), the retainage amount will be released (usually thirty (30) days after the date of substantial completion).
- Final Application for Payment: After retainage has been released, a final draw request will be submitted to the parish.
- Unconditional Lien Release: An unconditional waiver of lien will accompany (or follow) the final application for payment request.
- Hazardous Materials Close-Out Documents: Hazardous material documents (if any) will be submitted.
- Certificate of Occupancy: A copy of the Certificate of Occupancy will be submitted. The original C. of O. will be left at the site.
- As-Built Documents: The Architect/Contractor will submit one (1) set of as-built drawings to the parish/agency and one (1) set to the diocese. These documents need not be reproducibles.

FOR PARISH/AGENCY USE ONLY

- Final Major Construction/Renovation Budget Worksheet: The parish/agency will submit a final budget worksheet which includes all hard and soft costs for the project.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

INSURANCE AND LEGAL REQUIREMENTS

Contractual obligations create liability. Almost every contract entered into has risk implications, either through indemnity or insurance provisions. For these reasons, it is imperative that all diocesan construction contracts be audited by the diocesan Chief Financial Officer.

The table at the end of this section outlines the diocesan requirements for all construction projects. The information below will explain these requirements in full detail:

I. INSURANCE REQUIREMENTS

A. Comprehensive General Liability

Comprehensive general liability coverage provides protection against all liability exposures of the diocese. Coverage includes products, completed operations, premises and operations, elevators, and independent Contractors.

The current minimum coverage amount for all diocesan projects is set at \$2,000,000 per occurrence or the value of the building, whichever is higher.

B. Comprehensive Auto Liability

Comprehensive automobile liability insurance provides coverage for negligence based on bodily injury or property damage liability on an occurrence basis.

The current minimum for auto liability is set at \$2,000,000 per occurrence.

C. Professional Liability (Errors and Omissions)

Professional liability insurance coverage provides for specialists in various professional fields. Since basic liability policies do not protect against situations arising out of business or professional pursuits, professional liability insurance is purchased by individuals who hold themselves out to the general public as having greater than average expertise in particular fields.

Often referred to as *errors and omissions insurance*, professional liability provides protection for negligent acts and/or omissions resulting in bodily injury, personal injury, and/or property damage liability to a client.

The diocesan requirement for new construction, renovation, and service and repair contracts is currently set at \$2,000,000 per occurrence or project cost, whichever is higher. Contact the diocesan Chief Financial Officer for further information.

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D. Builder's Risk

Builder's risk insurance coverage insures building Contractors for damage to property under construction. It covers materials, supplies, fixtures, and temporary structures to be used in or incidental to the construction, fabrication, installation, erection, or completion of buildings under construction.

Builder's risk does not cover: 1) machinery, tools, plastic or canvas covers, mobile trailers, equipment, and property of a similar nature not destined to become a permanent part of the installation or structure; 2) money, notes, securities, plans, blueprints, specifications, and other similar papers; 3) trees, grass, shrubbery, or plants; and 4) glass, other than glass building blocks, unless loss is caused by fire, lightning, wind, hail, aircraft, vehicles, discharge from fire protective or building service equipment, explosion, riot, or civil commotion.

E. Worker's Compensation

Worker's compensation insurance coverage provides four (4) types of benefits: 1) medical care; 2) death; 3) disability; and 4) rehabilitation. These benefits are for employee job-related injuries or diseases as a matter of right (without regard to fault).

The diocese will examine the Certificate of Insurance to note if the Contractor has complied with statutory guidelines regarding worker's compensation guidelines.

F. Bid Bond

A *bid bond* is required of a Contractor submitting the lowest bid on a project. If the Contractor then refuses to undertake the project, the bid bond assures that the difference in payment be made between the lowest bid and the next lowest bid. The bid bond encourages Contractors to make serious bids and live up to their obligations.

Currently, the requirement of a bid bond is optional – it depends upon the size and scope of a particular contract.

G. Performance Bond/Payment Bond

A *performance bond* guarantees that a Contractor will perform under the contract in accordance with all specifications of the bid submitted. A *payment bond*, on the other hand, guarantees that a Contractor will pay fees owed for labor and materials necessary for the construction of a project. If these fees are not paid, an owner who has paid the Contractor might fall subject to subcontractor's or worker's liens against the completed project. If this happens, the Owner could end up paying many times the value of the work done.

The requirement for performance and payment bonds for new construction and service and repair contracts depends upon the size and the scope of the construction project. For renovation contracts over \$25,000, performance and payment bonds are

INSURANCE AND LEGAL REQUIREMENTS

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required. However, this requirement may be waived at the discretion of the Diocesan Building Commission (DBC).

H. Hold Harmless Agreement

The *hold harmless agreement* is where one party waives, in writing, rights of action or recovery against another party. Hold harmless agreements are usually found in the contract's indemnity clause or indemnity section.

The purpose of the hold harmless agreement is to clarify the extent of responsibility each party will assume, or to what extent one (1) party will hold the other party harmless.

The Finance Office has a standard Hold Harmless Agreement Form that is required with all contracts.

I. Maintenance Clause

There are many types of maintenance agreements into which the diocese may enter. Among these are maintenance agreements for equipment, for landscaping, for cleaning, for air conditioning machinery, etc.

Contracts for maintenance agreements should require that the vendor of such service(s) agree to:

indemnify and hold the diocese harmless from any and all claims, liabilities and/or loss arising out of the outside organization's activities, their employees or invitees; except for those liabilities arising out of the sole negligence of the diocese.

The diocese requires a maintenance clause or agreement for all construction works except new construction, unless otherwise negotiated.

J. Certificate of Insurance

For any contract that the diocese enters into where they require another party to maintain and show evidence of a certain level of insurance coverage(s), a *certificate of insurance* evidencing such coverage(s) shall be secured.

The contract will list the Corporation and the individual facility or parish as "Additionally Insured."

The certificate of insurance provides no coverage but merely shows evidence of specific insurance coverage at a point in time.

INSURANCE AND LEGAL REQUIREMENTS

PAGE FOUR

Because the certificate only evidences coverage, the certificate should be modified so that the diocese will be notified within thirty (30) days of any intent to cancel, materially change the policy coverage, or not renew the coverage as indicated.

All certificates should be reviewed carefully when received to ensure that the minimum requirements as set forth are met. If any certificate deviates from the standards as set forth, referral should be made to the proper party for their comments and recommendations.

It is important that certificates be monitored so that when a coverage indicated on a certificate expires, a new certificate is requested. This helps ensure that there are no gaps in coverage during the period of the contract.

The diocese requires a certificate of insurance from all Contractors at the time a contract is signed.

II. LEGAL REQUIREMENTS

The diocese, under civil law, is a *corporation sole* in whose name is vested the title to all real properties – land, buildings and improvements. **Since the parish is not a legal entity, all contracts must be signed by the Bishop.**

All contracts will be audited by the diocesan Chief Financial Officer. Please call (509) 965-7120, Ext.1000 to arrange for this review and a signature by the authorized delegate.

A. Contracts

Pastors are delegated to sign contracts up to \$15,000 with the following **exceptions**:

1. If the contract is for work requiring a permit;
2. If the project involves the worship space;
3. If the total cost of the project exceeds \$15,000;
4. If the contract is for architectural services; and
5. If the project involves asbestos or abatement thereof.

In all contracts, the Owner is the **Corporation of the Catholic Bishop of Yakima, a corporation sole**. The project identifies the parish name and city. Contracts shall include an "Approved by" signature line for the Pastor.

Three (3) originals of the contract are submitted to the Chief Financial Officer for execution. The Bishop, as a general procedure, signs last. The Chief Financial Officer distributes the executed originals accordingly.

If the parish decided to retain an architectural firm to perform a master plan (needs assessment, feasibility study, etc.) of the parish physical plant, a letter of proposal can be completed and executed by the Bishop. Contact the Chief Financial Officer for

INSURANCE AND LEGAL REQUIREMENTS

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specific details regarding this proposal letter. It has been the diocese's experience to negotiate with the Architect to receive additional schematic design services included in the master planning phase, hence saving the parish dollars for design services later in the process.

For remodel and renovation projects where asbestos-containing building materials are impacted, a separate, independent contract will be executed. The Chief Financial Officer will work with the asbestos contractor to formulate a letter of proposal based on the contractor's scope of services.

Unless otherwise arranged with the Chief Financial Officer, the American Institute of Architects (AIA) series of documents are used for all architectural/construction contracts.

B. Change Orders

A change in the scope of work will require a change to the original construction contract. Changes can be proposed by the parish, required by the city/county or proposed by the Contractor. All proposed changes, even if they are accomplished with no change in cost or time, should be documented by a written change order to the contract.

All change orders are approved by the parish and the diocesan Chief Financial Officer, signed by the Architect, Contractor, and the Bishop's delegate.

The diocesan Chief Financial Officer is contacted: 1) prior to the commencement of work on a change order; and 2) to review the change order process.

The Contractor shall submit a written proposal to the parish. The parish, together with the Bishop's delegate, approves or rejects the proposal. If approved, the Architect processes the proposal into a change order and gives the Contractor direction to proceed. Under no circumstances will work be performed prior to the parish and/or diocesan approval.

The parish has the authority, however, to approve changes under \$1,000 without diocesan approval. All proposed changes in excess of \$1,000 require diocesan review and approval.

C. Litigation

The diocesan Chief Financial Officer must be contacted immediately if any liens are filed or litigation threatened. The diocesan Chief Financial Officer and Attorney will work with the parish to resolve any construction-related legal issue(s).

**INSURANCE AND LEGAL REQUIREMENTS
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D. Affirmative Action

See "Selection of a Contractor."

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

Corporation of the Catholic Bishop of Yakima

GUIDELINES FOR BUILDING AND RENOVATING LITURGICAL SPACE

This document has not been promulgated by the Diocese of Yakima at the time of this publication but serves as a basis for renovating worship space in Central Washington.

“Whether designing a new space for the liturgical action or renovating an old one, teamwork and preparation by the congregation (particularly the liturgy committee), clergy, architect and consultant (liturgy and art) are essential. A competent architect should have the assistance of a consultant in liturgy and art, both in the discussion stages of the project (dialogue with congregation and clergy as well as among themselves) and throughout the stages of design and building... (EACW 44).”

A parish must obtain the services of a Liturgical Consultant to be present at each stage of the building or renovation process that involves the liturgy.

Each section has been numbered for ease of discussion. Those sections which are followed by bold text are various directives. Each directive is given an indication of its importance. Note: when an item is added to your project, follow the rating given for a new church. If deleting an item, follow the rating given for renovation of an existing church building. The ratings given here are as follows:

NORMATIVE
STRONGLY RECOMMENDED
RECOMMENDED
OPTIONAL
NOT RECOMMENDED
INAPPROPRIATE (not allowed in general)

See "Functions of a Liturgical Consultant."

Any and all liturgical changes to the sanctuary space must be approved by the Bishop. Physical work of these approved changes must be completed by a certified Liturgical Consultant. The Liturgical Consultant will work closely with the parish to educate the community as well as assist the architectural firm in its design.

Note that it is important to root any building project within the spirituality that asks how this construction project will improve the spiritual life of the community. It is highly suggested that you be sensitive to liturgical issues that call for education, understanding, formation, and time. When it comes to the renovation of the church or sanctuary, you are dealing with what people perceive to be a living organism that has a sacred character.

GUIDELINES FOR BUILDING AND RENOVATING LITURGICAL SPACE

PAGE TWO

SOME THOUGHTS FOR PRAYER AND REFLECTION

1. "You are no longer strangers and sojourners, but you are fellow citizens with the holy ones and members of the household of God, built upon the foundation of the apostles and prophets, with Christ Jesus himself as the capstone. Through him the whole structure is held together and grows into a temple sacred to the Lord; in him you are also being built together into a dwelling place of God in the Spirit" (Ephesians 2:19-22).
2. "Come to the Lord, a living stone, rejected by human beings but chosen and precious in the sight of God, and like living stones, let yourself be built into a spiritual house to be a holy priesthood to offer spiritual sacrifices acceptable to God through Jesus Christ" (1 Peter 2:4-5).
3. "According to the grace of God given to me, like a wise master builder, I laid a foundation, and another is building upon it. But each one must be careful how he builds upon it, for no one can lay a foundation other than the one that is there, namely, Jesus Christ" (1 Corinthians 3:10-11).
4. "God in heaven, today we come before you to dedicate to your lasting service this house of prayer, this temple of worship, this home in which we are nourished by your word and your sacraments. Here is reflected the mystery of the Church. The Church is fruitful, made holy by the blood of Christ: a bride made radiant with His glory, a virgin splendid in the wholeness of her faith, a mother blessed through the power of the spirit. The Church is holy, your chosen vineyard: its branches envelop the world, its tendrils, carried on the tree of the cross, reach up to the kingdom of heaven."

"The Church is favored, the dwelling place of God on earth: a temple built of living stones, founded on the apostles with Jesus Christ its corner stone."

"The Church is exalted, a city set on a mountain: a beacon to the whole world, bright with the glory of the lamb, and echoing the prayers of her saints."

"Lord, send us your Spirit from heaven to make this church an ever-holy place, and this altar a ready table for the sacrifice of Christ."

"Here may the waters of baptism overwhelm the shame of sin; here may your people die to sin and live again through grace as your children."

"Here may your children, gathered around your altar, celebrate the memorial of the Paschal Lamb, and be fed at the table of Christ's word and Christ's body."

"Here may prayer, the Church's banquet, resound through heaven and earth as a plea for the world's salvation."

"Here may the poor find justice, the victims of oppression, true freedom."

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"From here may the whole world, clothed in the dignity of the children of God, enter with gladness your city of peace..." (Prayer of Dedication of a Church).

5. "You continue to build your Church with chosen stones, enlivened by the Spirit, and cemented together by love" (Preface for the Dedication of a Church).
6. "Notice that among other things the material edifice intended to gather the faithful in prayer can, and to a certain degree must, be not simply a place of prayer, but in addition to a sign of prayer, a spiritual edifice, a prayer itself, the expression of worship, a work of art meant for the spirit" (Pope Paul VI, Address to a general audience, on the Church as a praying community, April 22, 1970).

THE CHURCH

7. As a parish community gathers to celebrate the opening of their new place of worship, the prayers of dedication say, "Here is reflected the mystery of the Church." Indeed, the first meaning of "church" as found in the Scripture refers, not to God's house, but to the house of the assembly, God's holy people who gather for prayer. Although "church" would later come to mean the actual building where Christians meet for worship, its deepest meaning cannot be appreciated without understanding the significance of the assembly of people who gather for prayer. These faithful people make up the very Body of Christ, and so the church building symbolizes both the community and, in a variety of ways, Christ himself.
8. Any attempts to design a place of worship must begin by acknowledging the mystery of the Church. Throughout the New Testament and the rest of the history of Christianity, many images have been used to describe the Church. It has been understood as the kingdom of God, the New Jerusalem, the Bride of Christ, and the Body of Christ. One of the ancient images, which might be particularly useful in relation to these guidelines, is the image of the Church as the New Temple. Long before Christians had buildings they called churches, they had understood their worship assembly as replacing the Jewish temple, for God's dwelling place was not within the holy people. The origin of this image is the scriptural saying of Jesus about destroying the temple and building another in three days (John 2:19; Mark 13:1, 14:58, 15:29). This image helps us understand that the Church is not only the place where God dwells, and therefore is intimately associated with Jesus Christ, the cornerstone (1 Peter 2:1-7), but also that the Church can be identified in an important sense with Christ, for he, too, is the new temple (John 2:21).
9. Each member of the Church is also a temple of the Holy Spirit (1 Corinthians 6:19), and the community as a whole is also described as being God's temple (1 Corinthians 3:16, 2 Corinthians 6:16, Ephesians 2:21). The Christian's essential place in the Church is no more strikingly described than by Peter calling us "living stones" to be built into a spiritual house (1 Peter 2:4).

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10. That the Church is primarily and preeminently the entire people of God, under the Lordship of the risen Christ and power of the Holy Spirit, was made clear in the teachings of the Second Vatican Council, particularly as expressed in the Dogmatic Constitution on the Church. In addition, the Council taught that the Church exists on the local level as well as at the universal level. Each parish is the Church, and not simply a subdivision of the Church.
11. It is with this background that we proceed to formulate guidelines to assist in the building and renovation of a worship space, for it is in this building that God's holy people, gathered for prayer, fully express and realize their identity as the Church.

GENERAL PURPOSE OF THE GUIDELINES

12. The purpose of these guidelines is to be of service to the ministry of the Bishop, who is the moderator of the liturgy in the diocese. In this capacity, they facilitate the work of the diocesan Liturgical Commission and the diocesan Building Commission. They also assist our Roman Catholic communities in Central Washington as they face particular building and renovation needs. These guidelines are therefore appended to the diocesan Guidelines for Construction, Remodel and Repair Projects.

THE PRIMARY DOCUMENTS

13. Building and renovation guidelines are an attempt to help realize the Church's sense of what a worship space ought to look like. Directives are found in three principal documents. The first, of course, is the Constitution on the Sacred Liturgy, the original renewal document. The second is the Roman Sacramentary, particularly its General Instruction on the Roman Missal (GIRM). The third is Environment and Art in Catholic Worship (EACW) from the United States Bishops.
14. It should be said at the onset that Environment and Art in Catholic Worship is not simply a book of suggestions. The latest edition of the Roman Sacramentary reminds us:

In those things which pertain to the arrangement and furnishing of churches and other requisites of liturgical art and architecture, the principles and directives of the 1978 statement of the Bishops' Committee on the Liturgy, Environment and Art in Catholic Worship, should be consulted and applied. (GIRM 253, Appendix).

15. The entire Roman Sacramentary, including this citation of Environment and Art in Catholic Worship as the official source for principles and directives, has been confirmed by the Apostolic See.

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THE STARTING PLACE: THE ASSEMBLY

16. Among the symbols with which liturgy deals, none is more important than this assembly of believers (EACW 28).
17. The most powerful experience of the sacred is found in the celebration and the persons celebrating, that is, it is found in the action of the assembly: the living words, the living gestures, the living sacrifice, the living meal... (EACW 29).
18. The norm for designing liturgical space is the assembly and its liturgies... (EACW 42).

THE ASSEMBLY SEEKS ITS OWN EXPRESSION

19. Our Catholic teaching tells us that the Church is preeminently manifested during the liturgy. In other words, during the liturgy it is the Church that has assembled there to do the sacred actions that make it the Church. What are those sacred actions?

...the gathering of the faith community in a participatory and hospitable atmosphere for word and Eucharist, for initiation and reconciliation, for prayer and praise and song. (EACW 40)

20. Once we understand what we do when we assemble as Church, then we simply design and arrange a space to accommodate those actions. This is what architects mean by the principle that "form follows function." That is, the shape and design of a building or space is determined primarily by what will be going on in that building or space.
21. This means that liturgy will make certain demands on architecture and art:

For the assembly seeks its own expression in an atmosphere which is beautiful, amidst actions which probe the entire human experience. This is what is most basic and most noble. It is what the assembly seeks in order to express the heart of the Church's liturgy (EACW 32).

22. Besides these demands, the liturgy also requires quality and appropriateness:

***Quality** is perceived only by contemplation, by standing back from things and really trying to see them, trying to let them speak to the beholder. Cultural habit has conditioned the contemporary person to look at things in a more pragmatic way: "What is it worth?" "What will it do?" Contemplation sees the hand stamp of the artist, the honesty and care that went into an object's making, the pleasing form and color and texture. Quality means love and care in the making of something, honesty and genuineness with any materials used, and the artist's special gift in producing a harmonious whole, a well-crafted work. This applies to music, architecture, sculpture,*

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painting, pottery making, furniture making, as well as to dance, mime or drama – in other words, to any art form that might be employed in the liturgical environment or action (EACW 20).

Appropriateness is another demand that liturgy rightfully makes upon any art that would serve its action. The work of art must be appropriate in two ways: 1) it must be capable of bearing the weight of mystery, awe, reverence, and wonder which the liturgical action expresses; 2) it must clearly serve (and not interrupt) ritual action which has its own structure, rhythm and movement (EACW 21).

23. Unfortunately churches in need of renovation often provide an environment that hinders or obstructs the liturgical action rather than serves it. Needless Communion railings are a good example. Even though they may have been expressive of something important at one time, and might be quite beautiful, they now force the liturgy to be at the service of architecture, rather than architecture and all the arts to be at the service of liturgy.

**New Church:
Renovation:**

**INAPPROPRIATE
NOT RECOMMENDED**

24. Pastors, parochial ministers, and those responsible for liturgical celebration should seek the advice of liturgical consultants, as well as the expertise of artists, designers and architects, to help determine whether the worship space meets the requirements of beauty, quality and appropriateness – and therefore whether renovation is in order.

DESIGN NORMS FOR THE WORSHIP SPACE

25. By environment we mean the larger space in which the action of the assembly takes place. At its broadest, it is the setting of the building in its neighborhood, including outdoor spaces. More specifically it means the character of a particular space and how it affects the action of the assembly. There are elements in the environment, therefore, which contribute to the overall experience, e.g., the seating arrangement, the placement of liturgical centers of action, temporary decoration, lighting, acoustics, spaciousness, etc. The environment is appropriate when it is beautiful, when it is hospitable, when it clearly invites and needs an assembly of people to complete it. Furthermore, it is appropriate when it brings people close together so that they can see and hear the entire liturgical action, when it helps people feel involved and become involved. Such an environment works with the liturgy, not against it (EACW 24).

THE SPACE IN GENERAL

26. One of the primary requirements of the space is visibility of all in the assembly: others in the congregation as well as the principal focal point of the ritual action (EACW 49).

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27. Visibility speaks more to the quality of the view than merely the mechanics of seeing. A space must create a sense that what is seen is proximate, important and personal. The arrangement of the space should consider levels of priority in what is seen, allowing visual flow from one center of liturgical action to another. Furthermore, the sense and variety of light, artificial or natural, contribute greatly to what is seen (EACW 50).
28. Audibility of all (congregation and ministers) is another primary requirement. A space that does not require voice amplification is ideal. Where an amplifying system is necessary, provision for multiple microphone jacks should be made (e.g., at the altar, ambo, chair, font, space immediately in front of the congregation, and a few spots through the congregation). Since the liturgical space must accommodate both speech and song, there must be a serious acoustical consideration of the conflicting demands of the two. The services of an acoustical engineer can enable architect and builder to be aware of certain disadvantages in rooms that are exclusively "dry" or "live." A room designed to deaden all sounds is doomed to kill liturgical participation (EACW 51).
29. Special attention should be given to the decision to choose a pipe organ or an electronic organ. Acoustical considerations are essential to such a decision. If a pipe organ is not chosen, consideration should be made about providing the space required for a future installation of a pipe organ.
- | | |
|--|-----------------------------|
| Pipe Organ: | STRONGLY RECOMMENDED |
| Space provided for future pipe organ: | |
| New Church: | STRONGLY RECOMMENDED |
| Renovation: | RECOMMENDED |
30. Lighting and a good sound system are essential for any church. Lighting not only provides adequate visibility, but can enhance the mood or spirit of the liturgy, and emphasize spaces, objects or persons. In recent decades there have been remarkable advances in lighting and sound technology. Engineers for lighting and sound should be consulted during building and renovation projects. Particular areas within the sanctuary area can be effectively highlighted by the use of color, lighting, dimmers, etc.
- | | |
|--------------------|-----------------------------|
| New Church: | STRONGLY RECOMMENDED |
| Renovation: | RECOMMENDED |
31. It may be desirable, in a multi-use facility, to provide projection or video capabilities. Such provisions must be done with care for the integrity of the worship space. It seems best that video presentations be limited to times other than during the liturgy.
- OPTIONAL**
32. The liturgical space should have a "good feeling" in terms of human scale, hospitality and graciousness. It does not seek to impress, or even less, to dominate, but its clear aim is to facilitate the public worship and common prayer of the faith community (EACW 52).
33. Special attention must be given to the unity of the entire liturgical space. Before considering the distinction of roles within the liturgy, the space should communicate an integrity (a sense of oneness, of wholeness) and a sense of being the gathering place of the initiated community. Within that one space there are different areas corresponding to

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different roles and functions, but the wholeness of the total space should be strikingly evident (EACW 53).

34. Planning for a convergence of pathways to the liturgical space in a concourse or foyer or other place adequate for gathering before or after liturgies is recommended. In some climates this might be outdoors. Such a gathering-space can encourage introductions, conversations, the sharing of refreshments after a liturgy, the building of the kind of community sense and feeling recognized now to be a prerequisite of good celebration (EACW 54).

**New Church:
Renovation:**

**NORMATIVE
STRONGLY RECOMMENDED**

35. The principal areas of the worship space should be accessible to the disabled. This includes access to the ambo, the altar, and any other places used by the various liturgical ministers.

STRONGLY RECOMMENDED

THE GATHERING SPACE

36. In older churches, the gathering space, if any, was often limited to the narthex or vestibule. These were frequently dark, narrow spaces, used for displaying pamphlets and other notices, perhaps with side areas containing ushers' equipment, restrooms, and the baptistery. Contemporary gathering spaces should be spacious, well lit, and welcoming. The space may include an outdoor portion, perhaps with protection from rain.

STRONGLY RECOMMENDED

37. One way the gathering space is hospitable and welcoming is the way it speaks of the community's belief about baptism and reconciliation. It is appropriate that the gathering space reflect the ancient custom of locating the baptistery near the entry of the church, rather than in the sanctuary area. The design might also allow the reconciliation chapel to be obvious on entry into the church. Such a design would clearly tell those who enter the church that this community is a welcoming and reconciling community.

THE MAIN ENTRANCE

38. Not only does the main door or entranceway set the tone for what is inside, but also serves as a sign of welcome and hospitality, honoring the persons who enter through it. Church doors therefore represent a special design challenge, for their purpose is far from simply functional.

THE MAIN BODY

39. The main body of the church, or the nave, must be constructed with careful attention to lighting, the acoustical demands of music and the spoken word, and visibility. People in the assembly should be able to see one another, as well as the focal points of the ritual action.

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40. Visibility of the ritual actions is achieved by proximity, where that is possible, and by the design and elevation of the sanctuary platforms. Although slanted flooring can achieve the kind of visibility that is required, it is to be discouraged, since its permanence effectively removes the possibility of flexibility in seating configurations, and because it also suggests a spectatorship on the part of the congregation that is common to theaters, concert halls, and other places designed for entertainment. Liturgy is neither entertainment nor performance, so any design feature, particularly with the permanence of slanted flooring, that suggests spectatorship during the liturgy, is inappropriate.

OPTIONAL

41. It is recommended that worship space be designed to accommodate devotional prayer, i.e., various forms of prayer, either private or communal, other than the Church's liturgical prayer. However this should not compete with or distract from the central purpose of the worship space – the celebration of the Eucharist. In designing a space that will accommodate devotions, consideration should be given to devotion that may have special place in the prayer of particular groups of persons within the community.

THE SANCTUARY

42. The sanctuary space is ordinarily designed with platforms to achieve the height that is necessary for visibility. The design and configuration of these platforms should not leave the impression of remoteness, isolation, or exaltation of the persons or furnishings on them. Any railings or fences that suggest keeping people out of the sanctuary are inappropriate.

Communion rails:

New Church:

Renovation:

INAPPROPRIATE

NOT RECOMMENDED

Sanctuary space does not leave impression of remoteness...:

New Church:

Renovation:

NORMATIVE

STRONGLY RECOMMENDED

THE SACRISTY

43. A vesting sacristy should be arranged near the entrance to the main body of the church. Such a location favors the procession of cross, candles, book and ministers through the midst of the congregation to the altar area.

New Church:

Renovation:

STRONGLY RECOMMENDED

OPTIONAL

FURNISHINGS IN GENERAL

44. Because the Sunday Eucharistic assembly is the most fundamental ecclesial symbol, the requirements of that celebration will have the strongest claim in the provision of furnishings for liturgy. Consequently, any liturgical space must take into consideration not only the general requirements of the assembly but also the need for a feeling of contact with altar, ambo and celebrant's chair (EACW 63).

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45. This primacy of the Eucharistic assembly, however, should not discourage a liturgical life of greater richness and variety in the local Church. In planning construction, renovation or refurbishing of liturgical spaces, baptism and the other sacraments, morning and evening prayer, services of the word, prayer meetings and other community events should be kept in mind (EACW 64).

NORMATIVE

46. When multi-functional use of the space is indicated by the needs either of the faith community or of the surrounding city, town or rural area which the faith community services, a certain flexibility or movability should be considered even for the essential furnishings. Great care, however, should be taken in the design and care of movable furnishings that none of the dignity, noble and simple beauty proper to such objects is sacrificed. There is no reason why a movable altar or ambo need have a flimsy, cheap or disposable appearance (EACW 65).
47. Consultation with persons who are experts, at least one in liturgy and one in the arts, is not a luxury but a necessity for those responsible for furnishing the liturgical space. Each piece of furniture has its own requirements, but at least two criteria are applicable to all of them, in fact, to any object used in any way in liturgy: 1) None should be made in such a way that it is far removed from the print of the human hand and human craft. When mass-produced items are chosen, care must be taken that they are truly suitable. Dignity and beauty in materials used, in design and form, in color and texture – these are concerns of artists for their work, for the furniture they build, and are not, unfortunately, the evident concerns of many mass manufacturers and merchandisers. 2) All furnishings taken together should possess a unity and harmony with each other and with the architecture of the place (EACW 67).

STRONGLY RECOMMENDED

CHAIRS OR BENCHES

48. Benches or chairs for seating the assembly should be so constructed and arranged that they maximize feelings of community and involvement. The arrangement should facilitate a clear view not only of the one who presides and the multiple focal points of reading, preaching, praying, music and movement during the rite, but also of other members of the congregation. This means striving for a seating pattern and furniture that do not constrict people, but encourage them to move about when it is appropriate (EACW 68).

OPTIONAL

49. Planners should keep in mind that traditional pews do not encourage the kind of movement envisioned by the document. They also make flexible configurations of seating impossible. One solution is that the first rows of seating be movable chairs or benches, with pews toward the back. This design would allow flexibility in the seating arrangements for daily Mass, weddings, funerals, morning and evening prayer, and other special liturgies.

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50. Seating for those in the ministry of music should also be constructed and arranged so that they are clearly part of the assembly. Facing the rest of the congregation enables these ministers to elicit the participation of the community without distracting from the central action of the liturgy.

OPTIONAL

51. Kneelers are optional furnishings for the worship space. Their purpose is simply to provide comfort and ease for the worshiper. The conference of bishops may determine when the assembly should stand, sit or kneel at Mass, in accord with local sensibilities and the character of the rite, although a particular worshipping community might adapt the rules for kneeling due to "lack of space, the number of people present, or some other good reason" (GIRM 21). Some churches provide kneelers on some of the seating as a solution to their needs.

THE CHAIR

52. Chairs or benches for the presiding minister or other ministers should be so constructed and arranged that they are clearly part of the one assembly, yet conveniently situated for the exercise of their respective offices. The importance of the personal symbol and function of the one who presides in liturgical celebration should not be underrated or underplayed, because it is essential for good celebration. The chair of that person should be clearly in a presiding position, although it should not suggest either domination or remoteness (EACW 70).
53. The presider's chair should be clear and obvious for what it is, and should not be lost in a collection of other sanctuary chairs.

NORMATIVE

THE ALTAR TABLE

54. The altar, the holy table, should be the most noble, the most beautifully designed and constructed table the community can provide. It is the common table of the assembly, a symbol of the Lord, at which the presiding minister stands and upon which are placed the bread and wine and their vessels and the book. It is holy and sacred to this assembly's action and sharing, so is never used as a table of convenience or as a resting place for papers, notes, cruets, or anything else. It stands free, approachable from every side, capable of being encircled. It is desirable that candles, cross, any flowers or other decoration in the area should not be so close to the altar as to constitute impediments to anyone's approach or movement around the common table (EACW 71).

NORMATIVE

55. The altar is intended for the functioning of a single priest, so need not be designed for concelebrants. Its shape would be square or slightly rectangular. It need not be spatially in the center or on a central axis. The worship space should not have more than one altar.

Altar for one priest:	STRONGLY RECOMMENDED
Altar square...:	RECOMMENDED
Altar not spatial...:	OPTIONAL

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56. A challenge to the designer is to provide an altar for the community that does not look like a biblical altar of sacrifice. At the same time, it should not appear to be simply an enlarged dining room table. It should, however, suggest both Eucharistic sacrifice and the warm, inviting appearance we would expect of the Lord's banquet table. The altar may be made of any becoming, solid, and skillfully constructed material, although stone is preferred. Sometimes too much stone can be cold and uninviting. Formica and the like are unacceptable for the Lord's holy table.

INAPPROPRIATE

57. The Rite of Dedication of an Altar indicates that if relics are placed beneath the altar, the relics "should be of such a size that they can be recognized as parts of human bodies." This means that small relics cemented into altar stones no longer need to be used. If identifiable remains of saints are used, they are placed beneath the table of the altar, not in it. Movable altars may not contain relics. In new churches statues and pictures of saints may not be placed over the altar, and in renovated churches effort should be made to give the altar its rightful focus, free of these embellishments.

Small relics...:	INAPPROPRIATE
Statues and pictures...:	INAPPROPRIATE
New Church:	INAPPROPRIATE
Renovation:	NOT RECOMMENDED

THE AMBO

58. The ambo or lectern is a standing desk for reading and preaching (although preaching can be done from the chair or elsewhere). One main ambo should be reserved for these functions and therefore not used by commentators, song leaders, etc. Like the altar, it should be beautifully designed, constructed of fine materials, and proportioned carefully and simply for its function. The ambo represents the dignity and uniqueness of the Word of God and of reflection upon that Word (EACW 74).

59. Clearly there is to be but one ambo. A very simple lectern, in no way competing or conflicting with the main ambo, should be used by the cantor, song leader, and reader of the announcements.

NORMATIVE

THE BAPTISTERY

60. To speak of symbols and of sacramental signification is to indicate that immersion is the fuller and more appropriate symbolic action in baptism. New baptismal fonts, therefore, should be constructed to allow for the immersion of infants, at least, and to allow for the pouring of water over the entire body of a child or adult... (EACW 76).

NORMATIVE

61. The more traditional location for the baptistery would be near the entrance to the church. Here those entering the building immediately encounter this symbol of a Church and a community that initiates and welcomes new members, and people can pass by the font and bless themselves with its water, reminding them of their own baptismal initiation.

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67. This space should offer easy access from the porch areas, garden or street as well as the main space. The devotional character of the space should create an atmosphere of warmth while acknowledging the mystery of the Lord. It should support private meditation without distractions. If iconography or statuary are present, they should not obscure the primary focus of reservation (EACW 79).

OPTIONAL

68. Daily liturgies would ordinarily be celebrated in the main body of the church, or in another chapel designed for this purpose. Celebrating Mass or services of the Word and Holy Communion in the Eucharistic chapel returns to the problem of the competing symbolism of the active and static aspects of the Eucharist, the very problem Eucharistic chapels are meant to avoid. If Mass must be celebrated in the Eucharistic chapel, the Eucharist should first be removed. Since this space is a chapel dedicated to Eucharistic prayer and devotion, it should not be designed for use on other occasions as a crying room, bride's room, vesting room, etc.

OPTIONAL

THE TABERNACLE

69. The tabernacle, as a receptacle for the reservation of the Eucharist, should be solid and unbreakable, dignified and properly ornamented. It may be placed in a wall niche, on a pillar, or Eucharistic tower. It should not be placed on an altar for the altar is a place for action, not for reservation. There should be only one tabernacle in a church building. A lamp should burn continuously near it (EACW 80).

Tabernacle place in wall niche, on a pillar, or Eucharistic tower:

New Church:

NORMATIVE

Renovation:

STRONGLY RECOMMENDED

Tabernacle placed on an altar:

INAPPROPRIATE

One Tabernacle in a church:

NORMATIVE

Lamp burns continuously:

NORMATIVE

70. Whenever possible, the tabernacle should be located in a room or chapel specifically designed and separate from the main church space. If a Eucharistic chapel is not possible due to current space or design restrictions, the tabernacle should be placed somewhere to the side of the main sanctuary space. In light of the competing symbolism involved in Eucharistic action and Eucharistic reservation, it is not proper to locate the tabernacle near the altar for the convenience this location might provide.

If a Eucharistic chapel is not possible due to space or design restrictions, the tabernacle should be placed somewhere to the side of the main sanctuary space: NORMATIVE

Tabernacle located near altar to afford convenient access:

INAPPROPRIATE

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THE RECONCILIATION CHAPEL

71. A room or rooms for the reconciliation of individual penitents may be located near the baptismal area (when that is at the entrance) or in another convenient place. Furnishings and decoration should be simple and austere, offering the penitent a choice between face-to-face encounter or the anonymity provided by a screen, with nothing superfluous in evidence beyond a simple cross, table and bible. The purpose of this room is primarily for the celebration of the reconciliation liturgy; it is not a lounge, counseling room, etc. The word "chapel" more adequately describes this space (EACW 81).

A Reconciliation chapel that provides the choice between face-to-face confession or anonymity offered by a screen:

NORMATIVE

The Reconciliation chapel should be designed for the sole purpose of being used for the sacrament of reconciliation:

STRONGLY RECOMMENDED

THE CROSS

72. A cross is a basic symbol in any Christian liturgical celebration. The advantage of a processional cross with a floor standard, in contrast to one that is permanently hung or affixed to a wall, is that it can be placed differently according to the celebration and the other environmental factors...(EACW 88).

A cross is located somewhere near the altar:

NORMATIVE

The cross ought to be the processional cross:

STRONGLY RECOMMENDED

Flexibility and movability with regard to the cross:

New Church:

NORMATIVE

Renovation:

STRONGLY RECOMMENDED

73. The cross required near the altar is a sign that what we do in the Christian assembly is related to the death of the Lord. The cross speaks of the paschal mystery, the dying and rising of Jesus. Sometimes the crucifix, especially with a life-like image of the dead Jesus, focuses exclusively on his biological death, which is just one moment in the paschal mystery. Perhaps planners could consider a number of crosses, with or without the image of the crucified Lord, that could be used for the various feasts and seasons of the liturgical year. The flexibility this would provide, especially if these crosses also serve as the processional cross for liturgies, generally outweighs the restrictions of a large cross permanently affixed to the wall.

The cross is a crucifix:

OPTIONAL

Flexibility and movability with regard to the cross:

New Church:

NORMATIVE

Renovation:

STRONGLY RECOMMENDED

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SACRED IMAGES

74. Images in painting or sculpture, as well as tapestries, cloth hangings, banners and other permanent or seasonal decorations should be introduced into the liturgical space upon consultation with an art consultant. Like the furniture and other objects used in worship, they become part of the environment and are subject to its criteria of quality and appropriateness. In addition, their appropriateness must take into account the current renewed emphasis on the action of the assembly. If instead of serving and aiding that action, they threaten it or compete with it, then they are unsuitable (EACW 98).

STRONGLY RECOMMENDED

75. In a period of Church and liturgical renewal, the attempt to recover a solid grasp of Church and faith and rites involves the rejection of certain embellishments which have in the course of history become hindrances. In many areas of religious practice, this means a simplifying and refocusing on primary symbols. In building, this effort has resulted in more austere interiors, with fewer objects on the walls and in the corners (EACW 99).

76. With few exceptions, sacred imagery should be characterized by its ability to suggest, to evoke, to lead us beyond what we see to the mystery that lies beyond. When such imagery, whether sculpture, painting, fabric or stained glass, draws attention to itself rather than to the mysterious reality it is suggesting, then its proper function as art has failed. This is often true of much imagery that is life-like and realistic. Its literalism is less likely to stir the religious imagination of the beholder.

DECORATIONS

77. Many new or renovated liturgical spaces...invite temporary decoration for particular celebrations, feasts and seasons. Banners and hangings of various sorts are both popular and appropriate, as long as the nature of these art forms is respected. They are creations of forms, colors, and textures, rather than signboards to which words must be attached. Their purpose is to appeal to the senses and thereby create an atmosphere and a mood, rather than to impress a slogan upon the minds of observers or deliver a verbal message (EACW 100).

78. Although the art and decoration of the liturgical space will be that of the local culture, identifying symbols of particular cultures, groups, or nations are not appropriate as permanent parts of the liturgical environment. While such symbols might be used for a particular occasion or holiday, they should not regularly constitute a part of the environment of common prayer (EACW 101).

STRONGLY RECOMMENDED

THE CRYING ROOM

79. There should be no question that baptized infants and children ought to be present in the Eucharistic assembly. The rules of common courtesy demand, however, that infants and small children who inordinately disrupt and distract the assembly should be taken out until they can be calmed. Churches should therefore provide a place (not necessarily a room),

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outside the main body of the church, for a parent to take the child until they are ready to return to the assembly.

80. This place could have some chairs, and be equipped with sound, and perhaps a window for viewing. But this space ought to be designed with a temporary stay in mind, not an attractively appointed isolation booth where parents and children will tend to spend the entire liturgy. Our stress on the unity of the assembly means we would no longer want to build rooms specifically designed to isolate certain members of the assembly. For this same reason we no longer build churches with choir lofts.

**Crying Room – the attractively appointed isolation booth where parents and children often spend the entire liturgy:
OPTIONAL**

**A space (not necessarily a room) designed for only a temporary stay where parents can take children to calm them; this space could include chairs, sound, and perhaps a window for viewing:
STRONGLY RECOMMENDED**

THE CERTIFIED LITURGICAL CONSULTANT

81. Whether designing a new space for the liturgical action or renovating an old one, teamwork and preparation by the congregation (particularly the liturgy committee), clergy, architect and consultant (liturgy and art) are essential. A competent architect should have the assistance of a consultant in liturgy and art, both in the discussion stages of the project (dialogue with congregation and clergy as well as among themselves) and throughout the stages of design and building... (EACW 44).

**A parish must obtain the services of a Liturgical Consultant to be present at each stage of the building or renovation process that involves the liturgy:
NORMATIVE**

82. The liturgical-artistic consultant is an invaluable partner of the architect, for the purposes of space can be imagined and the place creatively designed only by a competent designer (architect) who is nourished with liturgy's tradition, its current shape, together with the appropriate furniture and other objects used...(EACW 48).

83. All worship space construction or renovation projects must have the services of a liturgical consultant who meets the certification requirements of the Diocese of Yakima. It is the policy of this diocese that the appropriately certified consultant should be present to assist in each stage of the building or renovation process that involves the liturgy, from the initial discernment and education, to the final steps of furnishing the interior.

**A parish must obtain the services of a Liturgical Consultant to be present at each stage of the building or renovation process that involves the liturgy:
NORMATIVE**

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DEDICATION OF A CHURCH, CHAPEL OR ALTAR

84. In the Diocese of Yakima, the dedication or blessing of a church, chapel or altar is a celebration reserved to the Bishop. Parishes are advised to request the Bishop's presence well in advance of the proposed date.

DIOCESAN ARCHIVES

85. Please notify the diocesan Chief of Staff regarding articles that will no longer be used that may be of historical significance, or regarding religious articles (altars, altar stones, statues, sacred utensils, etc.) that will no longer be used.

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RESOURCES AND BIBLIOGRAPHY

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Shaping a House for the Church. Mauck, Marchita, Chicago: Liturgy Training Publications, 1990).

"National Bulletin on Liturgy: House of the Church." Canadian Conference of Catholic Bishops, Vol. 13, May/June 1980.

"Environment and Art: A Forum on Architecture and the Arts for the Parish." Chicago: Liturgy Training Publications.

Church Architecture: Building and Renovating for Christian Worship. White, James F. and Susan J., Nashville: Abingdon Press, 1988.

The Ministry of Liturgical Environment. Simons, Thomas G., Collegeville, MN: The Liturgical Press, 1984.

For additional resources, contact the diocesan Office of Liturgy.

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GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

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FUNCTIONS OF A LITURGICAL CONSULTANT

A Liturgical Consultant is retained by a parish when changes in the worship space are being considered. The tasks of a Liturgical Consultant are clarified by the following:

1. **NORMATIVE:** When a parish is involved in new construction or renovation they will retain the services of a consultant. When a parish is doing minor alterations, the Bishop is contacted to determine whether the retention of a consultant is necessary.
2. **NORMATIVE:** The Liturgical Consultant assists the Pastor and parish leadership in developing and implementing an educational plan for the building committee, parish staff, parish community, and Architect.
3. Assists the parish community to make decisions about the process used to change worship space by (**OPTIONAL**) suggesting various processes, by (**NOT RECOMMENDED**) designing appropriate processes, by (**STRONGLY DISCOURAGED**) facilitating the process.
4. Participates in architect selection by (**OPTIONAL**) suggesting the skills needed, by (**STRONGLY DISCOURAGED**) assisting in candidate selection, by (**STRONGLY DISCOURAGED**) sitting with the committee in interviews.
5. **NORMATIVE:** During the design stages of the liturgical space, provides advice as needed to the pastor, building committee and architect.
6. **OPTIONAL:** Assists the parish community with groundbreaking and dedication liturgies, by providing and recommending appropriate liturgies, and by designing and selecting liturgies.
7. **STRONGLY RECOMMENDED:** Participates in the selection of artists by suggesting skills needed by artists, and by assisting the community with selection of artists and artisans.
8. Participates in the selection of art by (**STRONGLY RECOMMENDED**) reviewing existing art, by (**NOT RECOMMENDED**) designing art and furnishings, by (**OPTIONAL**) assisting in the selection of art and furnishings. If the liturgical consultant does not have expertise in art, an art consultant should be retained.
9. **STRONGLY DISCOURAGED:** The consultant is hired by the community to perform dual duties as a Liturgical Consultant and Architect/Artist/Chairperson of a committee.
10. **NOT RECOMMENDED:** Is a member of the parish.
11. **NOT RECOMMENDED:** The consultant is the Pastor.
12. **NOT RECOMMENDED:** The consultant is a member of the parish staff.

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GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

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LITURGICAL CONSULTANT JOB DESCRIPTION

Description

All worship space construction or renovation projects must have the services of a liturgical consultant. This person has the expertise to assist the parish community and/or the Architect in creatively designing worship space that is nourished with liturgy's tradition and current reforms.

Scope of Services

Basic Services

1. Will be able to assist the Pastor and parish leadership in developing and implementing an educational plan for the building committee, parish staff, parish community, and Architect.
2. Will be able to provide advice as needed to the Pastor, Building/Renovation Committee, and Architect during the design stages of the liturgical space.
3. Will be able to participate in the recommendation of the art and artists by reviewing existing art.
4. Will be able to recommend skills needed by artists, and assist the community with the selection of artists and artisans.

Optional Services

1. Will be able to assist the parish community with ground breaking and dedication by providing and recommending appropriate liturgies and designing and selecting liturgies.
2. Will be able to assist in the selection of art and furnishings.
3. Will be able to assist the parish in selection of an architect by suggesting skills needed by the architect from the liturgical perspective.
4. Will be able to assist the parish community with decisions having to do with the change in worship space by suggesting various processes that might be helpful.

Qualifications of a Liturgical Consultant

1. Meets the certification requirements of the Diocese of Yakima.
2. Working knowledge of Catholic history and liturgy, and the impact of Vatican II.
3. Basic skills in group process.

LITURGICAL CONSULTANT JOB DESCRIPTION
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4. Working knowledge of the Constitution on the Sacred Liturgy, Environment and Art in Catholic Worship, the Sacramentary, the Lectionary, and other pertinent documents.
5. Knowledge of art and architecture in relation to liturgical history.
6. Understanding of a commitment to the diocesan Guidelines for Construction, Remodel and Repair Projects.
7. An awareness of and sensitivity to the financial implications that the project will have on a parish.
8. Working knowledge of church music and its role in liturgy.
9. Working knowledge of liturgical art and its significance in Catholic worship.
10. The knowledge and ability to refer to others resource persons and material related to liturgical issues in building and renovation.
11. The ability to work in a collaborative style.
12. At least an elementary knowledge of reading blueprints.
13. Active member of a Catholic parish.

Areas for which Liturgical Consultants are not Responsible

1. Choosing Architects, Artists, and Artisans.
2. Chairing the Building/Renovation Committee.
3. Serving in dual capacity as Liturgical Consultant and Architect or Liturgical Consultant and Artist or Liturgical Consultant and Chairperson of any committee.

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GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

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HISTORICAL PRESERVATION GUIDELINES FOR CHURCH BUILDINGS AND ARTIFACTS

When a church or other building in the parish complex has historical significance, it is recommended that consideration be given to maintaining the balance between the historical tradition of the building and the renovation of liturgical and other spaces. Church or school buildings can be adapted to fit new specifications, such as liturgical changes, seating requirements, barrier-free access and energy conservation, without losing their historical integrity. When major renovation begins, consideration also needs to be given to many of the historical artifacts that emerge during such a process, as well as to the documentation of the changes that occur.

I. DEFINITION OF ARTIFACTS

An *artifact* is any object modified by human hand and preserved because of its intrinsic, administrative, evidential, or informational value.

A. Factors Used to Determine Significance of Artifacts

1. Age;
2. Content;
3. Usage;
4. Circumstance of creation; and
5. Rarity.

B. Examples of Objects of Historical Significance

1. Fine art:
 - a. paintings;
 - b. sculptures; and
 - c. original and commercial prints.
2. Liturgical pieces:
 - a. chalices;
 - b. patens;
 - c. ciboria; and
 - d. tabernacles.
3. Cornerstone and contents;
4. Architectural structures:
 - a. niches;
 - b. moldings; and
 - c. columns.

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PAGE TWO**

5. Architectural details:
 - a. chandeliers; and
 - b. stained or beveled windows.

6. Illustrated manuscripts:
 - a. sacramentaries;
 - b. ceremonial; and
 - c. hymnals.

7. Textiles:
 - a. banners; and
 - b. vestments.

**RECOMMENDED STEPS TO FOLLOW IF A BUILDING OF HISTORICAL SIGNIFICANCE IS
DUE FOR RENOVATION OR REPLACEMENT**

Contact the Chief Financial Officer.

END OF SECTION (Last updated July 1, 2013)

GUIDELINES FOR CONSTRUCTION, REMODEL AND REPAIR PROJECTS

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SELECTED SECTIONS FOR SMALL CONSTRUCTION PROJECTS

This section specifically deals with the procedures and requirements when dealing with small projects. Below are the required sections a parish must review before any project is to commence.

Requirements:

I. Hold Harmless Agreement

The *hold harmless agreement* is where one party waives, in writing, rights of action or recovery against another party. Hold harmless agreements are usually found in the contract's indemnity clause or indemnity section.

The purpose of the hold harmless agreement is to clarify the extent of responsibility each party will assume, or to what extent one (1) party will hold the other party harmless.

II. Use of Volunteer Labor and/or Donations of Labor and Materials by Bonafide Contractors

Volunteer Labor

Many minor repairs and maintenance projects can be completed using parish volunteer labor. The type of projects done with volunteer labor should not be hazardous or require work at above-ground level. Competent supervisors should be on site at all times.

Volunteers should not be asked to work on or with any equipment that they have not been trained to operate.

All electrical and plumbing work must be performed by licensed, bonded workers and electrical or plumbing permits must be obtained.

The *Volunteer Application Agreement* (Appendix E) must be signed **before** the commencement of any work.

If the volunteers are performing work as part of a project done under contract with a contractor, the use of volunteers should be scheduled only before or after the contractor's work is fully completed.

If a parish combines a General Contractor and volunteer labor, care should be taken that volunteer labor not cause a General Contractor delay.

Despite the best intentions, the work of volunteers rarely is as good as work performed by professional workers.

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III. Certificate of Insurance

For any contract that the diocese enters into where they require another party to maintain and show evidence of a certain level of insurance coverage(s), a *certificate of insurance* evidencing such coverage(s) shall be secured.

The contract will list the Corporation of the Catholic Bishop of Yakima as the “Additionally Insured” on the insurance certificate. The parish, school or institution should be listed as the primary insured.

Because the certificate only evidences coverage, the certificate should be reviewed to ensure that we understand the termination date of the insurance policy.

All certificates should be reviewed carefully when received to ensure that the minimum requirements as set forth are met. If any certificate deviates from the standards as set forth, referral should be made to the CFO for their comments and recommendations.

It is important that certificates be monitored so that when a coverage indicated on a certificate expires, a new certificate is requested. This helps ensure that there are no gaps in coverage during the period of the contract.

The diocese requires a correctly completed certificate of insurance from all Contractors before the contract is signed.

IV. Legal Requirements

The diocese, under civil law, is a *corporation sole* in whose name is vested the title to all real properties – land, buildings and improvements. **Since the parish is not a legal entity, all contracts must be signed by the Bishop.**

All contracts will be audited by the diocesan Chief Financial Officer. Please call (509) 965-7120, Ext.1000 to arrange for this review and a signature by the authorized delegate.

Contracts

Pastors are delegated to sign contracts up to \$15,000 with the following **exceptions**:

1. **If the contract is for work requiring a permit;**
2. **If the project involves the worship space;**
3. **If the total cost of the project exceeds \$15,000;**
4. **If the contract is for architectural services; and**
5. **If the project involves asbestos or abatement thereof.**

In all contracts, the Owner is the **Corporation of the Catholic Bishop of Yakima, a corporation sole**. The project identifies the parish name and city. Contracts shall include an "Approved by" signature line for the Pastor.

END OF SECTION
(Last updated July 1, 2013)