

# DIOCESAN BUILDING & CONSTRUCTION POLICY

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DIOCESE OF YAKIMA

[POLICIES AND GUIDELINES FOR CONSTRUCTION, REMODEL AND  
REPAIR PROJECTS - DIOCESE OF YAKIMA \(YAKIMADIOCESE.ORG\)](https://www.yakimadiocese.org/policies-and-guidelines-for-construction-remodel-and-repair-projects)

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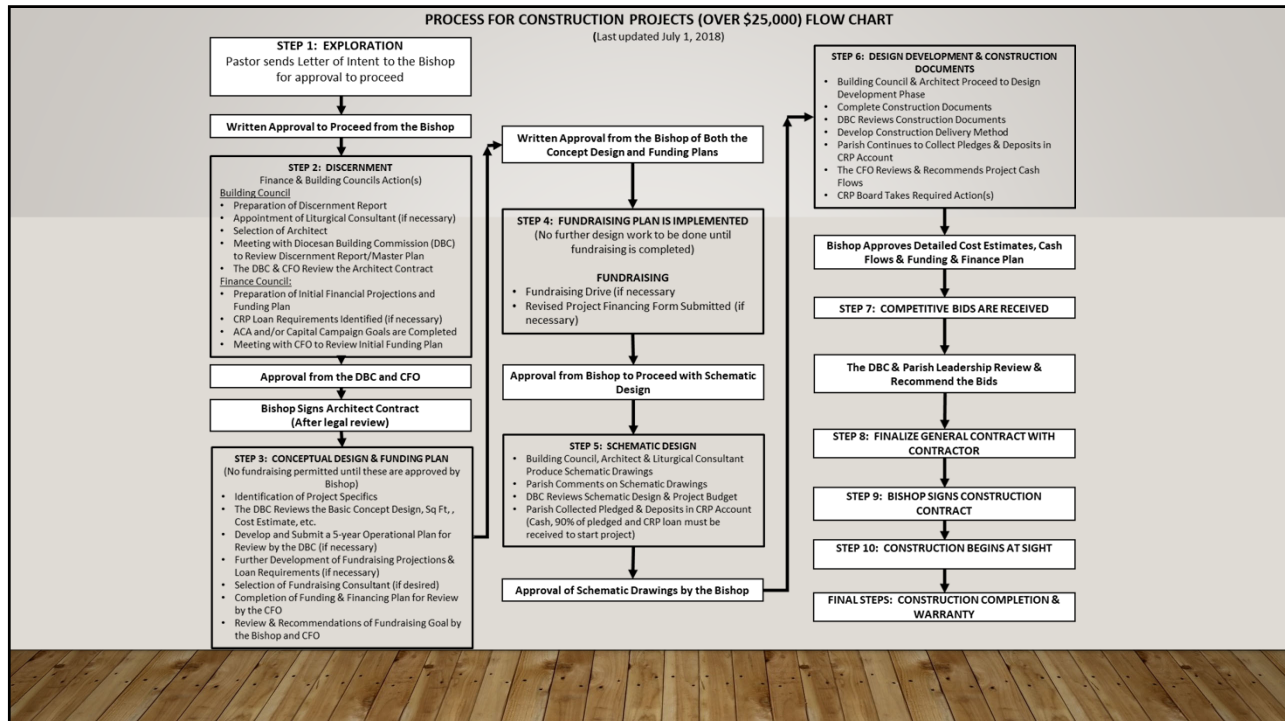
LINK TO THE DIOCESAN WEB PAGE FOR CONSTRUCTION POLICIES

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## Policies and Guidelines For Construction, Remodel and Repair Projects

Policies & Guidelines for Construction, Remodel & Repair Projects (Final 7-1-2018)

- [Appendix 1 – Construction Flow Chart – English \(Updated 7-1-2018\)](#)
- [Appendix 2 – Construction Flow Chart – Spanish \(Updated 7-1-2018\)](#)
- [Appendix A – Cost Breakdown Form \(Sample\) \(Updated 7-1-2018\)](#)
- [Appendix B – Insurance, Bond & Contractual Requirements \(Updated 7-1-2018\)](#)
- [Appendix C – Funding & Financing Plan \(Initial Proposal\) \(Updated 7-1-2018\)](#)
- [Appendix D – Loan Request Worksheet \(Updated 7-1-2018\)](#)
- [Appendix E – Proposed Timeline \(Updated 7-1-2018\)](#)
- [Appendix F – Funding & Financing Plan \(Final Proposal\) \(Updated 7-1-2018\)](#)
- [Appendix G – Check Request Form \(Updated 7-1-2018\)](#)
- [Appendix H – Volunteer Application Agreement \(Updated 7-1-2018\)](#)
- [Appendix I – Adult Volunteer Hold Harmless & Indemnity Agreement \(Updated 7-1-2018\)](#)
- [Appendix L – Addendum to Construction Contract \(Catholic Mutual\)](#)



## GENERAL GUIDELINES

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Building and construction projects estimated at \$25,000 or more are required to follow Diocesan Policies and Guidelines for Construction, Remodel and Repair Projects

## EXCEPTIONS TO THE \$25,000 THRESHOLD RULE:

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- Pastors are delegated to sign contracts up to \$25,000 with the following exceptions:
  - If the contract is for work requiring a permit,
  - If the project involves the worship space,
  - If the total cost of the project exceeds \$25,000,
  - If the contract is for architectural services,
  - If the project involves asbestos or abatement thereof; and
  - If the project involves roofing or mechanical equipment

- In all contracts, the owner is “Corporation of the Catholic Bishop of Yakima”
- The project identifies the parish/school name and city
- Contracts shall include an “Approved by” signature line for the pastor
- All contracts must go through the CFO of the Diocese of Yakima and be reviewed by legal counsel before being signed by the Bishop

## CONSTRUCTION FLOW CHART

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### STEP I – EXPLORATION

Pastor sends Letter of Intent to the Bishop for approval to proceed. The letter should address the question: “How will this project further the spiritual mission of the parish?”

- If approved, Bishop will respond in writing.
- Can be in the form of an email

## CONSTRUCTION FLOW CHART (CONT.)

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### STEP 2 – DISCERNMENT

- The parish/school's building council prepares the discernment report that includes:
  - Description of parish ministries;
  - Demographic information about the parish/school;
  - Needs assessment;
  - Parish/school master plan; and
  - Identification of proposed project(s)
  - Samples of prior discernment reports are available upon request

## CONSTRUCTION FLOW CHART (CONT.)

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- STEP 2 – DISCERNMENT (Continued)
  - The Architect is selected (to be presented for approval)
  - The Liturgical Consultant is appointed (if necessary)
  - The parish/school finance council prepares an initial financial projection and funding plan
  - CRP loan requirements are identified (if necessary)
  - ACA Goals are completed

## CONSTRUCTION FLOW CHART (CONT.)

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- **STEP 2 – DISCERNMENT (Continued)**
  - When ready, Parish/school building council meets with Diocesan Building Council to present discernment report and request recommendation to Bishop for approval
  - Once approved, the Architect contract is presented to the CFO, and then reviewed by legal counsel before it's signed by the Bishop

## CONSTRUCTION FLOW CHART (CONT.)

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- **STEP 3 – CONCEPTUAL DESIGN AND FUNDING PLAN**  
(NOTE: NO FUNDRAISING IS PERMITTED UNTIL THESE ARE APPROVED BY THE BISHOP)
  - Identify project specifics, create Basic Concept Design
  - Develop a 5-year operational plan (if necessary)
  - Further development & completion of fundraising projections & loan requirements
  - Selection of fundraising consultant (if necessary)

DBC must review the Basic Concept Design, Sq Ft, Cost Estimates, Fundraising goal, etc. for recommendation to the Bishop and CFO

## CONSTRUCTION FLOW CHART (CONT.)

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- STEP 4 – FUNDRAISING PLAN IS IMPLEMENTED

NOTE: NO FURTHER DESIGN WORK TO BE DONE UNTIL FUNDRAISING IS COMPLETED

- Fundraising Drive
- Revised Project Financing Form can be use for submission to DBC
- If CRP loan is needed, once half the project cost is collected in cash and the other half collected in pledges, can present to CRP Board of Directors to request a loan
- If satisfactorily funded, approval from Bishop is required to move forward with Schematic Design

## CONSTRUCTION FLOW CHART (CONT.)

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- STEP 5 – SCHEMATIC DESIGN

- Building council, Architect and Liturgical consultant produce schematic drawings for DBC review
- DBC reviews schematic design and project budget
- Bishop must approve Schematic Drawings before moving forward

## CONSTRUCTION FLOW CHART (CONT.)

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- **STEP 6 – DESIGN DEVELOPMENT & CONSTRUCTION DOCUMENTS**
  - Building council & Architect proceed to design development phase
  - Complete construction documents
  - DBC reviews construction documents & makes recommendation for approval
  - Parish/school continues to collect pledges & deposits into CRP account (FICA)
  - Once approved by DBC, CFO & Bishop can move forward to next step

## CONSTRUCTION FLOW CHART (CONT.)

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- **STEP 7 – COMPETITIVE BIDS ARE RECEIVED**
  - DBC & Parish leadership review & recommend the bids
- **STEP 8 – FINALIZE GENERAL CONTRACT WITH CONTRACTOR**
- **STEP 9 – Contract goes thru CFO & legal review before Bishop's signature**
- **STEP 10 – CONSTRUCTION BEGINS AT SIGNE**
- **FINAL STEPS – CONSTRUCTION COMPLETION & WARRANTY**



## SMALLER PROJECTS

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- All projects still begin with a Letter of Intent written to Bishop to propose the project needs – and must be approved before moving forward. (Can be in the form of an email)
- Projects not requiring any architectural work (i.e. roofs, HVAC, A/C units, etc.) can be streamlined:
  - After LOI is approved, if project is already fully funded, the parish/school can move forward with collection of 2-3 bid proposals (if not fully funded, then capital campaign needs to take place)
  - Bid proposals should be reviewed by parish/school councils, then submitted to Diocese for review and approval
  - Bishop signs the bid proposal –unless permission is granted for pastor to sign
  - Any contracts presented by the selected contractor must go through Diocesan Building Council review and legal review before Bishop's signs the document

## QUESTIONS?

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