



OFFICE OF REAL ESTATE, PLANNING, & PROPERTY DEVELOPMENT

Diocese of St. Augustine: Agenda

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 - Canon Law vs. Civil Law
 - Capital Project / Renovation / Repairs
- 3) Diocesan Building Committee
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Office of Real Estate, Planning, and Property Development: Mission

Under the direction of the Chancellor and guidance of the Secretary of Temporal Goods, the Real Estate Planning and Property Development Office offers assistance and oversight for all facilities in Diocese of St. Augustine. Bidding and contractual review are handled through this office in order to ensure a consistent and fair system. The office is focused on:

- Protecting current assets and stewardship;
- Safety and risk aversion;
- Liability reduction;
- Forecast and accommodating the future sustainable growth of the diocese;
- Bishop's delegate to oversee and collaborate with the parishes, schools & entities on Real Estate, Design, Construction & Maintenance.

Office of Real Estate, Planning, and Property Development: Services

Services Provided:

- Facilities management consulting;
- Design management services;
- Preliminary budgeting and feasibility planning;
- Construction management services;
- Property management services;
- Transactional real estate services;
- Contractor referral service



Construction and Renovation Policy

Applicability

This policy applies to projects if any of the following apply:

- exceeding \$25,000;
- all religious/sacred space planning;
- master site planning (i.e., conceptual site layout that shows the ideal location for each of the major site elements, existing buildings, future buildings, parking lots and the long-term proposed expansion of each as approved by the County/jurisdiction where located)
- civil engineering services associated with the purchase;
- permitting or zoning of diocesan or organization property.

Construction and Renovation Policy: Canon Law Vs. Civil Law

According to Civil Law, parishes and entities are owned by the Bishop of the Diocese of St. Augustine, a corporation sole.

According to Canon Law, the juridic person (pastor) retains the ownership rights of temporal goods.

Canon Law authorizes tribunals in certain instances and penalties that may be imposed. From a practical standpoint, canon law does not override civil and criminal legal systems.

- Lacks civilly-binding force in most secular jurisdictions.



Office of Real Estate, Planning, and Property Development: Civil Owner



Construction and Renovation Policy: Capital Project / Renovation / Remodel / Repair

- A **capital project** is a large project with a high cost that is capitalized or depreciated or to build or improve a capital asset.
- A **renovation** is a restoration of an existing asset.
- A **remodel** is creating of something new of an existing asset.
- A **repair** is the modification of an existing or old home feature to bring it back to its original performance level.



Diocesan Building Committee: Mission

- The mission of this DBC is to assist the diocesan entities, parishes, and schools in the development and maintenance of the physical properties of the Diocese of St. Augustine.
- The purpose of the DBC is to serve as an advisory body to the Bishop, Pastors, Superintendent of Schools, Principals, the Deanery, and other committees and councils, such as parish or diocesan finance council and real estate committees, that may be formed to achieve the mission of the Diocese of St. Augustine. The DBC serves in this capacity to identify facility, construction, and design issues and opportunities.

Diocesan Building Committee: Function

- Advise on feasibility of construction, remodeling, repair, and maintenance
- Review all design, engineering, construction and maintenance work.
- Review project documents to ensure quality, budget stewardship, and safety.
- Review post occupancy reviews to compile lessons learned into future best practices.
- Guide the diocese, its parishes and entities in its endeavors to keep buildings and grounds serviceable and aesthetically pleasing.
- Review long term and strategic site planning for diocesan properties.



Diocesan Building Committee: Members

- The DBC shall be composed of:
 - Chancellor (or representative) of the Diocese of St. Augustine
 - Chief Financial Officer (or representative) of the Diocese of St. Augustine
 - Deanery (or representative)
 - Pastoral or liturgical representative
 - Director of Real Estate Planning and Property Development of the Diocese of St Augustine
 - No less than (4) lay persons with professional experience in design construction, or facilities maintenance.
 - (2) Ad hoc guest pastors



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Diocesan Building Committee: Approvals

Capital Projects and Remodels:

- Phased Approvals

Renovations & Repairs:

- Phased Approval or Review

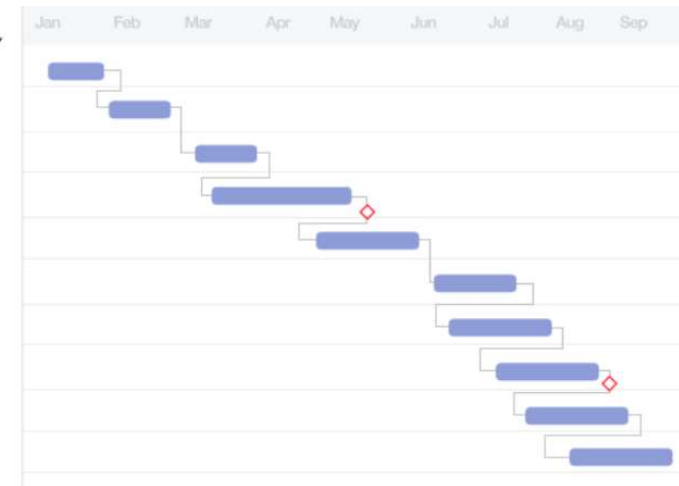
Process Overview (pgs. 8-28):

- Step by step procedure with description and goal of each step.
- Process checklist

Plan for approvals, contracting, supply availability, & permitting. Especially for work planned over breaks. Submit your requests as early as possible.

Construction schedule ▼

Contract writing
Contract signing
Secure financing
Obtain permits
Site work
Plumbing
Electrical
Roof
Inspection
Move in



Intranet / Internet

- Intranet: <http://intranet.dosafl.com/>
 - Forms
 - Request packet
 - Vendor / Consultant Qualification Forms
 - Standard Bid Form
 - Diocesan Construction & Renovation Policy
 - Vendor / Consultant Insurance Requirements
 - Recommended Practices
 - Continuing Education (CCFM Webinars)
- Internet: <https://www.dosafl.com/>
 - Diocesan Construction & Renovation Policy





Questions ?