

Process Overview Checklist

Below is a checklist for your use of the seven phases of the Construction/Renovation process and key activities:

Phase 1 - Submit Project Request & Prepare Preliminary Design Documentation

✓	Task	Notes
	Initial Consultation – Director, REPPD (Page 8; Section 1.1)	
	Initial Consultation – Director, Liturgical (Page 10; Section 1.2)	
	Is Building Committee established? (Page 10; Section 1.3)	
	Submit Initial Request Letter (IRL)? (Page 11; Section 1.4)	
	Initial Request Letter Approved? (Page 11; Section 1.5)	
	Establish a Tax-Free Building Fund? (Page 12; Section 1.6)	
	Is Capital Campaign established? (Page 13; Section 1.7)	
	Design team selected? (Page 14; Section 1.8)	
	Design team agreement executed? (Page 14; Section 1.8.1)	
	Preliminary Design deliverable received? (Page 14; Section 1.9)	
	Request for preliminary review with DBC (Page 14; Section 1.9)	

Phase 2 – Submission of Preliminary Design Documents to the Diocesan Building Committee (DBC)

✓	Task	Notes
	Preliminary project reviewed by Diocesan Building Committee (DBC)? (Page 15; Section 2.1)	
	Project approved? (Page 16; Section 2.2)	
	Resubmission (if required)?	
	Bid Construction Manager? (Page 17; Section 2.3.1)	
	Construction Manager Awarded? (Page 17; Section 2.3.1)	
	Update budget & schedule submitted to Director, REPPD? (Page 17; Section 2.3.2)	
	Request for Design Development review with DBC? (Page 17; Section 3)	

Phase 3 – Diocesan Building Committee Design Development Review

✓	Task	Notes
	Design Development drawings reviewed by DBC? (Page 18; Section 3.1)	
	Results of DBC received? (Page 18; Section 3.2)	
	Results of DBC integrated into design?	
	Drawings 100% completed?	

Phase 4A – Permitting and Final GMP

✓	Task	Notes
	Drawings submitted for permitting?	
	Contractor submitted GMP? (Page 19; Section 4.3)	
	GMP addendum executed? (Page 19; Section 4.3.1)	
	Updated quotes for Owner’s work? (Page 19; Section 4.3.2-3)	
	Updated budget and schedule submitted to Director, REPPD?	

Phase 4B – Permitting and Competitive Bid

✓	Task	Notes
	Drawings submitted for permitting?	
	Invitation to Bid (ITB) distributed to bidders? (Page 19; Section 4.4)	
	Prebid conference and walkthrough? (Page 19; Section 4.5.1)	
	Bids Received? (Page 20 Section 4.6.1)	
	Bid Opening? (Page 20 Section 4.6.2)	
	Bid analysis and recommendation received? (Page 20 Section 4.6.3)	
	Bid Awarded (Page 21; Section 5)	

Phase 5 – Contracting

✓	Task	Notes
	General Contractor’s agreement? (Page 21; Section 5)	
	Owner direct purchase orders issued? (Page 24; Section 6.6.2)	
	Furniture purchase orders issued?	
	Owner’s work agreements executed?	

Phase 6 – Construction

✓	Task	Notes
	Construction kick off meeting? (Page 22; Section 6.1)	
	Groundbreaking? (Page 22; Section 6.2)	
	GMP addendum executed?	

Phase 7 – Project Close Out

✓	Task	Notes
	Certificate of Occupancy received?	
	Warranty Certificates received?	
	Operations and maintenance manuals received?	
	Organization staff trained?	
	As-built hard copy to Organization facilities manager?	
	As-built PDF to Director, REPPD?	
	As-built CADD files to Director, REPPD?	
	Bishop’s Briefing	
	Letter of Acceptance received?	
	Post Occupancy Report schedule?	