



# Archdiocese of Los Angeles

## ACC Construction Department

Email: [construction@la-archdiocese.org](mailto:construction@la-archdiocese.org) Fax: (213) 637-6675

# Project Checklist

for use on Construction, Renovation, Facility and Plant Maintenance Projects

### Project Information

■ project name:	<u>&lt;enter name of project&gt;</u>	■ date:	_____
■ parish / school:	<u>&lt;enter name of parish / school&gt;</u>	■ Archdiocesan account #:	_____
■ street address:	_____	■ deanery #:	_____
■ city, state & zip code:	_____	■ phone #:	_____
■ project contact: Pastor, Principal or Administrator for project	_____	■ email: for contact person	_____

■ pastoral region (check one below):

Our Lady of Angels   
  San Fernando   
  San Gabriel   
  San Pedro   
  Santa Barbara

### PROJECT CLASSIFICATION (Based on Total Project Cost)

Project Phase	PARISH or Parish School		Archdiocesan High School		Any Project \$20,000 or Less	Comments / Notes
	Exceeds \$1,000,000	Exceeds \$20,000, but Less than \$1,000,000	Exceeds \$1,000,000	Exceeds \$20,000, but Less than \$1,000,000		
<b>1. FACILITIES NEEDS ANALYSIS</b>						
1. Facilities Assessment (see separate checklist)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended / Not Required	Options: 1. Hire Professional Firm 2. Conduct Self Assessment 3. Conduct Visual Inspections
2. Establish Parish / School Building Committee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended / Not Required	
3. Survey & Prepare Wish List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended / Not Required	
4. Identify Needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended / Not Required	Also identify maintenance projects
5. Prioritize Needs, Scope & Timeline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recommended / Not Required	
<b>2. CONCEPTUAL PLAN</b>						
1. Develop Ideas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Outline ideas, prepare narrative and/or sketches
2. Engage Preliminary Design Services (if needed)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Obtain recommendations, interview, select and contract with applicable Design Professionals
3. Programming / Determine Space Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Determine number of occupants and square footage requirements
4. Preliminary Code Analysis & Land Use Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Check Land Use / Zoning & Conditional Use Permits. Coordinate with ACC Real Estate Department.



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5. Prepare, Review & Select Solution(s)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Develop solutions and alternatives at various cost levels for selection.
6. Perform Preliminary Funding Analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does Parish / School have funds to execute project?
7. Submit Conceptual Plan to Regional Bishop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> For Info Only	<input type="checkbox"/> For Info Only	N/A	Provide copy of submittal to ACC Construction Department
8. Obtain Regional Bishop's Preliminary Approval to proceed with Planning Phase of Project	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	Provide copy of approval to ACC Construction Department
9. Obtain ACC Education Department Preliminary Review	<input type="checkbox"/> IF Parish School	<input type="checkbox"/> IF Parish School	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Provide copy of approval to ACC Construction Department
10. Obtain ACC Construction Department Review	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> (see comments / notes at right)	Required for all projects above \$20,000 or for any project <b>that is \$20,000 or less that</b> involves Asbestos abatement, Lead / Lead Based Paint remediation, Mold abatement, Structural modifications, Conditional Use Permit applications, Conditional Use Permit modifications
11. Submit for Archdiocesan Building Commission Meeting for "Conceptual Plan" Review, Approval and/or Recommendations	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A	N/A	Submit request to ACC Construction Department to schedule this meeting
<b>3. FUNDING ABILITY &amp; ASSESSMENT</b>						
1. Estimate ROM ("Rough Order of Magnitude") Project Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2. Identify & Review Available Project Funding Sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Identify available Cash on Hand, including Investment Pool funds and other sources. Determine if Line of Credit will be sought.
3. Perform Capital Campaign Feasibility Study	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A	N/A	If a professional consultant is hired, the contract must be approved by the ACC Legal Department
4. Prepare Preliminary Project Worksheet (showing Project Funding & Timeline)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Obtain template from ACC Construction Department



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5. Prepare Funding / Cash Flow Projections & Project Timeline	<input type="checkbox"/>	<input type="checkbox"/> IF Line of Credit is Requested or Required	<input type="checkbox"/>	<input type="checkbox"/> IF Line of Credit is Requested or Required	N/A	Obtain template from ACC Financial Services or Construction Department
6. Line of Credit Application	<input type="checkbox"/> IF Line of Credit Required	<input type="checkbox"/> IF Line of Credit Required	<input type="checkbox"/> IF Line of Credit Required	<input type="checkbox"/> IF Line of Credit Required	<input type="checkbox"/> IF Line of Credit Required	Submit Preliminary Project Worksheet and Funding / Cash Flow Projections for review prior to meeting
7. Meet with ACC Financial Services Department to Review Project Funding & Finances	<input type="checkbox"/>	<input type="checkbox"/> IF Line of Credit Required	<input type="checkbox"/>	<input type="checkbox"/> IF Line of Credit Required	N/A	Approval required before the Master Plan is initiated.
<b>4. MASTER PLAN</b> Required if Parish / School does not have an existing Approved Master Plan						
1. Obtain Master Plan Design & Entitlement Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Obtain recommendations, interview, select and contract with applicable Design Professionals (see Notes at end of this checklist)
2. Obtain Project Management Services	<input type="checkbox"/> IF Cost is = or > \$2M	N/A	<input type="checkbox"/> IF Cost is = or > \$2M	N/A	N/A	For projects equal or exceeding \$2,000,000, interview, select and hire a 3 <sup>rd</sup> Party Project Manager.
3. Review Entitlements, Land Use & Code Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Check proposed land use requirements with Government entities having jurisdiction over the Master Plan and Project
4. Develop Master Plan Drawings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Site Plans, Preliminary Floor Plans, Renderings or Building Elevations
5. Submit Master Plan to Regional Bishop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> For Info Only	<input type="checkbox"/> For Info Only	N/A	Provide copy of submittal to ACC Construction Department
6. Obtain Regional Bishop's Master Plan Approval	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	Provide copy of approval to ACC Construction Department
7. Obtain ACC Education Department Master Plan Review & Approval	<input type="checkbox"/> IF Parish School	<input type="checkbox"/> IF Parish School	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Provide copy of approval to ACC Construction Department
8. Submit & Obtain Master Plan / Conditional Use Approval from Government Jurisdiction	<input type="checkbox"/>	<input type="checkbox"/> IF Required	<input type="checkbox"/>	<input type="checkbox"/> IF Required	<input type="checkbox"/> IF Required	Submit land use and entitlement applications to all applicable Government entities having jurisdiction over the Project



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9. Submit for Archdiocesan Building Commission Meeting for "Master Plan" Review & Approval	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A	N/A	Submit request to ACC Construction Department to schedule this meeting
<b>5. CONCEPTUAL DESIGN</b> This Phase to be concurrent with the Master Plan (when possible)						
1. Obtain Conceptual Design Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Obtain recommendations, interview, select and contract with applicable Design Professional (see Notes at end of this checklist)
2. Review Project Specific Entitlements, Land Use & Code Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Check all applicable land use, entitlement and code requirements.
3. Develop Conceptual Design Drawings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Building Floor Plans, Elevations, Section & Rendering
4. Coordinate Conceptual Design with Utilities Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Review conceptual designs and requirements with Utility Providers for the Project (i.e. gas, power, telephone & water)
5. Submit Conceptual Design to Regional Bishop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> For Info Only	<input type="checkbox"/> For Info Only	N/A	Provide copy of submittal to ACC Construction Department
6. Obtain Regional Bishop's Conceptual Design Approval	<input type="checkbox"/>	<input type="checkbox"/>	N/A	N/A	N/A	Provide copy of approval to ACC Construction Department
7. Submit & Obtain Land Use / Conditional Use Approval from Government Jurisdictions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Submit land use and entitlement applications to all applicable Government entities having jurisdiction over the Project. Obtain necessary approvals.
8. Obtain Liturgical Design Review Committee Review & Approval	<input type="checkbox"/> IF Worship Space	<input type="checkbox"/> IF Worship Space	<input type="checkbox"/> IF Worship Space	<input type="checkbox"/> IF Worship Space	<input type="checkbox"/> IF Worship Space	Contact ACC Office For Worship to schedule a review meeting. Provide copy of approval to ACC Construction Department
9. Obtain ACC Education Department Conceptual Design Review & Approval	<input type="checkbox"/> IF Parish School	<input type="checkbox"/> IF Parish School	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Provide copy of approval to ACC Construction Department



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10. Obtain ACC Construction Department Review	N/A	N/A	N/A	N/A	<input type="checkbox"/> (see comments / notes at right)	Required if project involves Asbestos abatement, Lead / Lead Based Paint remediation, Mold abatement, Structural modifications, Conditional Use Permit applications, Conditional Use Permit modifications
11. Notify ACC Construction Dept of Approvals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Submit copies of approval letters
12. Submit for Archdiocesan Building Commission Meeting for "Conceptual Design" Review & Approval	<input type="checkbox"/>	N/A	<input type="checkbox"/>	N/A	N/A	Submit request at least 60 days in advance (of preferred schedule date) to ACC Construction Department to schedule this review meeting
<b>6. SCHEMATIC DESIGN</b>						
1. Review Available Funding For Design Phases	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Suggested Minimum Cash on Hand = 10% of total estimated Project Cost to start Schematic Design
2. Request Proposal From Design Professionals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Scope of Work to include Schematics, Design Development, Construction Documents, Bid & Award and Construction Administration
3. Obtain Design Services – Send Proposals to ACC Construction Department	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Contract with Design Professionals using ACC Standard Contracts & Agreements. ACC Construction Department prepares Contracts on behalf of Parish / School for projects over \$20,000 in total costs (see Notes at end of this checklist).
4. Coordinate Design with Required Outside Utility Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Review schematic designs and requirements with Utility Providers for the Project (i.e. gas, power, telephone & water)
5. Review Schematic Design	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Parish / School Committee and Internal Leadership Reviews of design
<b>7. DESIGN DEVELOPMENT</b>						
1. Prepare Design Development Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contract with Design Professionals if Agreements were not executed during Schematic Design Phase



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2. Review Design Development with Utility Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Review design and requirements with Utility Providers for the Project (i.e. gas, power, telephone & water)
3. Review Design Development Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parish / School Committee and Internal Leadership Reviews of design
4. Update Project Cost Estimate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Obtain Estimate from Contractor (using Pre-Construction Services Agreement) or 3rd Party Cost Estimator or Quantity Surveyor
5. Compare Cost Estimate Against Project Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
6. Review Scope & Perform Value Engineering (if cost exceeds budget)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	
<b>8. CONSTRUCTION DOCUMENTS</b>						
1. Review Available Funding For This Phase of Work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Suggested Minimum Cash on Hand = 30% of total estimated Project Cost to start Construction Documents
2. Prepare & Review Progress Drawings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parish / School Committee and Internal Leadership Reviews of design and drawings
3. Coordinate Detailed Design with Utility Providers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Review final designs and specific requirements with Utility Providers for the Project (i.e. gas, power, telephone & water)
4. Plan Check Submittals & Corrections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> IF Required	Check and comply with Plan Check and Permit requirements with Government agencies that have jurisdiction over the Project.
5. Update Project Cost Estimate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Obtain Estimate from Contractor (using Pre-Construction Services Agreement) or 3rd Party Cost Estimator or Quantity Surveyor



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<b>9. BID &amp; AWARD</b>						
1. Review Available Funding Prior to Bidding / Requests for Proposals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100% Funding Required	Minimum Cash on Hand = 60% of total Project Cost + 5 yr Repayment Plan (Principal + Interest) required before Bidding
2. Prepare and Submit Project Approval & Projected Cash Flow / Cash Need Analysis Worksheets to ACC Financial Services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Worksheets in Microsoft Excel format are available upon request from the ACC Construction Department
3. Obtain ACC Financial Services Approval of Project and Cash Flow / Cash Needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	Review & Approval may require meeting with representatives of the ACC Financial Services Department
4. Identify & Select Licensed, Insured & Qualified Contractors to Bid Project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5. Prepare & Issue Bid Documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6. Obtain Bids & Analyze Submittals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bids for projects over \$1,000,000 shall be sealed and submitted for a Bid Opening in coordination with the ACC Construction Department and representatives of the Parish / School
7. Select Winning Bid & Submit to ACC Construction Department for Contract Award	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	N/A	ACC Construction Department prepares Contracts on behalf of Parish / School for ALL projects over \$20,000 in total costs. ACC Legal Department reviews all documents as needed (see Note #1 at end of this checklist)

**Notes**

1. ALL vendor contracts / proposals require review by the ACC Legal Department, or use of currently approved versions of the ACC Standard Contracts and Agreements. For projects where the total cost is \$20,000 or less, a Parish or School is strongly encouraged to use the Archdiocese Small Construction Contract, which is available on the Archdiocese web site at: <http://handbook.la-archdiocese.org> in the "resources of Chapter 7: Facilities". All contracts exceeding \$20,000 in total value shall be prepared by the ACC Construction Department and executed by the Archdiocese on behalf of the Parish or School.



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**Notes** (continued)

2. Definition of Terms used in this Checklist:

- Design Professionals are licensed Architects, Interior Designers and Engineers (i.e. Civil, Electrical, Mechanical, Structural, etc.) registered or certified to practice in the State of California.
- The Timeline is a preliminary Schedule identifying desired start and completion dates for the Project.

3. The Construction Project Checklist is intended to only highlight the general steps of a Construction and Building Project. For more detailed guidelines on the Construction and Building Project Process, Construction tasks and activities and Close Out requirements, see:

- Archdiocese "**Capital Improvements: Policies & Procedures**", FY2015 Edition – a presentation and overview of important policies and procedures applicable to “Construction” related capital improvements.
- Archdiocese Construction Policies & Procedures #G-110, "**Classification of Building Projects**", Revision 1, adopted by Archdiocesan Building Commission on March 14, 2011.
- Archdiocese Construction Policies & Procedures #G-120, "**Guidelines for Building Projects**", adopted by the Archdiocesan Building Commission on January 12, 2006.
- Archdiocese Administrative Handbook, Chapter 7: Facilities. This document can be viewed at: <http://handbook.la-archdiocese.org/>

To obtain a copies of the guidelines, procedures and presentation, please contact the ACC Construction Department by email at: [construction@la-archdiocese.org](mailto:construction@la-archdiocese.org) or by phone at: (213) 637-7850.