



Archdiocese of Los Angeles

ACC Construction Department

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

Project Checklist

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

Project Information

■ project name:	_____	■ date:	_____
■ parish / school:	_____	■ 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		
1. FACILITIES NEEDS ANALYSIS						
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	
2. CONCEPTUAL PLAN						
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 that is \$20,000 or less that 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
3. FUNDING ABILITY & ASSESSMENT						
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.
4. MASTER PLAN 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 rd 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
5. CONCEPTUAL DESIGN 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
6. SCHEMATIC DESIGN						
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
7. DESIGN DEVELOPMENT						
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	
8. CONSTRUCTION DOCUMENTS						
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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9. BID & AWARD						
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 or by phone at: (213) 637-7850.