

# BUILDING AND MAINTENANCE COMMITTEE

## The Diocese of San Jose

January 06, 2005

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# **REGULATIONS OF THE BUILDING AND MAINTENANCE COMMITTEE OF THE DIOCESE OF SAN JOSE**

Revised: December 14, 2004

## **Introduction**

The Building and Maintenance Committee (Building Committee) has been established by the Bishop to help pastors, parishes / Director of Parish Life (DPL), cemeteries, schools, agencies and others in administration (the applicant) with the development and maintenance of Church properties, as well as to assist the Bishop in the discharge of his corporate duties. The Building Committee will evaluate all items and consider among other factors how those items support The Pastoral Plan for the Diocese of San Jose. Members will be appointed by the Bishop. The majority of the members will be non-Diocesan staff and non-clergy; and have a background and knowledge of building trades. Members are available to offer their experience and to assist, in any way they can, in the preparation and presentation of projects. The Committee is authorized to review and to make appropriate recommendations to the Bishop for all proposals of land transactions as well as the construction, maintenance and renovation of facilities of the Diocese, its parishes, cemeteries, schools and agencies.

## **I. Land Transactions**

### **A. Acquisition of New Property**

1. Land or buildings received as gifts will be accepted provided that the terms of the gifts can be met. The Building Committee will be asked to review such terms and make a recommendation as to whether the gift should be accepted. Once accepted, the Building Committee will be asked to make a recommendation, having heard a proposal from the pastor or agency head as to:
  - a. whether the gift can be incorporated into the parish/agency's master plan or;
  - b. the gift should be held for income or sale.
2. No land or building shall be purchased or leased by the Diocese, its parishes, or agencies unless the proposal has been evaluated by the Building Committee and the Bishop has consented to the purchase or lease.

### **B. Existing Properties**

1. As a general rule, land and buildings once acquired will not be sold as surplus except in unusual cases.
2. Long term leases may be proposed for surplus property in consultation with the parish, cemetery, agency or school. The Building Committee will make a recommendation as to the whether the property in question is indeed surplus to the long term needs of the parish, school, agency and diocese. The Diocesan Attorney, the Diocesan Finance Council and the College of Consulters will review the proposal for other implications.

## **II. New Construction / Reconstruction / Remodeling / Maintenance**

- A. The policies set forth regarding new construction, reconstruction, remodeling and maintenance are designed to provide general direction for the facilities development and construction for the Roman Catholic Bishop of San Jose, the Roman Catholic Welfare Corporation of San Jose, and their affected effective operations. The Plans will be developed through a consultation process involving the community, parish/school staff, Finance Committee, Building Committee, and Diocese of San Jose. The Master Plan will be developed using the Diocese of San Jose guidelines. See appendix.

The objectives of facilities development and construction are to plan, construct, and adapt, as needed through time, the physical facilities as an environment for pastoral activities,

suitable and adequate for the needs of students and community, the educational, cultural, and social activities deemed desirable, and the work of staff necessary thereto.

- B. In the meaning of these policies, facilities include: land, its design and development for use both now and in the future; the construction of buildings; and the acquisition of initial movable furniture and movable equipment.
- C. In scope, the activities envisioned are as follows:
  - 1. The development and continuous appraisal (at least every five years) of long-range Master Plans for land use, utility services, buildings, roads, pedestrian walks, outdoor recreational areas, parking areas, and open natural areas, including a projected timetable for completion of specific projects.
  - 2. The design, plans, and construction or major alteration of buildings, other structures, and site improvements.
  - 3. The planning, specification, and acquisition of initial movable equipment and movable furniture.

### III. Construction and Remodeling

#### A. General Conditions

- 1. Any project involving and expenditure of \$10,000 cash or gifts must be submitted to the Building Committee. Exceptions to this policy: emergency items that may arise between regular meetings of the Building Committee. Those items may include:
  - a. fire, health, safety, code violation, or security items
  - b. breakdowns/failures that affect operations
  - c. failure to immediately repair the item will lead to increased costs

For exceptions to this policy listed above; the Secretary of the Building Committee (Director of Facilities) must be consulted prior to the expenditure. In the absence of the Secretary of the Building Committee, consult the Diocese's Chief Financial Officer. The item will be discussed and approval obtained from the appropriate Chancery staff –Vicar General, Chief Financial Officer and chair of the Building Committee. The item will be reported at the next regular meeting of the Building Committee.

- 2. Any project involving the expenditure of \$10,000 cash or gifts must have the approval of the Parish Finance Committee.
- 3. Any projects, contract documents, or related or similar agreements involving an expenditure of \$10,000 or more, whether for the services of architect or the engagement of a contractor, *must be signed by an Attorney-in-Fact of the corporation sole.*
- 4. All contracts must be approved in form by the Diocesan Attorney prior to execution.
- 5. No contract can be executed or work begun without the Building Committee recommendation and the Bishop's approval of the Building committee's recommendation. (Cf. Statute 173,2)
- 6. It is the established policy of the diocese to comply with all governmental, fire, safety, accessibility and building codes, and permit processes. No building or maintenance project may be undertaken without complying with these codes.

7. All construction or improvements of \$10,000 or more are to be paid out of the Deposit and Loan Fund (DLF). This assures proper insurance coverage for additions or improvements.

## B. Special Conditions

1. All proposals of projects involving structural changes or rearrangement of liturgical spaces require the approval of the Environment and Art Committee of the Liturgical Commission prior to Building Committee review of schematic drawings. A statement of assurance must be issued by the Environment and Art Committee that the drawings proposed meet current liturgical norms.

*A Design Review Process is required of all projects affecting the worship environment. The Committee (Environmental and Art Committee) is charged by the Bishop to review and approve any permanent art, furnishings and changes to the existing arrangement of worship spaces and to review and approve plans for the creation of new worship space. ("For the proper construction, restoration, and remodeling of sacred buildings, all who are involved in the work are to consult the diocesan commission on the Sacred Liturgy and sacred art. The Diocesan Bishop, moreover, should use the counsel and help of this commission whenever it comes to laying down norms on this matter, approving plans for new buildings, and making decisions on the more important issues: General Instruction on the Roman Missal, 291) The Committee (Environmental and Art Committee) also evaluates landscaping projects that form or affect gathering areas related to the worship space areas that will be used for the Triduum liturgies and other outdoor rituals as these are also liturgical spaces. (Liturgical Commission, Environment & Art Committee, August 2004)*

2. Plans for schools and housing for religious school staff must be presented for the approval of the Superintendent of Schools before presentation to the Building and Maintenance Committee.
3. Every project must have a pre-approved Funding and Financing Plan. (Cf pages XX ff.)

## IV. New Construction

### A. Initial Step

1. Submit an application, available at the Chancery Office (Cf page 7), outlining the project and requesting an appointment with the Building and Maintenance Committee, 900 Lafayette Street, Santa Clara, CA 95050-4966. If consultation with a consultant, architect and/or engineer is necessary prior to the meeting, such selection of a consultant, architect and/or engineer is subject to the approval of the Building Committee. (A list of architects and engineers is available from the Chancery Office.) The architect, engineer or consultant used for this purpose may or may not be the architect, engineer or consultant selected for the project. The selection of an architect, engineer or consultant for each project will be based on the responses to a Request for Proposal and Qualifications for each project. See the Appendix for the Request for Proposal and Qualification process.
2. The initial Funding and Financing Plan will be submitted to the Finance Council for its review and approval. No project will be considered until seventy-five percent of the project costs have been collected. The project will not proceed to bid until one-hundred percent of the project costs have been collected and deposited in the Diocesan Deposit and Loan fund.
3. The Bishop will review the recommendations of the Finance Committee for approval. Only when the Bishop's approval of the project has been received may the applicant engage the consultant, architect, engineer and/or contractor.

## B. Preliminary Plans (Schematic Development Phase)

The applicant and architect must present plot plans, schematic drawings and probable construction costs, and all project related costs (permits, professional fees, soils tests, tests and inspection, construction contingency and, furniture and equipment) to the Building and Maintenance Committee for review and approval. See the Appendix for the Cost Estimate Summary and Anticipated Time Schedule form – to assist in identifying all project related costs. One copy of the plans should be sent to the Building Committee, c/o the Chancery Office three weeks prior to appearing before the Building Committee.

## C. Working Drawings (Design Development Phase)

1. After the preliminary plans have been approved, the applicant will be authorized in writing to proceed with the final working drawings and specifications. The architect will then present these to the Building and Maintenance Committee for review. When the final working drawings have been approved in writing, the architect will assist the applicant and Building Committee in the selection of contractors based on the Request for Proposal and Qualifications. The Request for Proposal will be advertised and notices sent to qualified and responsible contractors. A list of qualified contractors is available at the Chancery Office.
2. A re-evaluation of the probable cost of the project will be made at this time. The final Funding and Financing plan must be approved by the Diocesan Financial Council before going to bid.

## D. Contracts and Bids

1. When the working drawings (final drawings) and necessary bid documents have been completed, the project may be put out to bid or, in special cases, negotiated. Prior to bidding the project; a meeting will be held with the architect/engineer/consultant, the applicant and Director of Facilities; all parties are to agree to the scope and content of the project and sign the construction drawings, specifications, contract and any other project related documents.
2. All bidders are required to:
  - a. be licensed by the State of California for the appropriate trade or trades;
  - b. be bondable to 100% of the value of the contract;
  - c. pay prevailing wage for particular trade, or trades or classification (prevailing wage for Santa Clara County is the norm);
    - i. Prevailing wage is required for all maintenance work exceeding \$75,000 (asphalt, carpentry and cabinets, carpeting and flooring, concrete and masonry, doors and windows, electrical, fire sprinklers and fire suppression, landscape, metals, mechanical, painting, plumbing, roofing; telephone, data and security
    - ii. Prevailing wage is required for all maintenance, renovation, remodeling and new construction exceeding \$75,000
  - e. sign a statement to abide by all local and Federal laws relative to equal employment opportunities and non-discrimination in employment;
  - f. have Workers' Compensation Insurance in force;
  - g. be insurable to a minimum of \$1,000,000 each occurrence; \$2,000,000 general aggregate; additional insurance requirements may be required for capital construction, remodeling and reconstruction projects
  - h. comply with the prevailing work week and holiday requirements of Santa Clara County;
    - i. do no work on Sundays, Christmas and Good Friday
    - j. be willing to submit a history of experience for each job, if requested.

3. Bids shall be submitted to the Chancery Office in a sealed envelope with the name of the project and the general contractor marked on the outside of the envelope. These bids are opened at the designated time in the presence of the applicant, architect/engineer/consultant and representatives of the Building and Maintenance Committee.
4. Each bidder shall submit with his bids the names of all subcontractors and their respective bids.
5. The Bishop then reviews the Building Committee's recommendations on the bids, awards the contract and notifies the applicant.
6. No work on the project will begin until;
  - a. project funds (for all project related costs) are in the Diocesan Deposit and Loan fund (the parish/school has sufficient funds in the Deposit and Loan fund to begin the project)
  - b. the contract is signed
  - c. certificate of insurance is provided
  - d. bonds are provided
  - e. Preconstruction meeting is held with all parties and the applicant. The project schedule, construction period and protocol for contact between the parties will be formalized.
  - f. contractor has provided a Master Construction Schedule
  - g. contractor has provided a Schedule of Values
  - h. Notice-to-Proceed is issued

#### E. Change Orders

All change orders are to be submitted to the Diocesan Chief Financial Officer and Director of Facilities, and authorized by an Attorney in Fact for the corporation. Any and all proposed changes (proposed change orders) are to be reviewed by the Building Committee for recommendation to the Bishop. No item is a change order until reviewed by the Building Committee and approved by the Bishop. Each item that is requested as a change will state the reason for the change; and the funding source is identified for the change.

#### F. Project Reports

1. The applicant, in conjunction with the architect/engineer/consultant, is responsible for the successful execution of the work at the site.
2. All requests for progress payments must be submitted by the architect to the applicant for approval. The applicant will then send the invoices to the Chancery Office with a request for payment. The request for payment and/or progress payment will be signed by the contractor, the applicant and architect/engineer/consultant.
3. At the completion of the project, the architect/engineer/consultant will send to the Chancery Office a detailed report of the total cost, including architect/engineer/consultant fees, other fees for survey, surety bonds and total payments made to the general contractor, with a detailed breakdown of the project for major items such as site development, concrete, heating, plumbing, electrical, labor, etc. He will present two (2) complete set of plans "as built" drawings.
4. The architect/engineer/consultant must also file the Notice of Completion as required by law.

## V. Remodeling

- A. For all remodeling projects in excess of \$10,000, an application must also be submitted outlining the project and requesting an appointment with the Building and Maintenance Committee.
- B. If consultation with a consultant, architect and/or engineer is necessary prior to the meeting, such selection of a consultant, architect and/or engineer is subject to the approval of the Diocese. (A list of architects and engineers is available from the Chancery Office.)
- C. Any remodeling or maintenance within liturgical space requires approval of the Liturgical Commission, Environment & Art Committee.

*A Design Review Process is required of all projects affecting the worship environment. The Committee (Environmental and Art Committee) is charged by the Bishop to review and approve any permanent art, furnishings and changes to the existing arrangement of worship spaces and to review and approve plans for the creation of new worship space. ("For the proper construction, restoration, and remodeling of sacred buildings, all who are involved in the work are to consult the diocesan commission on the Sacred Liturgy and sacred art. The Diocesan Bishop, moreover, should use the counsel and help of this commission whenever it comes to laying down norms on this matter, approving plans for new buildings, and making decisions on the more important issues: General Instruction on the Roman Missal, 291) The Committee (Environmental and Art Committee) also evaluates landscaping projects that form or affect gathering areas related to the worship space areas that will be used for the Triduum liturgies and other outdoor rituals as these are also liturgical spaces. (Liturgical Commission, Environment & Art Committee, August 2004)*

- D. The Diocesan Finance Council approval will be necessary before finalizing plans.
- E. After the Bishop has approved the project, the pastor will receive written authorization to proceed.
- F. Prior to bidding the project; a meeting will be held with the architect/engineer/consultant, the applicant and Director of Facilities; all parties are to agree to the scope and content of the project and sign the construction drawings, specifications, contract and any other project related documents.
- G. Prevailing wage is required for all maintenance work exceeding \$75,000 (asphalt, carpentry and cabinets, carpeting and flooring, concrete and masonry, doors and windows, electrical, fire sprinklers and fire suppression, landscape, metals, mechanical, painting, plumbing, roofing; telephone, data and security
- H. The Request for Proposal will be advertised and notices sent to qualified and responsible contractors. A list of qualified contractors is available at the Chancery Office.
- I. No work on the project will begin until;
  - a. project funds (for all project related costs) are in the Diocesan Deposit and Loan fund (the parish/school/cemetery/agency has sufficient funds in the Deposit and Loan fund to begin the project)
  - b. the contract is signed by the Diocese
  - c. certificate of insurance is provided
  - d. bonds are provided
  - e. Preconstruction meeting is held with all parties and the applicant. The project schedule, construction period and protocol for contact between the parties will be formalized.
  - f. contractor has provided a Master Construction Schedule
  - g. contractor has provided a Schedule of Values
  - h. Notice to Proceed is issued

## F. Change Orders

All change orders are to be submitted to the Diocesan Chief Financial Officer and Director of Facilities, and authorized by an Attorney in Fact for the corporation. Any and all proposed changes (proposed change orders) are to be reviewed by the Building Committee for recommendation to the Bishop. No item is a change order until reviewed by the Building Committee and approved by the Bishop. Each item that is requested as a change will state the reason for the change; and the funding source is identified for the change.

## G. Project Reports

1. The applicant, in conjunction with the architect/engineer/consultant, is responsible for the successful execution of the work at the site.
2. All requests for progress payments must be submitted by the architect/engineer/consultant to the applicant for approval. The applicant will then send the invoices to the Chancery Office with a request for payment. The request for payment and/or progress payment will be signed by the contractor, the applicant and architect /engineer/consultant.
3. At the completion of the project, the architect/engineer/consultant will send to the Chancery Office a detailed report of the total cost, including architect's fees, other fees for survey, surety bonds and total payments made to the general contractor, with a detailed breakdown of the project for major items such as site development, concrete, heating, plumbing, electrical, labor, etc. He will present two (2) complete set of plans "as built" drawings.
4. The architect/engineer/consultant must also file the Notice of Completion as required by law.

## VI. Maintenance

- A. The applicant, planning any major expenditure (\$10,000 or more) on maintenance projects should submit a letter to the Building and Maintenance Committee, explaining the nature of the project including a rough cost estimate. The Director of Facilities for the Diocese may be consulted at the Chancery Office at (408) 983-0223.
- B. If consultation with a consultant, architect and/or engineer is necessary prior to the meeting, such selection of a consultant, architect and/or engineer is subject to the approval of the Diocese. (A list of architects and engineers is available from the Chancery Office.)
- C. Any or maintenance within liturgical space requires approval of the Liturgical Commission, Environment & Art Committee.

*A Design Review Process is required of all projects affecting the worship environment. The Committee (Environmental and Art Committee) is charged by the Bishop to review and approve any permanent art, furnishings and changes to the existing arrangement of worship spaces and to review and approve plans for the creation of new worship space. ("For the proper construction, restoration, and remodeling of sacred buildings, all who are involved in the work are to consult the diocesan commission on the Sacred Liturgy and sacred art. The Diocesan Bishop, moreover, should use the counsel and help of this commission whenever it comes to laying down norms on this matter, approving plans for new buildings, and making decisions on the more important issues: General Instruction on the Roman Missal, 291) The Committee (Environmental and Art Committee) also evaluates landscaping projects that form or affect gathering areas related to the worship space areas that will be used for the Triduum liturgies and other outdoor rituals as these are also liturgical spaces. (Liturgical Commission, Environment & Art Committee, August 2004)*

- D. Savings in some areas of maintenance (e.g. roofing, painting and paving) can be realized by combining projects of several parishes. A request for this service should be made to the Building and Maintenance Committee before February 28, of each year.
- E. Prevailing wage is required for all maintenance work exceeding \$75,000 (asphalt, carpentry and cabinets, carpeting and flooring, concrete and masonry, doors and windows, electrical, fire sprinklers and fire suppression, landscape, metals, mechanical, painting, plumbing, roofing; telephone, data and security
- F. The parish, school, cemetery or agency should prepare a request for proposal (RFP) for the maintenance expenditure. The RFP should describe the project. Three proposals should be collected for each maintenance project.
- G. Prior to bidding the project; a meeting will be held with the architect/engineer/consultant, the applicant and Director of Facilities; all parties are to agree to the scope and content of the project and sign the construction drawings, specifications, contract and any other project related documents.
- H. The Request for Proposal will be advertised and notices sent to qualified and responsible contractors. A list of qualified contractors is available at the Chancery Office.
- I. A prebid job walkthrough time and date will be scheduled for ALL contractors to attend.
- J. No work on the project will begin until;
  - a. project funds (for all project related costs) are in the Diocesan Deposit and Loan fund (the parish, school, cemetery and agency has sufficient funds in the Deposit and Loan fund to begin the project)
  - b. the contract is signed by the Diocese
  - c. certificate of insurance is provided
  - d. bonds are provided
  - e. Preconstruction meeting is held with the parish/DPO, school, cemetery and agency administrators. The project schedule, construction period and protocol for contact between the parties will be formalized.
  - f. contractor has provided a Master Construction Schedule
  - g. contractor has provided a Schedule of Values
  - h. Notice to Proceed is issued

#### K. Change Orders

All change orders are to be submitted to the Diocesan Chief Financial Officer and Director of Facilities, and authorized by an Attorney in Fact for the corporation. Any and all proposed changes (proposed change orders) are to be reviewed by the Building Committee for recommendation to the Bishop. No item is a change order until reviewed by the Building Committee and approved by the Bishop. Each item that is requested as a change will state the reason for the change; and the funding source is identified for the change.

#### H. Project Reports

1. The applicant, in conjunction with the architect/engineer/consultant, is responsible for the successful execution of the work at the site.
2. All requests for progress payments must be submitted by the architect to the applicant for approval. The applicant will then send the invoices to the Chancery Office with a request for payment. The

request for payment and/or progress payment will be signed by the contractor, the applicant and architect/engineer/consultant.

3. At the completion of the project, the architect/engineer/consultant will send to the Chancery Office a detailed report of the total cost, including architect's fees, other fees for survey, surety bonds and total payments made to the general contractor, with a detailed breakdown of the project for major items such as site development, concrete, heating, plumbing, electrical, labor, etc. He will present two (2) complete set of plans "as built" drawings.
4. The architect/engineer/consultant must also file the Notice of Completion as required by law.

## **VII. Insurance Requirements**

SURETY BONDS AND INSURANCE are the responsibility of contractors. These requirements, where applicable, will be verified by the Diocesan Insurance Administrator at the time the contract is signed.

### **A. Surety Bonds**

1. Surety Bonds for Performance and Labor and Material are to be provided by the contractor on all contracts for new construction. Bonds are to be for 100% of the contract price and are to be submitted on the current A. I. A. Document A31 1. The Diocese reserves the right to reject any bonding company because of rating.
2. On competitive bidding, the cost of the bonds is to be included in the contractor's bid price.
3. On negotiated contracts the cost of the Surety Bond is to be itemized as a separate cost.
4. Any request for waiving of the Surety Bond requirement on new construction must be approved. The inability of a contractor to be properly bonded may be reason for disqualification.
5. On contracts for remodeling of existing structures or for maintenance work, Surety Bonds may not be required at the discretion of the Building and Maintenance Committee.
6. All bonds are to be submitted to the Diocese Finance Office for approval at the time the contract is delivered for signature.

### **B. Insurance**

1. Every contractor shall be required to provide a Certificate of Insurance demonstrating that he carries acceptable Workers' Compensation and Liability insurance. The details of the Diocesan insurance requirements will be included in the General Conditions at bid time or are available from the owner's insurance administrator, Gallagher Heffernan, Inc., P. O. Box 7443, San Francisco, CA 94120-7443.
2. The certificates are to be issued by the contractor's insurance carrier and are to be filed with the owner's insurance administrator prior to contract signing.
3. The filing of insurance certificates applies to all work performed by independent contractors, whether it be new construction, remodeling or maintenance.

12 Step Project Review by the Building and Maintenance Committee

Step	What Happens	Who is involved
Step 1: Discussion on the local level	Discussion of the project and alternatives Use of other facilities in the Deanery. How does the project serve the community? How does the project address the Pastoral Plan?	Discussion with the local community, finance committee and building committee.
Step 2: Discussion on the diocesan level	For any item affecting the place of worship environment; review and approval.	Environment and Art Committee
Step 3: Discussion on the diocesan level	For any item affecting the school; for review and approval.	Superintendent of Schools
Step 4: Discussion on the diocesan level	Review of the Funding Plan. Review and approval of the Funding Plan. The Bishop will review the recommendations of the Finance Council for approval. Applicant can engage the consultant, architect and/or engineer.	Finance Council and parish, school cemetery or agency; the Bishop.
Step 5: Discussion on the diocesan level	Review of the consultant, architect and/or engineer. Recommendation to the Bishop to approve the selection consultant, architect and/or engineer. Approval to proceed with Working Drawings.	Building Committee and parish, school, cemetery or agency, and the Bishop.
Step 6: Discussion on the diocesan level	Review and approval of the Working Drawings. Re-evaluation of the probable costs. Review of the Funding Plan.	Building Committee and parish, school, cemetery or agency.
Step 7: Discussion on the diocesan level	Review of the probable costs. Review and approval of the Funding Plan.	Finance Council and parish, school cemetery or agency.
Step 8: Discussions on the diocesan level	Working Drawings and all project documents are to be signed by the applicant, consultant, architect and/or engineer and diocese. Written approval to bid the project.	Building Committee and parish, school, cemetery or agency. Consultant, architect/engineer, diocese.
Step 9: Discussion on the local and diocesan level	Advertise bid and/or invite approved contractors. Conduct a pre-bid job walkthrough. Collect bids/proposals at the Chancery Office. The Bishop reviews the Building Committee's recommendation and awards the contract.	Parish, school, cemetery or agency; assistance by diocese Finance / Facilities and Building Committee; the Bishop.
Step 10: Discussion on the diocesan level	Change Orders. ALL change orders are to be reviewed and recommended to the Bishop for approval.	Building Committee, the Bishop.
Step 11: Local level	Project reports. Summary of project progress, delays changes and costs.	Parish, school, cemetery or agency, along with the consultant, architect and/or engineer.
Step 12: Local and diocesan level	At project completion; the final report is provided to the Building Committee. The Committee recommends accepting the project as complete and filing a Notice-of-Completion. The Bishop will review the recommendations of the Building Committee for approval. The consultant, architect/engineer files the Notice-of-Completion. The contractor is paid the final retention 45 days after the Notice-of-Completion is filed.	Building Committee; parish, school, Cemetery or agency; consultant, architect and/or engineer; the Bishop.

**COST ESTIMATE SUMMARY AND ANTICIPATED TIME SCHEDULE**

<b>Parish/Agency:</b> _____	<b>Date Prepared:</b> _____
<b>Site Number:</b> _____	<b>Budget Ref. No.:</b> _____
<b>Project Name:</b> _____	<b>CFIS Ref No.:</b> _____
<b>Prepared by:</b> _____	<b>ENR Index:</b> _____
<b>Request for:</b> A <input type="checkbox"/> P <input type="checkbox"/> W <input type="checkbox"/> C <input type="checkbox"/> E <input type="checkbox"/>	

Site Acquisition   Plans   Working Drawings   Construction   Equipment

- |   |    |   |      |
|---|----|---|------|
| <b>1. Site Acquisition</b> <span style="border: 1px solid black; padding: 2px;">Acres:</span> |    |   |      |
| A. Purchase Price of Property   | \$ | - |      |
| B. Appraisals   | \$ | - |      |
| C. Costs Incurred in Escrow   | \$ | - |      |
| D. Surveys  | \$ | - |      |
| E. Other Costs (Title Report, Legal, other)   | \$ | - | \$ - |
| <br>  |    |   |      |
| <b>2. Plans and Working Drawings</b> <i>(Total may not exceed 13% of construction)</i>        |    |   |      |
| A. Architectural Fee for Preliminary Plans  | \$ | - |      |
| B. Architectural Fee for Working Drawings   | \$ | - |      |
| C. Project Management   | \$ | - |      |
| D. City/County Planning Department  | \$ | - |      |
| E. City/County Permits and Fees   | \$ | - |      |
| F. Preliminary Tests <i>(soils tests)</i>   | \$ | - |      |
| G. Other costs (Legal, A/E for PD and Permits)  | \$ | - | \$ - |
| <br>  |    |   |      |
| <b>3. Construction</b>  |    |   |      |
| A. Utility Service  | \$ | - |      |
| B. Site Development, Service  | \$ | - |      |
| C. Site Development, General  | \$ | - |      |
| D. Other Site Development   | \$ | - |      |
| E. Reconstruction   | \$ | - |      |
| F. New Construction <i>(building) (w/ Group I equipment)</i>                                  | \$ | - |      |
| G. Other  | \$ | - | \$ - |
| <br>  |    |   |      |
| <b>4. Tests and Inspections</b>   |    |   | \$ - |
| <br>  |    |   |      |
| <b>5. Contingency</b>   |    |   | \$ - |
| <br>  |    |   |      |
| <b>6. Construction Management</b> <i>(if justified)</i>                                       |    |   | \$ - |
| <br>  |    |   |      |
| <b>7. Architectural and Engineering Oversight</b>   |    |   | \$ - |
| <br>  |    |   |      |
| <b>8. Total Construction Costs</b> <i>(items 3 through 7 above)</i>                           |    |   | \$ - |
| <br>  |    |   |      |
| <b>9. Furniture and Group II Equipment</b>  |    |   | \$ - |
| <br>  |    |   |      |
| <b>10. Total Project Cost</b> <i>(items 1, 2, 8 and 9)</i>                                    |    |   | \$ - |

11.	Project Data	Outside Gross Square Feet	Assignable Square Feet	Ratio ASF/GSF	Unit Cost Per ASF	Unit Cost Per GSF
	Construction	0	0	0.000	\$ -	\$ -
	Reconstruction	0	0	0.000	\$ -	\$ -
<b>12.</b>	<b>Anticipated Time Schedule</b>					
	Start Preliminary Plans			Advertise Bid for Construction		
	Start Working Drawings			Award Construction Contract		
	Complete Working Drawings			Advertise Bid for Equipment		
	City/County Final Approval			Complete Project		

**COST ESTIMATE SUMMARY AND ANTICIPATED TIME SCHEDULE**

**Parish/School:** Diocese of San Jose **Date Prepared:** 11/04/04  
**Site Number:** \_\_\_\_\_ **Budget Ref. No.:** \_\_\_\_\_  
**Project Name:** Sample project **CFIS Ref No.:** \_\_\_\_\_  
**Prepared by:** Finance Department **ENR Index:** CCI 4100  
**Request for:** A  P  W  C  E

	Site Acquisition	Preliminary Plans	Working Drawings	Construction	Equipment	
<b>1. Site Acquisition</b>	Acres: _____					
A. Purchase Price of Property						\$ -
B. Appraisals						\$ -
C. Costs Incurred in Escrow						\$ -
D. Surveys						\$ 8,000
E. Other Costs (Title Report, Legal, other)						\$ -
						\$ 8,000
<b>2. Plans and Working Drawings</b> <i>(Total may not exceed 13% of construction)</i>						
A. Architectural Fee for Preliminary Plans						\$ -
B. Architectural Fee for Working Drawings						\$ 691,254
C. Project Management						\$ -
D. City/County Planning Department						\$ 8,000
E. City/County Permits and Fees						\$ 25,000
F. Preliminary Tests <i>(soils tests)</i>						\$ 12,000
G. Other costs (Legal, A/E for PD and Permits)						\$ 4,000
						\$ 740,254
<b>3. Construction</b>						
A. Utility Service						\$ -
B. Site Development, Service						\$ -
C. Site Development, General						\$ -
D. Other Site Development						\$ -
E. Reconstruction						\$ -
F. New Construction <i>(building) (w/ Group I equipment)</i>						\$ -
G. Other						\$ 6,890,670
						\$ 1,750,000
						\$ 8,640,670
<b>4. Tests and Inspections</b> <i>(2%)</i>						\$ 172,814
<b>5. Contingency</b> <i>(3%)</i>						\$ 259,220
<b>6. Construction Management</b> <i>(if justified @ 3%)</i>						\$ -
<b>7. Architectural and Engineering Oversight</b>						\$ 172,814
<b>8. Total Construction Costs</b> <i>(items 3 through 7 above)</i>						\$ 9,245,518
<b>9. Furniture and Group II Equipment</b>						\$ 459,550
<b>10. Total Project Cost</b> <i>(items 1, 2, 8 and 9)</i>						\$ 10,453,322

	Project Data	Outside Gross Square Feet	Assignable Square Feet	Ratio ASF/GSF	Unit Cost Per ASF	Unit Cost Per GSF
<b>11.</b>	Construction	25,000	17,570	0.700	\$ -	\$ -
	Reconstruction	0	0	0.000	\$ -	\$ -
<b>12.</b>	<b>Anticipated Time Schedule</b>					
	Start Preliminary Plans		11/15/04	Advertise Bid for Construction		07/17/05
	Start Working Drawings		03/01/05	Award Construction Contract		08/15/05
	Complete Working Drawings		05/15/05	Advertise Bid for Equipment		05/01/06
	City/County Final Approval		07/01/05	Complete Project		10/15/06

## REQUEST FOR PROPOSAL FOR ARCHITECTURAL AND ENGINEERING SERVICES

### I. Request for Proposal (RFP)

The parish, school, cemetery and agency will send a Request for Proposal (RFP) to architects and engineers for each project. The Building Committee can provide a list of architects and engineers for consideration. The responses to the RFP will be collected and evaluated by the parish or school. The parish or school will submit the finalist(s) to the Building Committee for review and recommendation to the Bishop. The Building Committee may request to interview the finalist(s).

### II. The request for proposal should include at a minimum the following.

1. Description of the proposed project
2. Description of the community being served
3. Estimated project cost
4. Project schedule
5. Statement of the professional services fee and reimbursable costs
6. Experiences with similar type projects
7. Experience with schools and parishes
8. Description of all architectural and engineering services that will be provided.
9. Description of all architectural and engineering services that will not be provided or provided at additional cost.
10. Experience with value engineering to remain within budget
11. Change order experience
12. References from owners and contractors
13. Projects that involved litigation or mediation and a statement concerning the outcome

### III. The parish, school, cemetery and agency will evaluate the proposals submitted by the architects and engineer. The finalist(s) will be forwarded to the Building Committee for review and recommendation to the Bishop.

1. Adequate in-house staffing to accomplish this project.
  - a. Ability of field personnel and commitment of those resources to the Project.
  - b. Support staff, education, experience and backgrounds.
  - c. Nature and extent of home office resources (human and technical).
2. Ability to do the programming, designing and construction administration within the allotted fee. Stipulated Sum fee; the fee is not based on a percentage of the construction cost.
3. Provide all architectural and engineering for the project except for deferred approval items; typically elevators, fire sprinklers and fire alarm systems.
4. Technology consultant included in the fee.
5. Recent experience working with schools and parishes.
6. Change order percentage, five percent or less.
7. List of recent comparable size projects.
8. Ability of consultants to perform the work.
9. Constructability Review, in-house and peer review.
10. Value engineering.
11. Construction cost estimating.
12. Accuracy of construction documents and drawings.
  - a. owner references
  - b. general contractor references
13. Communication; facilitate and coordinate communication between the architect, contractor and the parish, school, cemetery or agency.

## PROJECT MANAGEMENT / CONSTRUCTION ADMINISTRATION

Project Management (PM) / construction administration (CA) is vital to the success of the project and provides the leadership, organization, monitoring and direction to achieve a successful project. Parishes, schools, cemetery or agencies that are not capable of managing their capital projects are advised to hire an architect or construction manager (CM) to manage the project keeping in mind that the role of project management changes during different phases of a project. It is advised that when structuring the terms and conditions of an agreement with an architect/project manager, there be sufficient legal review to ensure that the form and content of the agreement clearly expresses the rights and obligations of both parties relative to scope, time and compensation.

Project management will:

1. Keep all the participants aligned with clear, appropriate objectives throughout the project.
2. Organize and manage all in-house staff, consultants, tasks, budgets and schedules.
3. Coordinate submittals, reviews and approvals.
4. Maintain scope (use and size) cost, and quality criteria and controls.
5. Maintain clear organizational systems and records.
6. Facilitate the communications, meetings, discussion and decision-making of the participants.
7. Provide problem-solving, decision-making and direction to keep the project on track.
8. Provide the leadership to produce a high quality project within budget and completed on schedule.

During the planning phase, project management is focused on general analysis and decision-making necessary to define the project to the level necessary.

During programming, schematic design and design development phases, project management is focused on site analysis, detailed decisions about the program (use and purpose of the project), creating the design, and making all the significant design decisions for the project.

Project managers work with preliminary plans and construction documents to insure that all the documents are produced and approvals secured prior to starting construction.

During the bidding and award of the contract, project management is focused on meeting the requirements of the competitive bid process and getting the low, responsive, responsive bidder under contract.

During Construction, the project management is focused on the construction process; administering the construction effort, providing quality control, activating systems and equipment and assuring that the project is complete, ready for end users operation, and obtaining occupancy permits.

During the immediate post-occupancy period, the project manager takes steps necessary to correct operational problems and follow up on warranties for the building construction, systems, and equipment.

When the parish, school, cemetery or agency assumes responsibility for the project at the end of construction, the focus shifts to the maintenance of the building or systems as an asset to the community with necessary upkeep, and repair, using a minimum of financial and physical resources.

Throughout the various phases of the project management, various local regulations, reviews and approvals must be addressed. Project management has to keep the work on the project going, while simultaneously submitting the required reports; assuring compliance with environmental regulations, building codes and other mandates.

All phases of a project should be managed without losing sight of the initial parish, school, cemetery or agency objectives for the project. It is advised that a project be continually monitored to assure that it still meets those objectives or, if the objectives are changing, that the project has enough flexibility to meet new objectives without affecting scope (use and size) or budget parameters.

**PM/CA/CM procedures to include:**

- I. Maintain logs for;
  - Submittals
  - Request for Information (RFI)
  - Proposed Change Order Log
  - Action Item Log
  - Non-Compliance Issues
  - Punchlist Items
  
- II. Holding Construction Progress Meetings and providing Construction Meeting Minutes. Suggested Construction Progress Meeting agenda to include:

PROJECT NAME  
Construction Progress Meeting No. xx

**Attendees:**

**Distribution:**

**Purpose:**

The purpose of the Construction Progress Meetings is for the Project team to monitor the progress of construction, the schedule and the project budget on a continuous basis and implement solutions for all issues to avoid delays and/or potential claims.

Review of previous meeting minutes.

- I. Submittals:**
- II. Requests for Information:**
- III. Schedule:**
  - Baseline schedule
  - Short Interval Schedule (current week and two week look-ahead)
- IV. Non-Compliance Issues:**
- V. Furniture /Furnishings / Equipment:**
- VI. Proposed Change Orders:**
- VII. Action Items / Other Issues:**
- VIII. Deliverables:**
- IX. Parish / School / Diocese Items:**

Project Information Sheet

Project Location: \_\_\_\_\_ Date: \_\_\_\_\_

Location Contact: \_\_\_\_\_

Telephone \_\_\_\_\_ Facsimile \_\_\_\_\_ Email \_\_\_\_\_

Fund No. \_\_\_\_\_ Account No. \_\_\_\_\_ Amount: \_\_\_\_\_

Architect/Engineer: \_\_\_\_\_

Contact: \_\_\_\_\_

Telephone \_\_\_\_\_ Facsimile \_\_\_\_\_ Email \_\_\_\_\_

Contractor: \_\_\_\_\_

Telephone \_\_\_\_\_ Facsimile \_\_\_\_\_ Email \_\_\_\_\_

1. Specifications/Drawings complete: \_\_\_\_\_ Date: \_\_\_\_\_
2. Plans Rooms \_\_\_\_\_ Date: \_\_\_\_\_
3. Public Notice \_\_\_\_\_ Date: \_\_\_\_\_ Date: \_\_\_\_\_
4. Pre Bid Conference -Time/Date: \_\_\_\_\_ Location: \_\_\_\_\_
5. Bid Opening -Time/Date: \_\_\_\_\_ Location: \_\_\_\_\_
6. Building Committee Review: \_\_\_\_\_ Date: \_\_\_\_\_
7. Approved by Bishop \_\_\_\_\_ Date: \_\_\_\_\_
8. Contract signed \_\_\_\_\_ Bonds \_\_\_\_\_ Insurance \_\_\_\_\_
9. Record Contract: \_\_\_\_\_ Date: \_\_\_\_\_
10. Notice to Proceed \_\_\_\_\_ Date: \_\_\_\_\_ Construction days \_\_\_\_\_
11. Begin Construction \_\_\_\_\_ Date: \_\_\_\_\_ Completion Date: \_\_\_\_\_
12. Substantial Completion: \_\_\_\_\_ Date: \_\_\_\_\_
13. Project Completion: \_\_\_\_\_ Date: \_\_\_\_\_
14. Received Warranties  
Roof \_\_\_\_\_ Date: \_\_\_\_\_  
Mechanical \_\_\_\_\_ Date: \_\_\_\_\_  
Electrical \_\_\_\_\_ Date: \_\_\_\_\_  
Plumbing \_\_\_\_\_ Date: \_\_\_\_\_  
Fire Alarm \_\_\_\_\_ Date: \_\_\_\_\_  
Other (s) \_\_\_\_\_ Date: \_\_\_\_\_
15. Building Committee acceptance: \_\_\_\_\_ Date: \_\_\_\_\_
16. Notice of Completion: \_\_\_\_\_ Date: \_\_\_\_\_
17. Pay Retention: \_\_\_\_\_ Date: \_\_\_\_\_

Date revised: 28-Oct-04		Plans Rooms and Builder Exchanges					
Company Name	Contact	Street Address	City	St.	Zip	Phone	Fax
Alameda Builders Exchange	Bidders	3055 Alvarado Street	San Leandro	CA	94577	510/483-8880	510/352-1509
Builders Exchange of Stockton, Inc.	Kim Fuentes	7500 N. West Lane	Stockton	CA	95210	209/478-1000	209/478-2132
Construction Market Data	Bidders	80 Swan Way, Suite130	Oakland	CA	94621	510/636-2480	510/636-2492
Contra Costa Builders Exchange	Shilea Venti	1900 Bates Ave., Suite E	Concord	CA	94520	925/685-8630	925/685-3424
Contractors Connection Referral Serv.	Jan Sanchez	1406 Allman	Oakland	CA	94602	510-531-1719	
F.W. Dodge / McGraw-Hill / Daily Pacific Builder	Tennison Long	1791 Tribute Road, Suite D	Sacramento	CA	95818	916-567-8002	916-922-9389
Peninsula Builders Exchange	Bidders	735 Industrial Road	San Carlos	CA	94070	415/591-4486	415/591-8108
Salinas Builders Exchange	Angie	590-A Brunken Ave.	Salinas	CA	93901	831/758-1624	831/758-6203
San Francisco Builders Exchange	Melanie	850 South Van Ness Ave.	San Francisco	CA	94110	415/282-8220	415/821-0363
San Jose Blue Print	Rej Berti	835 Julian Street	San Jose	CA	95126	408/295-5770	408/286-7122
Santa Clara Builders Exchange	Kanani	400 Reed Street	Santa Clara	CA	95050	408/727-4000	408/727-2779
Santa Cruz Builders Exchange	Gail	2555 Soquel Drive	Santa Cruz	CA	95065	831/476-3407	831/476-6349



## QUESTION ON BID DOCUMENT (QBD)

Project: [Project Name]

Location: [Project Location]

To: Architect/Engineer firm or  
 Parish/School/Diocese contact  
 Address  
 City / State / Zip code  
 Tel. (xxx) xxx-xxxx Fax: (xxx) xxx-xxxx  
 Attention:

QBD No.	#00x	RED'D:	
To A/E:		DATE:	
A to E		DATE:	
A to Contractor		DATE:	
ADDENDUM	REQUIRED	"Y__"	"N__"

From:   
 Firm:

Date:   
 Tel.:   
 Fax:

Type of Information Requested:

Site Work     
  Structural     
  Architectural     
  HVAC  
 Plumbing     
  Fire Protection     
  Electrical     
  Other

Spec. Section:   
 Drawing Sheet:   
 Paragraph(s):   
 Detail(s):

Question Requested:

Question / Comment:

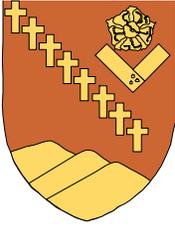
Mark this box if the QBD can be answered by Contractor's review of the documents. Reply with location(s) where the information can be obtained.

Reply:

By:  Firm:  Date:

The reply is an answer to a Bidder's question. The reply does not change the Bid Documents unless it is issued in an Addendum. Copy all contractors that attended the pre-bid conference / job walkthrough.





## BID PROPOSAL RESULTS

DATE: \_\_\_\_\_

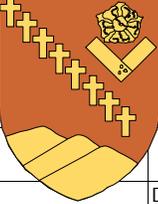
BID No. \_\_\_\_\_

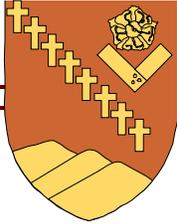
PROJECT NAME: \_\_\_\_\_

LOCATION: \_\_\_\_\_

ARCHITECT/ENGINEER: \_\_\_\_\_

<u>CONTRACTOR</u>	<u>BASE BID</u>	<u>ALT-1</u>	<u>ALT-2</u>	<u>ALT-3</u>	<u>ALT-4</u>
1. _____	_____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____	_____
5. _____	_____	_____	_____	_____	_____
6. _____	_____	_____	_____	_____	_____
7. _____	_____	_____	_____	_____	_____
8. _____	_____	_____	_____	_____	_____
9. _____	_____	_____	_____	_____	_____
10. _____	_____	_____	_____	_____	_____

	<b>BID PROPOSAL RESULT SUMMARY SHEET</b>					
	Date and Time:					
	Project Name:					
	Date:	Project Location:				
	Bidder A	Bidder B	Bidder C	Bidder D	Bidder E	Bidder F
Receipt of:						
<b>Bonds</b>						
Insurance						
Addendum #1						
Addendum #2						
Addendum #3						
<b>Base Bid</b>						
Allowance:						
<b>Total Amount</b>						
Add Alt. 1 [Item description]						
Add Alt. 2 [Item description]						
Deduct Alt. 1 [Item description]						
Deduct Alt. 2 [Item description]						
Deduct Alt. 3 [Item description]						
<b>Unit Price Items.</b>						
Desc. Item #1						
Desc. Item #2						
Desc. Item #3						
Desc. Item #4						



# DIOCESE OF SAN JOSE

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FINANCE OFFICE

Date

To: contact person, title  
Name of the firm  
Address  
City, State, Zip Code

Subject: Notice to Proceed; Contract, project name, and location.

Dear \_\_\_\_\_.

Enclosed, please find your fully executed original copy of the referenced contract dated \_\_\_\_\_. You are hereby notified to commence work in accordance with this contract within ten (10) working days from the date of this "Notice to Proceed".

The construction period is \_\_\_\_ working days.

If you have any question please call at (xxx) xxx-xxxx.

Sincerely,

\_\_\_\_\_  
Name  
Title











## **REQUEST FOR QUOTATION FOR MAINTENANCE, REMODEL AND RECONSTRUCTION PROJECTS**

- I. Request for Quotation (RFQ) for repairs and remodeling.  
The parish, school, cemetery or agency will send a Request for Quotation to contractors for each project. The Building Committee can provide a list of contractors for consideration. The responses to the RFQ will be collected and evaluated by the parish or school. The parish or school will submit the finalist (low, responsive, responsible bidder) to the Building Committee for review and recommendation to the Bishop.
  
- II. The request for proposal should include at a minimum the following.
  1. Description of the proposed project
  2. Prebid job walkthrough time and date
  3. Time, date and location for the collection of bid
  4. Base bid item
  5. Additive alternate item(s)
  6. Deductive alternate items(s)
  7. Project schedule
  8. Invite the contractors to provide an alternate method and cost quotation
  
- III. The parish, school, cemetery or agency will evaluate the proposals submitted by the contractors. The parish and school will recommend the low, responsive, responsible bidder to the Building Committee. The Building Committee will review the proposals and recommendation it's recommendation to the Bishop.  
  
Items to consider in the evaluation of the quotations.
  1. Is the price quotation responsive to the Request for Quotation
  2. Low, responsive, responsible bid
  3. Past experience with the contractor
  4. Other schools and parishes experience with the contractor
  
- IV. See the Appendix for sample Request for Quotations

REQUEST FOR PROPOSAL

**ROOF REPLACEMENT**

**AT**

**PARISH HALL, HOLY SPIRIT PARISH**

1200 Redmond Avenue  
San Jose, CA 9120-2742

Holy Spirit Parish is requesting proposals to replace the roof on the Parish Hall. Questions concerning the work can be directed to:

Rosalie Marty, Pastoral Associate  
Holy Spirit Church  
12000 Redmond Avenue  
San Jose, CA 95120-2742  
Telephone (408) 997-5101  
Facsimile (408) 997-5102

OR

Ian Abell, Director of Facilities  
Diocese of San Jose  
900 Lafayette Street, Suite 301  
Santa Clara, CA 95050-4966  
Telephone (408) 983-0223  
Facsimile (408) 983-0296  
Cell phone (408) 813-7573

**Job-walk**

There is a mandatory job-walk scheduled for **2:00 PM, Wednesday, January 26, 2005**, at the Parish Office, Holy Spirit Church, located at 12000 Redmond Avenue, San Jose, CA 95120-2742. Highway directions are attached.

If you revisit the site after the job-walk, please coordinate your visit with Rosalie Marty, Pastoral Associate at (408) 997-5101.

**Proposals**

Proposals are due by **4:00 PM, Wednesday, February 16, 2005**, at the Parish Office, Holy Spirit Church. Send, email, fax or deliver your proposal to the attention of:

Rosalie Marty, Pastoral Associate  
Holy Spirit Church  
12000 Redmond Avenue  
San Jose, CA 95120-2742  
Telephone (408) 997-5101  
Facsimile (408) 997-5102

**General**

The Parish assumes that the pitch of the roof is walk-able.

All work is to be completed within 30 working days from the Notice-to-Proceed, or the commencement of work.

The contractor is responsible for all labor, materials, connections, transportation, equipment, training, and any other items to complete the work. The contractor is responsible for all measurements and quantities of materials to accomplish this work.

Obtain permit from the City of San Jose. The parish will reimburse the contractor for the cost of the permit.

Clean, remove, and dispose of all roofing related debris upon completion of the project.

At the end of each workday, the site will be left in a safe and clean condition.

Storage of material; store materials following the manufacturer's recommendations.

The contractor will be required to provide a Certificate of Insurance listing the Roman Catholic Bishop of San Jose as additional insured.

The contractor will be required to provide a Certificate of Insurance for Workmen's Compensation Insurance.

Prior to beginning the work, the contractor will provide the owner the Material Safety Data Sheets (MSDS) for all products used on this project.

Application for progress payment; include Conditional Waiver and Release with the application for payment. For final payment; include the Unconditional Waiver and Release with the application for payment.

For all roof systems; contractor to contact the Conglas representative for inspections during the application of the roof. The contact information is;

Kurt Wampler  
P. O. Box 247  
Mill Valley, CA 94942  
Telephone and Cell Phone (415) 725-5943  
Facsimile (415) 381-2084

**Substitution of materials:** If the contractor proposes to substitute the Conglas specified materials, the parish must be notified seven (7) days prior to collection of proposals. The contractor is required to present a side-by-side comparison of the proposed product and offer the same warranty.

On the Bid Form / Proposal; stipulate the warranty period for materials and workmanship. Provide warranty information from the material manufacturer.

**Bid Form**

Please provide proposals listing the following:

### **Proposal No. 1**

Remove the existing concrete tile for reuse, remove and dispose of existing underlayment and sheet-metals, install Conglas –Conform SBS Modified Bitumen smooth surface underlayment, reinstall tile. See attached Conglas –Conform SBS information sheet. Provide replacement concrete tile to match existing tile -due to missing tile or due to breakage during the removal process.

#### **Unit Cost Item No. 1, Proposal No. 1**

Provide a cost per square for replacement concrete tile. The parish anticipates that not more than 5% of the roof tiles will be replaced. Care must be taken when removing and reusing the existing tiles. Randomly mix the new tile with the existing tile. Provide the parish a sample replacement tile for their review and approval.

#### **Unit Cost Item No. 2, Proposal No. 1**

Cost per square to replace damaged roof deck.

#### **Unit Cost Item No. 3, Proposal No. 1**

Install new built-up roofing in “well area”. Cold-process, provide and install Conglas system no. ND-3M4-CFG. See attached sheet listing Conglas Fiberglass Modified Bitumen Roof Systems. Cap sheet is Conform SBS Granulated.

1. Provide and install all sheet metal as required following good roofing practices. Sheet-metal includes but not limited to; valleys, curbs, flashings, galvanized nosing, ridge flashings, rain diverters, roof jacks, pitch pockets, etc.
2. Reinstall tiles using stainless nails and stainless wire; or copper nails and copper wire.
3. All large vents, hooded vents, wall or box outlets and scuppers are to be removed, cleaned, primed and reset according to the manufacturer’s specifications. If any metal is rusted or damaged beyond practical reuse, it will be replaced with new at an additional cost for material only.
4. All small vent flashings four inches and under and tube or 2 x 3 outlets are to be replaced with new. Where it is not practical to use roof jacks on projections, pitch pockets will be installed.
5. Install new galvanized sheet metal pipe flashings; paint to match the roof color.
6. Replace any damaged vent flashings with new aluminum vent flashings. Install new galvanized metal at gable ends.
7. Paint all vent and pipe flashings.
8. The existing metal coping is to be removed and then reset upon completion of the installation of the wall covering. Where removal of the metal coping is not practical, the existing metal coping is to be left in place and the wall covering is to be run up under its lip. The joints in the existing metal coping are to be caulked upon completion of the walls.
9. Supply and install 2” x 2” galvanized nosing at rake edges.

10. Supply and install ridge flashings at ridge of sloped roof where there is existing ridge flashings.
11. Supply and install new rain diverter in the same location where it was located on the existing roofs.
12. Clean, remove, and dispose of all roofing related debris upon completion of the project.
13. Provide warranty certificate for materials and workmanship to the Parish. Stipulate the warranty period for materials, and workmanship. On the Bid Form / Proposal; stipulate the warranty period for materials and workmanship.
14. Provide warranty certificate for materials and workmanship to the Parish. Stipulate the warranty period for materials, and workmanship. On the Bid Form / Proposal; stipulate the warranty period for materials and workmanship.

**Proposal No. 2**

Remove and dispose of the existing concrete tile and underlayment. Install 30 Year Rated Dimensional fiberglass composition shingles per the manufacturers' directions; Presidential TL, Certainteed Landmark, or Parish approved equal. Contractor is to verify that the shingles are recommended for the existing roof pitch. Install Conglas –Conbase MB 40 UL underlayment.

**Unit Cost Item No. 1, Proposal No. 2:**

Supply and install ½” plywood CDX to entire roof, if required after the removal of the slate tile.

**Unit Cost Item No. 2, Proposal No. 2**

Cost per square to replace damaged roof deck.

**Unit Cost Item No. 3, Proposal No. 2**

Install new build-up roofing in the “well area”. Cold-process, provide and install Conglas system no. ND-3M4-CFG. See attached sheet listing Conglas Fiberglass Modified Bitumen Roof Systems. Cap sheet is Conform SBS Granulated.

1. Tear off existing roof and remove all debris from the premises.
2. All large vents, hooded vents, wall or box outlets and scuppers are to be removed, cleaned, primed and reset according to the manufacturer's specifications. If any metal is rusted or damaged beyond practical reuse, it will be replaced with new at an additional cost for material only.
3. Install new galvanized sheet metal pipe flashings; paint to match the roof color.
4. Replace any damaged vent flashings with new aluminum vent flashings. Install new galvanized metal at gable ends.
5. Paint all vent and pipe flashings.
6. All small vent flashings four inches and under and tube or 2 x 3 outlets are to be replaced with new. Where it is not practical to use roof jacks on projections, pitch pockets will be installed.

7. The existing metal coping is to be removed and then reset upon completion of the installation of the wall covering. Where removal of the metal coping is not practical, the existing metal coping is to be left in place and the wall covering is to be run up under its lip. The joints in the existing metal coping are to be caulked upon completion of the walls.
8. Supply and install Conglas –Conbase MB 40 UL underlayment. See attached Conglas Conbase MB 40 UL information sheet.
9. Supply and install Presidential TL asphalt composition shingles per manufacturer's specification, color to be chosen by the owner from standard available colors from the manufacturer.
10. Supply and install 2" x 2" galvanized nosing at rake edges.
11. Supply and install 9" starter at all rake and eve edges.
12. Supply and install ridge shingles at ridge of sloped roof where there are existing ridge shingles.
13. Supply and install ridge flashings at ridge of sloped roof where there is existing ridge flashings.
14. Supply and install new rain diverter in the same location where it was located on the existing roofs.
15. Obtain permit from the City of San Jose. The parish will reimburse the contractor for the cost of the permit.
16. Clean, remove, and dispose of all roofing related debris upon completion of the project.
17. Provide warranty certificate for materials and workmanship to the Parish. Stipulate the warranty period for materials, and workmanship. On the Bid Form / Proposal; stipulate the warranty period for materials and workmanship.

**Proposal No. 3**

Alternate to Proposal No. 2; using 40 Year Dimensional Shingles

**Proposal No. 4**

Alternate to Proposal No. 2; using 50 Year Dimensional Shingles

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January 4, 2005

Attachments (4)

Location map

Conglas –Conform SGS Modified Bitumen sheet; smooth and granulated surface

Conglas –ND-3M4-CFG Fiberglass Modified Bitumen Roof System

Conglas –Conbase MB40 UL underlayment

## REQUEST FOR PROPOSAL

### REPAIR OF ASPHALT AND SLURRY SEAL LOTS AND ROADWAYS

**NAME OF PARISH OR SCHOOL**  
**Address, Santa Clara, CA 95050-4966**

NAME OF PARISH OR SCHOOL is requesting proposals to; remove and replace damaged areas of asphalt concrete, slurry seal the parking lots and roadways; repaint the stalls, curbs, game boards and basketball courts. Questions for the work can be directed to CONTACT PERSON, TITLE, at (408) XXX-XXXX, facsimile no. (408) XXX-XXXX.

There is a mandatory job-walk scheduled for 9:00 AM, **month-date-year**, at the parish/school offices located in the NAME building at ADDRESS, Santa Clara, CA 95050-4966.

Proposals are due by 4:00 PM, DATE AND YEAR, at the parish/school offices.

#### Base Bid:

Includes identified areas to remove and replace damaged asphalt with 2" (two inches) of asphalt; fill all cracks; slurry seal all asphalt; painting includes re-stripe parking lines, arrows, game boards, basketball courts, speed bumps, disabled stalls; repaint curbs. Please list the square footage of the damaged asphalt to be removed and replaced. Please list the square footage of the asphalt to be slurry sealed.

Include slurry seal of the kitchen area in the Base Bid; the parish may not choose to do Additive Alternate No. 3, listed below.

The parish assumes that the existing asphalt concrete is 2" (two inches) thick. Please provide a separate cost for 4" (four inches) of asphalt, if it is determined during construction that the asphalt is 4" thick.

#### Additive Alternate No. 1:

Carport area: Overlay with asphalt to channel rainwater to the storm drain located at the right rear of the carport.

#### Additive Alternate No. 2:

Install asphalt concrete at corner of track and center parking-carport. Excavate, add base rock, grade and pave with 2" (two inches) asphalt concrete.

#### Additive Alternate No. 3:

Parish Hall kitchen area; remove and replace the existing asphalt with 2" (two inches) of asphalt concrete. Please list the square footage of the damaged asphalt to be replaced.

The selected contractor will be required to provide a Certificate of Insurance listing the Diocese of San Jose as additional insured.

Prior to beginning the work, the contractor will provide the Parish Administrator the Material Safety Data Sheets (MSDS) for all products used on this project.

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## **GENERAL**

The contractor is responsible for all measurements and quantities of materials.

The work involves:

1. Removing and replacing the damaged asphalt concrete in the areas identified below.
2. Cleaning all cracks and filling with crack filler.
3. Slurry sealing the parking areas, parking lot adjacent to the school, roadways, and the two interior courtyards.
4. Priming asphalt with oil-spot seal, where there is motor oil, hydraulic oil or other oils on the asphalt.
5. Repaint the parking stalls, speed bumps, directional arrows, curbs, disabled parking, game boards adjacent to the school, the two basketball courts in the parking lot. There are yellow curbs in the main parking lot –basketball courts. There are red ‘no parking-fire zone’ curbs through out the site. Repaint the blue curbs at the disabled parking stalls. Repaint the disabled parking stalls. Repaint the cross walk lines. Repaint the limit lines.
6. The parish will change the orientation of the parking stalls along DeAnza Blvd., from parallel, to pull-in parking.

## **SCHEDULE**

The parish would like the work completed three weeks after the approval of the proposal.

## **MATERIALS**

Prior to beginning the work, the contractor will provide the Material Safety Data Sheets (MSDS) to the Parish Administrator. If the contractor will use products different than those contained in this Request for Proposal; the contractor must discuss and obtain approval of the substitution prior to collection of proposals.

### Crack filler

Use OverKote crack filler by Reed & Graham Inc., or parish approved equal. Properly clean and prepare all cracks to be filled, following manufacturer’s directions.

### Oil-spot seal

Use OverKote Oil-Spot Seal by Reed & Graham Inc., or parish approved equal. Properly clean and prepare the area, following manufacturer’s directions.

### Slurry seal

Use OverKote by Reed & Graham Inc., or parish approved equal. Properly clean and prepare the asphalt, following manufacturer’s directions.

Slurry seal application rate: 25 to 35 gallons per 1,000 square feet.

Add 2 to 3 pounds of 30 mesh sand per gallon in the roadways and other areas where the surface is rough.

Additive to OverKote slurry seal: OverKote Plus, latex additive at a 2% - 2 gallons per hundred gallons.

Paint Materials

Contractor to provide traffic paint for all work. Please identify the type of traffic paint and the manufacturer in your proposal.

**REMOVE AND REPLACE (R/R) ASPHALT LOCATIONS**

1. Rectory driveway; Remove and replace asphalt in three areas and prune tree roots.
2. Rectory driveway; remove and replace a section asphalt.
3. Walkway; remove and replace asphalt.
4. Main Entrance driveway; Remove and replace a section of asphalt, there is a long crack running parallel to the driveway.
5. Rectory and parish offices; remove and replace a section of asphalt.
6. Driveway at end of school building and center; remove and replace a section of asphalt.
7. Maintenance Shop driveway; at entrance to driveway, remove and replace a section of asphalt.
8. Maintenance Shop driveway; remove and replace a section of asphalt including the cross walk area.
9. Maintenance Shop driveway adjacent to the maintenance shop; remove and replace a section of asphalt.
10. Maintenance Shop driveway; remove and replace a section of asphalt, there is a long crack.
11. Carport and Maintenance area; remove and replace a section of asphalt in front of the carport.
12. Driveway behind the school building; remove and replace a section of asphalt around the storm drain.
13. Driveway behind the school building; remove and replace a section asphalt by the storage area.
14. Driveway behind the school building; remove and replace a section of asphalt at the end of the road.
15. Lower School Courtyard; remove and replace a previously patched area of asphalt adjacent to the planting area; remove and replace a section of asphalt that has been lifted by tree roots (prune roots) adjacent to planting area.

- END OF SECTION -

REQUEST FOR PROPOSAL

**REPLACEMENT OF EXISTING NATURAL GAS LINE(S)**

AT

GATE OF HEAVEN CATHOLIC CEMETERY

22555 Cristo Rey Drive

Los Altos, CA 94024

Gate of Heaven Catholic Cemetery is requesting proposals to replace the existing natural gas line(s) on the site with polyethylene gas lines. The work includes flatwork cuts and replacement; trenching and backfill will be performed by the owner. Questions concerning the work can be directed to:

Ian Abell, Director of Facilities  
Diocese of San Jose  
900 Lafayette Street, Suite 301  
Santa Clara, CA 95050-4966  
Telephone (408) 983-0223  
Facsimile (408) 983-0296  
Cell phone (408) 813-7573

**Job-walk**

There is a mandatory job-walk scheduled for **8:00 AM, Monday, December 20, 2004**, at the Catholic Cemetery offices located at 22555 Cristo Rey Drive, Los Altos, CA 94024.

If you revisit the site after the job-walk, please coordinate your visit with Orlando Herrera at (650) 210-3073.

**Proposals**

Proposals are due by **4:00 PM, Thursday, January 13, 2005**, at the Gate of Heaven Catholic Cemetery office. Send or deliver your proposal to the attention of:

Robert K. Lindberg, Director of Catholic Cemeteries  
Gate of Heaven  
22555 Cristo Rey Drive  
Los Altos, CA 94024  
Telephone (650) 428-3730  
Facsimile (650) 428-3733

**Bid Form**

Please provide proposals listing the following:

Base Bid: Install the polyethylene natural gas piping as detailed below. Install the polyethylene pipe and trace wire from the meter, across the bridge to All Saints Chapel, make the connections as detailed below.

Additive Alternate No. 1: The cost to install the polyethylene pipe with trace wire from the meter to the Catholic Cemeteries office building. Make the connections as detailed below.

Additive Alternate No. 2: The cost to run the high density polyethylene pipe with trace wire from the Catholic Cemeteries offices to the tenant house at the entrance to Gate of Heaven Catholic Cemetery. Make the connections as detailed below.

**General**

The existing 2” wrapped black steel pipe and 2” PVC natural gas lines have minor leaks. This project will replace the existing lines in approximately the same location.

Base Bid

From the gas meter to All Saints Chapel, approximately 1070 linear feet. The contractor will install the new polyethylene pipe with trace wire from the meter to the All Saints Chapel. Make the connections at the meter and All Saints Chapel as detailed below.

Additive Alternate No. 1

From the gas meter to the Catholic Cemeteries office building, approximately 280 linear feet. Install the polyethylene pipe with trace wire. Tie in the polyethylene pipe at the meter and at the Catholic Cemeteries Office building.

Additive Alternate No. 2

Replace the existing gas line from the Catholic Cemeteries office building to the tenant house at the entrance to the cemetery, approximately 948 linear feet from the ‘tee’ at the Catholic Cemeteries office building. Install the polyethylene pipe and trace wire.

The Catholic Cemeteries (owner) has identified the location of the existing natural gas lines with marking paint. The work involves installing polyethylene piping (yellow in color), with a trace wire, per the manufacturers directions. The contractor is to be certified or approved in the installation of the polyethylene piping system, and personnel properly trained/certified in the fusion welding.

The contractor is responsible for all labor, materials, connections, transportation, equipment, training, and any other items to complete the work. The contractor is responsible for all measurements and quantities of materials to accomplish this work.

The contractor will assist the Catholic Cemeteries with obtaining the necessary permits.

The Catholic Cemeteries (owner) will open trenches for the contractor to install the polyethylene pipe, cover the pipe with sand, fill and compact the trench. The owner will repair any utilities that are damaged by the owner during the trenching operation. The contractor is responsible for repairing any utilities damaged during the removal of the flatwork. The locations of the flatwork to be removed and replaced are listed below. The flatwork has been identified with red marking paint.

The contractor will be required to provide a Certificate of Insurance listing the Diocese of San Jose as additional insured.

The contractor will be required to provide certification that they are approved by the manufacturer to install the piping and field personnel have been properly trained in fusion welding.

Prior to beginning the work, the contractor will provide the owner the Material Safety Data Sheets (MSDS) for all products used on this project.

**Restoring / replacing the flatwork**

The contractor will saw cut flatwork, excavate those areas and replace the flatwork to match the existing. The contractor will use Jos. J. Albanese for the replacement/restoration work. The contact information is:

Gail Johanes, Estimator/Project Manager  
Jos. J. Albanese, Inc. Concrete Construction  
840-870 Parker Street  
P. O. Box 667  
Santa Clara, CA 95052-0667  
Telephone (408) 727- 5700  
Facsimile (408) 727-0366  
Cell (408) 210-8104

The owner has identified the flat work to be removed; the areas are marked with red paint. The sections to be removed are typically from expansion joint to expansion joint; or from cold joint to cold joint. One cut involves cutting a concrete sidewalk where the cut is not in an expansion joint or cold joint –adjacent to the electrical structure. The base bid also involves saw cutting the asphaltic concrete roadway across the bridge, cutting the curb and gutter, and installing the polyethylene piping with trace wire.

The contractor will remove the flat work at the following locations;

Items included in the Base Bid

1. Concrete pad at the gas meter; replace to match existing finish
2. Concrete sidewalk at the electrical building; replace to match existing finish
3. Concrete sidewalk at St. Theresa; replace walkway, curb and gutter with ADA accessible ramp
4. Concrete sidewalk, curb and gutter at All Saints Narthex; replace to match existing ADA accessible ramp
5. Concrete sidewalk, with red clay brick (pavers) at the border, behind the All Saints Chapel; replace to match the existing
6. Saw cut curb and gutter and asphaltic concrete roadway over the bridge; replace to match the existing. See attached drawing of the bridge.

There is no flat work involved in Additive Alternates No. 1 and 2.

Spoils can be left on site in the corporation yard for owner disposal. Coordinate delivery of the spoils with the owner prior to placing the spoils in the corporation yard.

**Gas Piping Underground:** PLEXCO PE 2406 (yellow) polyethylene gas distribution pipe with ASTM D251-3, ASTM D3261, and ASTM D2683 fittings with fusion welded joints. Pipe shall be labeled for NATURAL GAS in accordance with CPC.

Underground ferrous gas piping shall be electrically isolated from the rest of the gas system with listed or approved isolation fittings installed a minimum of six inches above grade.

Provide Perfection, or equal, anodeless, single seal riser for transition from below grade polyethylene to schedule 40 steel piping above grade. Minimum horizontal length shall be 30 inches. Minimum vertical length shall be 30 inches, or greater as required. Provide fusion connection to polyethylene pipe below grade, and screwed connections to steel pipe above grade.

(The Cemetery will waive the testing procedure listed in Pipe Protection, D Testing below, if these devices are used).

**Gas piping above ground to 30 inches below ground:** Schedule 40 black steel with beveled ends for welding, with Class 150 welding fittings. Mitering to form elbows or tees will not be permitted; where branch tee connections of welded piping are required, Bonney “Weldolet” fittings may be used if the branch is one-half of the diameter of the main or less. Provide gas service shut-off valves on downstream side of meter and at entry to each building conspicuously marked “GAS” with sign. Size and location of the sign shall be as required by the enforcing authority.

#### PIPE JOINTS AND CONNECTIONS

**Polyethylene Pipe:** Assembled with fusion joints in strict accordance with manufacturer’s instructions.

#### PIPE PROTECTION

- A. Wrap bare galvanized, copper, and black steel pipe buried in the ground and to 6 inches above grade, including piping in conduit, with one of the following or equal:
1. **Polyethylene Coating:** Pressure-sensitive polyethylene coating, “X-Tru-Coat” as manufactured by Pipe Line Service Corporation or “Green Line” wrap as manufactured by Roystrom Products, or equal.
    - a) **Field Joints and Fittings:** Protecto Wrap #1170 tape as manufactured by Pipe Line Service Corporation, or Primer #200 tape by Roystrom Projects, or equal. Installation shall be as per manufacturer’s recommendation and instructions.
  2. **Tape Wrap:** Pressure-sensitive polyvinyl chloride tape, “Transtex #V-10 or V-20”, “Scotchwrap 50”, Slipknot 100, or equal, with continuous identification. Tape shall be a minimum of 20 mills thick for fittings and irregular surfaces, two wraps, 50 percent overlap, 40 mils total thickness. Tape shall be laminated with a suitable adhesive; widths as recommended by the manufacturer for the pipe size. Wrap 20’-0” or longer sections of pipe with an approved wrapping machine.
- B. **Field Joints and Fittings:** Pabco double wrap or polyvinyl chloride tape as above. Provide at least two thickness of tape over the joint and extend a minimum of 4” over adjacent pipe covering. Build up with primer to match adjacent covering thickness. Width of tape of fittings shall not exceed 3”. Tape shall adhere tightly to all surfaces of the fittings without air pockets.
- C. **Cleaning:** Clean all piping thoroughly before wrapping.
- D. **Testing:** Test complete wrap of piping, including all epoxy painted piping with Tinker and Razor Co. test machine (San Gabriel, CA 818-287-5259).

## EXCAVATING

The owner will trench the site, the contractor is to coordinate the trenching activities with the owner. The contractor is responsible for the excavation and trenching at areas the flat work will be removed. The owner will provide barricades and warning signs as required.

## BACKFILLING

The owner will backfill the trench and flat work areas. The contractor is to coordinate the backfilling with the owner; the trenches are to be backfilled as soon as possible after installation of the pipe.

## TRACER WIRES

- A. Install tracer wire for non-metallic gas and water pipe in ground outside of buildings. Use AWG #12 tracer wire and lay continuously below vertical projection of pipe so that it is not broken or stressed by backfilling operations. Solder all joints.
- B. **Terminals:** Precast concrete box and cast iron locking traffic cover, Brooks 3TL, or equal; cover marked with name of service; 6" of loose gravel below box. Plastic terminal board with brass bolts; identify line direction with plastic tags. Test for continuity between terminals, after backfilling, in presence of owner.
- C. **Alternative:** Use electronically detectable plastic tape with metallic core, Terra Tape D, manufactured by Griffolyn Co., or equal; tape 2" wide, continuously imprinted "CAUTION WATER (GAS, etc.) LINE BELOW". Install, with printed side up, directly over pipe, 18" below finish grade. Backfill and material by owner. Terminal boxes not required.

### **Gas Valve or Shut-off Valve above grade:**

1. Provide Milwaukee BB2-100 with tee handle for 2 inches and smaller
2. Provide DeZurik 425 FRS49 for 2-1/2" and larger
3. Provide valves same size as upstream piping. Make any reduction in size of gas piping down stream of shutoff valves.

### **For gas service below grade:**

Molded polyethylene body ball valve: Nordstrom Valves – Polyvalve II for sizes up to 2 inches, and Polyvalve for sizes 2 inches and larger, or equal.

- a) Provide stub ends to match SDR of the piping, arrange for butt fusion welding. Provide valve body material to suit the adjacent piping system.
- b) Provide wrench to suit the valve operator.

## VALVE BOXES

Valve Boxes: Precast concrete or cast iron with cast iron locking type covers lettered to suit service – Brooks No. 3-TL, Christy No. B3, Fraser No. 3, Alhambra A-3004 or A-3005, Alhambra E-2202 or E2702, or equal, with extensions to suit conditions. Cast iron boxes of screw type or slip type, similar to those specified herein, will be acceptable. Use only cast iron

boxes in traffic areas. Provide owner with set of special wrenches or tools as required for operation of valves.

1. Minimum inside dimension or diameter of box: 4" for valve size 3" and smaller and 5" for valve sizes 4" and larger.
2. Where several valves or other equipment are grounded together, provide larger boxes of rectangular "vault" type adequately sized for conditions and similar in construction to those specified above.

December 15, 2004

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#### Attachments

Map Quest location of Gate of Heaven Catholic Cemetery

Gate of Heaven Catholic Cemetery, not to scale

Lake Development Plan, dated March 30, 1970, drawing of the bridge

## **MASTER PLANNING**

Building and Maintenance Committee

### Guidelines

A comprehensive planning document encompassing all functions of the parish, school, cemetery and agency should be updated every five years. Given the complexities of most parishes and school communities, the master planning process is not a step-by-step, linear process but a dynamic process consisting of a mixture of methods. Information and ideas are exchanged at every level, combined and recombined, until a particular approach emerges as a good choice. That approach is developed, often leading to new ideas and combinations, until a feasible plan is constructed and accepted. The plan must be idealistic enough to inspire improvement and change and realistic enough to be implemented successfully over time. This chapter is intended to serve as a guideline for the development of the parish/school Master Plan.

Master plans should have the following elements:

1. **Statement of Purpose**  
The purpose may be interpreted broadly or narrowly. It may be perceived as whatever the community needs or what the parish/school can best provide. The purpose is the underlying reason for capital outlay projects and should be stated in the master Plan.
2. The master plan should address the elements contained in the Pastoral Plan for The Diocese of San Jose.
3. **Description of the community and regional context.**  
The community context is described by contrasting the history of the community with current circumstances in the community and with its likely future, based upon current trends and projections, especially those shaping the environment ten years ahead when the building will come "on-line." Current unmet needs and needs and emerging circumstances dictate the types of services the parish/school must be prepared to provide. The extent to which these emerging circumstances vary from existing and past circumstances dictates the need for changes and additions in services and facilities.  
  
Characterizations of future circumstances must provide a basis for determining whether the unmet needs that generate the demand for new or remodeled facilities will continue, diminish, or increase.
4. **Analysis of community and regional needs.**  
Wherever possible, the description of the community context should be backed up by data and analysis. Factors to be considered are:
  - A. Demographics, county, city or other population studies. Population breakdown by age, gender, race/ethnicity, education, vocation, culture, etc.
  - B. Economic and job market forecasts. Employment statistics, status of major employers in the region, job market trends.

- C. Area community plans. Community development plans, planning and zoning, sustainable public economics and services, capacity of local environments and resources.
5. Projection and analysis of future needs, changes, economic trends and developments. What kinds of traditional and alternative approaches will improve facilities utilization and access, program scope and quality. Which ones are within the purpose of the parish/school. Which one(s) does the parish/school choose to pursue?
  6. Description of the philosophy of the parish/school. This is the interpretation of parish/school purpose and role in the community being served.
  7. Brief description of the scope (use and size) and emphasis of existing programs and services in relationship to the parish/school purpose and philosophy.
  8. Identification of the needs of programs, services, other services and activities, justified in terms of the previous information. The identification of the needs for the services and other activities drives facility decisions and must include the information to make those decisions. The identification of the needs of services and other activities should include:
    - A. The expected life span of each service and activity.
    - B. The current and projected parish/school growth.
    - C. All space, equipment or systems required for each service and activity.
  9. Formulation of long term goals and short term objectives to meet these goals. The time frame for the Master Plan should be as long term as possible, normally five to eight years. Long-term goals allow more time for fund-raising campaigns and developing financing and support for large capital outlay projects.
  10. Analysis of resources, available and needed, to implement these objectives. From the point of view of capital outlay projects, the evaluation of resources includes;
    - A Forecasting feasible funding sources.
    - B Setting appropriation amounts and schedules for the projects.
    - C Projecting future staff and operations costs for building projects.
    - D Determining downstream operations or capital outlay savings for cost efficiency projects.
  11. Implementation plan including tasks, timelines and accountability mechanisms. The timetables associated with the master Plan may be part of an administrative plan for implementation of the Master Plan. It is important that an administrator be responsible for follow through with specific dates for reports or accomplishments.
  12. Preparation of a site design.

13. Identification of facility projects relative to the above steps. The facilities evaluation analyses the 1) capacity, 2) condition, 3) adequacy, and 4) cost efficiency of the existing assets and sets forth objectives of keeping them functioning in at an optimum level. Evaluation of cost efficiency is done by reviewing the operations budget for areas where conservation might be effective and by reviewing future parish/school growth to see where other options might be substituted for a building project. Specific factors that should be considered when evaluating facilities are (not in priority order):
- A Structural and seismic stability.
  - B Changes in building Code.
  - C American's With Disabilities Act (ADA)
  - D Energy and water conservation
  - E Increased electrical infrastructure loads.
  - F Increased utility costs and fees
  - G Removal of hazardous substances, including asbestos.
  - H Consideration of security issues.

When the evaluation of existing facilities is complete, it provides the information to determine:

- A The operations and maintenance budget including deferred maintenance and special repairs, and hazardous substances removal.
  - B Methods for more efficient allocation and utilization of existing facilities.
  - C Identification of the need for capital outlay improvements.
  - D Definition and scope of individual capital outlay projects.
14. Formulation of an implementation and funding plan, subject to periodic evaluation and revision. The Master Plan should be reviewed annually to determine if its goals and stated objectives should be changed. For plans that list specific objectives with timetables, a revision will probably be required every year or two.