

Diocese of Wheeling-Charleston



Guidelines for Major Renovations - Construction

Revised July 2023

Guidelines for Major Renovation and/or Construction in the Diocese of Wheeling-Charleston

This booklet is published as an aid to those charged with planning major renovations and/or construction projects in parishes, schools, or institutions in the Diocese of Wheeling-Charleston. These guidelines are to be used in conjunction with existing Diocesan building procedures, finance policies and procedures of the Diocesan Building and Renovation Commission for constructing or renovating a sacred space. Refer to the procedures of the Building and Renovation Commission when constructing or renovating a sacred space.

Approvals and Costs

- All contracts or purchase of equipment in excess of \$15,000 must be approved in writing by the Diocese. The total cost of a project must be considered, even if it is to be completed in stages, with each stage costing less than \$15,000.
- Any purchase or renovation in excess of \$15,000 must have the approval of the Parish Finance Committee, Parish Pastoral Council, and/or School Board, prior to submitting a proposal to the Diocese for approval.
- All new construction and/or renovation projects must be approved by the Bishop, prior to commencing a capital fund drive for the project and before going out for bid.
- **Any construction or renovation for a church or worship area** must be reviewed by the **Building and Renovation Commission**. The **Department of Catholic Schools** must also review any plans for the construction or renovation of a school or religious education center.



Finances



Funds for the project should be in hand prior to the commencement of construction or renovation of the building. If a loan from the Diocese is necessary, **two (2) times** annual offertory is the normal expected maximum loan amount. The funds in hand and the loan amount must equal the total **PROJECT COST**. A schedule of loan repayment must be established with the Diocesan Finance Office.

Planning Phase

- Planning in new construction or major renovation projects are as follows:
- Develop conceptual plans addressing specific needs.
- Obtain the approval of the Parish Pastoral Council, Parish Finance Council, and/or School Board.
- Present general concept for pastoral approval by Bishop in writing, along with preliminary budget.
- If a capital fund campaign is to be conducted, special approval in writing by the Bishop is to be obtained at this time.
- Select a qualified architect or call the Buildings and Properties Office for assistance in the selection of an architect as required. All architect **AIA contracts** must then be submitted to the Bishop for approval through the Buildings and Properties Office. A contract is then signed between the Bishop and the architect for the project. A complete financing plan must be submitted at this time.
- Once architectural contracts are approved, the architect prepares preliminary sketches for Diocesan approval.
- After consultation with The Liturgical Building and Renovation Commission and the Department of Catholic Schools, a recommendation is presented to the Bishop for approval of the project.
- The architect is to prepare final plans and specifications for the project.
- Plans and specifications are approved by the parish and/or school board.
- Before proceeding further, all of the necessary funds must be on deposit in the construction account of the parish and/or school.
- Plans and specifications are submitted to the Director of Buildings and Properties Office for review. This usually takes a minimum of 10-15 working days. A review will also take place with the Diocesan Liturgical Building and Renovation Commission and the Department of Catholic Schools, if appropriate. **If a project is for a new church or church renovation, the interior appointments proposal requires a special review by the Diocesan Building and Renovation Commission.**



Bid Phase

- The reviewed and approved plans and specifications are now ready for the bidding process.
- The parish and the architect, if involved, choose an acceptable number of contractors to bid upon the job. Buildings and Properties will work with the parish/school to assist in getting bids as needed.
- **All contracts will be either a standard AIA contract or the Diocesan Standard Contract attached hereto.**
- The bids are normally opened at a designated location and time. The general practice is to award the contract to the lowest bidder, providing that all requirements are met. When bids are very close and within a reasonable margin, award may be considered to the second low bidder. It is not appropriate after the contract has been awarded to request that consideration be given to bidders other than the qualified low bidder.

Construction Phase



- After the contractors have been selected through the bid process, and all insurance requirements have been met, the contracts may be signed. The Bishop signs for the Diocese. The Bishop must sign all change orders over \$15,000 of any addition or deletion to the original project in advance. The Pastor can sign change orders under \$15,000 but must notify the Buildings and Properties Office.
 - Application and Certificate of Payment must be submitted for approval to the Buildings and Properties Office. This form must have the approval of the architect and the pastor before payment will be made.
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- It is normal but not mandatory to hold a ten percent (10%) retention from each contract until the total job is approved. While major construction jobs have no-lien contracts, material waivers should be obtained from all contractors on major projects. These documents are kept on file in the Buildings and Properties Office.
 - Should some difficulty arise during the course of construction, the Diocesan Director of the Buildings and Properties Office is always available to assist in working out the difficulty.

Project Finalization

Upon completion of the project, the pastor will sign a note with the Finance Office on behalf of the parish for the repayment of any indebtedness, and, if required, a regular loan repayment schedule will be arranged.

When a project is completed the construction account is closed and the **PROJECT DATA SUMMARY** form completed by the pastor and forwarded to the Buildings and Properties Office to be placed in a Diocesan file.

Renovations



The local pastor should establish a parish committee to assist in the evaluation and justification of any proposed renovations.

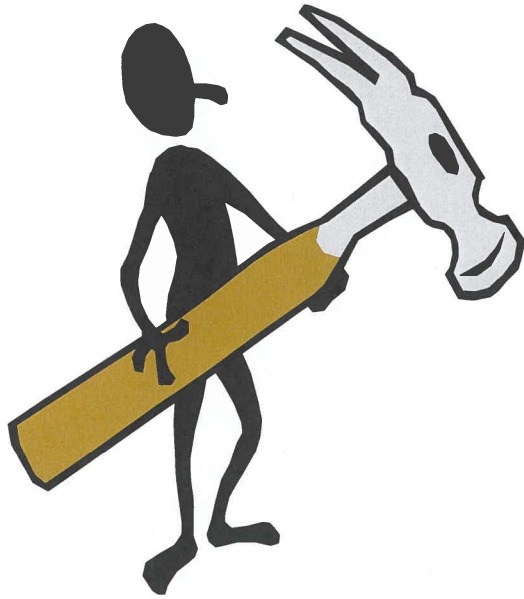
An outline of the description of the proposed project is to be submitted for the Bishop's consideration. A statement of finances should also be submitted with the general outline.

Any renovation to existing Diocesan facilities in excess of \$15,000 shall be considered major with two (2) exceptions:

- Proposed structural renovations shall be considered **major** regardless of cost. The proposed renovations shall be described in detail and submitted to the Bishop and Buildings and Properties Office for review and/or approval.
- Proposed liturgical renovations shall be considered **major** regardless of cost. The proposed renovations shall be described in detail and submitted to the Diocesan Building and Renovation Commission for review and/or approval.

Major improvements shall be treated as a new project requiring preliminary evaluation and step-by step procedures, each to be approved by the Bishop and the Director of Buildings and Properties, the same as for new building and construction programs.

Maintenance and Repair



- Each parish council should have an Advisory Committee to assist the Pastor in the evaluation and justification of routine repairs and maintenance.
 - The Pastor (assisted by the Advisory Committee) is authorized to contract for routine repairs and maintenance up to a cost not to exceed \$15,000, provided the cost can be financed on the parish level.
 - Expenditures for maintenance and additions of equipment to existing facilities, where the cost may exceed \$15,000, shall be described in detail in a proposal to be submitted to the Bishop and the Director of Buildings and Properties, for study and approval in writing.
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- Any structural repairs and/or changes shall be described in detail and submitted to the Bishop and the Director of Buildings and Properties for review.
 - Any liturgical changes, which include the purchase of appointments, shall be described in detail and submitted to the Diocesan Building and Renovation Commission for review and approval.
 - It is recommended that there be a minimum of two (2) bids obtained for all maintenance or repair projects over \$15,000, but it may be waived with approval from Buildings & Properties under certain situations. All bids should be sent to the Buildings and Properties Office with the recommended bid clearly marked.
 - All contracts for work for the Diocese of Wheeling-Charleston shall be in the **Standard AIA Form of Agreement** between owner (Diocese) and contractor **or the Diocesan Standard Form of Agreement**. This Agreement must indicate that the contractor is fully covered by Workmen's Compensation Insurance, Public Liability and Property Damage Insurance. (See insurance chart)

Environmental



When a parish/school or other entity becomes aware of an environmental issue, such as: asbestos, radon, lead, etc., the Buildings and Properties Office should be consulted immediately.

All Diocesan schools are subject to Federal Regulations regarding all hazardous materials.

All parishes, missions and other institutions are subject to local and state regulations regarding hazardous materials.

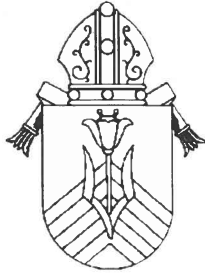
Real Estate

- No real estate is to be purchased or sold without the authorization in writing from the Bishop.
- In all planned transactions, the Diocesan Director of Buildings and Properties is to be consulted for direction.
- In most cases, the Diocesan attorney, or another attorney approved by the Diocese, will handle the legal transaction.
- All properties are to be held in the name of the “**Roman Catholic Bishop of the Diocese of Wheeling-Charleston.**”
- Prior to the closing of the transaction, the proposed Deed, Certificate of Title, and Plat of Property must be forwarded to the Chancery to be reviewed by the Director of Buildings and Properties and Diocesan attorney.
- After the closing, copies of all paperwork are to be sent to the Buildings and Properties Office. The original deed, once recorded, will be kept in the Chancery Archives.



The Chart below indicates the minimum insurance coverage required for specific projects and/or contracts. All Insurance Certificates should be submitted for Diocesan review prior to the beginning of the project. Questions regarding insurance matters may be directed to the Catholic Mutual Office or Buildings and Properties Office.

Insurance Requirements	New Construction or Renovations		Repair Contracts	Professional/ Mechanical Service Contracts
	Project Costs Less than \$1 Million	Project Costs More than \$1 Million		
Comprehensive General Liability, Including products	\$1 Million Limit	\$2 Million Limit	\$1 Million Combined Single Limit	\$1 Million
Comprehensive Auto Liability Work Site Vehicle	\$1 Million	\$1 Million	\$1 Million	\$1 Million
Professional Liability	\$1 Million	\$5 Million	N/A	\$1 Million or Value of Building, Which Ever is Greater
Builders Risk Coverage	Provided by Catholic Mutual Theft Coverage	Provided by Catholic Mutual Theft Coverage	Provided by Catholic Mutual Theft Coverage	N/A
Worker's Compensation	Statutory Coverage is Required	Statutory Coverage is Required	Statutory Coverage is Required	Statutory Coverage is Required
Hold Harmless Agreement	Required	Required	Required	N/A
Additional Insured Certificate	Required	Required	Required	N/A
Prepared By: Buildings and Properties Office				



Buildings & Properties Office

Diocese of Wheeling-Charleston
Post Office Box 230, Wheeling, WV 26003
(304) 233-0880; Fax: (304) 230-3401

Financing Proposal for Construction/Renovations And/Or Property Purchase

Parish Name: _____ Type Project: _____

Location: _____

Project Coordinator: _____ Telephone # _____

Estimated Cost:

1.	Architect/Survey/Soil Testing	\$	_____
2.	Site Work/Septic/Water System	\$	_____
3.	Construction	\$	_____
4.	Furnishings/Equipment	\$	_____
5.	Property Purchase	\$	_____
	Total Cost.	\$	_____

Financing Methods:

1.	Certificate of Deposit with Diocese	\$	_____
2.	Other Reserves	\$	_____
3.	Other (Specify – Stock, Bonds, Etc.)	\$	_____
4.	Diocesan Loans	\$	_____
5.	*Other Loans (Local Banks)	\$	_____
6.	*Grants	\$	_____
	Total Cost.	\$	_____

Approval Requested By:

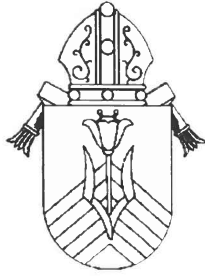
Pastor: _____ Date: _____

Parish Finance Council President: _____ Date: _____

Final Approval: Finance _____ V.G. _____ Buildings & Properties _____

Bishop: _____ Date: _____

- Letter or other documentation should support other Loans and Grants.
- Parish Finance Council President must sign document. Any expenditure over \$50,000 must have minutes of the meeting approving project attached to this form.
- Diocesan Building and Renovation Liturgical Committee must approve any Liturgical issues and their approval attached to this form.



Buildings & Properties Office

Diocese of Wheeling-Charleston
Post Office Box 230, Wheeling, WV 26003
(304) 233-0880; Fax: (304) 230-3401

Financing Proposal for Construction/Renovations And/Or Property Purchase

School Name: _____ Type Project: _____

Location: _____

Project Coordinator: _____ Telephone # _____

Estimated Cost:

1.	Architect/Survey/Soil Testing	\$	_____
2.	Site Work/Septic/Water System	\$	_____
3.	Construction	\$	_____
4.	Furnishings/Equipment	\$	_____
5.	Property Purchase	\$	_____
	Total Cost.	\$	_____

Financing Methods:

1.	Certificate of Deposit with Diocese	\$	_____
2.	Other Reserves	\$	_____
3.	Other (Specify – Stock, Bonds, Etc.)	\$	_____
4.	Diocesan Loans	\$	_____
5.	*Other Loans (Local Banks)	\$	_____
6.	*Grants	\$	_____
	Total Cost.	\$	_____

Approval Requested By:

Pastor (Designated): _____ Date: _____

Principal: _____ Date: _____

School Board President: _____ Date: _____

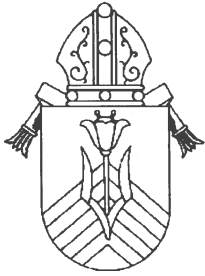
Final Approval: Finance _____ V.G. _____ Buildings & Properties _____

Schools Office _____

Bishop: _____ Date: _____

- Letter or other documentation should support other Loans and Grants.
- Parish Finance Council President must sign document. Any expenditure over \$50,000 must have minutes of the meeting approving project attached to this form.

Buildings & Properties Office



Diocese of Wheeling-Charleston
Post Office Box 230, Wheeling, WV 26003
(304) 233-0880; Fax: (304) 233-0890

Project Data Summary

Name: _____

Location: _____

Project _____

Description: _____

Date Project Approved: _____ Project Complete /Dedication Date: _____

Architect: _____ Project Estimated Cost: _____

Architect Fee & %: _____ Total Paid: _____

Land Acquisition, if any: _____

Area of Land: _____ Value of Land: \$ _____

General Contractor: _____

Contract Amount: \$ _____ Change Orders: \$ _____ Total: \$ _____

Sub-Contracts (Name & Amount): _____

Owner's Direct Cost – Furnishings, etc.: \$ _____

Total Cost of Project: \$ _____

General _____

Comments: _____

Estimated Monthly Payments on 5.5% Interest Bearing Loans**Estimated Payoff 20 Years**

Two times annual offertory is the normal expected loan amount

At 5.5% interest, a 20 year loan requires 17% of annual offertory as annual debt payments.

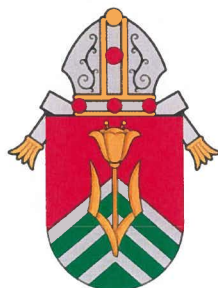
The 17% requirement is provided you only borrow two times annual offertory.

All amounts rounded to nearest dollar.

Loan Amount	Estimated Monthly Pymt	Over 20 Years Total Interest Pd	Over 20 Years Total Paid	Expected Annual	Over 20 Years Annual Pymt
				Offertory to Afford Loan	
\$10,000	\$69	\$6,510	\$16,510	\$5,000	\$825
\$25,000	\$172	\$16,273	\$41,273	\$12,500	\$2,064
\$50,000	\$344	\$32,546	\$82,546	\$25,000	\$4,127
\$100,000	\$688	\$65,094	\$165,094	\$50,000	\$8,255
\$200,000	\$1,376	\$130,185	\$330,185	\$100,000	\$16,509
\$300,000	\$2,064	\$195,278	\$495,278	\$150,000	\$24,764
\$400,000	\$2,752	\$260,372	\$660,372	\$200,000	\$33,019
\$500,000	\$3,439	\$325,466	\$825,466	\$250,000	\$41,273
\$600,000	\$4,127	\$390,557	\$990,557	\$300,000	\$49,528
\$700,000	\$4,815	\$455,650	\$1,155,650	\$350,000	\$57,783
\$800,000	\$5,503	\$520,744	\$1,320,744	\$400,000	\$66,037
\$900,000	\$6,191	\$585,838	\$1,485,838	\$450,000	\$74,292
\$1,000,000	\$6,879	\$650,929	\$1,650,929	\$500,000	\$82,546
\$1,250,000	\$8,599	\$813,662	\$2,063,662	\$625,000	\$103,183
\$1,500,000	\$10,318	\$976,394	\$2,476,394	\$750,000	\$123,820
\$1,750,000	\$12,038	\$1,139,127	\$2,889,127	\$875,000	\$144,456
\$2,000,000	\$13,758	\$1,301,860	\$3,301,860	\$1,000,000	\$165,093
\$2,250,000	\$15,477	\$1,464,590	\$3,714,590	\$1,125,000	\$185,730
\$2,500,000	\$17,197	\$1,627,323	\$4,127,323	\$1,250,000	\$206,366
\$2,750,000	\$18,917	\$1,790,056	\$4,540,056	\$1,375,000	\$227,003
\$3,000,000	\$20,637	\$1,953,789	\$4,952,789	\$1,500,000	\$247,639
\$3,250,000	\$22,356	\$2,115,522	\$5,365,522	\$165,000	\$268,276
\$3,500,000	\$24,076	\$2,278,254	\$5,778,254	\$1,750,000	\$288,913
\$3,750,000	\$25,796	\$2,440,985	\$6,190,985	\$1,875,000	\$309,549
\$4,000,000	\$27,515	\$2,603,718	\$6,603,718	\$2,000,000	\$330,186
\$4,250,000	\$29,235	\$2,766,450	\$7,016,450	\$2,125,000	\$350,823
\$4,500,000	\$30,955	\$2,929,183	\$7,429,183	\$2,250,000	\$371,459
\$4,750,000	\$32,675	\$3,091,916	\$7,841,916	\$2,375,000	\$392,096
\$5,000,000	\$34,394	\$3,254,649	\$8,254,649	\$2,500,000	\$412,732

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LIEN RECEIPT/RELEASE



I hereby acknowledge that I have been a Subcontractor/Material man, in connection with a contract job located at _____, owned by the Roman Catholic Diocese of Wheeling-Charleston, and I hereby acknowledge receipt of the sum of \$_____, and do RELEASE my inchoate right of Mechanic's and Material man's Lien upon said job site for work performed and materials furnished by me to same through the ____ day of _____.

Signature

Date