Procedure for Maintenance and Repair Projects in the Diocese of Jackson

Definitions:

- **New construction** as used in this document refers to site preparation for, and construction of, entirely new structures and/or significant extensions to existing structures whether or not the site was previously occupied.

- **Remodeling** as used in this document does not refer to maintenance, repairs, and renovation. Remodeling does refer to a change in building footprint, reconfiguration of the original floor plan, or a substantial change to the elevation of a building or structure in which the cost makes it a qualifying event (see Qualifying projects below).

- **Diocesan Entity** as used in this document refers to a parish, mission, or school.

- **Building Committee** as used in this document refers to a committee organized by a parish or mission’s pastor or LEM, or, in the case of schools, by the superintendent, pastor, and principal, who shall serve as a consultative and review committee throughout the life of the project. A member of the Finance Council along with other members of the parish/mission, or people who actively support the school, shall make up the Building Committee. Suggestions for other Committee members include realtors, engineers, building contractors, attorneys, accountants, bankers, etc.

- **Maintenance and Repair** as used in this document is work required to keep existing buildings, equipment and utilities in their operational state. This does not include any modification that changes the character, scope, or size of the original structure, facility, utility or improved area.

- **Emergency repair** as used in this document means repairs which are necessary, as a result of an emergency situation. The emergency repair should be designed to protect and maintain the functionality of the habitable space or remove immediate threat or injury to persons, property or immediate threats of violations of law.

- **Registered Design Professional** as used in this document means an individual who is registered or licensed to practice their respective design profession as defined by the statutory requirements of the professional registration laws of the state of jurisdiction in which the project is to be constructed, i.e. architect, engineer. A registered design professional does not include a plumber, electrician, etc..

- **Volunteer** as used in this document shall follow the definition as used on page 3 of the Volunteer Coordinator Manual as published by the Catholic Mutual Group. It is the responsibility of the Parish Pastor or School Principal that all volunteers comply with the Volunteer Coordinator Manual published by the Catholic Mutual Group and with all state and local laws requiring the issuance of a proper license.

Purpose:

To provide a clear procedure for involving key personnel at appropriate intervals to ensure that Maintenance and Repair Projects proceed according to an orderly process in which the Bishop gives his approval.
Project Cost:

Pursuant to The Parish Finance Council Dccrcc and Guidelines dated 2019 all projects which exceed 3% of a Diocesan Entity’s annual operating income based upon the previous fiscal year end are considered extraordinary expenditures and requires the advice of the Parish Finance Council and the approval of the Bishop.

The Parish Finance Council Decree and Guidelines also states on page 2 under General Financial Regulations “The following are decreed to be Extraordinary Acts of Administration and are reserved to the approval of the Diocesan Bishop according to the norms of law as it relates to this document:

a. To sell, exchange, mortgage or lease immovable Church Property;

f. To build, raze, or rebuild in a new form a parish building or to make extraordinary repairs upon such buildings;

h. To spend amounts over and above the amount specified as being ordinary administration for the parish. (see previous paragraph)

The Diocese of Jackson has a standard contract form that is used for projects that require the Bishops signature. The Diocese also accepts the American Institute of Architect (AIA) contract form as well.

The parish or school should contact the Director for the Department Temporal Affairs to review the financing options for the proposed project prior to soliciting for bids.

Establishing Project Scope:

Maintenance and Repair Projects may or may not need the assistance of a registered design professional. Depending on the complexity of the project, a registered design professional can help to create a scope of work which may include the design of plans and specifications and/or help in the orderly process and management of a project. The finance council and/or building committee will make the final decision regarding hiring the services of a registered design professional.

Should it be the decision of the Finance Council or Building Committee not to employ the services of a registered design professional it is still critical to create a “scope of work” for the project. A well written scope of work minimizes confusion and conflict and provides a vehicle for a more equitable bid process.

Soliciting Bids:

Once a “scope of work” has been completed and approved by the Finance Council or Building Committee the Diocese recommends a minimum of three (3) bids for the project. The Finance Council or Building Committee will review the bids. Should the bids be acceptable to the council or committee a decision to accept a bid can be made.

It is important to note that depending on the scope of work a local contractor licenses (local and/or state) may be required. A copy of the contractor’s licenses should be included with the bid submission. (if required.)
**Contractor Requirements:**

1. Contractor must have all required insurance certificates, state license in accordance with Mississippi State Statute 73-59-1 and 31-3-1. Contractors must also obtain any required local licenses and permits.

2. Contracts under $100,000, at the Owner’s option, Contractor shall furnish performance and payment bonds in a form and issued by a company satisfactory to Owner. Contracts over $100,000, Contractor shall furnish performance and payment bonds in a form and issued by a company satisfactory to Owner.

3. The final contract must be worded in compliance with the standard diocesan contract, including the Addendum to Construction Contract.

4. Contract must be reviewed by the Catholic Mutual Group.

5. Only properly licensed and insured contractors may volunteer their services. All labor must be tied to a properly licensed and insured business. No volunteer services by an individual will be allowed.

6. Only properly licensed and insured contractors may volunteer their services. All labor must be tied to a properly licensed and insured business. No volunteer services by an individual will be allowed. All parishes and school should follow the Diocesan Guidelines for Accepting Volunteers (this document is found on the Diocese of Jackson web site).

**Contract Preparation:**

After a contractor has been selected, a copy of all the contractors bid should be sent to the Diocesan Facility Manager. The Facility Manager will prepare a draft of the contract for the Finance Council or Building Committee and the contractor to review and return back to the Facility Manager. The Facility Manager will prepare a final copy of the contract for the contractor to sign. Once the contractor has signed the contract, the contract should be returned to the Facility Manager along with a copy of the contractor’s Certificate of Insurance naming the parish or school and the Diocese of Jackson as additional insured.

Once all the proper documents have been submitted and approved by the Facilities Manager the contract will be presented to the Bishop for his signature and approval. The signed documents will be mailed or scanned and emailed to the parish or school to be distributed to the selected contractor.

**Contract Implementation and Completion:**

The Finance Council or Building Committee will oversee the project along with the contractor and the registered design professional (if selected). Once the project is complete, the parish or school must submit a Project Completion Form to the Diocesan Facilities Manager to allow for proper “close out” of the project.

A copy of the original contract and supporting documents will be on file in the Department of Temporal Affairs.
Mary Woodward
Chancellor

Rev. Lincoln S. Dall
Vicar General

December 1, 2019
Date

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