



MAJOR CAPITAL PROJECT CHECK LIST

PROJECT NUMBER	CONTRACTEE / Parish	PROJECT Name		
PASTOR/Name	PASTOR/Cell	PROJECT'S LOCATION/ On Site		
MAINTENANCE	MAINTENANCE DIRECTOR/Cell	CONTRACTOR/Company Name	CONTRACTOR/Name	CONTRACTOR/Cell
Steps	Action Items Completed		Resources	
STEP 1 Contact DCFS				
1	Submitted a Project Request E-Form.		https://dioceseofcleveland.onbaseonline.com/Forms/DOCProjectRequest_Final.htm	
STEP 2 Project Review				
1	Discussed the Project's Need with DCFS.			
2	Discussed the Project's Scope of Work with DCFS.			
3	Determined whether or not Professional Services are required with DCFS.		<i>Volunteer Guidelines and Volunteer Form</i>	
4	Determined whether or not an Owner's Representative is required with DCFS.		<i>Owner's Representative and FAQ Owner's Representative</i>	
5	Determined the Project is a Major Capital Project with DCFS.			
STEP 3 Project Analysis Diocesan Finance Office Review				
1	The Diocese's Chief Financial Officer completed the Project's financial review.			
STEP 4 Engage Professional Services				
1	Proceed to STEP 4a. if Professional Services are required.			
2	Proceed to STEP 5 if Professional Services are not required.			
3	Prequalified all Professional Services using DCFS standards.		<i>Architect/Professional Services Qualification Questionnaire</i>	
STEP 4 a. Bishop's Consent to Engage Professional Services				
1	Wrote the Bishop for <i>Consent to Engage</i> Professional Services to develop Preliminary Plans.		<i>Consent to Engage Letter</i>	
2	Contacted Legal Office to draft a Professional Services Agreement.			
STEP 5 Bishop's Consent to Proceed				
1	Wrote the Bishop For Consent to Proceed with the development of Final Plans.		<i>Consent to Proceed Letter</i>	
2	Consulted with the necessary Parish Councils to the extent deemed necessary by the Bishop.			
3	Appointed a Parish Project Team.			
4	Received the Bishop's Consent to Develop Final Plans for bid and permit.			
STEP 6 Construction Contract Administration				
1	Prepared or had Professional Services prepare bid specifications and bid documents.			
2	Prequalified all Contractors using DCFS standards.		<i>Contractor Qualification Questionnaire</i>	
3	Solicited bids from prequalified contractors.			
4	Received a minimum of three (3) bids.			
5	Reviewed bids with DCFS.			
6	Awarded Work to Contractor.			
7	Received a construction agreement for the Project from the Legal Office.		<i>Diocesan Construction Agreement</i>	
8	Fully executed the Construction Agreement.			
9	Received the Construction Brief from DCFS.		<i>(Construction Brief, Insurance, Bonding, Wages) Forms</i>	
STEP 7 Project Work				
1	Received the Notice of Commencement.			
STEP 8 Project Closure				
1	Received the Contractor's written Notice of Completion.			
2	Received the Contractor's Completed Punch List.			
3	Contractor Delivered the Lien Release.			
4	Received the Contractor's Final Application for Payment (90% of Contract amount).			
5	Received two (2) copies of the As-Built Drawings.			
6	Received Contractor's Guarantee and/or Manufacturers Warrantee.			
7	Released the Retainage (10% balance of Contract amount).			
8	Completed and returned a Copy of the Construction Brief to DCFS.			
9	Completed/Returned a fully executed original copy of the Final Completion Review to DCFS.		<i>Final Completion Review</i>	