

Parish Building Guidelines

Diocese of Huron –2018 05 03

Introduction

The Diocese of Huron is encouraging a better understanding of the condition of all of the buildings within Diocese and a strategic plan to deal with their ongoing management. The reason for this is NOT because these buildings are being neglected. Indeed the opposite is true. Parishes universally are maintaining their buildings to the best of their ability. So why now is there a need to focus building condition?

- There is an axiom that we build to last for a hundred years. A significant portion of the buildings of the Diocese are approximately that age. As stated parish wardens and councils have been faithfully addressing issues as they arise. However it is also true that many basic elements of our buildings age and chemically changes over time. This means that regardless of how much evident issues are addressed the very nature of buildings will require analysis and repair often well beyond normal maintenance. The age of our building only amplify this fact.
- Like most religious denominations the number of active members within our Diocese is declining. This means that there are fewer resources to maintain buildings and also many of those buildings are now much larger than what the parishes require.
- There are many demands four our donations. Most charitable organizations can make a clear case of why the need the money and how it will be spent. It seems essential that parishes have a solid business plan and that part of the plan address it building's needs and how they are to be financed.

The Diocese is enacting guidelines to reinforce Canon 14 to ensure capital expenditures are well considered within the overall mission of the church.

It is recommending that whenever possible parishes have a building committee to not only address these issues but relieve wardens and councils, allowing them to spend more of their energies on the other numerous issues of church life.

These guidelines outline many of the regulations that are involved in building operation and repair

It suggests matters that should be considered when working with paid custodial help

It defines a process for dealing with significant repair, renovation or expansion

Finally it outlines the parameter for a professional facility review

Suggested Building Committee Structure

Ultimately the wardens have the responsibility for maintaining parish buildings. However, having a parish building committee is one way to 'spread the workload' and provides an opportunity to get others involved in ongoing church operations.

- Chair – preferably someone with construction or building maintenance experience, it is recommended that it not be a current warden
- Scribe – a member of the committee with time to communicate amongst other committee members, the rectory, wardens and council. As well they should be prepared to step in to the role of chair during times of unavailability
- Member(s) – beyond their willingness to serve, qualities of members that would be helpful include expertise in
 - Building maintenance – contractors, trades, custodial, insurance, engineers, architects
 - Parish building knowledge – past wardens, past ACW presidents, retired clergy
- Clergy-in-charge
- A Warden
- Custodian – The wardens and committee **may** choose to have the custodian attend some or all the meetings to provide comments and act as a resource. It is not recommended that a paid custodian have a voice in the actual decisions.

Regulations

Part of each parish's responsibilities for maintaining their buildings are to be aware of the regulations they must adhere to. Here are **some** of those.

Canon Law – The committee must be aware of the obligations of the parish under Canon Law of the Diocese with regard to buildings and property.

Safe Church – The committee should be aware of these requirements especially as it relates to work being completed on the building by others.

Ontario Building Code (OBC) – The committee should also be aware of their obligations under the Ontario Building Code Act. Refer to Appendix B.

Church buildings are normally classified under *A2 assembly use*. As such, changes require building permits and the services of architects and engineers. Canon 14 also requires approval of the Diocese when a building permit is stipulated.

It should be noted that residences and other non-church buildings have different classifications and requirements.

Renovations (any change) to existing buildings need to meet the same requirements. However isolated repairs, painting, interior finishes, minor masonry repairs, roofing can in some municipalities be done without permit. It is recommended that the local building department should be contacted.

However if major renovations or changes are proposed the OBC and the Building Department can stipulate that a portion or all of the building comply with current codes. This can happen if the parish simply decides to rent out a portion of the building or consider a public use such as a daycare or independently run drop in centre. The OBC considers this as a change of use and normally requires code compliance.

The Ontario Building Code is not retroactive. This means that items that are non-compliant, including accessibility concerns, are not mandated UNLESS significant changes or expansion is proposed.

Ontario Fire Code (OFC) – this code responds to many of the issues raised in the OBC but outlines how buildings are to be used once occupied. Unlike the OBC the Fire Safety Officer can request changes regardless if renovations are being completed or not. The extent to which fire prevention officers are involved with existing buildings vary from community to community. However they are most likely to be involved where there are special events or others are using the building.

Ministry of Labour- Employment Standards Act - – mandates workplace safety standards. It is advisable to discuss major employee issues with the Diocese

There is a requirement for an onsite up to date Hazardous Material report in place for all construction work.

During a construction project there needs to be an entity that is responsible for construction safety, referred to as the ‘constructor’. It must be a condition of any work done that the contractor takes on that responsibility. With a very few exceptions, if there is more than one contractor on the site at the same time, either by *having* more than one project at a time or by acting as the general contractor, the Owner (parish wardens and Diocese) is assumed to be the ‘constructor’ and liable for all accidents, infractions and fines. *This does not apply if a contractor uses subcontractors, however if there are two separate contracts, any accident deemed by the Ministry of Labour to have been caused by a breach of safety regulations, (e.g. roofer not wearing a safety*

harness, and falls off roof) will result in charges being laid against the “constructor”, i.e. the wardens and Diocese.

Ontario Electrical Safety Authority (ESA)– There are a number of electrical procedures that require the owner to engage professional trades, i.e. removal and disposal of electrical light ballasts.

Ontario Heritage Designation – few of the buildings in the Diocese are designated under this act. However buildings singly designated or found within a Heritage District have to comply with all requirements and seek permission for any change to building or grounds regardless whether or not a building permit is required.

The Technical Standards and Safety Authority (TSSA) - promotes and enforces public safety. Their policies govern building equipment such as boilers and elevators

Operating Certificates and Licenses – There are a variety of certifications that are required for operating buildings and the devices within them. Boilers and elevators are amongst those that need to meet certification standards.

Municipal Bylaws and Legal Easements – Properties can be affected by Zoning Bylaws and legal easements that might limit development of the property or its use. While this rarely affects existing buildings it can affect how they can be used.

Funeral, Burial and Cremation Services Act, 2002, and Ontario Regulations 30/11 and 184/12 – Properties that contain a cemetery including scattering gardens must comply with the act. The Diocese has a cemetery committee that parishes should be aware of and consult.

Health Code - Regional Health Units regulate this code which most often deals with food preparation especially for public consumption and for other user groups like daycares.

Liquor License – Event permits. – These are normally not the responsibility of a building committee to acquire or monitor.

Information gathering

All available building and property information should be gathered and stored together in a central well known and accessible location. A copy should be stored in an identified off-site location.

- Canon 14
- Health and Safety Standards
- Safe Church standards -as it applies to building repair and maintenance personnel.
- Equipment manuals, maintenance records and certification reports
- Hazardous Material report – Ministry of Labour requires an up to date report as a condition completing any work, repair or renovation.
- An up-to-date Diocesan self-assessment building matrix
- If available a site survey including site services and tile bed/well/underground tank locations as well as legal easements
- Available building construction drawings and documents
- If available the Professional Building Assessment Report (refer to Appendix C)

Regular operations and maintenance protocols

There are numerous issues to consider regarding the ongoing operation of the building. Most parishes have people already looking after the necessities of interior cleaning, exterior seasonal demands, and maintaining the various systems. Appendix A is a compilation of many of those responsibilities.

Wardens need to delegate the responsibilities for:

- Cleaning including weekly or daily expectations and tasks that happen with less frequency
- Exterior site maintenance
- Maintaining and monitoring the various building systems
- Addressing minor repairs including engaging tradespersons

Wardens also need to ensure that those involved with building maintenance have a working knowledge of:

- Health and Safety regulation
- Safe Church
- Expectation and limitations of the duties of paid custodians
- Emergency protocols

It is important that some of the wardens and/or building committee have a basic understanding of these maintenance procedures.

Procedure for repairs, renovations and new construction

It is strongly recommended that parishes have a good understanding of their buildings' condition, not only the issues that are immediately obvious but those not normally noticed that could significantly impact the integrity of the structure and the finances of parish. A complete professional review is suggested and a strategic plan for when significant items will have to be addressed and how they can be financed.

All parish lands, buildings and contents are the property of the Diocese. Therefore it is essential that the Territorial Archdeacon and the Diocese be aware of what is happening to the buildings. Canon 14 refers to when the Diocese needs to be consulted about building issues, including:

- *acquisition,*
- *purchase,*
- *sale,*
- *rebuilding,*
- *structural change*
- *projects for which a building permit is required*
- *any major repair or substantial redecoration*

of any church, rectory, parish hall, or real property.

The determination of what is a major repair is the responsibility and the decision of the Territorial Archdeacon and Diocese. All potential changes and repairs to the building should be reported to the Territorial Archdeacon.

Repairs are defined as replacing or mending elements of the building using the same materials and techniques. All other work is considered renovations. For example replacing a hot water boiler with another boiler is repair. Replacing it with the forced air system is a renovation.

- **Scheduled Repairs** – Parishes should have sufficient understanding to foresee upcoming repairs. There should be an initial cost estimate and a financial plan. Once it has received Vestry and Diocesan approval the requirements of Canon 14 have been met and no further approval is required within the stated budget for those repairs if they are substantial complete before the next annual Vestry. The implication is that parish building committees and wardens should be working together to plan for needed repairs one or more years ahead.
- **Minor Emergency Repairs** – emergency repairs by their nature are ones that need immediate action. The clergy, a warden or, if authorized, a member of the building committee should do what is necessary to stabilize the situation. This person in charge

should contact the other wardens/clergy and through them to the Archdeacon. Cost of repairs should be established and communicated before beginning permanent repairs.

- **Unscheduled Repairs** – Repair concerns that arise during the year need to be vetted by the Clergy-in-charge, wardens, treasurer and the Archdeacon. The Archdeacon will advise on the process required to proceed which depending on the immediacy and scope which may include one or more of the following:
 - A completed self-evaluation matrix.
 - Submission to the Land and Property Committee as well as the Diocesan Council for approval of the scope of the project and financial arrangements. The financial plan should include a contingency allowance of at least 20%.
 - A parish special vestry's approval of the project.
- **Renovation, Addition and/or Significant Repair** – Approval for this type of project is a three phase process. There should be an initial discussion with the Territorial Archdeacon before consultants or contractors are engaged. Throughout the project the Territorial Archdeacon should be kept informed. The Archdeacon has the right to refer the project to the appropriate committee of the Diocese.

Phase One – Review of the idea or issue before engaging professionals

- The first step is to discuss the idea or issue with the Territorial Archdeacon who will determine whether it is a signification renovation or repair. If it is significant the following steps will be required.
- The initial phase is to establish its scope and a rough preliminary cost estimate and requires. The concept must be submitted to the Land and Property Committee for review and approval in principle and include:
 - A completed mission statement for the parish.
 - Indication how this project is in response to its stated mission.
 - A professional building assessment report to determine general building condition.
 - A financial strategy for how this project will be funded and maintained as well as how the other issues within the professional report will be addressed. The financial plan should include a contingency allowance of at least 20%.
 - Proof of funding that complies with the funding requirements of Canon 14.
 - The Territorial Archdeacon must provide a letter of recommendation.
 - The parish vestry must have approved the idea in principle.

Phase Two – Design and Contract Documents

- Once the project has been approved in principle by the Diocese it can proceed to the planning phase including professional, developing plans and cost estimates.
- It is recommended that a separate committee be created. Their responsibilities would include:
 - Working with Wardens, Building Committee and Council to engage professional services (refer to Appendix D).
 - Working with the various committees of the parish and user groups to determine what is wanted/needed then building consensus on what is to be included.
 - Establishing a budget for the project and working with the treasurer to develop an initial financial plan. The plan should include a contingency allowance of at least 20% for renovations and repairs, 15% for additions.
 - Preparation of Permit and Tender Documents,
 - A final pre-tender estimate of costs must be completed by the Consultants. If the intent of the project or cost increases more than 10% the Archdeacon must be consulted before proceeding to tender.
 - Competitive bidding with three or more bids normally is required. It is wise to seek at least 5 bids and follow up during the tender period to establish how many bids you are likely to receive.
- No projects of this nature will be approved without the following;
 - A parish vestry approving the project.
 - A submission to Diocesan Council for approval of the scope of the project and financial arrangements.

Phase Three – Construction

- The parish shall submit a copy of the building permit to the Diocese as per Canon Law.
- The parish shall keep the Archdeacon and Diocese informed of progress including the status of the contingency with respect to changes to the project.
The parish and its building committee do not have authority to exceed the approved budget.
- The parish shall retain a record of the contract documents, changes and contract administration files. A set of 'electronic as built drawings and contract documents' are to be part of the agreements with consultant and contractor.

- Training on all systems shall be included as part of the contract and all warranties and instructional documents kept together with the other information to be gathered indicated herein.

The Review Process

This policy contains a review process with the intent of ensuring that there is not only a well thought out plan for the current issue but it is part of a comprehensive understanding and financial approach to maintaining the building in the long term. As previously stated the Diocese has a duty to ensure capital work meets the appropriate construction standards and is sustainable. In order to ensure this it has created the following process

Role of the Territorial Archdeacon/Regional Dean –have the best understanding of what is happening in the parishes within their deaneries. The decision as to what is a significant repair falls to them. That decision will be based on the type of work needed, the proposal provided and the value of the work compared to financial health of the parish. To assist in this process, Archdeacons may elect to form a small advisory group of knowledgeable laity and clergy within deaneries that will be able to evaluate issues as they are brought forward and assist in the process of determining what is considered significant work. The Archdeacon may also consult with the committees of the Diocese if additional advice is required

Role of the Diocesan Land and Property Committee – The role of this committee is to conduct the initial Phase One review of the Preliminary Concept for projects deemed significant by the Territorial Archdeacon and their teams. This review is to be completed before consultants are engaged and final plans prepared. The committee will review each submission using the criteria as indicated elsewhere in this document.

Once approval is given the parish can engage consultants for the purpose of preparing design and construction documents. The project can be tendered and prices/proposals received. The Diocese must authorize all contracts.

Role of the Diocesan Council – Their role is to review and grant permission to enter into a construction contract. Their review shall include:

- Ensuring that the scope of the project has not changed significantly from what was originally proposed.
- Ensuring that the project is within budget or the parish is able to present a feasible plan to fund the contract value.

- To ensure that the proposed cost contains a reasonable contingency allowance.
- To receive assurance that the work will comply with all government regulations and does not create an unreasonable liability for the parish or the Diocese.
- The Council's decision will be based on the parish's overall strategic capital plan that addresses item identified in the professional building assessment review.

The council has the right to have the Land and Property Committee conduct a review to assist them if questions arise.

Regular Operations and Maintenance Protocols

Health and Safety - Wardens of the parish are responsible for the health and safety of all paid part or fulltime employees and those contracted for seasonal work such as grounds maintenance and snow removal.

Employers and employees are governed by the following Ontario legislation:

- Occupational Health and Safety Act
- Workplace Safety and Insurance Act, 1997 and Regulations
- Regulations made under the Occupational Health and Safety Act, Revised Statutes of Ontario, 1990, Chapter O.1 as amended.

Wardens must ensure that proper protocols are established for reporting any incident that would fall under the provisions of the legislation listed above.

Prompt reporting to the Diocese office of any incident deemed reportable is a must.

Wardens, with the assistance of the property committee or other knowledgeable volunteers, should assess all church structures and property for potential "hot" spots. For example, an improperly grounded electrical service, a stair railing that will not support a minimum weight, tools or ladders that do not meet minimum safety standards etc.

Custodial Duties - Regardless of whether the parish has a paid or volunteer custodian it is wise to have a well-defined list of duties. This helps the custodian as much as the parish by setting out what needs to be done and what cannot be expected from the position.

The description should include:

- Number of hours of work.
- Their contact person(s) are for approvals, questions or concerns.
- What needs to be cleaned on a daily, weekly or monthly basis.
- The degree that mechanical/electrical/control systems monitoring and routine maintenance is considered part of the custodial duties. There should be a documented list of those duties.
- What limits of authorization the custodian has to call for assistance from trades people or order supplies.
- The degree of documentation with regard to hazardous materials and monitoring of systems.

The parish should also ensure that custodian meet the qualification with regard to:

- The Health and Safety Act
- Safe Church
- Operation of building systems
- Knowledge of emergency protocol

At least one current warden or building committee member should become familiar with the basic function(s) of each of the systems. This does not imply advanced technical expertise, just a 'working knowledge' of what the system does, how it does it and what kind of maintenance is required.

The wardens, custodian and office administrator should each have up-to-date copies of the contact information for all service providers. This would likely include any or all those responsible for: heating and cooling + HVAC, plumbing, fire exit signs + emergency lighting + extinguishers and smoke/heat/CO monitoring systems, security and lighting.

Checklists for Maintenance - As discussed above, checklists for various types of maintenance are invaluable and are mandatory for systems such as fire/smoke/CO detection, fire extinguishers as well as First Aid kits. Checklists prevent unnecessary duplication of service and act as the "baseline" data point for any new service providers.

Checklists can provide for the timely replacement of special lights (i.e. floods), critical batteries (i.e. emergency lighting, CO and smoke detectors), air filters, water softeners, ice melting supplies etc.

Parishes in rural settings would benefit from an accurate, up-to-date maintenance record for their septic system.

The church custodian is the logical person to take the responsibility for the various maintenance checklists and at least one warden must be prepared to assist and supervise these tasks.

Emergency Protocol and Contacts - FIRE, SAFETY and HEALTH emergencies demand protocols. Timely and logical emergency response to employees, volunteers, parishioners and visitors, as well as service providers is also paramount. If a person suddenly collapses in the nave during a service, who does what? If someone smells smoke in the church hall, what is the response?

Each municipality has different rules regarding emergencies

Check to see if:

- The fire department requires a key.
- What they need to know about the fire/smoke systems
- If they require an emergency contact person

It is a good idea to have clearly visible signs posted within the church, the basement, the hall and the office areas outlining what to do in an emergency with the relevant CONTACT INFORMATION.

Identify parish members who are trained and/or qualified to provide "first response". Their names and contact information should be posted at a desk in the nave as well as in locations such as the church hall, sacristy and office area. For example, a registered nurse, an off duty fire fighter or St. John Ambulance First Aider is an invaluable resource during a medical emergency.

Sample Fire/smoke protocol

1. If an alarm sounds, designated individuals supervise the evacuation of the building immediately - they ensure the building(s) are evacuated and close all fire doors behind them as they exit the building provided they can safely do so.
2. A designated person calls 9-1-1 with the exact location information for the first responders. The accuracy of this is critical in rural settings.
3. All persons assemble at pre-determined points well away from the building so it can quickly be determined if anyone is missing - a list of those assembled should be kept.
4. A designated person, likely a warden, the Clergy-in-charge and/or custodian meets the emergency responders and is prepared to answer their questions especially about HAZARDOUS MATERIALS that may be stored in the building.
5. All of the above should be rehearsed in drills at least once a year.

Sample Vulnerable Employee Protocol:

1. Employees arriving at the church for work should not enter the building if an outer door has been left unlocked or if there is any suspicion that a door/window etc. has been tampered with.
2. The employee should return to their car, get in and call one of the wardens and/or Clergy-in-charge immediately and request assistance. If they arrived by means other than a car, they should go to the nearest neighbour.
3. The warden (or designate) should immediately go to the church and be prepared to do a "walk through" with the employee to ensure there are no unauthorized persons in the building.
4. If there is even a vague suspicion that an unauthorized person or persons are in the building, the POLICE should be called immediately.

Procedures to deal with Minor Repairs and Maintenance

Wardens need to rely on church employees to identify issues and resolve the need for minor repairs and maintenance which occur over the cycle of a normal year.

Office administrators, custodians and some building committee members benefit from having authorization to write purchase orders (up to a fixed limit determined by the wardens and treasurer) or to access and sign for goods and materials for the parish at the customary service providers including the local hardware store. This streamlines the work we expect them to do and allows them to access local firms who usually supply and deliver everything from water softener salt to ice melt.

Building committee members, custodians and office administrators can keep track of these 'minor' purchases for repair and maintenance through the proper use of purchase orders and the prompt placement of credit receipts in the appropriate file location in the office. A useful backup to this information is the daily journal or log that these employees should complete.

Ontario Building Code Excerpts

One of the clauses in the OBC stipulates compliance for areas being renovated, repaired or extended. Many Building Departments have different interpretations of what constitutes a repair that falls within the control of the code and therefore requires a permit and professional assistance.

The Architects Act indicates that work completed to Assembly building such as churches requires the services of an architect who in turn must engage engineers for related work.

1.1.2. 7. Existing Buildings (See OBC Appendix A.)

(1) Except as provided in Section 3.17. of Division B, Section 9.40. of Division Band Part 11 of Division B, if an existing building is extended or is subject to material alteration or repair, this Code applies only to the design and construction of the extensions and those parts of the building that are subject to the material alteration or repair.

From OBC Appendix A -1.1.2. 7. Existing Buildings.

This Article describes the extent of renovation subject to the Building Code: only the areas or portions of a building being renovated, or other parts of a building adversely affected by that renovation need comply with the requirements of the Code; all other areas or portions need not comply with the Code and may remain unchanged.

Architects Act, R.S.O. 1990, c. A.26

3. *Subject to rules 4 and 5, an architect shall provide services that are within the practice of architecture and a professional engineer shall provide services that are within the practice of professional engineering related to the construction, enlargement or alteration of a building used or intended for,*
- i. assembly occupancy ...*

By definition within the act and the Ontario Building Code, a place of worship is classified as *assembly occupancy*. The impact of this provincial law is that an architect and if required professional engineers must be engaged for church capital projects regardless of building size.

Professional Building Assessment Report

The purpose of building assessments are to ensure that there is an independent review of key building elements in order to establish a plan to identify and address immediate and future building needs. This study is part of a basis for a strategic capital plan to ensure the building issues are addressed in a timely and financially planned way.

PLEASE NOTE: These assessments are NOT part of the normal services that architects or engineers provide. Normal services include only the reviews necessary for the changes or extensions proposed

WHY ARE ASSESSMENTS REQUIRED?

- Without knowing the actual condition of our buildings we have little hope of establishing a reasonable strategy for addressing issues that will undoubtedly arise.
- Unlike most other budget line items, building issues are ones that even if deferred will still need to be addressed at some point and likely continue to deteriorate, often at a cost beyond the control of those who will need to raise the money.
- Understanding building conditions will allow for maintenance to happen in a timely fashion hopefully avoiding the collateral damage caused to other building elements if work is deferred. It also will reduce the costly mistakes of completing things done in the wrong order.
- Considerations for improvements, renovations, additions should be considered in the context of repairs and upgrades that will be required.
- Having a strategic capital plan can provide confidence for parishioners that their donations are being well spent.

WHEN ARE ASSESSMENTS REQUIRED?

The Diocese has created a self-assessment tool to help parishes initially identify areas that might need to be addressed. This tool is not an alternative to a professional assessment.

Professional assessments are a prerequisite to Diocesan approval and should be completed if

- There are obvious needs for building repair, i.e.: the need to replace heating systems, roofs, significant masonry repair etc.
- If changes to the building are proposed, i.e.: internal renovations, accessibility upgrades, additions.

WHAT SHOULD A BUILDING ASSESSMENT REPORT INCLUDE?

Building assessments are visual inspections by professional to look at the total facility in order to identify significant items that the parish will need to address in the next ten years. The makeup of each study may vary depending on the specifics of the situation. When considering what is to be reviewed it is important to consider not only the essential components of the building but the other items that could become a significant cost factor. The Territorial Archdeacon and the Diocese can be consulted to ensure the study will contain the necessary information on which approvals can be granted.

An assessment should include:

- Hazardous Material Study – required by law if any work is to be done
- Condition of the exterior building envelope and significant interior elements
- Structural review of major elements
- Mechanical and Electrical systems

An assessment may include:

- Fire Alarm and Security systems
- Building code compliance – upgrades may be required if major renovations are being considered
- Accessibility
- Lightning Protection
- Stain glass condition

They can also include:

- A review of Zoning restrictions on the property
- Site conditions including parking and tree conditions
- Site water management

The report should:

- Identify the various issues requiring attention,
- Locate issues on schematic floor plans and where required building elevation drawings
- Assign a priority for its repair or replacement,
- Estimate a cost for repair, including values for restoring areas and finishes as may be required by the work
- Indicate if further intrusive examination is required

WHO IS QUALIFIED TO COMPLETE THESE ASSESSMENTS?

Normally the study team is led by an architect or structural engineer. The team must include specialists in each field with a proven understanding of institutional buildings of the same age and construction.

Those providing the hazardous material report must meet Ministry of Labour standards for it to be valid.

It is important that consultants have a proven history of building assessments and when the buildings are over one hundred years that they also have experience in historic restoration and repair.

The Diocese has a list of qualified professionals. It is suggested that parishes discuss their choice of consulting team with the diocese before engaging them.

WHAT IS THE COST OF THESE ASSESSMENTS?

Costs vary depending on the size, complexity and number of buildings to be reviewed. However they can normally cost between \$20,000 – \$35,000 for a medium size church and attached parish hall.

Why is the cost so high?

- The assessment requires trained professional with experience in building repair and restoration. Unlike other sources they have a professional liability for giving the best information they can.
- The assessment is completed by a team with a specialty in vary elements of the building and its systems.
- The report must not only include a summary of issues found but a preliminary evaluation of how important its repair is and a projected cost.

WHY NOW? WE HAVE NOT HAD TO WORRY ABOUT THIS BEFORE

Many of our buildings are now at a point in their normal life cycles where it is common that some major things will need to be addressed.

The declining number of parishioners means that we have more total building area within the Diocese than we need

The resulting decline in revenue means building issues may not be dealt with simply by a fundraising appeal.

There is an opportunity to make good decisions, keep our buildings in good condition without depleting available resources needlessly.

Q and A's that have been discussed regarding this report

Will this not put a lot of financial burden on parish now expected to complete a study before considering major work?

- Perhaps, but without a thorough understanding of building issues they will just be fixing the obvious in the absence of developing a plan that will take them into the future.
- For significant projects the cost of the report could be comparable to professional fees normally associated with transactions of a similar size; legal, realty, engineering, taxes, and permits.

Is there a way of reducing the cost of the study, perhaps using home inspectors or trades people?

- The report indicates discretion in the requirements of the study and the number of disciplines necessary.
- The issue of who is qualified is clearly defined based on repeated experiences of unqualified consultants who provide reports that miss significant problems.

Do these guidelines place a lot of responsibility on the Territorial Archdeacons who already have a lot to do?

- The fact that if building condition and capital projects are to be more tightly controlled then there will be more work for not only the Archdeacons but the parishes, the Land and Property Committee and the Diocesan administration as well.
- The committee has discussed the likely number of projects annually that might be considered 'significant'. At this point that number seems rather small, dozens not the hundreds throughout the Diocese.
- However there are some suggestions to reduce the workload. Involve the Regional Deans in this review process. Have a deanery based advisory group that can assist parishes and make recommendations to the Territorial Archdeacon. Finally if this report is accepted, a more objective checklist could be provided by the Land and Property Committee to assist the Archdeacons in the determination what is significant and what is not.

Why the added step of Phase One?

During committee discussions the following situations have been commonly raised:

- Parishes often self-determine what is 'significant,' completing work without the approval required by canon law and without considering the larger picture or the possible options.
- Projects like accessibility ramps or elevators are significant but sometimes installed on buildings that parishes may not be able to sustain.
- Roofing is replaced or changed on buildings before also considering need for structural reinforcing.
- And the fact that under the current process the only Diocesan approval or review comes at the end of the design and tendering process when significant money has already been spent, placing additional pressure on the Council to approve. Currently those decisions must be made primarily only on the proposed project, not with an understanding of total building condition and the other items that might need to be addressed.

Is there some way to soften these requirements, especially for smaller parishes?

- The report indicates discretion in the scope of the study. However the requirements of completing the matrix, having a good understanding of capital needs along with a strategy and financial plan remain prerequisites and essential for good stewardship of parishes and the building(s) under their responsibility.
- There may be an option for low or no cost preliminary reviews, similar to those done in 2017, to continue. They could enable a reduction in the scope of the actual professional review.

Will this not require changes to Canon Law especially number 14?

This report has been submitted assuming that it is an adjunction to Canon 14, not to alter its intent. However it will be up to the Diocese to decide

Engaging Consultants and Contractors for Repair, Renovations or Construction

When to engage professional help?

Unless it is an emergency, consultants and contractors should not be engaged unless the procedure outlined in the guidelines has been followed, specifically that the Territorial Archdeacon or the Diocese has been contacted.

The consulting services for which you might require of a professional:

- Building assessment.
- Feasibility study of a variety of options.
- **Design services which should include project cost estimates.**
- Zoning Bylaw change procedures, Minor variance applications.
- Site Plan approval documents.
- **Permit Drawings for construction to address the requirements of the Ontario Building Code. On site review is limited to certification of this work being complete.**
- Tender Documents which are much more detailed in order to get truly competitive pricing from a series of contractors. Post tender services include regular site visits and contract administration.

Items in bold are basic architectural services. Do not assume other services are included.

There are options for selecting and engaging professionals to help your parish. What will work best for your situation depends on the project in mind. It is important that you have done some preparation. You will need:

- A description of the work you propose for the project.
- A project budget including construction costs and consulting fees that is not to be exceeded.
- A description of the type of services you are asking the consultants to provide.
 - Architects normally provide an initial design and estimating service, preparation of permit or tender documents and review of the project as it proceeds through construction. The Ontario Architects Association has a standard contract for OAA 600 (current edition is 2013). This document contains a checklist of services that can be provided. Most normally mechanical, electrical and structural engineering.

- <http://www.oaa.on.ca/professional%20resources/documents/Contracts/OAA%20600>
- This document is a template that can be modified by either party. Those modifications need to be document. **Nothing in those modifications should reduce the professional liability of the consultants from the conditions of the base contract documents.**
- Ensure that the agreement clearly states that the parish has the right to end the relationship at the end of any of the services indicated in the list above, i.e.; Work should be able to proceed to the assessment or design and stop without any obligation to proceed farther or any form of further compensation.
- You should acquire the list of qualified professionals from the Diocese

Consider the following when selecting a consultant:

- Their experience with projects of a similar size and nature to yours.
- Identify who are the actual consulting team members and their involvement throughout the process.
- The fee that they are charging should definitely be a consideration but remember professional fees are a small part of an overall project. The difference in the service provided can often be more important.