

GLOSSARY & DEFINITION OF ARCHDIOCESAN TERMS

ABC Archdiocesan Building Commission. The Commission serves in an advisory capacity to the Executive Director of the DMS and the Archbishop in connection with planning, construction and major renovation of all Archdiocesan and Parish facilities.

ADA The Americans with Disabilities Act gives civil rights protection to individuals with disabilities similar to those provided to individuals on the basis of race, color, sex, national origin, age, and religion. It guarantees equal opportunity for individuals with disabilities in public accommodations, employment, transportation, state and local government services, and telecommunications.

AHERA Asbestos Hazard Emergency Response Act of 1986

AIA American Institute of Architects

APC Archdiocesan Priests Council

Activation The step in the project development process where the Owner is able to initiate planned operations within the building.

Archdiocesan Legal Counsel The Law Offices of Gallagher, Evelius & Jones, LLP

Architect A professionally qualified and licensed person who prepares plans and specifications for a building or structure. Architectural services include such duties as project analysis, development of the project design, and the preparation of construction documents (including drawings, specifications, bidding requirements, and general administration of the construction contract). For purposes of this document, it can be any design professional, such as an architect, engineer, planner, landscape architect, interior designer, etc.

Architect's Basic Services A recognized series of phases performed by an Architect as follows: Phase I: Master Plan; Phase II: Schematic Design; Phase III: Design Development; Phase IV: Construction Documents; Phase V: Bidding/Pricing; Phase VI: Construction; Phase VII: Completion/Close-Out; Phase VIII: Project Warranty Period.

Architectural Drawing A line drawing showing plan and/or elevation views of the proposed building for the purpose of showing the overall appearance of the building.

Asbestos Management Plan An asbestos management plan is a site-specific, written plan for the maintenance of asbestos-containing material (ACM) in a condition that prevents the release of asbestos fibers. It also includes response procedures for fiber release episodes. It may address the ACM in an entire facility or a just a portion of a facility. Material that is assumed to be asbestos-containing by the asbestos inspector must

be included in the asbestos management plan as ACM, unless the assumed material is sampled and determined not to be ACM.

As-Built Drawings (also known as Record Drawings) Contract drawings marked up to reflect changes made during the construction process. It is good practice to make as-built drawings by marking the changes on reproducible drawings such as sepias for duplication purposes later.

Bid Bond A written form of security executed by the bidder as principal and by a surety for the purpose of guaranteeing that the bidder will sign the contract, if awarded the contract, for the stated bid amount.

Bid Opening The actual process of opening and tabulating bids submitted within the prescribed bid date/time and conforming to the bid procedures. A Bid Opening can be open (where the bidders are permitted to attend) or closed (where the bidders are not permitted to attend). (See Bid Date/Time, Open Bid, Closed Bid.)

Bid Package All drawings, specifications, documents, estimates, paperwork bid forms, and bid bonds relevant to a construction project. A contract is based on the bid package.

Bid Tabulation A summary sheet listing all bid prices for the purpose of analyzing the bid results. Bid tabulations include the required items of the invitation to bid and usually include bid amount, completion time, addendums included, contract exclusions, bonding rate, etc. Often times, the apparent low bidder is not the actual low bidder.

Bidding Documents The published advertisement or written invitation to bid, instructions to bidders, the bid form and the proposed contract documents including any acknowledged addenda issued prior to receipt of bids.

BOFA Archdiocesan Board of Financial Administration

Bond (See Bid Bond; Bonding Company; Contract Bond; Contract Payment Bond; Contract Performance Bond; Labor and Material Payment Bond; Performance Bond; Subcontractor Bond.)

Bonding Company A properly licensed firm or corporation willing to execute a surety bond, or bonds, payable to the Owner, securing the performance on a contract either in whole or in part; or securing payment for labor and materials.

Budgets Budgets shall include all labor, materials, supplies, maintenance and contracts. These items may include (but are not limited to): temperature controls, fuel burners, fuel supplies, elevators, routine painting (window frames, classrooms, etc.), carpentry and items of a similar nature.

Builder’s Risk Insurance Indemnifies for loss of or damage to a building under construction. Insurance is normally written for a specified amount on the building and applies only in the course of construction. Coverage customarily includes fire and extended coverage, and vandalism and malicious mischief. Builder’s risk coverage can be extended to a “special” form as well. The builder’s risk policy also may include coverage for items in transit to the construction site (up to a certain percentage of value) and items stored at the site.

Building Committee (Parish) A committee from the Parish composed of the Pastor and four (4) to six (6) lay Parish leadership or staff experienced in the requirements of the project or in the development, design or execution of the work.

Building Envelope (Sometimes referred to as Building Shell) 1) The waterproof elements of a building that enclose conditioned spaces through which thermal energy may be transferred to or from the exterior. 2) The outer structure of the building.

Capital Projects These projects include all phases of any new construction or repair work involving the buildings, physical plant or facilities of a Parish, School or other AOB-owned facility.

Change Order A written document between the Owner and the Contractor and signed by the Owner and the Contractor authorizing a change in the work or an adjustment in the contract sum or the contract time. A change order may be signed by the Architect or Engineer, provided they have written authority from the Owner for such procedure and that a copy of such written authority is furnished to the Contractor upon request. The contract sum and the contract time may be changed only by change order. A change order may be in the form of additional compensation or time; or less compensation or time known as a Deduction (from the contract).

Closed Bid/Estimate A process where only invited bidders or estimators are given access to the project-specific RFP (Request for Proposal) information. This option is for those seeking bids/estimates from a pre-qualified and selected list of professionals or services.

Commissioning The step in the project development process where the Contractor and the Owner complete the work of the project by starting all systems, testing and balancing systems, and teaching the Owner how to operate all building components. Also included is the acquisition of all operating and use permits, Owners taking of beneficial occupancy, and Owners enabling the required insurance coverage for the new asset that is being turned over to it.

Construction Documents All drawings, specifications and addenda associated with a specific construction project.

Construction Cost The direct Contractor costs for labor, materials, equipment, and services; Contractor's overhead and profit; and other direct construction costs. Construction cost does not include the compensation paid to the Architect, Engineer and other consultants, the cost of the land, rights-of-way or other costs that are defined in the contract documents as being the responsibility of the Owner. (See Soft Costs.)

Construction Documents Phase The third phase of the Architect's basic services wherein the Architect prepares working drawings, specifications and bidding information. Depending on the Architect's scope of services, the Architect may assist the Owner in the preparation of bidding forms, the conditions of the contract and the form of agreement between the Owner and Contractor.

Construction Management Organizing and directing staff, materials, and equipment to accomplish the purpose of the designer.

Construction Management Contract A written agreement wherein responsibilities for the coordination and accomplishment of overall project planning, design and construction are given to a construction management firm. The building team generally consists of the Owner, Contractor and Designer or Architect.

Construction Phase The seventh phase of the Architect's basic services, which includes the Architect's general administration of the construction contract(s).

Contract Bond A written form of security from a surety company, on behalf of an acceptable prime or main Contractor or Subcontractor, guaranteeing complete execution of the contract and all supplemental agreements pertaining thereto and for the payment of all legal debts pertaining to the construction of the project.

Contract Payment Bond A written form of security from a surety company to the Owner, on behalf of an acceptable prime or main Contractor or Subcontractor, guaranteeing payment to all persons providing labor, materials, equipment, or services in accordance with the contract.

Contract Performance Bond A written form of security from a surety company to the Owner, on behalf of an acceptable prime or main Contractor or Subcontractor, guaranteeing the completion of the Work in accordance with the terms of the contract.

Date of Substantial Completion The date certified by the Architect when the Work or a designated portion thereof is sufficiently complete, in accordance with the contract documents, so the Owner may occupy the Work or designated portion thereof for the use for which it is intended.

Design A graphical representation consisting of plan views, interior and exterior elevations, sections, and other drawings and details to depict the goal or purpose for a building or other structure.

Design-Build Construction When a prime or main Contractor bids or negotiates to provide Design and Construction services for the entire construction project.

Design-Construct Contract A written agreement between Contractor and Owner wherein the Contractor agrees to provide both design and construction services.

Design-Development Phase The second phase of the Architect’s basic services wherein the Architect prepares drawings and other presentation documents to fix and describe the size and character of the entire project as to architectural, structural, mechanical and electrical systems, materials and other essentials as may be appropriate; and prepares a statement of probable construction cost.

Design Professional A term used generally to refer to architects; civil, structural, mechanical, electrical, plumbing, and heating, ventilating, and air-conditioning engineers; interior designers; landscape architects; and others whose services have either traditionally been considered “professional” activities, require licensing or registration by the state, or otherwise require the knowledge and application of design principles appropriate to the problem at hand.

Design Team A group of professional consultants working collaboratively on a project.

DFM Archdiocesan Division of Facilities Management, a division of the Department of Management Services. The DFM oversees all Archdiocesan-owned properties; provides consultation to parishes on preventive maintenance needs; assists parishes in the planning and construction of new facilities and in major renovations; manages operations of the Catholic Center building.

DMS Archdiocesan Department of Management Services. The DMS provides system-wide resources for the administration of the Archdiocese of Baltimore. It is charged with the responsibility of providing services that enable administrators to fulfill the financial, technical, legal and collegial requirements for Parish, school, and institutional management.

Direct Cost (or expense) All items of expense directly incurred by or attributable to a specific project, assignment or task. Direct Costs, Hard Costs, and Construction Costs are synonymous. (See Construction Costs and Hard Costs.)

Facility or Site Analysis A visual inspection of a building and on-site improvements for functional or physical deterioration.

Environmental Remediation The removal or encapsulation of any hazardous material by a qualified and trained contractor.

Estimate for making recommendations to improve functional and physical deficiencies to increase market value; AND/OR prepare a Reserve Study over five (5) years to increase Net Operating Income (NOI) for the facility. (See Site Analysis.)

Existing Conditions Plan A composite plan of a property or building showing all known features or conditions.

Extraordinary Repairs and Replacements This covers major elements of the facility, which are usually beyond the scope of the maintenance staff or committee, e.g., a new roof, replacement of HVAC equipment, windows, roads, parking lots, etc., or repairs that change the appearance of the structure. Conformance to building and fire codes generally falls within this definition.

Fast Track Construction (Fast Tracking) A method of construction management that involves a continuous design-construction operation. When a prime or main Contractor starts the construction work *before* the plans and specifications are complete. (See Design-Build Construction.)

Friable Asbestos-Containing Material The term “friable asbestos-containing material” means any asbestos-containing material applied on ceilings, walls, structural members, piping, duct work, or any other part of a building that when dry may be crumbled, pulverized, or reduced to powder by hand pressure. The term includes non-friable asbestos-containing material after such previously non-friable material becomes damaged to the extent that when dry it may be crumbled, pulverized, or reduced to powder by hand pressure.

General Conditions A written portion of the contract documents set forth by the Owner stipulating the Contractor’s minimum acceptable performance requirements including the rights, responsibilities and relationships of the parties involved in the performance of the contract. General conditions are usually included in the book of specifications but are sometimes found in the architectural drawings.

General Contractor Properly licensed individual or company having primary (prime) responsibility for the Work.

General Contracting (the traditional method) When a prime or main Contractor bids the entire work AFTER the final design, plans and specifications are complete and have been approved by the Owner. (See Design-Build Construction and Fast Track Construction.)

Indirect Cost (or expense) A Contractor or Consultant’s overhead expense; expenses indirectly incurred and not chargeable to a specific project or task. The terms indirect costs and soft costs are synonymous. (See Soft Costs.)

IPLF Archdiocesan InterParish Loan Fund

Labor and Material Payment Bond A written form of security from a surety (bonding) company to the Owner, on behalf of an acceptable prime or main Contractor or Subcontractor, guaranteeing payment to the Owner in the event the Contractor fails to pay for all labor, materials, equipment, or services in accordance with the contract. (See Performance Bond and Surety Bond.)

Lien, Mechanic's or Material The right to take and hold or sell an Owner's property to satisfy unpaid debts to a qualified Contractor for labor, materials, equipment or services to improve the property.

Loss Reconstruction Restoration of buildings or properties due to fire, storm, flood, vandalism or other calamity necessary to return the property to its original condition and function.

Lump Sum Contract A written contract between the Owner and Contractor wherein the Owner agrees to pay the Contractor a specified sum of money for completing a scope of work consisting of a variety of unspecified items or work.

Master Plan Document that describes, in narrative and with maps, an overall development concept including both present property uses as well as future land development plans.

Meeting Notes A written report consisting of a project number, project name, meeting date and time, meeting place, meeting subject, a list of persons in attendance, and a list of actions taken and/or discussed during the meeting. Generally, this report is distributed to all persons attending the meeting and any other person having an interest in the meeting.

Needs Analysis Study An in-depth study of the programmatic use of a facility space based on a Parish's mission statement. Also, referred to as a space study. This becomes the basis of a master plan.

New Construction Any building to be constructed or purchased; or a major addition to an existing building which increases the property value, useful life, uses, or scope of operations within the facilities and conforms to the established mission of the Parish or institution.

Open Bid/Estimate A service offered by constructionplace.com where any bidder or estimator is given access to project-specific RFP (Request for Proposal) information. This option is for those seeking bids/estimates from any interested professionals or service without pre-qualifying them. For security and easy access, the project poster receives an e-mail showing the links to "View the RFP Details" and "View Any Bids" as they are received. This gives the RFP poster the ability to file and track the respective RFPs using their own e-mail filing system.

Owner-Architect Agreement A written form of contract between the Architect and client for professional architectural services.

Owner-Construction Agreement Contract between the Owner and Contractor for a construction project.

Owner-Construction Management Agreement Contract between the construction manager and client for professional services.

Parish and School Operating Budgets These include all labor, materials, supplies and maintenance contracts, such as, but not limited to: temperature controls, fuel burners, fuel supplies, elevators, routine painting (window frames, classrooms, etc.) carpentry and items of a similar nature.

Pastor A person who has charge of a Parish, school or other Archdiocesan institution including a pastor, administrator, pastoral life director of a Parish, or the president/principal of a regional or cluster elementary school or Archdiocesan high school.

Performance Bond 1) A written form of security from a surety (bonding) company to the Owner, on behalf of an acceptable prime or main Contractor or Subcontractor, guaranteeing payment to the Owner in the event the Contractor fails to perform all labor, materials, equipment, or services in accordance with the contract. 2) The surety companies generally reserve the right to have the original prime or main or subcontractor remedy any claims before paying on the bond or hiring other Contractors. (See Labor and Material Payment Bond and Surety Bond.)

Pre-Qualification of Prospective Bidders A screening process wherein the Owner or his/her appointed representative gathers background information from a contractor or construction professional for selection purposes. Qualifying considerations include competence, integrity, dependability, responsiveness, bonding rate, bonding capacity, work on hand, similar project experience, and other specific Owner requirements.

Project Cost All costs for a specific project including costs for land, professionals, construction, furnishings, fixtures, equipment, financing and any other project related costs.

Project Cost Data Worksheet A tool used in the management of a project to summarize all costs associated with the design, execution, furnishing and funding of a project. It is used to maintain and control costs within an established budget.

Project Documents All the plans, drawings and specifications used to bid a project and necessary to complete all work.

Project Manager (Project Management) A qualified individual or firm authorized by the Owner to be responsible for coordinating time, equipment, money, tasks and people for all or specified portions of a specific project. (See Construction Manager.)

Project Management Team A select group of individuals assembled to oversee a specific project. This team usually consists of the Project Manager, Pastor, Architect and (where applicable) Construction Manager.

Project Representative A qualified individual authorized by the Owner to assist in the administration of a specific construction contract.

Qualified An individual or firm with a recognized degree, certificate, or professional standing; or who by extensive knowledge, training and experience, has successfully demonstrated his/her abilities to identify and solve or resolve problems associated with a specific subject matter or project type.

Reimbursable Expenses (or Costs) Amounts expended for or on account of the project that, in accordance with the terms of the appropriate agreement, are to be reimbursed by the Owner.

Renovation A project of restoration and/or replacement that sets as its prime objective the long-term preservation of a building or property to perpetuate the historic or future sale value, or serves to upgrade the property to current standards, codes or guidelines.

RFI 1) An abbreviation for Request for Information. 2) A written request from a Contractor to the Owner or Architect for clarification or information about the contract documents following contract award.

RFP 1) An abbreviation for Request for Proposal. 2) A written request from the requestor (usually the Owner or a Contractor) to a Contractor, design professional or Subcontractor for an estimate or cost proposal. The RFP usually contains a specific scope of work.

Schedule of Values A statement furnished by the Contractor to the Architect or Engineer reflecting the portions of the contract sum allotted for the various parts of the Work and used as the basis for reviewing the Contractor's applications for progress payments.

Schematic A preliminary sketch or diagram representing the proposed intent of the designer.

Schematic Design Documents Documents and drawings that illustrate the relationship and scale of the components of the project.

Schematic Design Phase The first phase of the Architect's basic services in which the Architect consults with the Owner to ascertain the requirements of the project and prepares schematic design studies consisting of drawings and other documents showing the scale and project components for the Owner's approval.

Scope of Work A written range of view or action; outlook; hence, room for the exercise of faculties or function; capacity for achievement; all in connection with a designated project.

Soft Costs Soft Costs are cost items in addition to the direct Construction Cost. Soft Costs generally include architectural and engineering, legal, permits and fees, financing fees, construction interest and operating expenses, leasing and real estate commissions, advertising and promotion, and supervision. (See Construction Cost.)

Specifications A detailed, exact statement of particulars, especially statements prescribing materials and methods; and quality of work for a specific project. The most common arrangement for specifications substantially parallels the CSI (Construction Specification Institute) format.

Special Conditions A section of the conditions of the contract, other than the General Conditions and Supplementary Conditions, which may be prepared for a particular project. Specific clauses setting forth conditions or requirements peculiar to the project under consideration, and covering work or materials involved in the proposal and estimate, but not satisfactorily covered by the General Conditions. (See General Conditions.)

Stipulated Sum Agreement A written agreement in which a specific amount is set forth as the total cost of a project or service.

Structural Changes These cover any modifications to the building that compromise the safety of the structure.

Structural Components consist of any load-resisting building elements as defined by the applicable building codes including but not limited to beams, trusses, joists, columns, bearing walls, partition walls, skylights, roof and floor decks, fire walls, windows and doors.

Structural Design A term used to represent the proportioning of structural members to carry loads in a building structure.

Substitution A proposed replacement or alternate offered in lieu of and represented as being equivalent to a specified material or process.

Surety (See Bonding Company.)

T&M 1) An abbreviation for a contracting method called Time and Materials. 2) A written agreement between the Owner and the Contractor wherein payment is based on the Contractor's actual cost for labor, equipment, materials, and services, plus a fixed add-on amount to cover the Contractor's overhead and profit.

TPC (Total Project Cost) includes cost of design, construction, furnishings, permits, contingency and inflation, as well as cost of all phases of an overall project or program, regardless of duration or scheduling. TPC also includes the summation of all project cost elements as agreed to on the approved Request for Capital Project Expenditure Form or Request for Capital Repairs and Maintenance. Project costs generally include all fixed capital costs, all loose capital costs, and related soft costs necessary to accomplish the work required.

Work The term Work is defined as the construction and/or services required by the contract documents, whether completed or partially completed, and includes all other labor, materials, equipment and services provided or to be provided by the Contractor to fulfill the Contractor's obligations. The Work may constitute the whole or part of the project.