

A Guide to Selecting Consultants for Church or School Building Projects in the Archdiocese of St. Paul and Minneapolis

STRATEGIC MINISTRY PLANNERS

FACILITY NEEDS ASSESSMENT FIRMS

ARCHITECTURAL FIRMS

FEASIBILITY/CAMPAIGN CONSULTANTS

LENDERS

GENERAL CONTRACTORS

**OWNER'S REPRESENTATIVES AND
CONSTRUCTION MANAGERS**

AUDIT FIRMS



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ABOUT THIS GUIDE

How to Use This Guide

Essentially, this guide has three sections. The first is an introductory section on the recommended process to follow when you select consultants for your building project. Our experience is that if you follow this formalized process, you will be more likely to succeed at selecting consultants that are competent and well-matched to your project.

The second section contains tips and suggestions for working with these consultants. We describe in some detail what specific services are offered by consultants in different areas and offer general selection tips based on our experience.

The third section contains lists of professional consultants, firms, businesses and organizations that specialize in various aspects of planning and executing a successful church building or school building project.

In some cases we have worked directly with these firms. In other cases, we have had these firms recommended to us by parishes that have used them. In still other instances, we have listed firms, but have no direct or indirect experience with them. We note that Catholic Finance Corporation has not made any independent investigations of the consultants listed.

We do not endorse or recommend any of the firms in this guide. Their names and contact information are provided solely for your convenience. Each parish or school is responsible for selecting their own consultants and should carefully investigate the quality of work, experience and references of any consultant they are considering hiring.

We've grouped consultants according to the following areas:

- Strategic Ministry Planners
- Facility Needs Assessment Firms
- Architectural Firms
- Feasibility/Campaign Consultants
- Lenders
- General Contractors
- Construction Managers
- Audit Firms

We update the lists of consultants regularly, and we will always be happy to send you the most current list electronically.

Other resources for you during this process may include representatives of the Association of Parish Business Administrators (APBA) and the National Association of Church Business Administration (NACBA).

About Catholic Finance Corporation

Catholic Finance Corporation helps Catholic parishes, schools and other Catholic organizations with their building needs—whether those needs are for project planning, financial advice, direct lending, loan collateralization, or preparing for Archdiocese approvals. We are funded with proceeds from the Community Growth Partnership Program of the *Growing in Faith* capital campaign. We are an independent non-profit corporation, separate from the Archdiocese, and governed by its own Board of Directors.

Our mission, quite simply, is to promote the growth of Catholic institutions. We meet this mission, in part, by providing the following services:

- Financial advisory services for building projects and for budgeting and operational issues
- Loan collateralizations
- Direct loans
- Educational/informational resources

Much time, effort and expense can be saved by partnering with us as you begin planning for your project. We can help you each step of the way, or be available as needed.

With collectively over 100 years of broad and substantive staff expertise in capital project financing and budgeting and operational issues, our staff will guide you through the many steps involved with planning and implementing a building project.



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SECTION I:

A PROCESS FOR HIRING PROFESSIONALS

Points to Consider Before You Start

The first thing to realize about the process is that it is not “one size fits all.” Below, we present what we think is a more formal and, frankly, rigorous process. However, you may be more comfortable learning as you go or using the references of parishes or schools you know who have completed projects. The process and information that we present here are yours to use, in whole or in part, as they fit your needs.

Here, then, are our step-by-step suggestions for a formalized process that allows you to define the scope of your project (or activity within the project), identify the qualifications you need, select the best firm and move forward with your building project. A successful selection process will help you find the best person or company at a cost that is fair and reasonable to both parties.

Your successful building project will need a range of services provided by professionals. Here are some of the categories for which you can use the hiring process we will outline:

- Visioning, Master Planning and Needs Studies
- Needs Assessment of Existing Facilities
- Capital Campaign Feasibility and Implementation
- Architectural and Engineering Services
- Construction Management
- Specialty Services, such as legal, audit, or other needs

Please note that we have not included General Contractors in the above list, although we have devoted a section of our guide to discussing their role in the building process. They are not mentioned here because the process of selecting and hiring a General Contractor usually is more complex and often spans a greater amount of time. Some of the concepts in this section of the guide will apply to the process. However, we offer more specific hiring guidelines in the General Contractor section.

Now let’s look at how to begin the selection process.

Always Put Qualifications First (yes, ahead of price)

One factor—qualifications—should outweigh every other consideration, including price, in your selection of a professional firm.

What do we mean by qualifications? In choosing a professional firm, there are critical factors to consider, such as knowledge, reputation, rapport, organizational structure, past performance, technical competence and commitment to the parish or school interests. Each of these factors will have a major impact on the outcome of the project. Qualifications of the actual professionals working on the project should also be understood and evaluated before the parish or school employs a specific professional.

Once qualifications and work scope have been established, price and means of compensation can be negotiated with the selected firm. Both the hiring entity and the professional must be in agreement. Experience has shown that inadequate compensation can lead to inadequate results.

The professional should be retained early in the project when the project parameters are still flexible. With adequate information, the professional can provide technical input and responsive ideas which allow the parish or school to make intelligent choices at the onset of the project, thereby avoiding or minimizing duplication of efforts, inappropriate or inadequate design, and unrealistic expectations regarding affordability or other potentially expensive mistakes.

Another important aspect of the qualification-based selection process is the involvement of appropriate individuals throughout all phases of the process, including management at the parish or school. After hiring a professional, a parish/school must designate a staff person who will provide effective support and work directly with the professional. The role of the parish's or school's representative is to ensure timely completion of the contracted services, and to provide the professional with timely information and decision-making. The primary contact at the parish/school must have administrative skills, project management skills and people skills, and also be able to dedicate the time required for this commitment.

Gather Information So That You Make the Best Decision

The two most commonly used methods of gathering information in the selection of a professional are the "one-step" and the "two-step" approaches.

The "one-step" approach consists of sending out a Request For Proposal (RFP) directly to selected professionals or through advertising in a newspaper or technical magazine, requesting a submission of proposal. The proposal submission requirements usually consist of qualifications and experience, their suggested project work program, staffing plan and time schedule.

The "two-step" approach consists of advertising for the submission of qualifications or sending out a Request For Qualifications (RFQ). The key to an RFQ is that it permits respondents to use "boilerplate" materials and minimizes the time and effort required for them to respond. After the RFQs are received and evaluated, the second step is to create a short list, generally consisting of no more than five of the most qualified professionals (fewer is better), and send out a Request for Proposals ("RFP") to the short-listed professionals.

You will often get a higher quality response with the second approach. Consultants will put more time and effort into tailoring their response to an RFP if their chances for success are improved or the project has a large enough financial return. It is better to be one of three than one of five, and it is more economical to propose on a project that will yield \$50,000 in fees, rather than \$5,000 in fees.

Although it may seem more time consuming, the second approach is generally less time consuming and more favorable. In the long run it eliminates costly staff time and financial expenditures for the parish or school in the selection process. These may be expenditures which can be more productively used in the actual performance of the project by both the parish/school and the selected professional.

How to Prepare Your Request for Qualifications

In order to request a statement of qualifications (RFQ), the parish/school must briefly identify the general scope and particular needs of the project. The RFQ should be structured in such a way that it is easily understood and concise, with the project clearly defined. The RFQ should include the following:

- Parish or school name and contact person, mailing address, telephone and fax numbers, and email address
- Project location
- Project description including intended size, capacity and other general anticipated requirements
- Anticipated project milestones and schedule dates, including desired project completion date
- Description of any other projects, in process or planned, for the same site or time frame which may affect the scope of work
- General scope of services desired, description and budget range of the project
- List of information each firm should submit in the response to the RFQ, including:
 - ♦ Experience with this type/size of project
 - ♦ Experience of the designated staff
 - ♦ Use of sub-professionals
 - ♦ Other evaluation criteria important to the parish or school
- Relative weight to be given by the parish or school to evaluation factors
- Number of copies required
- Deadline for submission and schedule for professional selection

When designing an RFQ, the emphasis is on enabling the respondent to use existing marketing materials they have on hand.

How to Prepare Your Request for Proposals

Each short-listed firm should be asked to produce a technical proposal which describes in detail the firm's technical approach to the project. However, technical proposals should be required only when the project is well-defined and the significance of the project justifies the expense and time to the short-listed firms and the parish/school. The level of detail requested of the consultant in responding to an RFP should be commensurate with the projected compensation of the consultant.

In general, technical proposals should contain the following information:

- Team members, including the identification of the individual at the consultant firm who will serve as the team leader, other key personnel, other professionals, staff expertise and experiences, and the roles they will fill on the particular project

- Existing project commitments and anticipated duration of those commitments
- Technical approach—a discussion of the tasks or steps that the professional will undertake to accomplish the type of work described in the scope of services
- Project management approach—a discussion of quality control and assurance, company commitment, progress reports, technical memoranda and the process for providing follow-through during and upon completion of the desired service
- Location—where the work will be performed
- Commitment to project schedule

Request that the consultants responding to the RFP include their fee proposal in a separate sealed envelope, and then set those fees aside until after the interview process has been completed and the appropriate professional or firm has been selected.

How to Evaluate the Proposals You Receive – and Get to a “Short List”

The goal of the evaluation process is to develop a “short list” of two or three qualified firms. The evaluation process is extremely important and the parish/school should devote a considerable amount of time to this process. The best approach is to establish a selection committee composed of competent individuals who are able to make an informed decision based on the material submitted. It is important that the members of the committee bring a diversity of background to the evaluation process. The selection committee may find that developing a matrix, which includes weighted values for desired qualification items, quite often yields successful results.

Depending on the discipline area of the consultant you are hiring, evaluation factors may include some of the following:

- Capability to perform all aspects of the type of project required in the scope of services
- Recent experience in projects comparable to this project (five years is a good measure)
- Reputation for personal and professional integrity and competence, in the form of a third-party endorsement(s)
- Professional background of key personnel (education and experience) and their responsibilities for the project
- Workload and existing commitments
- Recent experience in special areas associated with the anticipated project
- Indication of how often the team has worked together in the past
- Understanding of the project
- Demonstrated ability to set and meet schedules and deadlines
- Capability to complete projects within budget, without cost escalations or overruns
- Quality of projects previously undertaken
- Familiarity with the geographic location of the project
- Knowledge of issues pertinent to their field, such as zoning, building codes, competing capital campaigns, non-profit organizations, and so on

- Project management techniques, including communications with parish/school
- List of references (last five clients; professionals in related areas of the building process, such as an architect providing a reference on a contractor)

Interview the “Short List”

The parish/school may decide to interview representatives of each short-listed firm. The purpose of the interview is for the parish/school to get to know the designated team members of the short-listed firms. In this setting, the individuals on the selection committee will be able to get a feel for the “chemistry” between them and the professional. You should be able to get a sense of the character of the professional in the interview. Since you may be spending a significant amount of time with these people, make sure you enjoy their demeanor and trust their professionalism.

Prior to the interview

Start by notifying the firms who submitted a proposal of the dates scheduled for interviews, if pertinent. Generally, at least two weeks should be given for the preparation of the interview. The interview notification should include the date, location and the allotted time. The time allotted for interviews should be longer for those consultants that will be doing a more significant portion of the work on your project. For instance, longer interviews would be warranted for architects and general contractors than for campaign consultants or lenders. Time for the presentation should be limited to about 30-40 minutes for the professional’s presentation, with an additional 30-45 minutes for questions and answers.

Here are suggested guidelines for setting up and conducting an interview:

- Set up an interview panel of three to five persons. The panel members should be familiar with the project and have a strong technical background related to the project.
- Provide the interview panel with a Performance/Evaluation Form having weighted criteria developed by the interviewing committee. This can be a qualitative or quantitative rating process.
- Schedule all interviews on the same day, if possible, with each interview allotted about 30 minutes for presentation and about 30 minutes for questions.
- Leave 15 to 30 minutes between the scheduled interviews.
- Provide a slide projector, overhead projector, screen and easels if the professional requests it, and make sure the room being used for the interview is flexible enough to accommodate presentations being made with this type of equipment.
- Inform firms of the selection schedule (including when a decision will be made) and the potential project schedule.

Prepare and use interview evaluation forms, which include a weight and score for each criteria/item. These forms will help you evaluate, rank, and ultimately select a compatible and quality professional. The evaluation forms should be developed and submitted to the short-listed professionals prior to the interview and be used by the committee during the interviews to rank the candidates.

During the interview

The following are important aspects to be noted during interviews:

- Organization of the presentation
- Quality of presentation content
- Timing of the presentation
- Qualifications of team members
- Qualifications and organizational skills of the project manager for the consultant firm
- Ability of the team to interact and demonstrate rapport with the parish/school in the interview setting
- Communication abilities of individual team members, especially the firm's project manager
- Specific knowledge about your particular project
- An understanding of your parish or school's mission and needs

All firms should be evaluated separately by each member of the selection committee. Getting a quick read of the selection committee's impressions can often expedite the selection process. Not infrequently, one particular firm will outshine the others and a simple ballot will confirm that fact to the committee. In the event there is a divergence of opinion, the chairperson of the selection committee should later compile the individual presentation sheets and determine which professional or firm received the best score. If more than two firms were interviewed, and the top two firms are close in score, new score sheets should be distributed and just the top two candidates re-scored.

The following are suggested evaluation criteria:

- Understanding of project requirements: Firm's analysis, preparation and level of effort and interest (including whether or not they visited the facility prior to the interview)
- Design approach/methodology/philosophy: Technical alternatives, creativity, problem-solving ability, good visual communications
- Project management: Proposed project schedule, cost control measures to be monitored by the firm, how the firm handles extra services or unexpected situations
- Key project personnel: Qualifications and experience of the hired firm's project manager, other key personnel
- Approach to quality: Methods used to obtain quality
- Project design team: Quality of professionals who would be made part of the team
- Firm responsiveness: Plan for progress reports, general attitude and ability to communicate
- Firm's interest in asking committee insightful questions
- How the individuals representing the firm interact together - do they have smooth rapport and does everyone present in their interview session?

- Geographic considerations: Familiarity with locale and local governmental and regulatory agencies

Fee Negotiations

After selecting the preferred firm or professional, the envelope with their fee proposal should be opened. A subjective judgment must be made about the appropriateness of the fee relative to the work effort proposed to be delivered and the caliber of the individuals delivering the work product. The fee proposals of the other candidates can serve as benchmarks for this evaluation. Make sure you understand what the true difference is behind varying firm fee quotes—sometimes what appears to be a large difference may be insignificant when factored into the overall picture, or a particular fee quote may be inadvertently missing something. In the event fee levels don't match expectations, renegotiate the scope of the work. If that fails, consider negotiating with the second-place firm. Remember, the goal is to come to an agreement that is mutually beneficial for both parties.

Now You Are Ready to Make the Final Selection!

The selection of the professional should be accomplished soon after interviews, preferably within about a week. Fees need to be negotiated, and if negotiations are unsuccessful, it may suggest talking with the second-place finisher and so on. Timely selection, resolution of the compensation issue, and notification of the professional facilitates better planning and personnel scheduling on the part of the professional. It also shows the professional that you are organized and serious about managing a successful project.

Once the parish/school has selected the professional, the notification should be sent out promptly. The notification of professional selection should contain the project name, the schedule indicating dates such as the initial “kick-off” meeting, other milestones, the project start date and project completion date.

All unsuccessful professionals should be notified in writing that they were not selected, and the notification of the selected professional should happen upon completion of the contract execution. The unsuccessful professionals should be thanked for their effort and time in responding to the RFQ or RFP and be assured that this does not reflect on any future selection of the professional. The runner-up should be notified that they may still be in contention until fee negotiations have been concluded with the selected professional.

We hope this guide to selecting professionals will help your parish or school see the value in a qualifications-based selection process and, by using this process, achieve the ultimate goal—a successful project.

SECTION II:

TYPES OF CONSULTANTS AND TIPS FOR SELECTION

STRATEGIC MINISTRY PLANNING

“Don’t begin to renovate a church unless you’re ready to renovate the community.”
--John Buscemi, Liturgical Consultant

Strategic ministry planning is the work of translating your parish or school vision and mission into action that expresses that vision and mission. This work is the process during which your church or school often concludes that something new or better needs to be done—a change that ultimately may require a building project.

What action should be taken to express your ministry? How do you build consensus behind these ideas? And how do you make sure the end result supports and helps realize your parish or school vision?

This is important work that will impact the very nature and future of your parish. The work of a committee charged with strategic ministry planning can be aided by consultants who are experienced in visioning and ministry planning. They can provide leadership training for this committee and help you follow a process that builds consensus among your congregation. Consultants skilled in ministry planning are listed in Section III of this guide.

The Motivation for Ministry Planning

All meaningful planning is purpose driven.

As the purpose of our faith is to celebrate and spread the Word of Jesus Christ, so the work of the church or school is to minister to people in Christ’s name. Sometimes a building change is required to make that ministry more effective, to help it grow, or to respond to growth.

Without that basic purpose of faith, it would be difficult to inspire the determination and sacrifice necessary to complete the work of ministry planning and transform it into action.

Start by Appointing a Strategic Ministry Planning Committee

Forming a committee is an important first step in formally recognizing the need to examine how your parish or school should address growth or a change in ministry.

For strategic ministry planning to gain broad support, it must be forged with input, participation and buy-in from your parish or school. Not only will the input insure that all voices are heard, but this will also pave the way for broader financial support that will be needed to carry out the ministry.

In particular, if the strategic ministry planning leads to a new church or school building or addition, it should be a collaborative process, rather than the idea of just one person. The building or addition must represent the “enduring will” of the parish. A single person or group—the pastor, the parish council, the finance chair, the business administrator, the principal, a vocal parish member—cannot be expected to know what the enduring will of the congregation is or to have complete ownership of a plan.

The membership of the Strategic Ministry Planning Committee should be formally recommended by the parish council. The committee should consist of:

- A chairperson who is respected and impartial
- The pastor
- The parish business administrator
- General membership from the congregation

Criteria for general membership of the committee are parishioners who have shown a commitment for aspects of the work of the church or school, who carry the respect of other parishioners, and who have experience that is relevant to all aspects of church or school life. The committee should have members representing liturgy, music, school and faith formation, and social justice and outreach.

If your parish has ethnic diversity or if demographic trends suggest the growth of immigrant populations or perhaps an increase in a certain age group, your Strategic Ministry Planning Committee should include representatives of these groups. This will help ensure sensitivity to their worship customs.

If this committee shows careful deliberation, builds consensus among parishioners, and ultimately develops a master plan that is acceptable and inspiring, it has succeeded in doing its job.

The Committee Will Work to Translate Vision to Reality

The work of the committee in general terms is to articulate the church's vision in terms of ministry.

The committee may start with a newly adopted parish vision statement, or one that needs revision. The committee will update or revise the vision statement based on the extent to which the parish and its mission have changed. Or, the committee may need to create a new vision statement.

The committee should set up a process by which it obtains reactions from parish members to its ideas and its draft recommendations. Sometimes this is accomplished by publishing a draft and asking for feedback from individuals and also during forums or "town hall" meetings of the congregation.

Some Strategic Ministry Planning Committees may choose to form a broader advisory group of up to 50 selected and active parish members who represent key areas such as worship, education, ministry and so on. This advisory group is then asked to review the plan, seek feedback from the congregation, and report back during a large advisory group meeting.

The work of the committee usually takes at least a year. The process requires extensive dialogue with the parish community.

A Central Question: Will a New or Renovated Building be Necessary?

Often strategic ministry planning results in necessary changes to the parish facilities. This may come about because of a need to better minister to an aging population or to a growing number of young families with school-age children. Perhaps the parish has grown and the fellowship hall is too small, or the church kitchen can no longer accommodate the number and size of events.

Keep in mind, though, that it is wise to not start with a building in mind. The building, itself, should come last in your thinking and in your process. If you start by focusing on and documenting *needs*, you will be able to build consensus over time. If you start with a building in mind, portions of the congregation may immediately begin to resist the idea. They may feel pushed or inadequately consulted and informed, and unsure of how the committee got so far, so fast. They may become suspicious of the costs, which could lead to less support and ultimately fewer contributions. The best work of the church or school should be careful, deliberate and not rushed.

When strategic ministry planning leads to a building project, the committee can be re-constituted into a building committee, with some of the core members remaining involved. Also, the point at which one committee's work ends and the other committee's work begins may vary from organization to organization. In particular, sometimes the Strategic Ministry Planning Committee will work with an architect to translate identified needs into a physical form. Other times the committee will deliver a verbal master plan to the parish council, which then will turn over the work to a new building committee.

How to Accomplish Strategic Ministry Planning

1. Announce plans to create the committee in the church bulletin and from the pulpit (usually this is a directive from the parish council).
2. Seek volunteers to participate on the committee.
3. Select the chairperson and build committee membership.
4. Provide leadership training to the committee.
5. Ask the committee to examine and possibly revise the parish vision statement, based on today's and future needs, and seek consensus among the congregation.
6. Based on this vision, ask the committee to articulate ministry needs and plans.
7. Document the use of the current parish structures and determine if new ministry needs can be met by reconfiguring use within the current structure.
8. If the committee believes that a new building is needed, or an addition or renovations, the committee should list the specific needs.
9. Seek feedback and build consensus around the strategic ministry plans.
10. Announce the committee's recommendations to the parish.

Selecting a Strategic Ministry Planning Consultant

Strategic ministry planning consultants have different strengths, approaches and styles. When selecting a strategic ministry planning consultant, consider these criteria:

- **Type of planning experience.** Does the consultant specialize in Catholic entities, or broader denominational work? Do they work on non-faith-based projects? Would a broad or narrow focus be most helpful to you?
- **Ability to develop skills.** Does your committee need to develop certain organizational skills, such as leadership, governance and decision-making? If so, can the consultant teach these skills and empower your committee to be more effective and to make good decisions?
- **Data resources.** Does the consultant have access to demographic and geographic database information that will help you benchmark and scale your needs?
- **Ability to integrate.** An accomplished consultant will be adept at two types of integration. The first is in working with multiple groups within your parish, such as the Building Committee, the Visioning Committee and the Parish Council. The second type of integration skill is the ability to help align external groups, such as the architect and fund raiser, with the work of the Planning Committee.
- **Style match.** Will your committee be comfortable working with the consultant(s)? Is there a fit between the consultant's style and approach, and the culture of your parish or school?

FACILITY NEEDS ASSESSMENT FIRMS AND ARCHITECTS

We have grouped facility needs assessment firms and architects together because the two services, while distinct, are related and typically are offered by the same firm, which is usually an architectural firm. Some architectural firms have engineers on staff, but to the extent they don't, you may have to go directly to an engineering firm to have the work done.

A facility needs assessment is a critical and early part of the building process because the assessment considers the condition of your current physical plant and how your current facility can or should integrate with your proposed new facility.

One of the most common mistakes we see is that a parish will focus on the new project and will not be aware of the repair and renovation needs of the current facility. For example, a church may be considering expanding a portion of the existing building but will not have assessed what critical repairs will be necessary in the current portion of the building in the next several years. Deferring building maintenance is a common practice that can have expensive consequences. Overlooking the potential costs for these repairs may have a significant impact later on your ability to afford a new project.

That is the value of a facility needs assessment. It provides a comprehensive view of what will be necessary to keep the current facility functioning and will address how the new and old parts of the building will fit together and, as a whole, relate to the overall desired effect.

Parishes that have failed to account for current facility capital needs could jeopardize the financial success of a new project. If, for example, an old building has a roof that begins leaking, the roof will need to be fixed. If the roof repair was not a planned repair, in this instance the money may have to be taken from the new expansion project, threatening the successful completion of the expansion. Worse yet is the situation of having completed a new project that "cash-straps" a parish or school, and then having an existing system break down, thereby creating further financial stress for the parish or school.

We have seen cases of parishes and schools beginning with plans for a new building and, after the facility's needs assessment, realizing that the extent of their giving capacity will be exhausted by just the current repair needs. They postpone the new project—and wisely so—or incorporate both the new and existing needs in the capital campaign.

Whether you conduct the facility needs assessment with an architectural firm or not, you would be well served to make sure that the old and new parts of your expansion project fit well together both functionally and aesthetically. Congregations may want to preserve the old, familiar and traditional look of your church, while younger parishioners may want the church to take on a more modern look. Use both your facility needs assessment and your initial architecture discussions to address this issue and involve your congregation in the decision so that your final plan satisfies as broad a segment of your parishioners as possible.

Some Pointers on Selecting the Right Firm

Here are some ways to evaluate the facility needs assessment and architectural firms:

- What is their design reputation? Does it match your tastes? If you're looking for a traditional "look," avoid a firm known for wild and unconventional structures. If you are thinking of a building that fits well with the environment and has the conservative look of, say, wood, you may not be happy with a firm that is known for designing buildings with a lot of mirrored glass and metal.
- Do you like buildings they have designed for a similar situation? Make sure you compare apples to apples. In other words, if you are a rural parish, have the firm show you how they have designed buildings in a rural setting with a comparable size and budget.
- Present the candidates with a design problem your project faces and ask them for their ideas. Ask them how they would integrate the old and the new building, given your parish's general wishes. This will give you a good idea of their creativity—or lack of it.
- Ask them to illustrate what they call good chemistry between their design team and your building committee. Do they have sensitivity toward your members and your design issues and mission? Make certain that you are asking this question of the actual staff who will work on your project.
- Carefully check references and make sure the firm stayed on time and on budget.
- Who is doing the assessment of the existing facility—an architect or an engineer? Is the right professional being used for the right task and who is the overall coordinator?

FEASIBILITY/CAMPAIGN CONSULTANTS

Feasibility/campaign consultants are the professionals who:

- Help articulate the parish or school vision that is driving the building project
- Determine an achievable amount of funds that can be raised
- Support and/or direct the fundraising campaign

The feasibility consultant's function is to determine the feasibility of a capital campaign. The function performed by a campaign consultant is to implement a capital campaign. In some cases, you may hire one firm to do both or one firm to do the feasibility study and another to do the capital campaign support.

What You Should Expect Them to Provide

While no two firms may operate the same, there are some general comments that can be made about what you should expect from these consultants. Feasibility/campaign consultants should help you define an achievable fund raising objective and a methodology for achieving the objective. They may do this based on their past experience and an "audit" of your parish or school resources and giving patterns. Realistic goal setting in collaboration with the pastor, advisory leadership and a feasibility study are essential.

Once this goal is agreed to by the parish/school, the consultants should provide support in these areas:

- Refine the fund-raising messages, tied to your mission and the building project
- Hold front-end consensus meetings within the parish or school to build unified support
- Train volunteers on how to conduct the campaign
- Demonstrate a process to reach all parishioners and potential donors, either face-to-face, by phone or by mail
- Prepare all communications related to the campaign, including key messages, letters, brochures and forms
- Offer problem solving when you fall behind your timetable or goal
- Be available at any time to provide assistance during the solicitation period of the campaign

There is another dimension to a good consultant that goes beyond tactical skills. We have found that the best consultants become emotionally vested. They understand and commit to the parish/school vision and generate excitement within the community for achieving the fund raising goals. They understand the building project is just one aspect of a higher goal or mission.

One final pointer: don't get ahead of yourself. Most campaigns start with a quiet period when they meet with targeted large donors to secure major gifts. Then when they move on to all the other parishioners, the campaign already can demonstrate momentum and success.

How to Select the Best Feasibility/Campaign Consultants

Experience counts. Look for a firm that has a track record of meeting fund raising targets. Talk to their references, including verifying that the relationship was comfortable and that the firm was able to adapt to the style of the parish or school leadership, as well as to the parish or school culture. Is the experience broad? Has the firm been involved in capital, stewardship and endowment campaigns? Did the actual pledges received match their feasibility projections? If appropriate, what is the consultant's track record for campaigns based on a different consultant's feasibility study?

Do they provide all of the services listed on the previous page? Who at the firm will be providing the services? Make sure you meet the people who will work with you and that you understand their qualifications. Also make sure that you are comfortable with the method and approach they propose to use in soliciting the funds.

Ask them to describe a campaign that failed and why. Often you can learn more about a firm from how they handled failure. Finally, make sure you clearly understand what the firm will do and what is expected of parish staff. Depending on your parish, you may work best with a firm that provides everything, soup to nuts; or, you may prefer the firm to take more of an advisory role. Make sure the services fit your needs.

Some Pointers on Structuring the Engagement

Be clear on what you expect, when you expect it and what you expect to pay both in fees and other expenses. It may help to have a monthly timetable of activities that the firm will conduct from the start to the finish of the campaign.

Most campaigns take three years! Be careful to structure the contract so that you are not left unsupported if the campaign takes longer or if the campaign is falling short of its goal.

The final selection decision is yours. We do not make recommendations or keep a log of parish comments on consultants. However, we are confident that if you follow the guidelines for selecting a consultant that we've provided, you will make the best choice for your situation.

General Rules of Thumb About Campaigns

There are some general rules of thumb that might help in determining the scope of your building project or setting up the planning committee:

- In your first campaign, expect to raise between 1.5 and 2.5 times your annual operating budget.
- If you plan on having more than one campaign, know that the Archdiocese's current rule of thumb is that for the second campaign, you should expect to raise 60% of your first campaign total, and for the third campaign, you should expect to raise 30% of your first campaign total. Your actual experience may turn out differently, depending on the dynamics of your organization, such as being in a high growth area or having particularly strong leadership skillful in inspiring giving.

- Capital campaigns take about three years to complete.
- It's more effective to hire a campaign professional than to rely on someone from your parish. Use your parishioners as advisors.
- The ultimate success of a campaign often depends on the strength of the leadership and the enthusiasm of the pastor.
- About 25% of a congregation will contribute 75% of your campaign target. About 50% of a congregation will contribute the other 25% of the campaign target. Twenty-five percent will likely contribute nothing.

LENDERS

Typically, you will need to borrow money for your building project. The loan usually begins at a point in your capital campaign when you (and the bank) are confident that you can meet or exceed your fund-raising target.

At that point, the bank gives you a construction loan of a one to two year duration that you use to pay for construction of the building. Once the building is completed, you will pay off as much of the construction loan as possible with your capital campaign funds. Usually, you will have a balance left that the bank (or another bank) will convert to a long-term loan of 10 to 20 years, but with the interest rate re-set every three to five years. At each re-set date, the new rate will reflect the market conditions at that time.

Payment of the long-term loan becomes a debt service obligation that must be incorporated in your operating budget or covered through additional fund raising or an increase in fees.

It is more common than not (but not required) that a church/school will use the same lender for both the construction loan and the long-term loan. For cases in which the same lender is used, you can choose between a “single-closing” for both the short and long-term loans or separate closings for both loans. (If you use two lenders, you will have to close each loan separately.) In a “single closing,” you and the lender agree on terms and amounts for both the construction loan and the permanent financing. Even so, the interest rate for the permanent loan may be different from the interest rate for the construction loan, but it is usually fixed at closing. Typically, there is a rate re-set when the loan is converted to permanent (long-term) financing. One advantage of a “single closing” is that certain loan fees may only be charged once, instead of both at the time of the construction loan and then again at the time of the permanent loan. A second advantage is that fixing the loan rate up front on the permanent loan mitigates the risk of adverse rate increases during the construction period.

Selecting the right lender is crucial to the success of a building project—and also one of the most difficult choices in the building process. Lender selection is crucial because you need the financing and you need someone who can provide you a favorable interest rate so as to minimize the cost of capital to build the project.

The selection of the right lender is difficult because the process, itself, of arriving at a loan rate may be complex, and rate determination is a function of the quality of your parish or school’s creditworthiness. The process is also somewhat of a paradox. Often banks want to be involved early (in part to keep their competition out, but also to direct a project’s business decisions), but they generally receive no compensation for providing financial advice. If they work with you, become familiar with your project, and become comfortable with your planning and development process, and you then switch to another banker to do the loan, they will receive no return on their time investment. However, the longer you wait, the more information you will have about the results of your capital campaign. If those results are positive, you’re likely to attract more bankers interested in financing your project, and as a result of this competition, a lower lending rate.

Major Areas of Credit Analysis

Discussions with possible lenders usually cover four major issues:

1. Financial Information. Banks will ask for and review your financial statements. They'll want to see revenues and expenses, and your balance sheet. They'll want to understand how well you handle cash flow for current operations. They'll also want information about your capital campaign and the financial resources created by it. They often require that a capital campaign feasibility study be conducted if you are planning to borrow funds before the capital campaign has been concluded. They will be interested in the financial wherewithal of benefactors that make extraordinary gifts. Depending on the bank, they may be very interested in the parish's or school's "clientele" and how this group is being served by the organization.

2. The Building Project. Lenders will want to review your building plans and construction contract. They will be especially concerned about the cost of "extras." They'll want to understand how you expect to cover cash flow needs of the project apart from your day-to-day operational income and expenses.

3. Collateral. With few exceptions, banks want their loans secured by a first mortgage in the borrower's real estate. The loan amount is then limited to 70% to 80% of the appraised value of the real estate.

4. Covenants to the Loan. Covenants are legal requirements or conditions that banks place on the building loan. They vary according to the financial condition of the church or school and the status of the capital campaign, but are typically a part of the lending package. They will include obligations to meet reporting requirements (such as providing annual financials and proof of insurance).

More Details About Creditworthiness

Covenants required by a bank will depend on the bank's assessment of the financial strength of your church or school and of your building project (both the strengths and weaknesses determine your overall "creditworthiness"). Although each case is unique, you can expect to be asked to consider some or all of the following:

- **Coverage requirements.** The bank may require you to have pledged revenues in excess of your debt service after covering the payment of your operating expenses. In other words, your rate may be contingent on your church or school annual revenues after expenses being a certain amount more than your annual loan payments. Typical coverage ratios range from a low of 1.00:1.00 to 1.25:1.00 at the high end.
- **Loan to value ratio.** Your lender very likely will require that the value of your current building and land that has been put up for collateral be larger than your loan. The loan to value ratio often is expected to be 75% or less.
- **Completion of a capital campaign feasibility study.** Usually your lender will require that you hire someone to conduct a capital campaign feasibility study that demonstrates that a sufficient amount of funds will be raised to retire most of the construction loan.

- **Initial and subsequent capital campaigns.** If your project will be primarily financed by a capital campaign, a bank will typically require you to covenant to start the capital campaign by a certain date, have a specific campaign goal, and complete the campaign after a certain period of time. Also, in the event that the campaign does not reach the targeted goal, the bank may require that you hold a second (or even third) campaign until you achieve the desired goal, giving them the assurance that the revenues will be sufficient to cover the debt payments plus the additional coverage requirements.
- **Broad participation by the “users.”** Banks may require that a large percent of your congregation (in the case of a church building project) or a large percent of the parents of your student body and alumni (in the case of a school building project) participate in the capital campaign. They know that campaigns that have limited appeal and support often fall short.

What Banks Charge

The bank that gives you a building loan will ask you to pay back the principal and an interest rate charge, usually over a 15- to 20-year amortization period, but with an interest rate re-set after the first three to five years. In order to get the loan, the bank will charge an origination fee, which is a percent of the loan amount, and legal fees for preparing the lending agreement.

How Do You Select the Right Bank for Your Project?

There is no “right” bank. However, you may want to consider some guidelines for selecting a bank that have been helpful to parishes in the past.

First, it can be helpful to select a bank that understands and values the non-profit or religious aspect of church work. For this reason, a bank in your community, known by your parishioners, may provide a more comfortable or trusting relationship.

Look for a bank with prior church lending experience. The experience of these bankers should help you prepare a strong financial platform and avoid mistakes they have seen other churches make.

Finally, find a realistic bank. A bank that will loan you money without demanding financial accountability may seem appealing, but that lack of discipline may come back to hurt your parish if you later find that you cannot handle the debt service because you over-extended your project plans. You want a bank that understands the strength (and weakness) of campaign pledges and is aware that a pledge is not a legal contract.

One Final Note About Your Lender

Often, the bank that loans you money for your building project will require that you keep your church or school primary banking accounts with them, establishing a “depository” relationship. If you select a bank other than your current bank, you may need to be prepared to switch!

GENERAL CONTRACTORS

The general contractor is the firm responsible for the actual construction of your building. The firm is called “general” because it usually hires “sub-contractors” to do part or most of the actual building—excavation, structure, plumbing, electrical, heating and air conditioning, and so on.

Typically, the general contractor is compensated by mark-ups of sub-contractor work and additional fees for project coordination and management work.

Among general contractors, there are two main types:

1. A **“build-only” general contractor.** A “build-only” contractor works from an architectural design developed by an independent architectural firm.
2. A **“design/build” general contractor.** The contractor has architects on staff who will design the building, and general contractors who will build it. Or, because of a pre-existing relationship with a professional that is not in-house, they may negotiate directly with your architect from the very early stages of design, giving input on major systems (structural, HVAC, etc.) that will enhance the final project and help on how to work within your budget.

We should note that there are almost as many general contractor work and fee arrangements as there are projects. For example, we have seen situations in which the general contractor is hired by the parish or school on a straight fee basis, rather than getting a percentage of subcontractor charges. There are also arrangements in which a member of a parish acts as an owner’s representative and conducts the work of the general contractor.

However, we strongly recommend that you use professionals in the roles of general contractor (or owner’s representative). For purposes of this section, when we refer to the general contractor, we mean the person or company that coordinates the actual construction. We also discuss here the two traditional ways in which general contractors are engaged, while acknowledging that there will be many variations between the two. To proceed, then, a major decision you must make regarding your building project is whether you want to select a “build-only” or a “design/build” general contractor.

There are pros and cons to each decision. “Design/build” contractors argue that they can offer both services at a lower cost than if they were purchased separately. They cite internal efficiencies and the fact that the architect knows how to design to the contractor’s construction strengths. “Design/build” contractors may not want to build something designed by an outside architect. Choosing to build a replica of an existing structure that the general contractor has previously built is an instance where the cost savings can be realized, such as a new classroom wing to an existing school.

However, most developers (such as parish building committees) select “build-only” general contractors and hire architects separately. In this situation, the architect is your representative with the contractor and, to an extent, looks out for your interests. The architect, however, is not a construction manager. For example, if there are disputes over the cost to fulfill the

architectural intent, the architect will look for ways to represent your interests by modifying the drawings to keep the project on budget.

When structuring the architectural contract, you can require that the architect assist you in obtaining competitive bids to accomplish the work. The architect will translate the approved design into detailed bid sheets. Bid sheets, with approved project specifications and drawings (architectural, structural, mechanical, electrical, landscape, etc.) are sent to multiple general contractors, who will submit competitive bids for the project. Depending on the size of your community and the size of your project, the architect can help you decide how many contractors to solicit bids from.

In order to select the general contractors who will be invited to bid on your project, the building committee members should look at buildings that those contractors have built. Ask the building owner or developer if the project was completed on time and on budget. Was the relationship positive? Were disputes settled amicably? What is the reputation of the subcontractors they use? What is your architect's opinion of the contractor? Involve your architect in the selection process by having them serve on the interviewing committee.

As part of your due diligence, you should ask for an audit of the contractor's financial records, a list of projects of the same nature and scope as your project and insurance information, and verify that the contractor is bonded. Obtaining a legal history of the firm is also important.

All things being equal, a sense of trust between the building committee, the architect and the general contractor is essential. Specifically, you may want to meet with the general contractor's owner or partners, as well as the project manager and site superintendent who will be assigned to your project. The latter two are the people who will be most responsible for keeping the project on schedule and within budget. In many cases, the feeling of trust between you (or your building committee) and these people becomes the deciding factor in the selection of a general contractor.

How to Evaluate Contractor Bids for a Build-Only Scenario

There are three typical scenarios you may face for the bids received from competing contractors:

1. All the bids are too high. In this case, work with your architect to eliminate some of the "nice to haves," and re-bid the project to all contending general contractors. Another technique is to ask each general contractor to look for ways to cut costs. Then share ideas among all bidding general contractors and ask them to re-bid by considering all cost-saving ideas at once.

2. One bid is substantially lower than the others. Do not interpret this to mean that the low bidder is the desired general contractor. Compare bids and identify the items for which the low bidder is reducing costs. Make sure something was not overlooked or that an inferior product is not being recommended. Occasionally, a contractor may bid low simply to win a contract and have work for their employees, but this is an atypical event. Here, again, your architect can be of help in making that assessment. Another reason to be wary of unusually low bidders is that some contractors purposely underbid a job to get it, with the intent of pushing you later for add-

ons during construction that will bid the price higher. This is a situation that could bring the building owner daily stress and confusion, as well as unplanned higher costs.

3. All the bids are similar. If all bids are within several thousand dollars—even \$100,000 if the project is a multi-million dollar project—this is the best scenario in which to be. It likely means that the bid specifications were complete and the design is functional. Now other factors besides cost can be your deciding factor.

How to Evaluate Bids for a Design/Build Scenario

In this scenario, the owner usually goes with one general contractor from the start after an extensive interview process. The owner gives the general contractor a budget up front and requires the general contractor to stick to it. To manage costs and complete the project on budget, the contractor asks various sub-contractors to bid on the sub-contracting jobs.

The owner should have an agreement with the general contractor that all sub-contractor bids are open to the owner's inspection.

The project is considered a success if the owner gets the building that was originally envisioned, for the budget that was set at the beginning.

Cost Overruns (Contingency Funds)

Most experienced builders warn of the need to budget for cost overruns, and most lenders require a construction contingency. Both builders and lenders feel that even the most careful and complete specifications and the most thorough due diligence cannot anticipate the unexpected. For example, an examination of the building site, even with subsurface soil testing, may produce no evidence of soil problems or the extent of any known problems. Actual excavation may prove otherwise by uncovering water problems, contamination or other situations, which will require additional cost to remedy.

The rule of thumb is to reserve in a contingency fund an additional 8% to 12% of the overall cost of construction in order to cover any unexpected events. The amount of the contingency can vary depending on the level of design that has been completed. More thorough project specifications and site testing prior to or during the bid process generally will equate to less unforeseen expenses. As the end of the construction period approaches (and the possibility of costly surprises diminishes) unspent contingency dollars can be directed to upgrades in finishes or other improvements to the project. The unspent funds can also be used as the beginning of a repair and replacement fund, or used to reduce the mortgage.

One way to address cost overruns up front is to offer the general contractor an incentive to avoid them. The understanding could be, for example, that the general contractor gets half of the savings if the overall project comes in under budget.

The general rule, however, is to manage your building project so that most of your contingency fund is spent on upgrades (better carpet, better landscaping, better lighting, etc.) rather than on problems!

Best Time to Build

In this area of the country, the best time to build is April through October, when the ground is not frozen or snow doesn't hamper construction. Cold weather also adds heating costs to both interior and exterior work on the building, since adhesives and mortar need to be above freezing in order to cure. Therefore it is best to time the construction so that buildings are framed and closed in between April and October. However, in Minnesota, any building project that will take more than nine months is going to run into some winter conditions. The contractor should plan for this as part of his "general conditions" to construct your building. Delays in starting dates or other unanticipated events can cause an increase in costs related to the weather. See "Contingency Funds" above for a few cautionary words about those unplanned surprises.

In a strong economy, when general contractors are busy, prices are high. In a slow economy, they are more amenable to negotiating price.

OWNER'S REPRESENTATIVES/CONSTRUCTION MANAGERS

Every construction project needs a person, or in some cases a team, who the other contracted professionals working on a project can turn to for a definitive answer or resolution to a problem. This person must represent the owner's interest during the entire development and construction process, so that nothing is left to chance or goodwill. This person is the "owner's representative."

Given the sheer complexity of the building process, many owners will hire professional firms to act as their "proxy owners." The firm serving as an owner's representative will assist in the orderly planning, construction and, in some cases, operation of the facility.

In other cases an owner will hire a construction manager who provides a subset of the services of an owner's representative. The construction manager will be at the building site during construction and represent the interests of the owner in finishing the project on time, on budget, and according to the exact specifications of the project.

If an individual at the parish or school has the skills, time and experience, they can act as an owner's representative.

Another way the term "construction manager" is used is when, in certain instances, an owner acts as the construction manager in lieu of hiring a general contractor. In these instances, the parish or school assumes the liability and responsibilities generally accepted by a general contractor. This particular construction manager role is not recommended for parish/school projects and therefore is not discussed further here.

Too often, parishes will want to rely on their parish business administrator to perform the task of being the owner's representative or construction manager. While this may appear to save the parish money, this can be a false economy since the parish business administrator already has a full-time job. (Now they have two!) Also, a parish business administrator may not have the expertise to effectively represent the parish in the role of owner's representative or construction manager. In some parishes there are retired construction personnel who have both the time and expertise to perform these functions. In other cases, the owner may prefer to have a totally independent professional construction manager representing the parish building project.

The owner's representative or construction manager interfaces with the architect and the general contractor's project manager. The general contractor's project manager is an employee of the general contractor who oversees the project from his or her office, including the general contractor's site manager, who is the on-site person managing the day-to-day details of getting the project built.

Besides the obvious advantage of having someone to coordinate the building project details from the owner's perspective, the construction manager will have experience suggesting more efficient ways of accomplishing the same end (e.g. identifying more efficient HVAC systems, less costly but just as efficient windows, reduced redundancy, change in finishes, etc.) and holding subcontractors to task when they complain about labor shortages or conflicting demands from other projects.

The banking community prefers to see a professional construction manager any time construction costs exceed \$1 million.

Duties of an owner's representative or construction manager before construction may include:

- Construction budget and cost planning
- Providing guidance on environmental impact issues
- Interfacing with state and local agencies, such as planning departments, city councils and zoning boards
- Assisting in selection of construction professionals
- Considering energy savings opportunities
- Acting as liaison with soil and water testing agencies, surveyors, security and telecommunication firms, landscape contractors, building maintenance companies and hazardous material abatement firms

Duties of an owner's representative or construction manager during construction may include:

- Interacting with the city inspectors if needed
- Tracking the budget
- Conducting on-site inspections and quality assurance
- Mediating and resolving issues between the architect and the general contractor
- Tracking disbursements and preventing cost over-runs
- Approving regular payments to the contractor based on percentage completion of the project
- Evaluating and recommending to the owner cost-saving measures
- Providing regular reports to the parish building committee

The previous three items may alternatively be handled by an inspecting architect.

Duties of an owner's representative or construction manager after construction may include:

- Testing various systems that have been installed
- Formulating facility operations and property management requirements

Usually there is a site meeting every week during construction. At the meeting are the construction manager (or owner), the architect, project manager, site superintendent, and major sub-contractors, if required. These meetings are the regular venue for discussions about unforeseen problems, cost overruns, decisions on upgrades or downgrades and scheduling.

Three Essential Rules

Whether you hire a professional firm or oversee the project yourself, veteran developers give these three essential rules for all building projects:

1. Don't pay for things you didn't order.
2. Don't pay for things twice.
3. Don't pay for another person's mistake.

AUDIT FIRMS

A parish church or school may conduct an audit of its financial operations or of its building project, or both.

An audit is an independent review of an organization's financial information and procedures. A successful audit results in a "positive assurance" that the financial information of the church or school is presented fairly. (This differs from a "review," which leads to an assurance that there are no material changes that need to be made to financial information. A "review" is "negative assurance." Another level of oversight is called a "compilation," in which an outside firm puts the organization's financial information into the form of a financial statement.)

Audits are conducted by a licensed Certified Public Accountant (CPA), who works for an accounting firm or the accounting area of a larger financial consulting firm.

Is an Audit Required?

The Archdiocese requires parishes or schools with budgets over \$1 million to conduct an independent audit at least once every five years. If the budget is under \$1 million, the parish or school is required to conduct a financial review at least once every five years. There is also a requirement that an independent audit be performed whenever the pastor leaves.

When parishes or schools are planning a building project, their bank may require an audit (sometimes an annual audit) as a covenant of its loan for the project.

Attitudes toward audits vary. Sometimes the management of a parish or school prefers audits because an audit offers confirmation that their financial procedures and expenditures are in order. Parishioners sometimes regard an audit as proof that their contributions to both the church operations and a building project are being safeguarded. However, some parish and school administrators regard an audit as "overhead," and the cost can impact a tight budget.

What Does an Audit Entail?

In an audit, an outside accounting firm looks at a parish or school's assets and liabilities, its cash balance, checking and savings accounts and investment statements, stewardship revenues (pledges and collections) and, if you are engaged in a building project, the status of pledges toward the building and the construction statement. The firm will look at details around disbursements, equipment/capital leases, inventories, payroll, purchasing, receipts and travel, among other things.

As part of the process of evaluating financial information, an auditor might comment on the following:

- Adequacy of internal controls
- Extent of compliance with applicable laws, regulations, policies and procedures
- Existence of assets and proper safeguards for their protection

- Adequacy, reliability, and effectiveness of financial and personnel reporting systems and procedures
- Quality of management's performance in carrying out assigned duties and accomplishing goals and objectives

How Much Does an Audit Cost?

Many variables affect the cost of an audit. Following are some guidelines for cost variations:

Time of year

Audits are less expensive if conducted when audit firms are less busy. So audits conducted in August, September and October usually command a more reasonable rate than those held at other times of the year when audit firms are working at capacity.

Parish or school accounting sophistication

If your internal accounting system is sophisticated and if you have your accounting and bookkeeping “house in order” before you engage an outside firm, the firm will require less time to collect and analyze information. All things being equal, the audit will then cost less. In other words, if your general ledger is correct, your bank statements reconciled, your records up-to-date and your monthly financial statements to your Board clear, you will require less of your auditor and the price of the audit will be lower.

Size of parish or school

The larger your budget is, the costlier the audit will be. Essential audit steps are the same regardless of size, but there is some additional time required by larger, more complex operations.

The cost of a base audit could be around \$5,000 to \$6,000. For larger organizations, or organizations that require a great deal of legwork on the part of the audit firm, the cost could be around \$8,000 to \$9,000.

What Is the Actual Audit Process?

You should plan on allowing four to six weeks to select an audit firm (see “Selecting an Audit Firm,” below). Once a firm is selected, the timeline could be as follows:

February, March and April

Use this time to select the audit firm. The selection of the audit firm, extent of engagement and fee are confirmed through an engagement letter, which indicates the objective of the engagement, staff members assigned to the engagement, the projected time frame and the information the church or school will need to supply for the audit.

May, June and July

Get a list from your audit firm of the items that will need to be available and begin to collect and organize this information. These may include schedules, a description of internal financial controls, and other documentation and information. The selected firm will hold a pre-engagement meeting with the parish or school management. This also may be called an

“entrance conference.” An entrance conference is scheduled with you to discuss the purpose, scope and process of the engagement. Subsequently, the firm will perform a preliminary survey of your procedures, objectives, size, written policies and procedures, organizational charts, related forms and job descriptions.

August

The firm should begin its field work at this time, gathering information from you and information from your financial institutions or lenders. They also will conduct their audit testing, procedures and analytical review.

September

Throughout the audit, the auditor will discuss any proposed recommendations with the client and then prepare a finding sheet. The audit firm will then issue a preliminary statement to parish or school management. The preliminary statement identifies outstanding issues, as well as a preliminary financial and narrative presentation. A management letter may also be presented at this time. If there are issues, the firm and parish/school management will need to spend time dealing with these issues.

October

Once issues, if any, are resolved, a final report is submitted. Depending on the desires of the parish or school, the audit firm may be asked to present the financial report and the management letter, if any, to the finance council or to the parish.

Selecting an Audit Firm

While price is an important factor in selecting an audit firm, it should not be the first consideration. Instead, focus on the relationship and trust that is generated (or not generated) during the selection process. Your parish or school will be working closely with the audit firm. Success depends on your ability to form an efficient working relationship.

Since the audit firm will have contact at a parish with the business administrator, pastor, deacon and someone from the finance council, and contact at a school with the principal, business administrator and Board, those people should be involved in the selection process.

If you are establishing a new audit relationship, seek four to six bids. Look at the following criteria for candidates:

- Audit experience
- Familiarity with non-profits
- Familiarity with churches
- Familiarity with Catholic institutions
- Familiarity with key people in the Archdiocese
- Consistency and tenure of the firm’s staff

The person leading the engagement should be a licensed CPA. The size of the firm may not matter. Large firms may be more expensive, but this is not always true. Smaller firms may offer better personal service, but this is not always true either.

Ultimately, you will want a firm that has the experience, knowledge and “personality” fit for a good and effective working relationship. This working relationship may become long-term if and when you desire future guidance or answers to questions raised by the audit.

SECTION III:

LISTS OF MN CONSULTANTS

Strategic Ministry Planners

Note: Catholic Finance Corporation (CFC) does not endorse or recommend, approve or disapprove of any of the consultants listed below. Their names and contact information are provided solely for your convenience. CFC has not made any independent investigation of the consultants listed and is not responsible or liable for any actions or inactions of the consultants. Any party considering hiring a consultant is responsible for selecting their own consultant, is free to use firms other than those provided on the list, and should carefully investigate the quality of work, experience and references of any consultant they propose to hire.

Henderson Consulting, Inc.

Attn: Gregory M. Henderson
4600 Weston Lane
Plymouth, MN 55446

Phone: 763-577-0927
Fax: 763-509-9676
Email: ghenderson@consultant.com

Jerry Roth & Associates, LLC

Attn: Jerry Roth, President
13309 Willow Lane
Burnsville, MN 55337

Phone: 612-875-2272
Email: JerryRothLLC@comcast.net

Kairos

Attn: Ms. Ann R. Bailey
413 Wacouta Street, Suite 200
St. Paul, MN 55101

Phone: 800-851-3019
Fax: 651-289-3211
Email: ann@kairosandassociates.com
Website: www.kairosandassociates.com

TeamWorks International, Inc.

Attn: Dennis Cheesebrow, President
Amy Anderson, Director of Client
Relations and Business Development
4801 Highway 61 North, Suite 106
White Bear Lake, MN 55110

Phone: 651-429-7340
Fax: 651-429-7782
Email: dennisc@teamworksintl.net
amya@teamworksintl.net
Website: www.teamworksintl.net

Facility Needs Assessment Firms

Note: Catholic Finance Corporation (CFC) does not endorse or recommend, approve or disapprove of any of the consultants listed below. Their names and contact information are provided solely for your convenience. CFC has not made any independent investigation of the consultants listed and is not responsible or liable for any actions or inactions of the consultants. Any party considering hiring a consultant is responsible for selecting their own consultant, is free to use firms other than those provided on the list, and should carefully investigate the quality of work, experience and references of any consultant they propose to hire.

Adolfson & Peterson Construction

Attn: Ms. Andra Adolfson
6701 West 23rd Street
Minneapolis, MN 55426

Phone: 952-525-2304
Phone2: 952-544-1561
Fax: 952-525-2333
Email: aadolfson@a-p.com
Website: www.a-o.com

BKV Group Inc.

Attn: Mr. John G. Sponsel, AIA
222 North Second Street
Minneapolis, MN 55401

Phone: 612-373-9138
Fax: 612-339-6212
Email: jsponsel@bkggroup.com
Website: www.bkggroup.com

BWBR Architects

Attn: Mr. Steve Patrick
380 St. Peter Street, Suite 600
St. Paul, MN 55102-1996

Phone: 651-222-3701
Fax: 651-222-8961
Email: marketing@bwbr.com
Website: www.bwbr.com

Cunningham Group Architecture, P.A.

Attn: Mr. Brian Tempas
201 Main Street SE, Suite 325
Minneapolis, MN 55414

Phone: 612-379-3400
Fax: 612-379-4400
Email: btempas@cunningham.com
Website: www.cunningham.com

DLR Group

Attn: Mr. William J. Lawrence
9521 West 78th Street
Minneapolis, MN 55344-3853

Phone: 952-941-8950
Fax: 952-941-7965
Website: www.dlrgroup.com

Kodet Architectural Group, Ltd.

Attn: Mr. Ed Kodet
15 Groveland Terrace
Minneapolis, MN 55403-1154

Phone: 612-377-2737
Fax: 612-377-1331
Email: ekodet@kodet.com
Website: www.kodet.com

Kraus-Anderson Facilities Group

Attn: Mr. Dennis Sullivan, Ed.D.
479 Apollo Drive
Lino Lakes, MN 55014

Phone: 763-792-3669
Fax: 763-792-3678
Email: dsullivan@k-a-c.com
Website: www.krausanderson.com

Facility Needs Assessment Firms Continued

Hoffman LLC

Attn: Mr. Patrick Del Ponte, Director of
Planning
PO Box 8034
Appleton, WI 54911

Phone: 920-380-2131
Phone2: 920-540-2112
Fax: 612-337-0031
Email: pdelponte@hoffman.net
Website: www.hoffman.net

Miller Dunwiddie Architects

Attn: Mr. Chuck Liddy
123 North Third Street, Suite 104
Minneapolis, MN 55401

Phone: 612-337-0000
Fax: 612-337-0031
Website: www.millerdunwiddie.com

NorthMarq

Attn: Mr. Paul Donovan, Vice President
Advisory Services Group
801 Nicollet Mall, Suite 1825
Minneapolis, MN 55402

Phone: 612-305-2113
Fax: 952-842-2270
Email: paul.donovan@northmarq.com
Website: www.northmarq.com

Rafferty Rafferty Tollefson Architects, Inc.

Attn: Mr. Craig E. Rafferty, Principal
278 East Seventh Street
St. Paul, MN 55101

Phone: 651-224-4831
Fax: 651-228-0264
Website: www.rrtarchitects.com

RSP Architects, Ltd.

Attn: Mr. David Norback
1220 Marshall Street NE
Minneapolis, MN 55413

Phone: 612-677-7100
Fax: 612-677-7499

Stahl Construction Company

Attn: Ms. Stephanie Dean, Director of Marketing
5755 Wayzata Boulevard
St. Louis Park, MN 55416

Phone: 952-767-2132
Phone2: 952-931-9300
Fax: 952-931-9941
Email: info@stahlconstruction.com
Website: www.stahlconstruction.com

Architectural Firms

Note: Catholic Finance Corporation (CFC) does not endorse or recommend, approve or disapprove of any of the consultants listed below. Their names and contact information are provided solely for your convenience. CFC has not made any independent investigation of the consultants listed and is not responsible or liable for any actions or inactions of the consultants. Any party considering hiring a consultant is responsible for selecting their own consultant, is free to use firms other than those provided on the list, and should carefully investigate the quality of work, experience and references of any consultant they propose to hire.

Anderson Architecture, Inc.

Attn: Mr. Mark Carsten Anderson
275 East Fourth St., Suite 530
St. Paul, MN 55101

Church/Worship Facilities: 100% of work
Examples: St. Odilia, Shoreview
St. Therese, Deephaven

Phone: 651-228-0494
Fax: 651-228-0498
Email: info@an-arch.com
Website: www.an-arch.com

ATS&R Planners/Architects/Engineers

8501 Golden Valley Road, Suite 300
Minneapolis, MN 55427

Church/Worship Facilities:
Example: Holy Cross School,
Lonsdale/New Market/
Vesili

Phone: 763-545-3731
Fax: 763-525-3289
Email: information@atsr.com
Website: www.atsr.com

BKV Group Inc.

Attn: Mr. John G. Sponsel, AIA
222 North Second Street
Minneapolis, MN 55401

Phone: 612-373-9138
Fax: 612-339-6212
Email: jsponsel@bkvgroup.com
Website: www.bkvgroup.com

BWBR Architects

Attn: Mr. Steve Patrick
380 St. Peter Street, Suite 600
St. Paul, MN 55102-1996

Church/Worship Facilities: 10% of work
Example: St. Hubert, Chanhassen

Phone: 651-222-3701
Fax: 651-222-8961
Email: marketing@bwbr.com
Website: www.bwbr.com

Cunningham Group

Attn: Mr. Brian Tempas
201 Main Street SE, Suite 325
Minneapolis, MN 55414

Church/Worship Facilities: 5% of work

Phone: 612-379-3400
Fax: 612-379-4400
Email: btempas@cunningham.com
Website: www.cunningham.com

Architectural Firms Continued

Dennis Batty & Associates Group, The

Attn: Mr. Dennis Batty
22770 Imperial Avenue N
Forest Lake, MN 55025

Church/Worship Facilities: 65% of work

Phone: 651-464-3756
Email: info@dennisbatty.com
Website: www.dennisbatty.com

Durrant

Attn: Mr. William J. Lawrence, AIA
303 Locust Street, Suite 210
Des Moines, IA 50309

Phone: 515-309-0945
Fax: 515-309-0944
Website: www.durrant.com

Hammel, Green and Abrahamson, Inc.

701 Washington Avenue N
Minneapolis, MN 55401

Church/Worship Facilities: 5% of work

Example: Our Lady of Grace, Edina

Phone: 612-758-4000
Fax: 612-758-4199
Email: info@hga.com
Website: www.hga.com

Hoffman LLC

Attn: Mr. Patrick Del Ponte, Director of Planning
PO Box 8034
Appleton, WI 54911

Phone: 920-380-2131
Phone2: 920-540-2112
Fax: 612-337-0031
Email: pdelponte@hoffman.net
Website: www.hoffman.net

Houwman Architects, Inc.

Attn: Ms. Lori Houwman
833 3rd Street SW
New Brighton, MN 55112

Church/Worship Facilities: 5% of work

Phone: 651-631-0200
Fax: 651-639-9726

Kagermeir Skaar Asleson Architects, Inc.

Attn: Mr. Eric C. Oleson
526 South Second Street
Mankato, MN 56001

Phone: 507-388-6271
Fax: 507-388-5499

Kodet Architectural Group, Ltd.

Attn: Mr. Ed Kodet
15 Groveland Terrace
Minneapolis, MN 55403-1154

Church/Worship Facilities: 25% of work

Example: Pax Christi, Eden Prairie
St. Joseph the Worker,
Maple Grove

Phone: 612-377-2737
Fax: 612-377-1331
Email: ekodet@kodet.com
Website: www.kodet.com

Architectural Firms Continued

McGuire Courteau Lucke Architects, Inc.

Attn: Patrick F. McGuire
400 St. Paul Building
6 West Fifth Street
St. Paul, MN 55102

Church/Worship Facilities: 60% of work
Examples: St. Henry, Monticello
All Saints, Lakeville
St. Pascal Baylon, St. Paul

Phone: 651-222-8451
Fax: 651-222-5414
Email: mcl@mclarchitects.com
Website: www.mclarchitects.com

Miller Dunwiddie Architects

Attn: Mr. Chuck Liddy
123 North Third Street, Suite 104
Minneapolis, MN 55401

Church/Worship Facilities: 20% of work
Example: Restoration of Cathedral of
St. Paul

Phone: 612-337-0000
Fax: 612-337-0031
Website: www.millerdunwiddie.com

Paulsen Architects

Attn: Mr. Bryan Paulsen, President
220 East Main Street, Suite 4
Mankato, MN 56001

Church/Worship Facilities: 5% of work
Example: St. Andrew, Elysian

Phone: 507-388-9811
Fax: 507-388-1751
Email: bryan@paulsen-arch.com
Website: www.paulsen-arch.com

Rafferty Rafferty Tollefson Architects, Inc.

Attn: Mr. Craig E. Rafferty
278 East Seventh Street
St. Paul, MN 55101

Church/Worship Facilities: 35% of work
Example: St. Thomas Becket,
Eagan
Hill-Murray High School
Expansion, Maplewood

Phone: 651-224-4831
Fax: 651-228-0264
Website: www.rrtarchitects.com

Rice Stromgren Architects

Attn: Mr. Jeff Stromgren
711 West Lake Street, Suite 603
Minneapolis, MN 55408

Church/Worship Facilities: 30% of work

Phone: 612-827-7802
Fax: 612-827-1528
Email: jstromgren@aol.com

Station Nineteen Architects, Inc.

Attn: Tim Johnson
2001 University Avenue SE, Suite 100
Minneapolis, MN 55414

Church/Worship Facilities: 80% of work

Phone: 612-623-1800
Fax: 612-623-0012

Architectural Firms Continued

Sessing Architects, Inc.

Attn: Mr. Ward A. Sessing
6 Pine Tree Drive, Suite 190
St. Paul, MN 55112

Church/Worship Facilities: 70% of work

Phone: 651-490-1470
Fax: 651-490-1627
Email: wsessing@sessing.com
Website: www.sessing.com

Vanman Architects and Builders Inc.

Attn: Mr. Jake Holmes
669 Winnetka Avenue North, Suite 210
Minneapolis, MN 55427

Church/Worship Facilities:

Example: St. Francis Xavier School,
Buffalo

Phone: 763-541-9552
Fax: 763-541-9857
Email: info@vanmanab.com
Website: vanmanab.com

WAI Continuum

Attn: Mr. Scott Koester, Vice President
381 East Kellogg Boulevard
St. Paul, MN 55101

Church/Worship Facilities: 15% of work

Phone: 651-227-0644
Fax: 651-223-5092
Email: scottk@waicontinuum.com
Website: www.waicontinuum.com

Waters Edge Architectural Group, Inc.

Attn: Mr. Jeffrey M. Nagel
Waters Edge Professional Building
103 15th Avenue NW, Suite 300
Willmar, MN 56201

Church/Worship Facilities: 15% of work

Example: St. Luke, Clearwater

Phone: 320-235-7775
Fax: 320-235-8673

Williams/O'Brien Associates, Inc.

Attn: Mr. James O'Brien
1300 Nicollet Mall #219
Minneapolis, MN 55403

Church/Worship Facilities: 40% of work

Example: St. Michael's, St. Michael

Phone: 612-338-8981
Fax: 612-338-8982

Note: The percentage of church/worship facilities work for the firms listed is taken from the web site for American Institute of Architects Minnesota.

Feasibility/Campaign Consultants

Note: Catholic Finance Corporation (CFC) does not endorse or recommend, approve or disapprove of any of the consultants listed below. Their names and contact information are provided solely for your convenience. CFC has not made any independent investigation of the consultants listed and is not responsible or liable for any actions or inactions of the consultants. Any party considering hiring a consultant is responsible for selecting their own consultant, is free to use firms other than those provided on the list, and should carefully investigate the quality of work, experience and references of any consultant they propose to hire.

Cosgriff Company

Attn: Mr. Tim Browne, Vice President
601 Carlson Parkway, Suite 1050
Minnetonka, MN 55305

Phone: 952-475-6335
Fax: 952-449-5101
Email: tbrowne@promotv.net

Cunneen Parish Fundraising Services Inc

Attn: Wayne Miller, Regional Director
6951 Kenmare Drive
Bloomington, MN 55438

Phone: 866-223-7128
Fax: 952-944-3423
Website: www.cunneenfundraising.com

Currie, Ferner, Scarpetta & DeVries

Attn: Mr. Jim Scarpetta
401 2nd Avenue South
Minneapolis, MN 55401

Phone: 612-340-9819
Fax: 612-333-6672
Email: cfsd@usa.net

Ernhart & Associates

Attn: Mr. James R. Ernhart, President
201 Norfolk Avenue
Elk River, MN 55330

Phone: 763-441-7120
Phone2: 763-441-7812
Fax: 763-441-7489
Email: ernhart@mr.net
Website: www.ernhart-assoc.com

Hal Johnson and Associates, Inc.

Attn: Mr. Hal Johnson
5232 Vincent Avenue South
Minneapolis, MN 55410-2420

Phone: 612-925-1419
Fax: 612-925-2374

Jack Hodnett and Associates

Attn: Mr. Jack Hodnett
4708 West 70th Street
Edina, MN 55435

Phone: 952-922-7788
Email: jhodnett@mn.rr.com

James Company, The

Attn: Mr. James Harrison
1805 Tierney Drive
Hastings, MN 55033

Phone: 800-472-0535
Phone2: 952-975-6014
Email: jharrison@jamescompany.com
Website: www.jamescompany.com

Feasibility/Campaign Consultants Continued

Joseph Consulting

Attn: Mr. George L. Joseph
6025 Shadowbrook Drive
Bettendorf, IA 52722-0771

Phone: 563-359-3033
Fax: 563-445-2308

Kairos & Associates

Attn: Rev. Glenn Schoonover,
Vice President for Congregational Services
3459 Washington Drive, Suite 100
St. Paul, MN 55122

Phone: 800-851-3019
Fax: 651-289-3211
Email: glenn@kairosandassociates.com
Website: www.kairosandassociates.com

Mark Davy & Associates

Attn: Mr. Mark Davy, President
4500 Park Glen Road, Suite 280
St. Louis Park, MN 55416

Phone: 952-929-0444
Fax: 952-929-1563
Email: mdavyassoc@aol.com
Website: www.markdavyfundraising.com

McCarthy & Associates

Attn: Mr. Tom Parker
16250 Northland Drive, Suite 200
Southfield, MI 48075

Phone: 248-552-9220
Fax: 248-552-0875

Resource Services, Inc.

Attn: Mr. Michael Halloran, Vice President
5151 Belt Line Road, Suite 900
Dallas, TX 75254

Phone: 800-527-6824

Walsh & Associates

Attn: Mr. Michael A. Walsh, President
1601 East Highway 13, Suite 200
Burnsville, MN 55337-6848

Phone: 952-882-9392
Fax: 952-882-5270
Email: michael@walshfundraising.com
Website: www.walshfundraising.com

Lenders

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21st Century Bank

Attn: Mr. Jonathan F. Dolphin, Senior Vice
President
21660 South Diamond Lake Road
Rogers, MN 55374

Phone: 763-493-2178
Fax: 763-428-2125
Email: jdolphin@21stcenturybank.com
Website: www.21stcenturybank.com

Allied Irish Bank

Attn: Mr. Cormac Daly, Executive Vice President
405 Park Avenue
New York, NY 10022

Phone: 212-339-8067
Fax: 212-339-8008
Email: cormac.f.daly@aibny.com
Website: www.aibny.com

Anchor Bank

Attn: Mr. Gene Crapser, Executive Vice
President
66 East Thompson Avenue
West St. Paul, MN 55118

Phone: 651-457-1111
Fax: 651-457-6855
Email: Gene_Crapser@anchorlink.com
Website: www.anchorlink.com

Associated Bank

Attn: Mr. Russell Knighton, Vice President
1801 Riverside Avenue
PO Box 582419
Minneapolis, MN 55458

Phone: 612-349-2225
Fax: 612-904-1305
Website: www.associatedbank.com

Bremer Bank

Attn: Mr. Ronald Zweber, Vice President
225 South Sixth Street, Suite 200
Minneapolis, MN 55402

Phone: 612-782-1966
Fax: 612-782-1978
Email: rjzweber@bremer.com
Website: www.bremer.com

Catholic Aid Association

Attn: Mr. Ken Turgeon
3499 Lexington Avenue North
St. Paul, MN 55126

Phone: 651-490-0170 ext. 141
Fax: 651-490-0746
Email: kturgeon@catholicaid.com
Website: www.catholicaid.com

Catholic Finance Corporation

Attn: Mr. Michael Schaefer, Executive Director
5826 Blackshire Path
Inver Grove Heights, MN 55076

Phone: 651-389-1077
Fax: 651-389-1071
Email: mpschaefer@catholicfinance.org
Website: www.catholicfinance.org

Lenders Continued

Catholic Knights of America

Attn: Mr. Jeff Bauman, CIO
1100 West Wells Street
Milwaukee, WI 53233

Phone: 414-278-6475
Toll Free: 800-927-2547 x6475
Fax: 414-273-2120
Email: jeff.bauman@catholicknights.org
Website: www.catholicknights.org

Catholic Order of Foresters*

Attn: Mr. Greg Temple
355 West Shuman Boulevard
Naperville, IL 60563-8494

Phone: 630-983-4927
Toll Free: 800-552-0145
Fax: 630-983-4057
Website: www.catholicforester.com

Cherokee State Bank

Attn: Mr. Scott Burger, Commercial Lender
607 South Smith Avenue
St. Paul, MN 55107

Phone: 651-290-6971
Fax: 651-290-6968
Website: www.bankcherokee.com

GE Public Finance

Attn: Mr. Patrick A. Tatarek
8400 Normandale Lake Boulevard, Suite 470
Minneapolis, MN 55437

Phone: 952-897-5605
Fax: 952-897-5601
Email: patrick.tatarek@ge.com
Website: www.gepublicfinance.com

KleinBank

Attn: Mr. Jim Emmer
1630 Arboretum Boulevard
PO Box 35
Victoria, MN 55386-0035

Phone: 952-443-2491
Fax: 952-443-2658
Email: j.emmer@kleinet.com
Website: www.kleinet.com

Knights of Columbus*

Attn: Mr. David J. Nowak, Manager
Supreme Council
1 Columbus Plaza

Phone: 203-865-1710
Fax: 203-772-0037
Email: david.nowak@kofc-supreme.com
Website: www.kofc.org

M & I Marshall & Ilsley Bank

Attn: Mr. Chris Flynn
6625 Lyndale Avenue South
Richfield, MN 55423

Phone: 612-798-3223
Fax: 612-798-3146
Email: cflynn@micorp.com
Website: www.mibank.com

North Star Bank

Attn: Mr. Garrett S. Jensen, Vice President
Commercial Lending
1820 North Lexington Avenue
Roseville, MN 55113

Phone: 651-487-4413
Phone2: 715-781-5668
Fax: 651-489-9541
Email: dphillips@northstarbank.com
Website: www.northstarbank.com

Lenders Continued

Northland Bank

Attn: Mr. Chris Flynn
6625 Lyndale Avenue South
Richfield, MN 55423

Phone: 612-798-3223
Fax: 612-798-3146
Email: cflynn@micorp.com
Website: www.mibank.com

Park Midway Bank

Attn: Mr. Richard Beeson, Jr., President
2265 Como Avenue
St. Paul, MN 55108-1797

Phone: 651-523-7800
Fax: 651-523-7887
Website: www.park-bank.com

Premier Bank

Attn: Mr. Andrew Nath, Executive Vice
President
2866 White Bear Avenue
Maplewood, MN 55109

Phone: 651-523-7800
Fax: 651-777-3761
Email: anath@premierbanks.com
Website: www.premierbanks.com

US Bank

Attn: Mr. Bryan L. Ljung, Vice President
U.S. Bank BC-MN-H03O
800 Nicollet Mall
Minneapolis, MN 55402
Contact if project is over \$2 million

Phone: 612-303-3824
Fax: 612-303-2251
Email: bryan.ljung@usbank.com
Website: www.usbank.com

Attn: Mr. Matt Bierman, Vice President
9633 Lyndale Avenue South
Bloomington, MN 55420
Contact if project is below \$2 million

Phone: 952-887-6025
Fax: 952-960-3151
Email: matt.bierman@usbank.com
Website: www.usbank.com

Wells Fargo Bank

Attn: Mr. Rich Gove, Vice President
MAC N9307-013
7900 Xerxes Avenue South
Bloomington, MN 55431

Phone: 651-205-6025
Fax: 651-205-8537
Email: g.rich.gove@wellsfargo.com
Website: www.wellsfargo.com

Western Bank

Attn: Ms. Carol Maloney,
Vice President Commercial Lending
1740 Rice Street
Maplewood, MN 55113

Phone: 651-290-7826
Fax: 651-290-7838
Email: cmaloney@western-bank.com
Website: www.western-bank.com

** These fraternal insurance companies require an unlimited Archdiocesan guarantee on their loans, so they have suspended lending in the Archdiocese because an Archdiocesan guarantee is not currently available.*

General Contractors

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Adolfson & Peterson Construction

Attn: Ms. Andra Adolfson
6701 West 23rd Street
Minneapolis, MN 55426

Projects: St. Edward, Bloomington
St. Henry, Monticello
St. John the Baptist, Jordan
St. Joseph, Lino Lakes
St. Vincent de Paul, Brooklyn Park

Phone: 952-525-2304
Phone2: 952-544-1561
Fax: 952-525-2333
Email: aadolfson@a-p.com
Website: www.a-p.com

Anderson Builders

Attn: Mr. Greg Anderson, President
3555 Louisiana Avenue South
St. Louis Park, MN 55426

Phone: 952-927-5400
Fax: 952-927-5444
Email: ganderson@anderson-builders.com
Website: www.anderson-builders.com

Donlar Construction

Attn: Mr. Jon Kainz
480 Cedar Street, Suite 500
St. Paul, MN 55110

Projects: St. Joseph, West St. Paul
St. Odilia, Shoreview
Transfiguration, Oakdale

Phone: 651-227-0631
Fax: 651-227-0132

Gunderson Construction

Attn: Mr. Dick Gunderson, Jr.
1760 Commerce Court
White Bear Lake, MN 55110

Projects: Assumption, Richfield
St. Peter, North St. Paul
St. Raphael, Crystal

Phone: 651-770-5001
Fax: 651-770-5577

General Contractors Continued

James Steele Construction Company

Attn: Mr. Dan McKay

1410 Sylvan Street

St. Paul, MN 55117

Projects: Good Shepherd, Golden Valley
Guardian Angels
St. Jerome, Maplewood
St. John the Evangelist, Little Canada
St. Pius X, White Bear Lake

Phone: 651-488-6755

Fax: 651-488-4787

Email: jsc@jsteeleconstruction.com

Website: www.jamessteeleconstruction.com

Knutson Construction Services

Attn: Mr. Geoff Glueckstein

5500 Wayzata Boulevard, Suite 300

Minneapolis, MN 55402

Phone: 763-546-1400

Fax: 763-546-2226

Website: www.knutsonconstruction.com

Langer Construction

Attn: Mr. Garth Ristau

54 Moreland Avenue East

West St. Paul, MN 55118

Projects: Byrne Residence
Divine Mercy, Faribault
Good Shepherd, Golden Valley
Mary, Mother of the Church, Burnsville
Our Lady of Good Counsel, Plymouth
St. Francis of Assisi, Lake St. Croix Beach
St. John Vianney, South St. Paul

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2737 Fairview Avenue North

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Projects: Cathedral of St. Paul, St. Paul
Risen Christ Catholic School, Minneapolis
St. Mary of the Lake, White Bear Lake
St. Rose of Lima, Roseville

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Attn: Mr. Roger J. Johnson, AIA

Senior Project Architect

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General Contractors Continued

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Phone2: 952-931-9300
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Website: www.stahlconstruction.com

Viking Construction

Attn: Mr. Dave Roth
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St. Paul, MN 55102
Projects: St. Leonard of Port Maurice, Minneapolis

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Witcher Construction Co.

Attn: Mr. Douglas A. Loeffler, Vice President
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Phone2: 952-830-9000
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Email: dloeffler@witcherconstruction.com
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Owner's Representatives and Construction Managers

Note: Catholic Finance Corporation (CFC) does not endorse or recommend, approve or disapprove of any of the consultants listed below. Their names and contact information are provided solely for your convenience. CFC has not made any independent investigation of the consultants listed and is not responsible or liable for any actions or inactions of the consultants. Any party considering hiring a consultant is responsible for selecting their own consultant, is free to use firms other than those provided on the list, and should carefully investigate the quality of work, experience and references of any consultant they propose to hire.

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Owner's Representatives/Construction Managers Continued

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Audit Firms

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