

EARTH DAY FACILITY MANAGEMENT TRAINING SEMINAR



THE ARCHDIOCESE OF MIAMI CAFETERIA



Morning Sessions: (9:00 am - 12:00 pm)

09:00am - 9:30am: -Opening Prayer

-Welcome and Mission Statement

-Facility Management and Environmental Stewardship

David Prada (ADOM)

09:30am - 10:30am: -Project Procedures and Managing Facility

-Maintenance Needs.

• David Prada and James Carballo (ADOM)

10:30am - 10:45am: -Break

10:45am – 12:00pm: -Implementing Energy Saving and Energy

-Management Strategies.

Idania Gonzalez (FPL)

Lunch Break

Afternoon Sessions: (1:00 pm - 4:00pm)

01:00pm – 02:30pm: -Understanding Insurance Requirements

Maria Vergho and Tony Abella (AJG)

02:30pm - 02:45pm: Break

02:45pm - 04:00pm: -Risk and Loss/Liability Management

• Gary Lopez (AJG)





Building and Property Office Mission Statement:

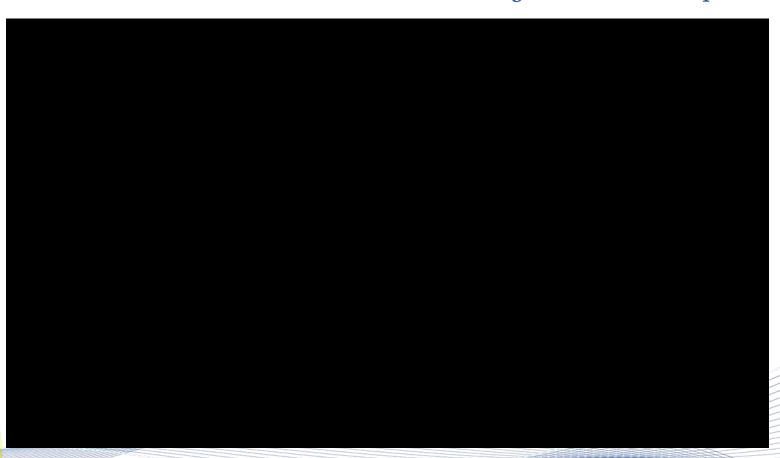
To Support the Archdiocese of Miami in Proclaiming the Good News of Christ through the work that we do related to its Buildings and Properties. We are charged with being faithful stewards of Archdiocesan assets, and with providing professional guidance and assistance to Church entities in the planning and overseeing of maintenance and construction projects.

When planning a project for your parish refer to the detailed ADOM Building and Property Office Project Procedures Outline (refer to handout)



Earth Day Perspective

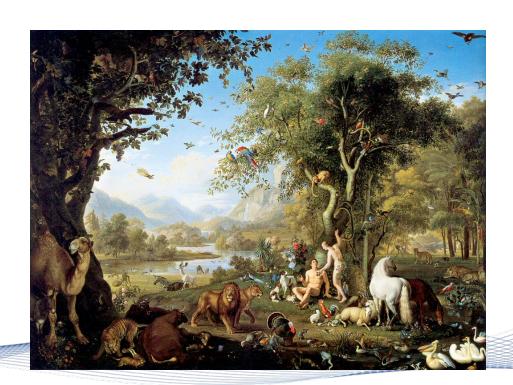
Catholic Climate Covenant – Who's under your carbon Footprint?





In Genesis (Gen 1:24-31) the story of creation demonstrates how in order to be authentic stewards of the earth we must balance three key concepts:

> Stewardship, Dominion, and Ecology (both human and environmental)





- 1-Stewardship implies a commission to care for something that is not our own. For all the gifts we receive from God we are charged to look after it for the good of another. "A good steward endeavors to act, as closely as possible, as his/her master would act in his place..."
- 2-**Dominion** calls us to a profound responsibility as "co-creators" with God to take the raw materials around us and to gather nurture and harness them for the benefit of everybody.
- 3-Environmental Ecology analysis and study of interaction among organisms and their environment
- 4-Human Ecology interrelatedness of various social, economic, political, or environmental crisis that confront human beings and human families.
 - "The Catholic Conception of Environmental Stewardship is rooted in the dignity of the Human Person and his relationship with God."



Key Points for us to consider as those who are charged with building and maintaining the built environment:

- Responsibility that we as humans are given when we are drawn by God into creative action as co-creators.
- We as Humans are created by God from the raw materials of the earth.
- The breath of life (spirit) given to Humans is cause for them to be exalted in the created order.
- We must resist any idea that the goods of the earth inhabit a disordered place above and apart from the human race. "If humans are seen as a "blight" or a force to be resisted...we upend Gods plan.

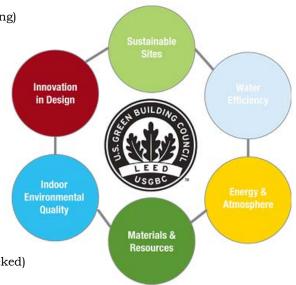




LEED: LEADERSHIP IN ENERGY AND ENVIRONMENTAL DESIGN

RATING SYSTEM FOR THE DESIGN, CONSTRUCTION AND OPERATION OF GREEN BUILDINGS

- 1. Sustainable Site
 - Managing how you treat property
 - Encouraging less vehicle use (buses, bicycles, parking)
 - Managing stormwater (quantity and treatment)
 - Heat Island Effect (roof and parking)
- 2. Water Efficiency
 - landscaping and innovative water usage
- 3. Energy and Atmosphere
 - Energy performance
 - Renewable energy sources
- 4. Materials and Resources
 - Recycling
 - Waste management (diverting waste rom landfills
 - Using products with high recycled content
 - Use products manufactured locally
 - Specifying products that are rapidly renewable
 - Using ceritified wood (responsibly harvested and tracked)
- 5. Indoor Environmental Quality
 - HVAC performance -Indoor air and Outdoor air balance
 - CO2 monitoring
 - Use of Low emitting materials/products (adhesives, paints, flooring)
 - System Controls
 - Daylight and Views

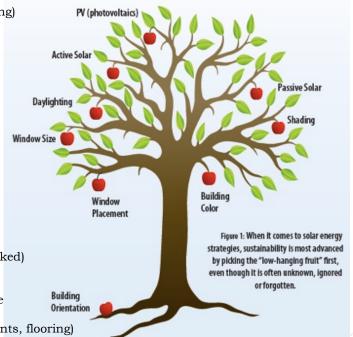




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BUILDING THE KINGDOM

Building and Property Office

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ENERGY SAVING INITIATIVES:

- 1. FPL ENERGY SURVEY
- 2. FPL ON-CALL PROGRAMS
- 3. FPL TIME OF USE RATES
- 4. HVAC EQUIPMENT SETPOINTS
- 5. HVAC PROGRAMMABLE CONTROLS
- 6. LED LIGHTING
- 7. IMPLEMENT PASSIVE SOLAR SOLAR TECHNIQUES:
 - 1. SHADING DEVICES/LANDSCAPING.
 - 2. REFLECTIVE WALL AND ROOF **COATINGS**
- 8. FPL TAX REFUNDS

Guaranteed savings on your electric bill

Lower your electric bill the easy way with FPL's On Call program. By enrolling in On Call, you agree to let FPL occasionally turn off equipment you select, for short periods of time, only when absolutely necessary. In return, you will receive a monthly credit on your bill even if On Call is not activated, Historically, On Call has been activated three to four times a year, during times of high electricity demand.

Savings and options you control

With FPL's On Call program, you choose the equipment and time options you want to enroll in the program. Depending on the options you choose, you can save as much as \$137 per year.*

Qualifying equipment options:

- » Central air conditioning (A/C) » Electric water heater
- » Central heating**













Building and Property Office



Mandatory Business Recycling

High grade **Steel** office paper

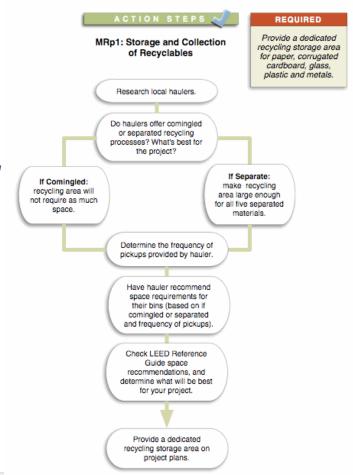
Scrap Mixed paper production

metals

Corrugated **Plastics** cardboard

> Glass **Textiles**

Wood Aluminum







Resources:

Catholic climate covenant.org

"Reflection of Climate Change and Environmental Stewardship." **USCCB - Archbishop Thomas G** Wenski

QUESTIONS?



ADOM PROJECT PROCEDURES

The Project Construction Cycle - The Tree Swing



How the client described it



How the architect envisioned it



How the engineer designed it



What the budget allowed



How the liability insurance agent described it



Create your own cartoon at www.projectcartoon.com

How the estimator bid



How the manufacturer made it



What the building inspector expected



How the contractor installed it



What the customer really wanted



How the project was documented



How the customer was billed



Emergency Projects (Fires, Floods, Broken Waterlines)

- > First: ACT to Address the emergency locally:
 - Stay Calm, Stay Safe!
 - Call 911 if emergency is life threatening and warranted (fire, injury, etc...)
 - Turn off water valves, use extinguishers only if safe to do so.
- > Second: Call GB Hotline @ 877-376-2561 (client 060001)

(THIS # SHOULD BE READILY AVAILABLE AND PROGRAMMED IN YOUR CELL PHONES)

Third: Call David Prada (305-951-4058 cell)



PROJECT FUNDAMENTALS

EVERY PROJECT AND CONTRACT MUST DEFINE 3 ELEMENTS TO BE EFFECTIVE (AND LEGAL):

- 1. Scope (what is included/excluded in the project?)
- 2. Budget (what is the cost of the project?)
- 3. Schedule/Time (how long will project take?)

Which of you wishing to construct a tower does not first sit down and calculate the cost to see if there is enough for its completion? Otherwise, after laying the foundation and finding himself unable to finish the work the onlookers should laugh at him and say, 'This one began to build but did not have the resources to finish... (LUKE 14:25-33)









Building and Property Office

Small Projects (Under \$25,000)

- Call Building and Property Office for assistance and guidance.
- > Parish must define (Building and Property Office can help):
 - Scope (what is included in the project? Are permits needed?)
 - Budget (what is estimated total value of the project-hard/soft cost)
 - Time (how long will project take?)
- Parish obtains Bids/Prices/Insurance Documents from 3 Qualified Vendors and prepares ADOM Contract.
 - * BEFORE soliciting 3 bids/prices you must provide the vendors the following in order to confirm they can meet ADOM requirements:
 - ADOM Standard Construction Contract (even if Pro-Bono)
 - ADOM Insurance Requirements (even if Pro-Bono)
- Pastor to confirm contractor submits insurance certificate in accordance with ADOM standards, and pulls all permits as required by code, before commencing work.
- > Submit all documentation to Building and Property Office for review. All contracts, permits, and forms that need "OWNER SIGNATURE" are submitted to the Building and Property Office for verification and signature by Archbishop Wenski as Owner.



Minor Capital Projects (additions, renovations, remodeling, maintenance, and roofing \$25,000 or more)

- Call Building and Property Office for assistance and guidance.
- Pastor requests Project Approval from Archbishop for project concept and finances (copy to Chancellor for Administration), including confirmation that the Parish Finance Council has approved the project.
- Archbishop's written approval is sent to pastor
- Building Property Office assists Parish during design and construction process:
 - Preparing complete Scope, Budget, and Schedule
 - Selecting and Hiring Architect and Contractor
 - Preparing Contracts (ADOM or Other)
 - Ensure all Vendors meet ADOM Insurance Requirements.
 - Assist with project management services (in house or outsourced)
 - Assist parish to manage Budget and Schedule
 - Obtaining permits and navigating gov't agencies.
 - Interface with Archdiocesan attorney as needed.
- Pastor to confirm contractor submits insurance certificate in accordance with ADOM standards, and pulls all permits as required by code, before commencing work.
- Submit all documentation to Building and Property Office for review, All contracts, permits, and forms that need "OWNER SIGNATURE" are submitted to the Building and Property Office for verification and signature by Archbishop Wenski as Owner.



Major Capital Projects (additions, renovations, remodeling, maintenance, and roofing \$25,000 or more)

- Call Building and Property Office for assistance and guidance.
- Pastor requests Project Approval from Archbishop for project concept and finances (copy to Chancellor for Administration), including confirmation that the Parish Finance Council has approved the project.
- Archbishop's written approval is sent to pastor.
- Review Concept and preliminary drawings with ADOM Project Review Committee.
- Building Property Office assists Parish during design and construction process:
 - Preparing complete Scope, Budget, and Schedule
 - Selecting and Hiring Architect and Contractor
 - Preparing Contracts (ADOM or Other)
 - Ensure all Vendors meet ADOM Insurance Requirements.
 - Assist with Project Management Services (out sourced)
 - Assist parish to manage Budget and Schedule
 - (including direct purchase tax savings)
 - Obtaining permits and navigating gov't agencies.
 - Interface with Archdiocesan attorney as needed.
- Pastor to confirm contractor submits insurance certificate in accordance with ADOM standards, and pulls all permits as required by code, before commencing work.
- Submit all documentation to Building and Property Office for review. All contracts, permits, and forms that need "OWNER SIGNATURE" are submitted to the Building and Property Office for verification and signature by Archbishop Wenski as Owner.





Miscellaneous Projects:

- **Building Demolition**
 - Call Building and Property Office for assistance and guidance.
 - Pastor writes letter requesting approval of ANY building demolition project to Archbishop, copy to Sr. Elizabeth. Letter should include detailed demolition description, costs/bids, and funding sources.
- 40 Year Re-Certifications
 - Notice is sent to Parish from Building and Property Office
 - Parish **IMMEDIATELY** hires AE team to prepare and submit report (time sensitive and fines may be incurred).
 - Parish funds and makes any required corrections.
- Notice of Violations
 - Notice is sent to Parish from Building and Property Office
 - Parish notifies Building and Property Office of plan to resolve violation or request assistance from Building and Property Office.
- Carnival Agreements
 - Submit the following to Janet Rancano in Building and Property Office
 - Carnival Agreement (current version- rev 8-8-2012)
 - Certificate of Liability
 - **Permits**





ARCHDIOCESE OF MIAMI (RE) ROOFING REQUIREMENTS

- 1. Maintain your roofs and follow recommendations provided in your parishes annual Roof Management Report.
- 1. Required to maintain existing roof warranties
- 1. Call the ADOM Building and Property Office Prior to installing a new roof or performing roof repairs as required to meet minimum installation and warranty requirements for
 - Flat Roofs
 - Tile Roof
 - Shingle R
 - Metal Roof
- ADOM team will assist in bidding, construction inspections, and closeout.

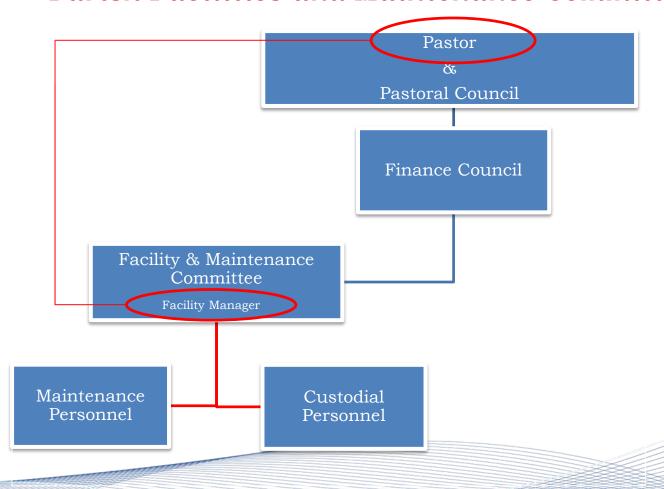


MANAGING FACILITY MAINTENANCE REQUIREMENTS

James Carballo Project Manager Building and Properties Office



Parish Facilities and Maintenance Committee





PARISH FACILITIES AND MAINTENANCE COMMITTEE

The purpose of the parish Facilities and Maintenance Committee (FMC) is to be responsible for the efficient, effective, and safe administration of all physical assets of the church. These will include buildings, internal and external maintenance, vehicles and other motorized equipment, and other plant account equipment. The FMC will be responsible for efficient space utilization and adequate provision of ministry furniture, hardware, and equipment. The FMC will ensure that the facility is safely and securely maintained and managed.





PARISH FACILITIES AND MAINTENANCE COMMITTEE

- Advise the pastor regarding the results of quarterly inspection of all parish facilities.
- Recommend repairs or replacements based on priorities established by these inspections. <Capital Improvements Five Year Plan>
- Develop a detailed inventory of all parish assets and update on an annual basis.
- Assist in the development of guidelines concerning use of parish facilities.
- Assist in the development of parish energy conservation programs.
- Develop team of parishioners who will donate time and talents for parish maintenance task, taking note of the extent to which such work is allowed to be performed by volunteers under the guidelines of the Archdiocese risk management and insurance programs.
- Review the parish's risk management and loss prevention reports in order to insure corrective action is taken where necessary.
- Ensure that the safety and security of the parish campus is addressed and reviewed regularly.
- Work with Parish Pastoral Council and other parish committees to provide long-range planning for both the financial and physical needs of the parish. <Capital Improvements Five Year Plan>





FACILITIES AND MAINTENANCE COMMITTEE REPORTS:

Provide a narrative quarterly report that details elements of responsibility that are of interest to the parish at large. Such items may include special purchases, needs not yet met, future activities that may impact programs, and so forth. The FMC will annually update and submit the Capital Improvement Five Year Plan to the Pastoral Council for budgeting and planning purposes.



Samp	le Parish Cap	ital Improve	ment Five Yea	ar Plan		Total 5 Yr Expenditures
Capital improvement	YR-1	YR-2	YR-3	YR-4	YR-5	
Paint School			\$70,000.00			\$70,000.00
Restripe Parking Lot	\$100.00	\$100.00				\$200.00
Replace Chiller			\$50,000.00			\$50,000.00
Roofing "band-aids"	\$5,000.00	\$5,000.00				\$10,000.00
Re-Roof				\$120,000.00		\$120,000.00
LED Lighting Replacement					\$50,000.00	\$50,000.00
Yearly Total	\$5,100.00	\$5,100.00	\$120,000.00	\$120,000.00	\$50,000.00	\$300,200.00



CREATING A FACILITIES SPACE PLAN INVENTORY

- Create and Update your Facility Space Plan Inventory annually
- Inventory each space in your facility including:
 - Space Dimensions
 - Area
 - Potential uses
 - Furniture Fixtures and Equipment





Building A	
Room 201	
20' x 30'	
600 Sq.Ft	
30 Student Desks	
1 Teacher Desk	

Use
Daily
Sunday School
Nights



Maintenance Fundamentals

- When driving up to, or walking the property you should look for deficiencies.
 - Things that will just pop out at you. Note them down and add them to a list to address based on priority.
 - Examples
 - 1. Landscaping Are there plants that need to be replaced, lack of mulch
 - 2. Exterior Paint Is it peeling, chipping or have mildew? The facility should be on an approx. 7-10 year paint cycle.
 - 3. Parking lot? Are the stripes faded? What condition are the signs in?
 - 4. What is the overall appearance of the property when you stand back and look at it? Clean and neat does not require a large expense.





Maintenance Fundamentals

- Types of Maintenance
 - **Preventative Maintenance** The planned servicing and repairs of equipment and facilities that result from inspections and systematic schedules.
 - Examples of this type of Maintenance
 - HVAC quarterly maintenance and filter cleaning
 - System continues to operate a peak efficiency
 - Paint 6-10 year paint schedule
 - Maintain the integrity of the building envelop







Maintenance Fundamentals

- Types of Maintenance
 - **Operational Maintenance** Activities and services which are continuous in order to provide physical resources on a daily basis.
 - Landscaping and Irrigation
 - Light bulbs
 - Touch up interior walls
 - Replace stained or damaged ceiling tiles







PERMITS: Work that does not require permits per FBC** **Verify with your municipality for exceptions**

- Electrical
 - Repair work performed by <u>licensed and insured electrical</u> contractors that does not exceed \$500.00. (Materials and Labor)
 - Repair/replace electrical wall switches and outlets
- Plumbing
 - Repair work performed by licensed and insured plumbing contractors that does not exceed \$500.00. (Materials and Labor)
- Building
 - Repair work performed by a <u>licensed and insured building</u> contractor that is not structural in nature and does not change the occupancy, does not affect life safety and the value of which does not exceed \$1000.00 (Materials and Labor)
- Mechanical
 - Repair work performed by licensed and insured mechanical contractors that does not exceed \$500.00. (Materials and Labor)



- In-House or Outsource?
 - Advantages for using contractors
 - It eliminates personnel problems: The contractor is responsible for employment decisions
 - Eliminates the need to purchase expensive equipment
 - The contractor will be responsible for the consumable cleaning supplies
 - The contractor will provide trained personnel
 - Disadvantages for using contractors
 - A greater degree of planning is required on the part of the church management
 - Inspection of work accomplished becomes more difficult
 - Immediate custodial problems are more difficult to handle
 - Security of the facility may be compromised



Tools to Manage your Workload

Checklists

Checklists are an efficient tool for tracking daily work activity and insuring that the work gets completed on a regular basis.



Field Inspection	N/A	ОК	Deficient	Comments
All open screwed connections bull plugged				
Lines, equipment, and steam tracing are identified				
No crosstie between process and utilities; dead spools and double block-bleeds in place				
Proper hose connections provided				
Adequate operating access, escape routes provided				
Operator alarm and shutdown test facilities adequate and have been tested				
Fire and safety inspection performed				
Temporary piping, hoses, tubing and gauges removed				
All primary PSV block valves are car sealed open. Spare PSV block valves are car sealed closed				
All valves designated on the P&IDs are car sealed in correct position and all valves that been blinded temporary or permanent are in the master blind list				
Operating procedures and process discussions updated				
Operator training completed				



Tools to Manage your Workload

- **Equipment Inventory**
 - Equipment Inventory is used along with and incorporated in the Facility Space Plan.
 - Can be used to track maintenance records.
 - Can be used to track equipment repairs and expenses.

		In	vento	ry Lis	t			
Inventory ID	Name	Description	Unit Price		Reorder	Reorder Time in Days	Quantity in Reorder	Discontinued?
	1							
	1							
		2						
	-							
	-		-				-	
		3						
		2						
		0	100					
	2	S.						
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Tools to Manage your Workload

- Work Orders
 - Work orders are an efficient way to track maintenance issues by need and importance.
 - The type of work order system you use is up to the facility manager.



Use this form to submit a work order request to COGZ CMMS Software in your maintenance department				
Your Name*				
Your Email				
To Email*	cogzworequest@MyCompany.com			
Short Description*				
Enter Details of Request on this Form. Multiple requests will not be processed.				



Required Tests prior to construction or renovation

Lead and Asbestos tests are required prior to renovation. Lead

- 1. Lead was banned in 1978.
- 2. Damages the Brain and central nervous system.
- 3. Causes decreased intelligence, reading and learning disabilities such as ADD and ADHD.

Asbestos

- 1. Causes Asbestosis and lung cancer
- 2. Fine mineral fiber.
- 3. Can be found in Drywall, popcorn ceilings etc.

Contact ARS Environmental Alex Front – (954) 227-2402 www.epa.gov/lead