

# CCFM Today

CONFERENCE FOR CATHOLIC FACILITY MANAGEMENT

Summer 2011



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## CONFERENCE FOR CATHOLIC FACILITY MANAGEMENT

**NATIONAL OFFICE:**  
PO Box 618146  
Chicago, IL 60661

## PRESIDENTS REMARKS

I hope that everyone who was here in St. Louis enjoyed themselves and found the conference to be a great experience. I know that I enjoyed being involved in pulling it all together.

The comments that we have received have been very positive. However, we got such a small sample that we are asking that if you have a comment that you haven't made yet, that you still do so! You can do that either by contacting me at [trichter@archstl.org](mailto:trichter@archstl.org) or Roger Hughes at [rhughes@oldstpats.org](mailto:rhughes@oldstpats.org). We can only get better if we learn from our past.

Now that the St. Louis conference is over, we have to start looking to the future. As the 2011-2012 President of CCFM, I have a few things that I would like to see us accomplish this year.

- With Roger's guidance, I want to take a look at how our Board operates, to see if there are any opportunities to make it function even better.
- I want to make sure that our up-coming conference in Covington is very successful. Since we are heading into the hometown of

Bishop  
Foys, our  
Episcopal  
Moderator,  
there is no  
room for  
error.



Thomas Richter  
President  
Archdiocese of St. Louis

- Continue the good work that we have done with the Catholic Extension Society. Their involvement has brought a number of new Dioceses into CCFM. That is not only good for CCFM, but even more importantly, their involvement in CCFM is good for those small dioceses.
- Round out the membership of our committees by asking more Dioceses and religious orders to participate. If you want to get involved, contact Roger or me at the above referenced e-mail addresses. And if you don't volunteer, don't be too surprised if you don't get a call asking you to "volunteer".

Well, that is all from here for now. Have a great summer-and be safe out there!✚

go online to,

[www.CCFM.net](http://www.CCFM.net),

to learn more

## BOARD OF DIRECTORS

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Diocese of Charlotte

## We've Come a Long Way, Baby.....Reflections of the Past President

All I can say is, "Wow!" This is my immediate response to the past two years as president of CCFM. They were a whirlwind. I was elected president as we left Pittsburgh and stepped down at the end of the conference in St. Louis and we had Orange County in between. What a ride! Great places, great conferences, great participation!!

I would love to take credit for everything that transpired during my presidency, but it wasn't me getting things done, it was all of you. Under the direction of Roger Hughes, Executive Director, and the leadership of our board, great things have been accomplished. Through the work of Deacon Piche and Jim Zelinski and their committees, our Regular and Corporate membership has significantly increased with the number of religious orders doubling. All of our committees are bigger and stronger than ever with more and more regular and corporate members taking part.

We have become financially sound again and will be in even better shape by the end of the next fiscal year having two years of expenses tucked away in our investment account. Through Roger's outreach, CCFM began a partnership with Catholic Extension Society. Their generosity has allowed mission dioceses to attend our conference and become new members over the last two years. This really helps us provide our knowledge, professional expertise, and training throughout our entire Church.

As CCFM moves into the future, we need to recognize our changing environments. Over the past few years we have seen our members losing jobs due to the downsizing, outsourcing, or even closing of facility maintenance, construction, and real estate offices. Through population shifts, economic reasons, or reduction of vocations, many of our properties



Janis K. Balentine  
*President Emeritus*  
Diocese of Colorado Springs

have to be sold or converted. For these reasons, our Support Group is even more valuable as it turns a year old. They have helped fill our Resource Center with documents to share and are assisting those members in need. A new program they are offering is the Maintenance 101

presentation to help train new pastors in the basics of facility management.

To help keep us moving forward, Communications and Long Term Strategic Planning became standing committees under our bylaws. The website has been completely revamped and is still changing and growing under the direction of Barry Koebel. Michael Davitt helped us create a Long Term Strategic Plan which the board is ratifying this summer and we have already begun implementing some of the activities.

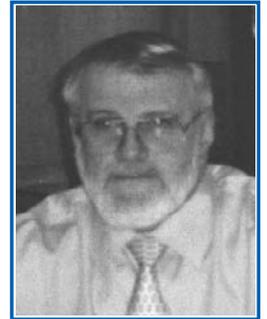
Our conference in St. Louis saw further innovations such as the Internet Café, special meetings with the mission dioceses and religious orders, and a return of the Sponsor/ Exhibitor Reception. Bill, Eric, and Andy kept our educational tracks strong and more of them are qualifying for AIA continuing education credits. Remember, all the tracks can be found on the website along with pictures of past conferences and news of the upcoming 2012 conference in Covington. We also saw charter members like Les McDonald, Lou Baird, and Noel Olsen receive the recognition they so long deserved.

Thank you all for the support I received during my presidency and the commitment you all have to our conference.

Yes, baby, we have come a long way, but we have a long way yet to go and our road is forever changing.✠

## BUSINESS PARTNERS

Not too long ago there was no such thing as a CCFM business partner. CCFM was envisioned to be self sufficient and comprise only of dioceses or archdioceses. After several conferences it was realized that we were all members of a very unique occupation, one that not only encompassed various everyday methods of maintenance, property management, design and construction, but also one that required highly sophisticated approaches to the design and construction process as well as the sale and purchase of property. Churches and church associated buildings required much more specialized knowledge than usual maintenance, designs and construction efforts. Not only do they require specialized personnel in the day to day operation of these facilities, they also require a cadre of very specialized craft workers and materials, such as stained glass experts, liturgical furnishing experts, acoustic engineers and lighting experts to mention just a few. Maintenance issues are also highly specialized due to the age and lack of maintenance as well as the historical significance of the buildings. Property acquisition and sales is also a very specialized area because of Canon Laws and determining the profane use of sacred goods and properties.



Peter Silva  
Chair Company/  
Corporate Committee  
Archdiocese of Boston

We realized that even though each of our diocesan members had excellent understandings of the work they did, they did not have all the answers. Nor did we always have the knowledge of what was happening in our world or what new processes or materials used outside the church arena could be incorporated in our day to day work efforts. We relied on knowledge and experience of each other that was broad but unfortunately, often limited. Some dioceses had no facilities or construction personnel at all. Often the insurance section of a diocese would handle maintenance and construction as well as real estate. *In essence, there was a real need to expose ourselves to outside experts, who unlike ourselves, dedicated their expertise to very specialized, but limited fields. Thereby, like a Doctor who specializes in a*

*Mark your calendar now  
for CCFM 2012  
Covington, Kentucky  
April 22-25*

APRIL 2012						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
<b>22</b>	<b>23</b>	<b>24</b>	<b>25</b>	26	27	28
29	30					

*particular practice and becomes much more knowledgeable about that specific practice, so does the engineer, manufacturer, contractor or artist who work in our world become well versed on the specifics and advances within their own area of expertise.*

In an ever ongoing attempt to increase our members ability to have as many resources at their fingertips as possible, CCFM decided in 1997 to look out beyond only diocesan doors and seek expertise from those who we felt would be of great benefit and could service the needs of the member dioceses. The first exhibitors were welcomed to the conference in Newport and corporate sponsors became a reality at about the same time. The number of exhibitors has grown to an average of 40 at each conference, each with a highly specialized expertise that is relative to the day to day operations of the dioceses and other religious institutions. ***Our Business Partners (Exhibitors, Corporate Members and Corporate Sponsors) have brought the conference to a whole new level of professionalism and accomplishment that was never anticipated or envisioned when the conference was born. They are truly an important part of our conference.***

Our Business Partners today provide us with the ongoing expertise required to do more with less as our world goes through some major changes, particularly in financing and aging buildings. They have the answers and are more than willing to provide the advice and expertise we need. Our Business Partners are truly a major component of CCFM and have helped us to grow and provide our religious members with the assistance and guidance they need.

In an effort to show our deep appreciation for the support from our Business Partners, CCFM has entered the 21st Century with our continually improving and user friendly website. There is a forum area for members to ask questions that all our Business Partners can address directly with the diocese or religious institution that has the question. We have created the ability to link the CCFM website directly to the website of each of our Business Partners at the click of a button. We have provided a separate category just for identification of the various Business Partners by trade (or by multiple trades) that we encourage our Business Partners to populate with a description of the services and products they provide and contacts. Many of our Business Partners have taken advantage of these capabilities and hopefully all our Business Partners will do so in the near future. It does not matter if you are a local Business Partner either, many dioceses are very close to each other and the diocese just across the river or parkway may provide more opportunities for a local business to expand without a significant expense.

As we continue to build our religious institution and diocesan membership base, which has been growing steadily, there will be more opportunities for our Business Partners. That is our goal. We will continue to expand our membership of dioceses and religious institutions and to welcome and expand our list of Business Partners and foster and encourage our members to explore their possibilities and problems with our Business Partners to the full extent possible. ***We welcome any ideas or comments that may provide more opportunities for our Business Partners and provide more assistance to our religious membership.*** †

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## The Importance of a Master Facility Plan

*Article provided by FRANCK & LOHSEN ARCHITECTS, Washington, D.C.  
CCFM Member*

Most parish churches and other facilities are in need of maintenance, renovation, or expansion. **All too often these needs are identified and addressed only when they get to the crisis stage, and the resulting work must be done without a sufficient budget or proper planning.** If these needs could be identified earlier, a priest and parish would have the time to plan a logical sequence for the work, and most importantly, to fit the work into their financial planning. Work that can be foreseen is always better than work that is an unexpected expense.

How then can a parish plan for their facility expenses? The answer lies in a reliable Master Facility Plan. The diocese can assist each parish by suggesting a suitable format and encouraging each parish to keep their Master Facility Plans up to date.

**The Master Facility Plan must begin with an assessment of the physical condition of the existing parish facilities, along with an estimate of the life left in each of the building components, such as the roof, mechanical system, lighting, sound systems, organ, etc.** This can be accounted for in a relatively simple form, prepared by a consulting architect and engineer, or in some cases by the parishes' own facilities personnel.

Layered on top of this can be an estimate of the occupancy requirements projected into the coming years. Based on demographic estimates and other diocesan planning, this will indicate if any building expansion or new construction is anticipated. This can be difficult to quantify exactly, but it is helpful to understand the most likely scenarios facing a parish in the next five to ten years.

Finally, the Master Facility Plan should contain a program for any aesthetic or liturgical enhancements desired by the parish. This can include new works of painting or sculpture, new stained glass, decorative painting, new pews, sanctuary renovations, a new organ, and similar items. These improvements, while not necessary for the physical function of the church, are often critical to the success of a Master Facility Plan, because they help to keep the focus on the fact that the goal of the Master Facility Plan is to not only maintain, but to enhance the church. A well organized and illustrated Master Facility Plan is not merely a list of upcoming liabilities. It can, in fact, be an effective tool for making sound and achievable financial plans to meet the

*Continued on page 8*

St. Louis, 2011





coming needs. By understanding the magnitude of not only the necessary, but also the desired upgrades to its facilities, a parish can organize the work and raise the funds in a timely manner. Having a plan which illustrates the aesthetic as well as the functional elements is critical to raising funds. As any priest will tell you, it is very rare that a donor will pledge to replace the mechanical system, but often you will find a long list of people willing to donate a new stained glass window or a beautiful new baptismal font. If planned well, the costs of each phase of the work can be shared between these two types of improvements. Making sure that the parish and its key donors understand that their gifts are enhancing not only the function but also the beauty of their church.

Diocesan facility managers are usually not in the position to mandate that each parish maintains a current Master Facility Plan. They can, however, take the time to prepare a standard format and help to engage the service of a professional team that can help each parish to assess its needs. When done in a standardized manner for several parishes, these services would be quite inexpensive.

Of course, a Master Facility Plan is only a useful tool if it is kept up to date. Once the plan is established, it should be updated every two years. If prepared in an organized format, such an update should not be time consuming or expensive at all.

Keeping up with the demands of the facilities of a parish is challenging enough. Expanding that reach to all of the facilities in a diocese can be almost impossible to keep up with, unless there is a standard and workable process in place. **The ultimate goal is to avoid the surprise projects that can lead to either unexpected costs or deferral of maintenance. The diocese can help to guide its parishes with the creation of their Master Facility Plans.** †

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# LESSONS LEARNED

*Article provided by Robert A. Palisch  
Manager - Archdiocesan Building Projects  
Office of Building and Real Estate  
Archdiocese of St. Louis*

There are many aspects of construction, and many different documents to rely on when performing construction projects. **One of the ways owners protect themselves is to use a payment and performance bond to protect the finances, and to ensure that the construction project gets completed.** The Archdiocese of St. Louis does this on all major construction, and especially on projects that require a loan from the Archdiocesan Fund, our internal “Bank”.

As many CCFM members do, **the St. Louis Archdiocese used a selection committee to establish a list of pre-approved General Contractors.** Our selection was made based on many things - company size, types of projects done in the past, references on past projects, and also on the financial stability of the company. Part of our ongoing management of this list is evaluating contractors after they have completed a project, and evaluating their financial records on a yearly basis to be certain that there are no issues that need to be addressed, and to have a comfort level with their financial stability. We evaluate these records, and look at balance statements, income statements, cash flow, and an audited statement or review. This helps evaluate how the contractors are doing financially, and hopefully give us a good snapshot of their stability.

**Even though we check financial records, require payment and performance bonds and select bidders from our pre-approved list, we recently ran into a problem with one of our contractors that I would like to share as our “lesson learned”.**

We had a contractor that was low bidder on 3 projects within a 6 month time period. Payment and performance bonds were required on these projects, and shortly after the contracts were signed, he submitted the bond documents. During the course of the project, the general contractor was having trouble getting his subcontractors to the jobsites, was slow in his responses to inquiries, paperwork was getting slower, and the general flow of the projects seemed to slow up, creating a concern. Although we always require unconditional lien waivers from the subcontractors paid on previous invoices, subcontractors were starting to complain that they were not being paid. When this came to light, we immediately started issuing joint – two party checks, payable to the general contractor and his subcontractor and/or supplier. After this went on for a month, we received notice from a number of subcontractors that they had been issued checks from the contractor that had been issued on insufficient funds. We were assured by the GC that these payments would be made good, however, after another month, they were not. At this point, these subcontractors were sent a copy of the payment bond, and instructed to seek payment through the bond. Two weeks later we were notified that the bonding company had no evidence that the bonds for these projects were ever purchased, and when they questioned the general contractor,

Lessons Learned

he could not produce any evidence of payment. Upon further investigation, it was discovered that the bonds presented to the Archdiocese were fraudulent documents, forged by the contractor on his copy machine. A long story made shorter, we terminated the contract with the GC, and pursued legal action against him.

**This is our lesson learned. Our procedures now include contacting the bonding company and getting documentation confirming that the bonds are legitimate, and have been paid for and issued as reflected. Luckily, we did not lose any funds over and above the amount of the original contracts, because we received lien waivers and these lien waivers were checked against previous payments to ensure the subcontractors were getting paid.**

Our advice based on what we have been through, **ALWAYS** get unconditional lien waivers from all subcontractors and major suppliers, and if you require payment and performance bonds, make sure that you check their validity with the issuing company.†

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## ***Dramatically Reduce Your Facilities Lighting Energy Consumption and Gain a Quick Return on Investment***

*Article Submitted by CentiMark Corporation  
CCFM Member*

Many corporations and businesses are demonstrating “green” responsibility by seeking out technologies that reduce their carbon footprint. One such solution is the use of daylighting with solar powered tubular top lighting technology. **Solar light pipes help decrease a facility’s energy consumption during peak energy load times when energy costs are the highest, dramatically reducing your facility’s lighting energy consumption during daylight hours.**

Annually, there are 3,650 hours of usable free daylight that can replace electrical lighting. CentiMark provided solar light pipes operate regardless of geographic location and collect more usable light at more times of the day than any other light pipe. Daylight is brought into your facility without using complicated mechanical devices or conversion to other kinds of energy.

Through the efficient use of solar energy, you can turn your roof into an asset that contributes to your bottom line and potentially gain a return on investment in less than 18

months as many customers have realized. Sign-up for our free Daylighting webinar to learn how your company can "get off the grid" with solar powered tubular top lighting.

## ***Is Your Roof Prepared for All Storm Seasons?***

Although, no one can be certain what this Spring/Summer season will bring, it's always wise to prepare your roof before severe weather strikes. Now's the time for a roof inspection to check the entire roof field, decking, flashings, drains, gutters, walls and ponding water to determine the condition of your roof. **Taking a proactive approach can extend the life of your roof and help you avoid costly repairs or replacement. We are always available, call and schedule a roof inspection with CentiMark and prepare your roof for the coming storm seasons.**

## ***Maintaining Your Most Important Asset***

Your roof is your most important asset. However, we frequently don't recognize the importance of maintaining the roof until there is a roof leak or water entry into the facility. Instituting a preventative maintenance program can save your organization costly roof repairs or early replacement as well as uncover hidden roof damage within the roofing structure. CentiMark customizes preventative maintenance program to fit any budget. Learn how to implement a roof preventative maintenance program for your building.

*Cindy Molnar*

*National Accounts Manager*†

### **ADDRESS UPDATE**

If you wish to update our mailing address information or if you wish to add other names to our list please complete the information below or visit [www.ccfm.net](http://www.ccfm.net)

Name \_\_\_\_\_

Position \_\_\_\_\_ Arch/Diocese \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Deletion     Addition     Correction

### **What would you like to see in CCFMToday**

Members are encouraged to submit items as well as articles for consideration in **CCFMToday**. Notices of Employment Opportunities are published on the web site as they are received in the National Office, as well as in the upcoming edition of **CCFMToday**.

#### **CCFMToday Publication Schedule**

**CCFMToday** will accept notices and articles for future issues according to the following schedule:

<b>Deadline Date</b>		<b>Publication Date</b>
February 20	Spring Issue	April 1
May 20	Summer Issue	July 1
August 20	Fall Issue	October 1

We would appreciate your comments & input on items for future issues. Please mail to:  
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## CONFERENCE FOR CATHOLIC FACILITY MANAGEMENT

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FIRST CLASS MAIL

### Canon Law Society of America (CLSA)

<b>October 10, 2011</b>	Jacksonville, FL	Hyatt Regency Jacksonville-Riverfront
<b>October 8, 2012</b>	Chicago, IL	Hyatt Regency O'Hare

### National Federation of Priests' Councils (NFPC)

<b>April 23-26, 2012</b>	Nashville, TN	Radisson Hotel
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### Conference for Catholic Facility Management (CCFM)

<b>April 22-25, 2012</b>	Covington, KY	Marriott at Rivercenter
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### National Association of Church Personnel Administrators (NACPA)

<b>2012</b>	To Be Announced	To Be Announced
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### Diocesan Fiscal Management Conference (DFMC)

<b>September 25-28, 2011</b>	Minneapolis, MN	Hyatt Regency Minneapolis
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### Diocesan Information Systems Conference (DISC)

<b>June 1-3, 2011</b>	Boise, ID	Hampton Inn & Suites Boise/Downtown
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