The Episcopal Diocese of Texas

Project and Construction Guidelines

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These guidelines help congregations plan and complete master plans, new construction, and major renovations. The goal is to provide safe, accessible facilities that support ministry and remain financially sustainable. Use the steps that apply to your project, and involve the Diocese early so that planning, funding, and approvals stay coordinated.

Keep the congregation informed throughout the process. A communications plan should explain the need, invite input, build support for the capital campaign, and provide regular updates during construction.

Planning and defining the project

1 Identify the need

The Vestry or Bishop's Committee should begin by identifying the ministry or facility need. Review the congregation's core values, mission, vision, and action plans, and update them as needed. Use that work to distinguish what the congregation needs to carry out its ministry from what it would simply like to have.

2 Form a Building Committee

The Vestry or Bishop's Committee appoints a Building Committee to evaluate options and guide planning. Determine whether the project needs a new or updated master plan. A smaller renovation or expansion may not require a master plan, but it will likely require an architect.

3 Contact the Diocese

Contact the Diocese early for guidance on the process and recommendations for architects, engineers, contractors, and other professionals. Early coordination helps identify approval requirements, financing questions, and concerns before substantial time and money are committed.

4 Select an architect

Interview and select a registered professional architect. Most projects benefit from architectural services, including interior remodeling and updates to kitchens or offices. In addition to meeting the immediate need, the architect can improve how the space functions, its appearance, energy efficiency, and operating costs.

The project team must address applicable building codes, life safety requirements, and accessibility requirements. These issues should be considered during planning and budgeting. Qualified design professionals help the congregation provide safe, accessible space and manage the property responsibly.

Specialists in worship space, acoustics, lighting, or educational environments may work with the architect. A designer does not replace the registered architect, who remains responsible for the architectural drawings.

5 Develop the master plan or preliminary design

When a master plan is needed, the architect leads the process with direction from the Building Committee. Allow approximately four months, with opportunities for input from the congregation and other users, including a school when applicable. Focus groups and surveys can help define priorities and build support for a future capital campaign.

If the scope is already clear and a master plan is unnecessary, the committee works with the architect to define the project's needs and prepare for design, engineering, and construction drawings.

6 Approve the direction and authorize the next phase

The Vestry or Bishop's Committee adopts the master plan or approves the preliminary design. For a master plan, the next decision is whether to begin planning and a feasibility study for Phase I. For a smaller project, authorize the Building Committee and architect to proceed with detailed drawings within an approved budget.

7 Meet with the Diocesan Resource Team

Review the project's status, schedule, congregational financial statements, and any concerns with the Diocesan Resource Team. Discuss what the Church Corporation will need to review and when the project should be presented. Contact Blaker, Fisher, Mullins, and/or Hilfinger.

Design and financial planning

8 Begin schematic design

Engage the architect to work with the Building Committee on schematic design. This phase establishes the initial layout and approach to the project and provides a basis for preliminary pricing.

9 Select the general contractor early

The recommended approach is to bring the general contractor into the process as the project moves from the master plan to schematic design for Phase I. Having the architect and contractor work together allows the team to evaluate materials, construction methods, availability, delivery schedules, and costs before the design is complete.

The source recommends an American Institute of Architects (AIA) agreement using a guaranteed maximum price (GMP) structure, commonly associated with construction manager at risk delivery. Coordinate the appropriate agreement with the Diocese.

10 Define preconstruction services and fees

The agreement should describe the contractor's preconstruction services and identify their cost. These services generally include design consultation, review of materials and construction methods, scheduling input, and cost estimates at key milestones, including schematic design and design development.

Ask that preconstruction costs be included in the contractor's overall project fee and become separately payable only if the project does not proceed within an agreed period, such as 30 months after the contract date, or if the congregation selects another contractor to build the project.

11 Include improvements to existing facilities

Each phase of new construction should include meaningful repairs or upgrades to existing facilities. Consider paint, flooring, restrooms, accessibility, lighting, and other needed updates. Also review exterior paint, parking lot resurfacing and striping, parking and site lighting, landscaping, and signage. The project should reflect responsible care of the entire campus.

12 Prepare a five-year financial plan

The standing or ad hoc Finance Committee develops a five-year financial plan and projections. Work with the Diocese to evaluate whether debt financing, including a commercial bank loan or Crump loan, is appropriate and affordable. Contact Blaker for this information.

The plan should account for projected membership and attendance, staffing, additional operating costs, and other changes associated with the project. It should show how the congregation will support the completed facilities while continuing its ministry.

13 Review design and costs at each milestone

The Vestry or Bishop's Committee reviews the schematic design and preliminary estimate before authorizing design development. It then reviews the feasibility study, design development, updated estimate, and any need for debt financing.

14 Authorize the capital campaign

The Vestry or Bishop's Committee approves the campaign goal and campaign budget, including communications, and authorizes the campaign committee to proceed. It also gives the Building Committee clear direction on project scope and budget.

15 Begin financing discussions

The Finance Committee begins negotiations with potential lenders for construction financing and, if authorized by the Vestry or Bishop's Committee, long term financing.

16 Align the design with the approved budget

The Building Committee, architect, and contractor reconcile the design and estimate with the approved scope and budget. The committee and architect then proceed with construction drawings.

Final review and approvals

17 Coordinate the Church Corporation presentation

Contact David Fisher or Michael Hilfinger to update the project schedule, discuss possible presentation dates, and confirm the information required in the advance packet for the trustees. The source indicates that the Church Corporation meets approximately four times a year; confirm meeting dates and submission deadlines directly.

18 Approve the final scope and budget

The Vestry or Bishop's Committee approves the final project scope and budget. The Building Committee then works with the architect and contractor to finalize the construction drawings.

19 Coordinate accessibility registration and review

The source states that construction projects with an estimated cost of $50,000 or more must be filed with the Texas Department of Licensing and Regulation (TDLR) for architectural barriers and accessibility compliance. Have the responsible design professional confirm the current requirements and coordinate filing the plans and stamped construction drawings.

The architect, interior designer, landscape architect, or engineer with overall design responsibility is responsible for filing under the applicable TDLR requirements. If there is no architect of record, confirm with the project team who will handle the filing.

The source refers to Exhibit C containing selected requirements current as of May 2017, but that exhibit was not included in the supplied document. Use current requirements and guidance from an experienced architect when planning the work.

20 Obtain and review subcontractor bids

The contractor solicits competitive bids from multiple subcontractors for the major trades, such as concrete, framing, masonry, electrical, plumbing, roofing, millwork, and hardware. Time the bids so that pricing is available shortly before the Church Corporation presentation.

The Building Committee reviews the bids with the contractor and architect, makes selections, and the contractor prepares the GMP agreement.

21 Present the project for approval

Present the recommendation and approval request to the Church Corporation. Include the master plan, design, scope, project cost, and five year financial projections. Explain the operating costs of the new facilities, proposed debt service, and the congregation's capacity to support ministry, programs, and staffing as it grows.

22 Finalize agreements after approval

Once Church Corporation approval is received, the Building and Finance Committees can finalize the financing and construction agreements.

Groundbreaking and construction

23 Plan the groundbreaking service

Coordinate the groundbreaking service with the bishop's office. The source refers to the Book of Occasional Services, page 214, and provides that the bishop or a priest appointed by the bishop serves as celebrant. Confirm the appropriate service and reference when planning.

If a consecrated space will be converted to another use, arrange for it to be secularized before demolition or construction begins. For example, this applies when an existing nave becomes a parish hall as part of a project to build a new nave.

Hold the ceremonial groundbreaking before construction starts. Use the occasion to share the ministry vision and involve the congregation, school, neighbors, and local community. Consider inviting elected officials, school leaders, nearby clergy, business owners, and the Chamber of Commerce. Food, fellowship, and opportunities to offer prayers can help make the event meaningful.

24 Designate the owner's representative

When construction begins, the Building Committee designates a member to serve as the owner's representative or project manager. This person is the primary day to day contact for the contractor's site superintendent, project manager, and architect.

The committee must remain available to address questions, contingencies, and change orders promptly so that decisions support the schedule and budget.

25 Hold regular progress meetings

Construction progress meetings are generally held on site every week or two. Participants typically include the owner's representative, site superintendent, contractor's project manager, architect, and Building Committee members as needed. The full committee generally does not need to attend; the chair often participates.

26 Continue Building Committee decisions

The Building Committee continues meeting during construction. Work with the architect to review vendor submittals and make timely decisions on paint, flooring, wall coverings, fixtures, restroom tile, and other finishes.

27 Communicate progress and control site access

For safety, Building Committee members, church staff, and congregants may enter the construction site only for prearranged, supervised visits coordinated with the contractor. Keep the congregation informed through bulletins, newsletters, website updates, and photographs or cameras positioned to document progress.

Dedication and future funding

28 Schedule the dedication

If the project includes new worship space, a bishop is present for its dedication and consecration. A bishop may also attend the dedication of other spaces. The rector or vicar should contact the bishop's office well in advance to arrange a date.

During the service, the rector and senior warden should recognize the committee members and others who helped complete the project.

29 Welcome the community

Consider an open house to introduce neighbors to the new facilities and updated campus. A Sunday afternoon event with tours, activities for children, food, and refreshments can help the congregation welcome people and build relationships.

30 Evaluate the next capital campaign

As the initial campaign progresses, assess whether a follow on campaign is appropriate. Consider the remaining debt, additional facility needs, congregational growth, and the congregation's energy and willingness to participate. Smaller congregations, limited growth, or campaign fatigue may support taking a break.

If substantial debt will remain after the initial pledge period, generally three years, discuss its effect on the operating budget and the timing of another campaign. Ongoing debt payments should be weighed against the congregation's capacity to fund ministry, programs, and staffing. A planned break with a defined timetable may be appropriate before a campaign to reduce principal. That campaign may also include needed facility improvements.

For a healthy, growing congregation with additional needs and support for the next phase, a campaign during the final six months of the initial three year pledge period can maintain momentum. It carries forward the experience of the campaign team, invites newer members to participate, and allows existing donors to consider continuing their support before their current pledges end.

The congregation must decide which approach best fits its circumstances. Maintain a clear ministry vision and a realistic plan that supports progress without exhausting the people who make it possible.

Diocesan resources

The contacts below are carried forward from the 2024 source. Confirm current names, titles, and responsibilities before distributing these guidelines.

Jonathan Blaker
Director of Treasury | jblaker@epicenter.org | (713) 353-2134

Primary resource for banking, financing, accounting, bylaws, incorporation, and property and casualty insurance. Areas of assistance include appropriate debt levels, construction financing and Crump loans, budgeting, cash flow, financial controls, reporting, and property and casualty claims.

David Fisher
Director of Foundations | dfisher@epicenter.org | (713) 353-2109

Coordinates Church Corporation presentations and agenda scheduling. The source identifies this role as the staff executive for the diocesan foundations, including the Church Corporation, Episcopal Foundation of Texas, Quin Foundation, Great Commission Foundation, and Episcopal Health Foundation. Also provides information on planned giving and the diocesan Participating Fund for major gifts, building funds, endowments, and other long term investments.

Canon Perry Mullins
Canon for Mission Amplification | pmullins@epicenter.org | (713) 353-2136

The initial contact for congregational growth, mission expansion, strategy and capital campaigns.

Michael Hilfinger
Director of Real Estate and Facilities | mhilfinger@epicenter.org | (713) 353-2135

Contact me early for assistance with property leases, sales, donations, and related real estate matters. I can help connect the congregation with brokers, architects, engineers, contractors, owner's representatives, and other consultants, and assist with property tax issues, appraisal requirements, and contract negotiations.