Diocese of Palm Beach
The Office of Building & Construction

A Guide to assist with Contractor/Vendor Compliance

Example of Building & Construction vendors are;

Plumbing, Electrical, Air Conditioning, Landscape, Pest Control, Flooring, Windows, Doors, Audio/Security Cameras, Pressure cleaning, Locksmith, Roofing,Fencing, Paving, Asphalt, General Contractors, Architects, Engineers, etc..

- ☐ **If you are using a vendor that is compliant for "All Entities" per the spreadsheet emailed from the Office of Building & Construction.**
  - Go to DMR Building & Construction ->Folder Green File GV Compliant Emails -> All Entities for compliance email
  - Complete Diocese of Palm Beach work order contract (see notes below regarding contracts)
- ☐ **(New Vendors) not in Gallagher Verify system --Give the vendor following Forms**
  - The letter from Gallagher Verify on your letterhead
  - The Vendor Data Form (**Please complete your part on top with contact name and email for your location**)
  - Sample COI for your Entity
  - The vendor is directed to submit the vendor data form and their certificate of insurance to coiobc@diocesepb.org for review and approval. *Ask them to copy your email when sending.
- ☐ **Complete Diocese of Palm Beach work order contract and attach proposals as Exhibit "A" (see below contract information for type of contract to use)**
  - Have **ONLY** the vendor sign our contract at this point and then you email to coiobc@diocesepb.org
  - Please do not sign or have the pastor sign the vendor proposals or contracts.
- ☐ **A letter of compliance from Gallagher Verify is emailed to your entity contact that is listed on vendor data**
  - All vendors are required to have a compliance letter prior to commencing of any work on the properties.
  - The compliance email should be uploaded to Sage and kept on file at your locations for auditing purposes.
  - At this point the pastor can sign the contract if under 50K.
- ☐ **All Permits, Notice of Commencements and any other documents requiring owner signatures are required to come to the Office of Building & Construction for signature.**
  - Pastors/Directors are not authorized to sign these documents.
- ☐ **All Roofing repairs/replacement regardless of dollar amount are required to be processed through this office with an approved Diocese roofing company.**

Diocese of Palm Beach Work Order Contract Information

If the project is under 50k except for Roofing repairs/replacement projects use the Diocese of Palm Beach **short form contract** attaching their unsigned proposal as Exhibit "A "and have the vendor sign the contract **first**.

- Please do not sign or have the pastor/principal sign the vendor proposals or contracts.
- Once a compliance email from Gallagher Verify is received from Office of Building & Construction then the Pastor can sign the contract.

If the project is over 50k or a roofing repair/replacement then the seven-page contract will need to be reviewed, approved, and processed through the Office of Building & Construction, Finance, and Bishops office.

- The contract will require the signature of the **Bishop**.
- The funds for this project will need to be deposited in the SFT "B" account for your entity.
- All invoices will be processed through the Office of Bldg & Construction after the Pastor signs and approves the invoice.
- Copy of checks will be sent to your parish/school/entity for your records.

Please contact our office if you have any questions or need assistance completing work order contracts, requesting certificate of insurance, etc.

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