



## Office of Construction and Real Estate -Things to Know

### • MEET THE TEAM

- **Hung Pham:** Executive Director of Construction & Real Estate 727-336-9056. Email: [hqp@dosp.org](mailto:hqp@dosp.org). Oversees both Construction & Real Estate office at the Diocese. Contact him relating to any construction related issues or real estate questions. This includes construction projects, property renovations, vendor recommendations and future planning.
- **Tom Farrell:** Construction Project Manager 603-801-3108. Email: [tfarrell@dosp.org](mailto:tfarrell@dosp.org). Oversees Project Management of construction projects on-site. Contact him for any construction projects currently underway.
- **Bruce Heisler:** Real Estate Manager 813-431-5693 Email: [bheisler@dosp.org](mailto:bheisler@dosp.org). Contact him if you have a real estate requirement. This includes buying, selling, leasing, market analysis, etc. for any Diocesan property. This also include any special events rentals or lease.
- **Bridget Pagnoni:** Construction Office Manager 727-344-1611 x 5367. Email: [bpagnoni@dosp.org](mailto:bpagnoni@dosp.org). Contact her for any contract forms, payment applications, vendor invoices and closeout project paperwork. She will assist with setting up vendor and construction project paperwork.
- **Alice Siepak:** Construction & Real Estate Administrative Assistant email: [asiepak@dosp.org](mailto:asiepak@dosp.org) 727-344-1611 x 5513.

### • REAL ESTATE

- Should you have a real estate need please contact Bruce Heisler to schedule a meeting to review the request. They typically will fall into one of four main (4) categories. Prior to the meeting, please review the links to documents below that will need to be submitted for final approval:
  - **Permission to Sell** a Diocesan Property [Permission to Sell \(PTS\)](#),
  - **Permission to Lease Diocesan Property or Third-Party Property** [Permission to Lease \(PTL\)](#),
  - **Permission to Acquire a Property** for Diocesan Use [Permission to Acquire \(PTA\)](#)
  - **Permission for a Special Event** (Concert, Parking, Carnival, Etc.) [These are handled on a case-by-case basis via a License Agreement. Each License Agreement is specific to the given event.](#)
- Upon review by the Construction & Real Estate office, next step is for our office to submit your request to the Bishop for approval. Along with the approval letter [Transfer Authorization Form \(TA-001\)](#) will be included to show how costs associated with the transaction will be paid for.
- In the case of a property acquisition a FR-001 form [Financial Report \(FR-001\)](#) must be included with the permission submittal. This is to assure proper funds are available to acquire the property.
- In the case of a Special Event a Certificate of Insurance will be needed. Please this form as the guideline [Certificate of Insurance \(COI Requirements\)](#).

## • CONSTRUCTION

- Should you have any new construction, renovation, or capital maintenance projects, or just need advice on property improvements (roof, air-conditioning, etc.) please contact Hung Pham to discuss. Projects will fall into different categories and contract packages and procedures differ for projects based on cost:

- [Under \\$50,000](#)
- [\\$50,000-\\$500,000](#)
- [Over \\$500,000](#)

- Construction Process:

- Projects may require design, drawings and permits. Please discuss with Hung Pham as to the necessity of these criteria.

- **If the project does not impact worship space, require a permit, AND/OR under \$50K, please proceed as follows:**

- **Contractor Proposal:** Obtain a detailed proposal with labor, sales tax, and material breakdown.
- **Documentation:** Get completed W-9, Certificate of Insurance (COI), and Diocese of St. Petersburg [Construction Contract \(CC-001\)](#) from the contractor.
- **Contracting:** Pastor and/or Principal may contract directly with the contractor.
- **Final Steps:** Obtain Certificate of Warranty and final Diocese of St. Petersburg [Release of Lien \(ROL-1\)](#) before making final payment.

- **If the project does impact worship space, require a permit, AND/OR over \$50K, contact Hung Pham and provide the following documents:**

- **Contractor Proposal:** Obtain detailed proposals with labor, material, and sales-tax breakdown.
- **Review:** Send preferred proposal to the Executive Director of Construction and Real Estate for review.
- **Approval:** Upon approval, the contractor must complete necessary documentation ([CC-001](#), W-9, COI, NOC).
- **Permission to Build:** Complete Permission to Build template [Permission to Build template](#) and [Transfer Authorization form \(TA-001\)](#).
- **Submission:** Assemble all documents as one PDF file and send to the Executive Director of Construction and Real Estate.

- **Approval:** Allow up to 2 weeks for written approval from the Bishop.

- **Funding:** Ensure construction work is fully funded and all funds deposited in the Construction Work in Progress account.

- **Execution:** Construction contract, approved by pastor and signed by Chancellor of Administration, is executed and construction may begin. Periodic site visits will be conducted by our office to ensure work conforms with the contract.

- **Invoices:** Submit all invoices to the Office of Construction and Real Estate for processing.

- **Change Orders:** Any changes to scope, cost, or time must be submitted to Diocese of St. Petersburg via [Change Order \(CO-001\)](#) and a [Transfer Authorization form \(TA-001\)](#). Written approval is required before starting change order work.

Should you need further information please visit our website [DOSP.org/Construction&RealEstate](https://DOSP.org/Construction&RealEstate)

# **Construction Project Check List**

**07-01-2025**

## **All Construction Projects Require the following:**

### **From the Contractor:**

- \_\_\_\_ - Detailed proposal with cost breakdown for materials, sales tax, and labor.
- \_\_\_\_ - DOSP Construction Contract R06-01-2024 (signed by Contractor and Entity)
- \_\_\_\_ - W9 (Tax ID)
- \_\_\_\_ - COI (Certificate of Insurance listing the Diocese as additional insured)
- \_\_\_\_ - NOC (Notice of Commencement if project requires a permit)

### **From the Entity (Parish/School/Cemetery/Mission/etc.):**

- \_\_\_\_ - All the above documents from the Contractor
- \_\_\_\_ - Permission to Build completed, dated, and signed by Pastor/Principal/Exec. Director)
- \_\_\_\_ - TA-001 Form for funding completed, dated, and signed by Pastor/Principal/Exec. Director)

### **At Completion the Contractor will need to provide the following:**

- \_\_\_\_ - Letter or Certificate of Warranty (Claim information, Start Date, Duration, etc.)
- \_\_\_\_ - Diocese of St. Petersburg - Final Release of Lien
- \_\_\_\_ - Final Invoice
- \_\_\_\_ - CO/Permit Closure (Certificate of Occupancy/Completion/Final inspection/Closure Status if project requires a permit)

**Other documents may be required depending on the scope, cost, and complexity of the project.**

**Please contact the Executive Director of Construction and Real Estate at 727-344-1611 or**

**hqp@dosp.org**

## **Real Estate Transaction Check List**

**06-01-2025**

### **Real Estate Transactions Require the following:**

#### **For Property Sale, Lease or Acquisition:**

\_\_\_\_ - Submit to Office of Construction & Real Estate Permission Letter depending on transaction type

- Permission to Sell (PTS) Form Document
- Permission to Lease (PTL) Form Document
- Permission to Acquire (PTA) Form Document

\_\_\_\_ - TA-001 Form for funding completed, dated, and signed by Pastor/Principal/Exec. Director

\_\_\_\_ - Written approval to proceed from Chancellor

#### **For Special Events:**

\_\_\_\_ - Written request submitted to Real Estate Manager providing details of the event

\_\_\_\_ - TA-001 Form for funding completed, dated, and signed by Pastor/Principal/Exec. Director

\_\_\_\_ - Written approval from Real Estate Manager to proceed

\_\_\_\_ - COI (Certificate of Insurance from vendor listing the Diocese as additional insured)

**Other documents may be required depending on the scope, cost, and complexity of the transaction. Please contact the Real Estate Manager at 813-431-5693 or [bheisler@dosp.org](mailto:bheisler@dosp.org)**