

PROJECT MANAGEMENT 101

FROM VISION TO
PLANNING TO
IMPLEMENTATION

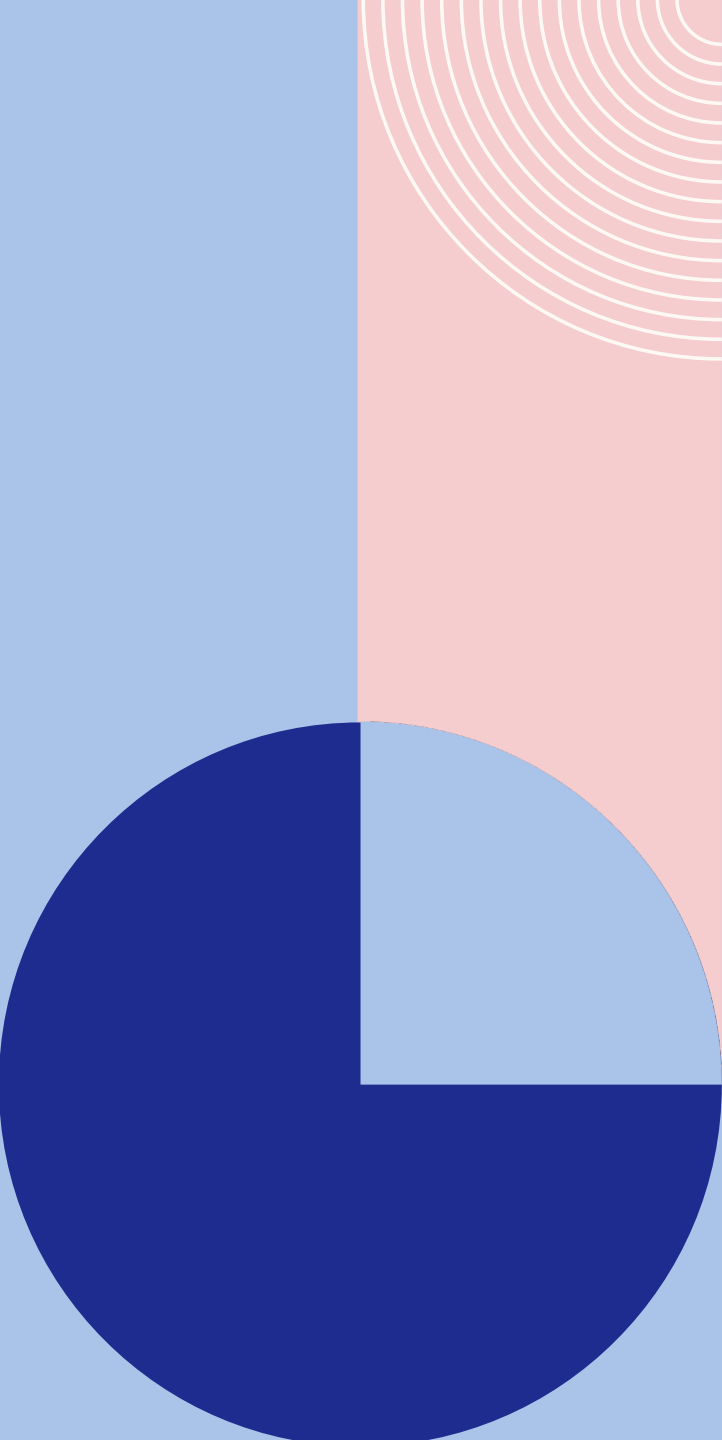
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Planning a project is similar to planning a road trip:

- You want to have a destination and a map to get you there
- You want to have a car full of fun people, good music, and a few good drivers
- You want to make sure you have enough money to reach your destination
- Detours, pit stops, and unexpected exits are okay as long as you remember to call your partners and keep them in the loop

Make sure to enjoy the ride!





Visioning



Organizing

Implementation

ENVISION THE POSSIBILITIES

What is the project and what needs to happen to make it a reality?

How did you identify the need?

How does the community feel about it?

What do you already know about the potential project? What's missing?

- Known knowns
- Known unknowns
- Unknown unknowns

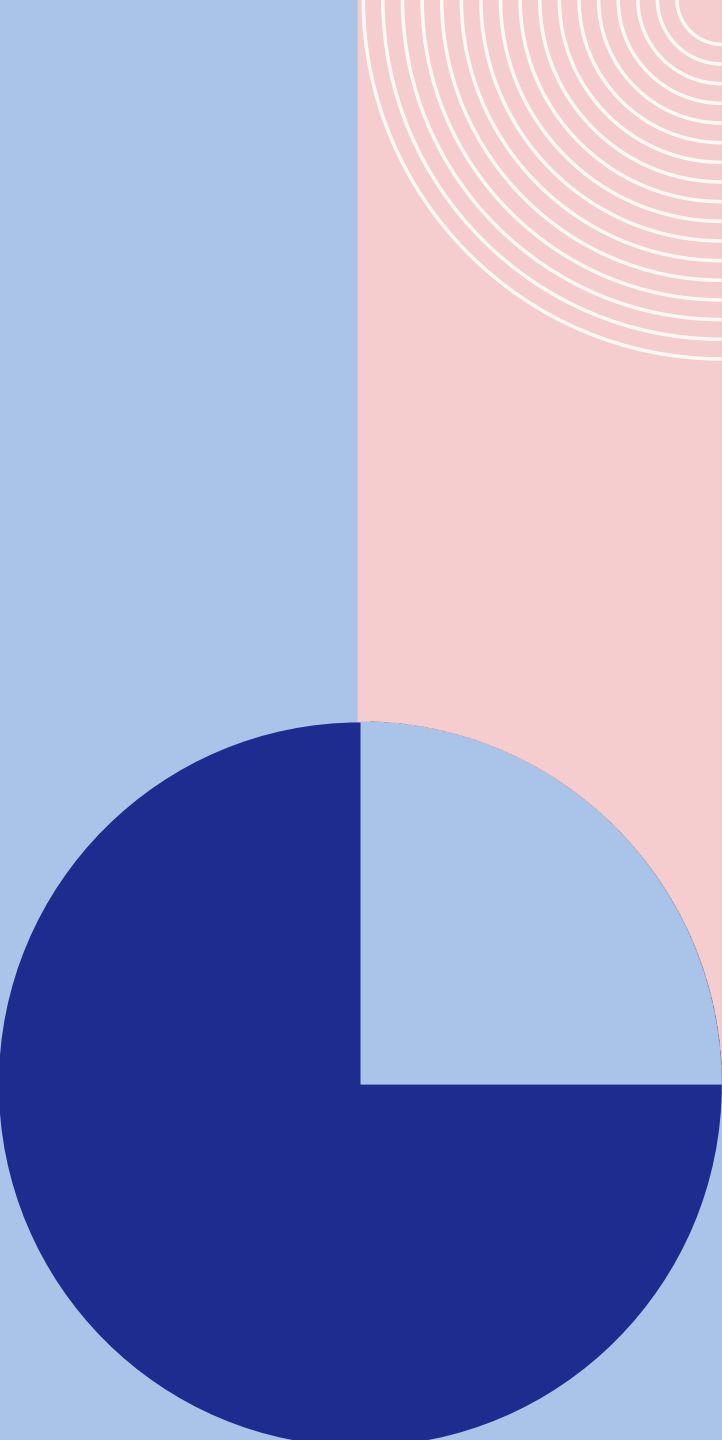
ORGANIZE AROUND THE VISION

Who needs to be involved to move the idea forward?

- community
- local officials
- partners and technical assistance providers
- regulators*
- funders*

Who is missing from the conversation?

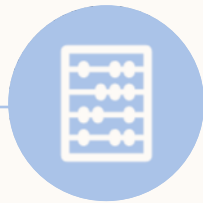
Who is the working group and what are their roles?



Individuals

Organization

WORKING GROUP



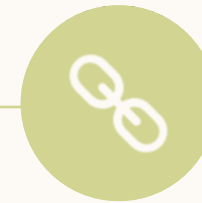
STRUCTURE

- Chairperson/President
- Vicechair/VP
- Treasurer
 - Good financial skills
- Secretary
 - Good writer/communicator



IMPORTANT SKILL SETS

- Accounting
- Funding and finance
- Legal
- Architecture, engineering, historic preservation
- Project management
- Marketing and Communications
- Business planning



QUALITIES

- Enthusiasm for the project
- Time and energy to invest in making the project successful
- Good connections, but not already over-committed

RESPONSIBILITIES



Utilize existing skill sets

Bring on new members/volunteers to fill gaps

Recognize when you need to seek professional advice

Take advantage of capacity-building resources and funding

101 Tip:

Programs like VHCB's Rural Economic Development Initiative (REDI) and USDA's Technical Assistance grants are designed to increase capacity and support projects. The Vermont Community Foundation also has a non-profit Capacity Building program to build organizational capacity

REFINE THE PROJECT

- What is the resource?
- What is the proposed use?
- What are the current limitations?
- Are there any ownership issues to resolve?

DEFINE THE SCOPE OF WORK

Preliminary work:

Basic understanding of the project, the budget, and the general direction

Pre-development work:

Everything needed to get you from planning to implementation

Schematic Design Phase

Design Development Phase

Construction Documents Phase

LAYERS OF DESIGN WORK



SCHEMATIC DESIGN PHASE

- Document existing conditions
- Summarize constraints
- Develop and evaluate alternatives
- Prepare preliminary cost estimate
- Select a preferred option



DESIGN DEVELOPMENT PHASE

- Determine major building and site systems
- Civil, structural, and architectural layers
- Systems (MEP, fire)
- Further refinement of costs



CONSTRUCTION DOCUMENTS PHASE

- Integration of final selections & systems
- Detailed architectural & engineering drawings
- Project manual with specifications and project procedures

NAVIGATING FUNDING

What is the total project budget?

-*Soft Costs*

-*Hard Costs*

-*Contingency*

What are the short and long-term obligations of the potential funding sources?

What are the administrative costs?

Look for funding that aligns with the project goals and uses

FUNDING



STATE

FEDERAL

TAX CREDITS

FINANCING

FOUNDATIONS

Know how much you need to raise from the community and set a goal

Work with partners to compile a list of all the potential funding options – amounts, deadlines, funding timelines, regulatory requirements, long-term stewardship obligations, reporting requirements, etc.

Invest time in the sources that are most likely to yield positive results and align with the project goals and priorities

101 Tip:

Socialize the project with partners, donors, and funders before you start submitting grant applications and asking for donations

FEDERAL FUNDING CONSIDERATIONS

NEPA AND SECTION 106

- The National Historic Preservation Act (NHPA) and the National Environmental Policy Act (NEPA) are two separate laws that require federal agencies to “stop, look, and listen” before making decisions that impact historic properties and the human environment.
- NEPA and Section 106 are separate requirements with different parameters for what is afforded consideration in each review.

REPORTING & LONG-TERM OBLIGATIONS

- Quarterly and Annual federal reporting requirements
- Notice of Interest and/or easements as a result of federal funding

Discuss the regulatory review with funders before submitting grant applications

HUD FUNDING & CHOICE LIMITING ACTIONS

“A choice limiting action is any activity that a grantee undertakes, including committing or expending HUD or non-HUD funds, that reduces or eliminates a grantee's opportunity to choose project alternatives that would avoid or minimize environmental impacts or enhance the quality of the human environment.”

101 Tip:

Many funders will require separate regulatory reviews, but coordination can help smooth the process

FUNDRAISING 101



Major Donors: *50-75%*

Middle Donors: *15-40%*

Grassroots
Donors: *5-15%*

101 Tip:

Formulate a plan for early fundraising or securing seed money for initial planning and consultations

PROCUREMENT

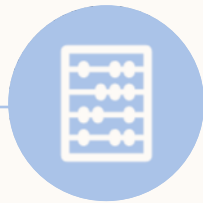
Understand all the procurement requirements of a funding source before you sign the grant agreement

- Does the funder require competitive bidding?
- How many bids are needed?
- Does Davis-Bacon apply?
- Does the Build America, Buy America Act apply?
- How will bidding impact the project timeline?

101 Tip:

*Make sure important regulatory requirements are included
in bid documents and contracts*

BUDGET



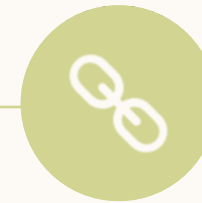
PRE-DEVELOPMENT

- Pre-development funding can be limited and timing is important
- Complex projects can cost \$100,000+ for pre-development



IMPLEMENTATION

- Grant programs are frequently reimbursement programs, some based on % of expenses or project progress
- Tax credits are paid out upon project completion
- Understand payment schedules and determine if you need bridge financing



EXPENSE TRACKING

- In-kind match requirements
- Keep track of which programs have federal % maximums
- Organizational expenses vs. project expenses –make sure you budget for both!

IMPLEMENTATION

Double-check that all regulatory and permitting requirements are approved

Have a clear payment/draw schedule that aligns with the purpose and percentage of the funding

Create a calendar of reporting requirements and keep track of change orders and updates

Assign a point person for contract and construction management

Inform funders of substantial changes ASAP

DON'T FORGET!



LANGUAGE

Include funder credit
as required



COMMUNICATE

Share progress on
social media



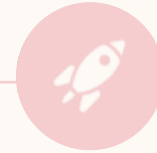
THANK YOU!

Always say thank
you!



PHOTOGRAPHS

Take pictures along
the way



CELEBRATE

Celebrate successes
big and small

101 Tip:

Focus on the big picture, but remember to take things one day at a time

Bonus Tip:

We mean it when we say we are here to help!

THANK YOU!

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