

## Project Management Plan

One of the most important Pre-Contract Activities is the development of a comprehensive and practical Project Management Plan. It lets the Project Management Team know where the Team is going and how it will get there by stipulating the roles and responsibilities of all the individuals involved in the project and sets forth when and how all activities will be implemented.

The Plan must include *at least* the following components:

- The identity, roles and responsibilities of all persons involved in the implementation of the project;
- The identity of target dates for completion of key tasks;
- The method by which the chief executive and grant manager will oversee and monitor all aspects of the project to assure timely and effective implementation;
- The identity of specific project benchmarks by which the administration and implementation of the project will be tracked and analyzed. Benchmarks should be specific dates by which tasks and subtasks will be completed;
- The method for design and construction contract administration including surveying and additional engineering, plan review, bidding, change order approval, and local government inspection and oversight;
- An identification of potential problems and complexities inherent in the project, and an analysis of how these will be anticipated and mitigated;
- The method by which local government officials, including the chief administrator of the locality, will be kept informed of the status of the project;
- The process for review, approval and payment of invoices related to all project expenditures; and
- A timetable for expenditure of administrative funds based on benchmark accomplishments.

The Grantee should recognize that different kinds of projects will require that different elements be included in the Plan. For example, all housing projects will need to address the

role of the Housing Rehabilitation Oversight Board and industrial job creation projects will need to address the timing and completion of the private investment.

## **Steps in Completing the Plan**

The Project Management Plan must be developed with the direct input of all involved individuals. Each person with task responsibilities must recognize and accept his or her part and its relationship to the timely and successful completion of the project. To facilitate this, the following steps must be a part of the development of the Plan:

### ***First Project Management Team Meeting***

The Team's first meeting will be a Facilitated Management Session (FMS). It *must* be attended by all persons who have a vested interest in the project and/or have a role in the successful completion of the project so their *direct* input can be obtained. At the FMS, a Community Development Specialist/facilitator will assist the Team in identifying at least the following three items:

- Tasks to be completed so that the project activities can be completed;
- Assignment of responsibility (responsibility charting) to one individual for each task that is identified and the assignment of a support individual for each task (responsibility may not be shared by two individuals); and
- Sequencing and timing of the completion of tasks so that the project can be completed within the framework of the CDBG Grant Agreement.

It is sometimes necessary to schedule a second meeting to ensure that all items have been adequately covered and to ensure that the appropriate individuals are familiar with the Plan. Once all of the information has been gathered, a Plan is drafted and submitted to DHCD for review and approval.

### ***Draft Plan Circulated***

The Draft Plan should be circulated to all Project Management Team members to ensure that the Plan reflects the input of individuals who will be responsible for completing tasks. Once it does, the Plan can be submitted to DHCD for review and concurrence.

### ***DHCD's Concurrence of Plan***

Upon receipt of the Plan, DHCD will review it for sufficiency and completeness. Any questions regarding the Plan will be raised by the Community Development Specialist and must be answered by the Grantee to ensure that the Plan addresses all issues.

## ***Execution of Plan***

After all Project Management Team members have acknowledged that the Plan is sufficient, accurate and reflects their commitment to complete tasks by a certain time, the Plan must be signed *at least* by the Chief Administrative Official, the Grant Manager and the Community Development Specialist. Once the Plan is executed, copies should be distributed to all members of the Project Management Team. The Plan must be scanned in its entirety and as a single document and uploaded into CAMS via “Reports and Communication” as an Ad Hoc *contract* document.

## **Alternative Plan Development Process**

In certain very limited projects involving an established Project Management Team with a record of successful, timely project completion, an abbreviated process and Project Management Plan may be acceptable. This matter must be negotiated with your Community Development Specialist.

## **Revisions to the Plan**

The Project Management Plan is a living document and an integral part of the grant management process. As such, the Project Management Team is expected to review the plan regularly and revise it as necessary. Typically, it will need to be revised under two scenarios:

- The timeline needs to be revised to reflect changes in completion dates. In this case, the revised timeline should show *both* the original completion date and the revised completion date. Amending the Plan on a regular basis is a nonproductive use of everybody’s time so the Team should take the time to develop realistic completion dates from the start; *or*
- To support a request to amend the CDBG Grant Agreement. In this case, the revised Plan must identify how the Grantee will complete its project by the proposed deadline. Note that this requires more than simply a reassignment of milestone dates. It requires an explanation of how individuals on the Project Management Team will *do things differently* to achieve the required outcome by the new deadline. If there has been a critical issue that has delayed the project, the revised Plan must also identify the new, concrete approach being taken to overcome the critical issue.

Because the Project Management Plan is an official contract document, all revisions must be reviewed and approved by DHCD. The revised Plan must be uploaded into CAMS via “Reports and Communication” as an Ad Hoc *contract* document.

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