

Knowledge Bites: Working with a Project Manager for Community Projects

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In the beginning ...

- Predevelopment advising by Preservation Trust of Vermont
- Fundraising to gain / demonstrate community buy-in



Assembling the team



- How did we know we needed a project manager? Jeff Dunbar said we did! (and so did PTV)
- Selecting a PM
- Selecting an architect

What has been useful so far about having a PM?

- Helping in design conversations
- Being a hub in a way a volunteer really doesn't have capacity for
- Strengthening funding applications
 - Grantors generally see the value of a PM, so they will have more confidence in your application
 - PTV in fact reimburses immediately for PM costs



Stories from the (building) trenches

- Town of Brattleboro Energy Efficiency Improvements
 - Energy Study made recommendations on building envelope and HVAC improvements
 - OPM
 - Engaged design professional - mechanical engineer to design heating systems for Parking garage and public library
 - OPM/Owners put out RFP for CM services
 - Insulation and air sealing successful. Issues with mechanical noise in library
- Groundworks Collaborative
 - Brought in Clerk of the Works after project start
 - Helpful to collaborate with on design changes/financial decisions and justifying costs to the owner



Defining terms

- Project manager: Likely someone internal to your org or on your committee, who serves as the point of contact, inspects project, makes decisions, recordkeeper
- Owner's project manager: A professional who represents your interests and has the background knowledge to advise throughout the project, including architect selection, assisting with design, spot potential problems, Quality Control, and help things stay on track.
- Construction Manager: Assists with budget estimates and design decisions based on cost and experience, bids job to subcontractors, delivers final construction project
- Clerk of the Works: Works for the owner holding the builder accountable to the Construction Documents

Construction Management

- Some orgs require 3 competitive bids, the CM selection and procurement process often satisfies
- Select a CM through an RFP process
- CM works for the owner and is an integral member of the project team
- Preconstruction fee will include the cost to do several rounds of budget estimates starting with conceptual design budget and go through final design. This allows the owners and architects to make design decisions that fit their budget.
- The CM will then bid out all subcontracts to multiple bidders, scope review the subcontractors when bids are received to make sure they have all their required items, and deliver a Guaranteed Maximum Price for the project, which includes a contingency.
- The CM can perform work based on agreement with the owners, typically bidding on certain scopes against other subs to ensure their price is competitive. This format is “Open Book” where all cost documentation is available to the owner.

Competitive Bid

- Owners and architects put together complete 100% Construction Documents.
- These documents are then sent to a number of General Contractors who put together a bid.
- The winning bidder is usually the coined the “Lowest Responsible Bidder.”
- Risks to accepting the low bid are that the builder may try to cut corners in order to make more profit or if they missed items in the construction documents.

When / who to call

- An OPM can enter the process as early as “back of the napkin” (formally called “predevelopment”), and can play an important role in initial design conversations. But you can engage one at any point in the process.
- While typically you would call in a CM when you have a schematic design developed with a design professional there are Construction Management firms that have a design/development department in-house.

How much does all this cost me?

- Having good project management will ultimately save you from costly errors and omissions
- An OPM will be spending most of their hours early on in the design process; maybe 10-15 hours / week in predevelopment and development, and 5 hours / week during construction (but not every week). Rates are typically somewhere around \$100/hour.
- CM contracts charge a fixed preconstruction fee based on scope, plus a fixed management fee on a sliding scale based on the cost of the project. A million dollar project might be eight percent, a two million dollar project five percent, a five million dollar project 3 percent..

How do I find the right person?

- Get someone on your building committee who has construction experience
- Recommended consultants:
 - Andrew Dey, andrew@andrewdey.com
 - Steve Horton: stevnhorton@gmail.com (*not a typo*)
 - Scott McKusick: smckusick37@comcast.net
 - Helm Construction - Mel Baiser: mel@buildhelm.com
- Of course, feel free to reach out to GPI as well! anthony@gpivt.com

- Example of contract
- Timeline - conceptual vs actual

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Additional tips

Q&A