



There are some basic steps that a project owner goes through in the initial development of a project. Regardless of the size or type of project, these steps are generic and more than likely will apply to help you get started on the right foot. These steps include: conceptualization, justification, scope & budget, funding, and approvals.

Conceptualize

Identify your project. Every project starts with an idea. Whether it's a 100-story skyscraper or an HVAC upgrade or roadway resurfacing, you have to start somewhere. This is big-picture thinking, my friend, broad strokes, 30,000-foot-view – don't get bogged down in the details (there's plenty of time for that later). Identify hazards, whether they come in the form of asbestos or lead, or a challenge in the approval process, or not enough power to turn the engine. Work to know what you don't know. Talk it out with someone; at this point you've been spending quite a bit of time mulling over your idea, a fresh perspective is in order. Most good ideas become great ideas when they bounce back to you off someone else. Find a friend, colleague, or a design or construction professional and give your idea an initial reality check.

Justification

Like it or not, this is where we all must become salesmen. We need to prove to ourselves and others that our project is worthwhile, unless, of course, we have an unlimited funding stream with no built-in controls that we can draw from completely at our own discretion. Probably not, so we are tasked with the burden of demonstrating that the benefits of our project override the costs. Justification of a project can range from simple reasoning such as public safety, periodic maintenance, expanded operational needs or increased profits, or more complicated such as community benefit, sustainability, or decreased operational costs. Either way – this is the selling point of your project and providing justification may require a level of finesse that a professional can provide.

Scope & Budget

Once we know we are on solid ground justifying our project, our next objective is to clearly and concisely define it. Again, do not get bogged down in the details. This exercise is more about setting the perimeter, drawing the boundaries, deciding what's in and what's out. This is the step that if taken too lightly will come back to haunt us. The clearer we define the

limits of the project, the less chance that scope creep will attack us further down the road. Simultaneously, we must assign costs associated with the elements that we identify. Be sure to address both hard and soft costs. Using historical values is the best way to develop a budget. A construction or design professional can add meaningful insight into the process. The most reliable scopes and budgets are a product of precisely identified work elements and accurate historic cost information.

Funding Source

All of this hard work is for naught if you do not have money to fund your project. Where will your money come from? Sometimes the answer to this question is simple because the funding source is direct and you do not have to go outside your own agency. If that is the case, you can move on to the next question. How much do you have? If funding is inadequate, you may have to adjust your scope and budget to fit your pocketbook. Or, you may have to hunt for funds, such as grants, gifts or loans. Finance professionals can be helpful in this step. After you have exhausted all your resources and identified all your funding sources and amounts, be sure your scope and budget fit your funding model.

Approvals

Now we're in the home stretch. With scope and budget, justification, and funding source in hand, we are ready to seek approval. We all like to think we are in charge, but the fact is we are all accountable to someone. Whether the approval we need is from our parents, our boss, a board, or a committee, we need approval. Having diligently executed the previous steps, we are fully prepared, applying a little salesmanship to present our project to the powers-that-be. We are now on our way with a level of confidence needed for success.



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