

PROJECT DEVELOPMENT RESOURCES PENN-STRATIGIES

BENEFITS OF A INFASTUTURE STRATEGIC REVIEW AND 5 YEAR-CAPITAL

Program

THOMAS MICOZZIE, N.H.A.

Principal

STRATEGIC PLAN

A Guide to Successful
Implementation For Your Facility

DEFINE YOUR VISION FOR PROJECT

- What needs to get done and what is the priority ?
 - Who is included and what roles do they assume ?
 - What in the plan is included for the strategic plan ?
 - New project
 - Infrastructure
 - Roofs
 - Furniture and equipment
 - Vehicle's
 - Emergency equipment upgrades
 - Paving
 - Office renovations
 - Resident room renovations

PROJECT Meetings

All Meetings Require Planning

Weekly /Bi-Weekly /Monthly Meetings

- Agenda
- Minuets from Last Meeting
- Task Assigned
- Standard Topics
- Sub-Group Reports
- Identify on site oversight
- Identify key decision maker to contractor
- Publish results to key internal and external interested parties.



WHAT ARE THE ELEMENTS OF A STRATEGIC PLAN WHERE TO BEGIN

Define Vision
Assess Where You Are
Determine Priorities
Define Responsibilities
Measure And Evaluate Results
Celebrate Your Success

Project Team Announcement

Communications is a key factor in the success of any project. Key factors to consider.

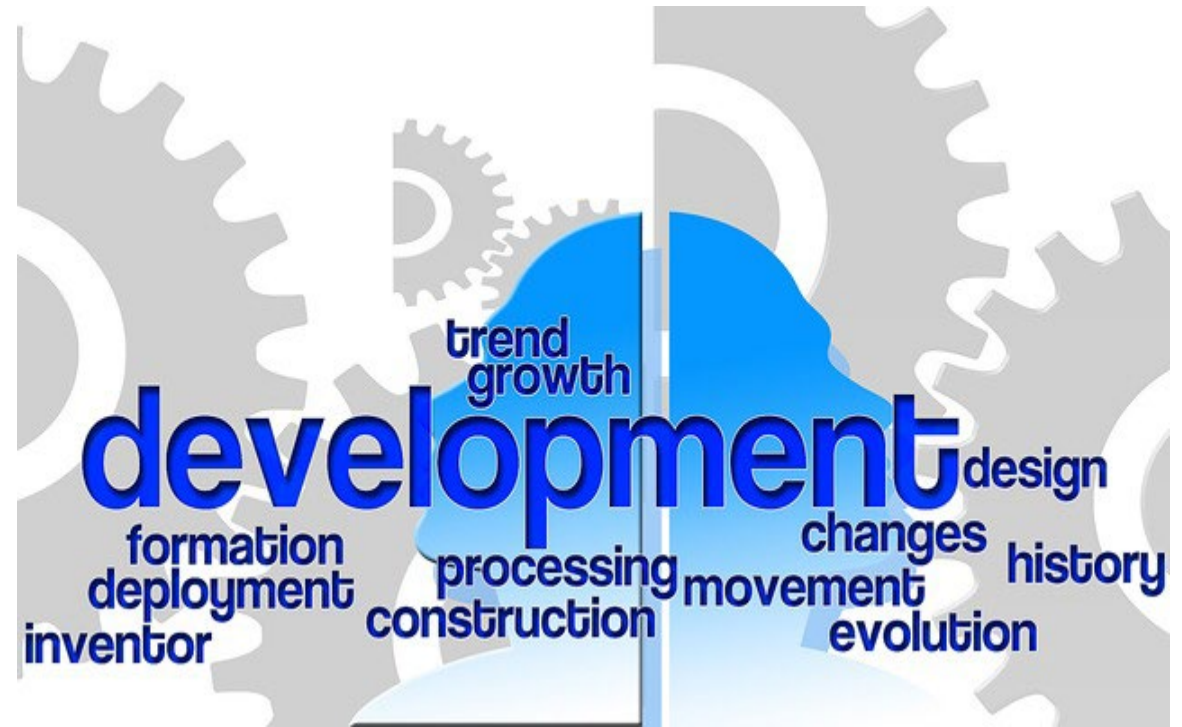
1. Name of Project
2. Capital Budget
3. Start Date and Projected Completion.
4. Press Release



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Regardless of size, organizations can prepare for capital investment under any circumstance using capital strategic planning!

Strategic capital planning quantifies how much money an organization needs to achieve its objective .



Project steps

How many facilities currently have a strategic capital plan in the works or are contemplating one in this fiscal year ?

How's Project Moving ?

Are you seeing Costs Increase ?

Steps to keep Project Alive !



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Let's start a project :

New dayroom with coffee shop for families

1. Administrator /Boards selects the team who is involved ?
 1. Facilities Director
 2. Dietary Director
 3. Activities Director
 4. Nursing Director
 5. Finance Officer
 6. Purchasing Director
 7. Any one missing ?



Team Controversy Avoidance and Resolve

Define a leader on team ,This should not be Administrator.

Define how conflicts get resolved.

Implement ground rules upfront .

Types of Conflict

1. Financial
2. Design
3. Personalities

Discuss Options

• PROJECT ISSUES THAT COME UP

- Selection of Firms
- Layout
- Colors
- Contractors
- Space allocation



Selection of Architect

Request for Proposals

1. Experience
2. Full disciplines
 - Land Development/Zoning
 - Design
 - Electrical
 - HVAC
 - Carpentry
 - Sprinkler
 - Structural
 - Licensure D.O.H.



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Contractors Selection COUNTY

Lowest Responsible Bidder

5 Primes

1. General
2. Mechanical
3. Plumbing
4. Sprinkler
5. Electrical



PRIVATE FACILITIES

CRITERIA

Varies from facility to facility however all would rely on committee within reason on price, competency and their presentation and bid submission:

No separations act unless federal Grant, State or Local fund are utilized

Check with Legal .



Separations Act & Prevailing Wage

Separations Act

The Separations Act is a 109-year-old Pennsylvania law that requires public construction projects to have four different prime contractors — one for the general contractor, a plumbing contractor, an electrician and one for heating and air conditioning — all hired separately.

Prevailing Wage. The Pennsylvania State Prevailing Wage law requires that all workers on state funded construction projects that exceed \$25,000 be paid the State Prevailing Wage. The Federal Government requires the payment of Prevailing Wages for all Construction Contracts that have federal funding that exceeds \$2,000, which includes federal, state and local public works projects.



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Project Legal Review

Legal Review entails several factors in the initial phase !

1. Planning and zoning
2. Permitting
D.E.P./Sewar/Storm Water
3. Bid requirements
County/State or Private
4. Prevailing Wage
5. Approvals



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Any
Questions

PENNSTRATEGIES



Local, State, and Federal Government Appropriations

Whether you're a business or municipality, Penn Strategies can help you procure funding for your program or project with our grant writing expertise. First, we'll study your business and current positioning. Then, we'll sit down with the appropriate people to identify your true needs.

We have a proven track record of success and a team with extensive knowledge of locating and selecting the best grant programs for you. Not only can we help you complete the application process, but with a results-driven approach, we'll follow through and advocate for your grant until it's approved.



We have represented the following types of entities:



Municipalities



School Districts



Universities



Authorities



Non-Profit
Organizations



Private
Businesses



Hospital
Systems



National Associations

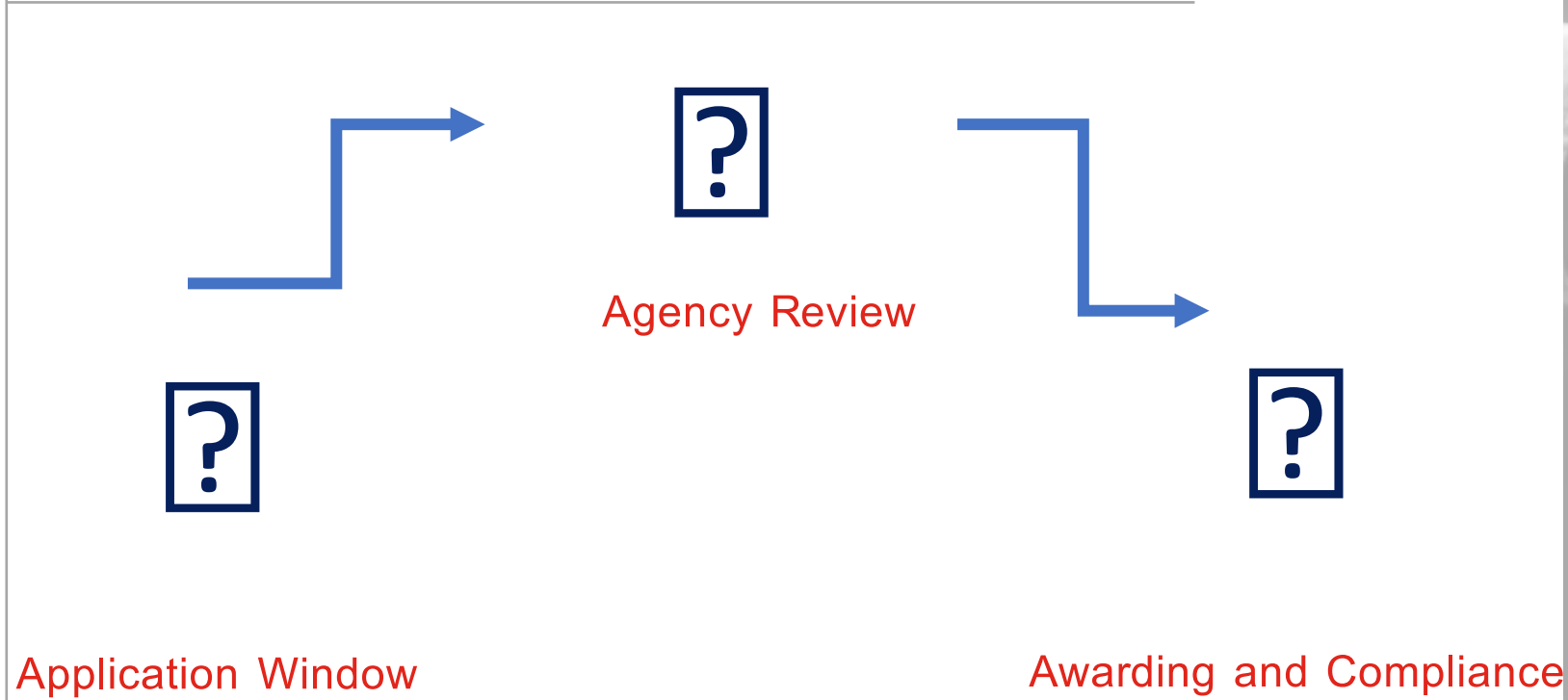
The Typical Grant Application Process

1. An organization has a funding shortfall for a project need.
2. Each Pennsylvania agency has applicable programs depending on the project scope.
3. These programs may or not be funded through the Commonwealth budget.
4. Once a program is identified, there is an application window where various exhibits, including cost estimates, engineering designs, and other plans, are submitted to the agency for review.
5. After the review period, the agency awards the grant, and a contract is executed between the grantee and Commonwealth. The specific project goals and benchmarks are fine-tuned and agreed upon by both parties.
6. Close-out audits are conducted to ensure taxpayer money is spent appropriately.



The Grant Process

Grant Application Process



Examples of Commonwealth of Pennsylvania Agencies

- Department of Community and Economic Development (DCED)
- Department of Conservation of Natural Resources (DCNR)
- Department of Transportation (PennDOT)
- Department of Labor and Industry (L&I)
- PA Commission on Crime and Delinquency (PCCD)
- Department of Health (DoH)
- Fish and Boat Commission

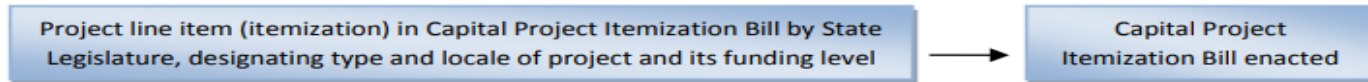


Redevelopment Assistance Capital Program (RACP)

- The Redevelopment Assistance Capital Program (RACP) is a Commonwealth grant program administered by the Office of the Budget to acquire and construct regional economic, cultural, civic, recreational, and historical improvement projects.
- A project is eligible for a RACP grant if it has a cultural, civic, historical, regional, or multi-jurisdictional impact and generates substantial increases in employment, tax revenues, or other measures of economic activity.
- The RACP grant program operates on a proportional reimbursement basis. Therefore, as the Grantee incurs and pays construction expenses, the Commonwealth will reimburse – contingent upon the corresponding expenditure of matching funds.
- Getting an award through this program requires a viable project and political support.

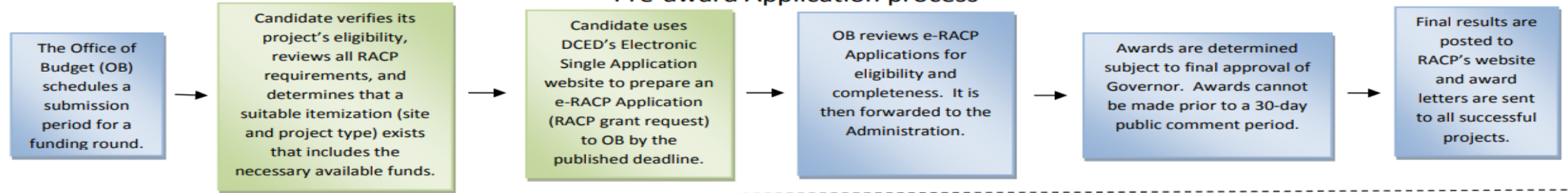
REDEVELOPMENT ASSISTANCE CAPITAL PROGRAM (RACP)

Legislative process

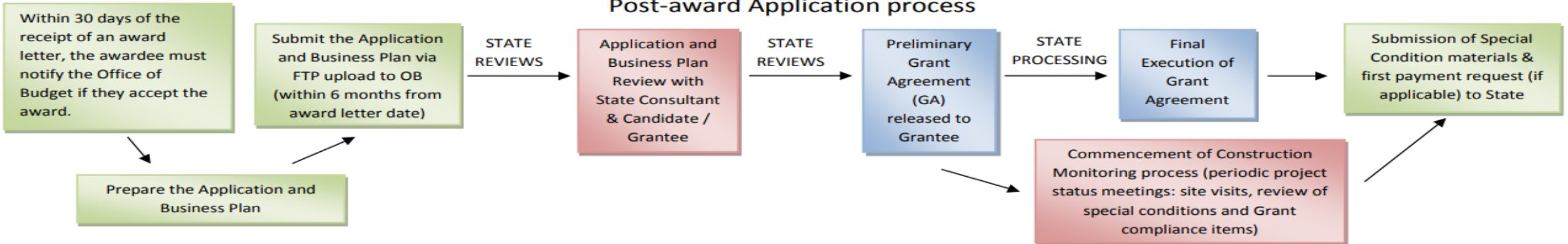


NOTE: Only non-sunset itemizations/projects from Capital Budget Acts with remaining, unused amounts are available for funding.

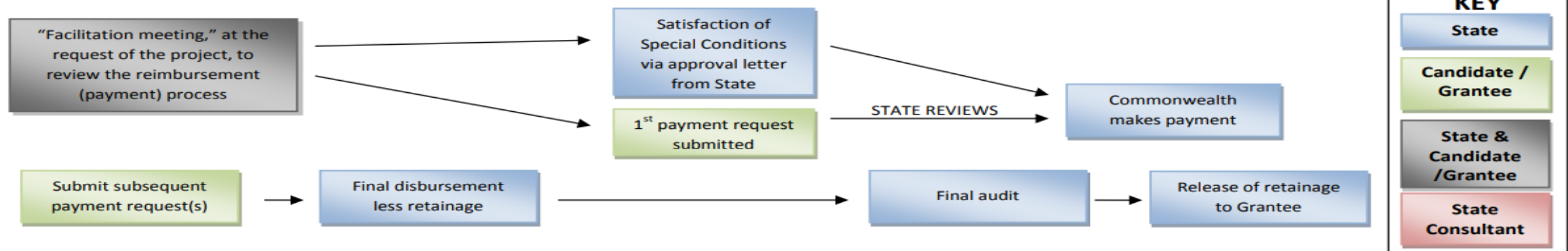
Pre-award Application process



Post-award Application process




Reimbursement process





KEY


- State
- Candidate / Grantee
- State & Candidate / Grantee
- State Consultant

The Capital Stack

 Projects often need multiple sources of funding.

 Some sources are grants, low-interest government back loans, bonds, and cash commitments from the grant application.

 These funding sources are often a combination of local, state, federal, private and bank financing.

 Public private partnerships are critical to make up these funding gaps.

Questions?