



Project Management

When is it needed?

Although regular vendor oversight is often part of Heritage's scope of work, most communities have a variety of projects and/or improvements that go beyond the day-to-day operations of the association and expertise of the manager. In order to ensure quality services are being performed and appropriate steps are being taken, our staff begins with a complete analysis of the task. When large scale projects fall into one or more of the categories below Heritage recommends, and in some cases requires, a project manager be assigned.

CHECK your project!



Capacity: Time required to complete the project



Homeowners: Number of residents affected by the project



Expense: Total investment for the project



Compliance: City and County Codes



Knowledge: Construction Acumen

Once the manager has reviewed the initial trigger points and identified the proposed project as having one or more issue, they must complete the attached questionnaire to determine what process is in the best interests of the association.



Project Management Services

Heritage Questionnaire: **CHECK** your project!

The following information is used to determine the need for Project Management Services.

- Project managers provide expertise that minimizes both risk and liability for the association.
- Project managers can avoid errors, analyze proposals, and supervise the quality of third party vendors.
- Project managers increases the likelihood of completing the project on-time and in budget.

Capacity

Will the work on the project take several days, weeks or months? YES / NO
Approximately how long will the project take including all the preliminary work, permitting, inspections, etc. _____
Can the manager attend to the project along with other daily responsibilities? YES / NO

Homeowners

Are five or more homeowners/residents going to be affected by the project? YES / NO
Does the project require frequent coordination between homeowners? YES / NO
Will the project require frequent and time sensitive communications? YES / NO

Expense

Will the total project exceed \$5,000 in expenses? YES / NO
All costs should be included such as engineering reports, permitting, materials and labor, etc.
Total project estimate: \$ _____

Compliance

Does the project require any coordination with municipalities? YES / NO
Does the project require an engineer? YES / NO
Does the project affect any city/county codes or requirements? YES / NO

Knowledge

Does the project include the coordination of multiple trades? YES / NO
Does this project require expertise in construction that would go beyond the scope of a property manager? YES / NO

Analyzing Results

If the answer is “yes” to any of the above questions, managers are required to inquire about project management services. Heritage Construction & Maintenance (HCMC) has project management available. Independent project managers may also be used. Proposals will vary based upon the scope of work.