How to Build a Great Team

Presented by Linda Herman
and Jayni Allsep

May 20, 2016
PROJECT FLOW CHART

Secure a Site
- Due Diligence
- Real Estate
- Legal

Preliminary Design & Engineering Plans

Obtain Planning Approvals & Land Use Entitlements

Construction Financing & Construction Documents

Construction Bidding & General Contractor

Building Permit & Agency Approvals

Project Management
- Budget
- Schedule
- Control Center

Marketing

Establish Core Group

Community Outreach

BUILDING YOUR COHOUSING TEAM

Construction & Construction Management

Management & Operations Policies

Final Inspections Occupancy Permit

MOVE IN!!!
PROJECT MANAGER

- When one is needed: At the beginning
- What they do: Development

- Professional point person of development project. Involved with all aspects of project. The PM is the “Information Center”
- Represents the community to regulatory agencies, consultants, etc.
- Assists community with hiring of team, including General Contractor, and negotiating contracts.
- Schedule and quality control
- Manage and coordinate team thru planning and design phases
- Cohousing Community’s representative during construction phase
- Prepare and manage master budget. Review and approve all invoices and expenses. Maintain financial accounting of project.
- Coordinate all regulatory approval and permitting processes.
PROJECT MANAGER

- What they do: Community
  - Assist with decision-making, group process and facilitation as needed.
  - Assist with developing marketing plan and materials.
  - Assist with marketing events
  - Liaison between development and community
  - Membership agreements
  - Assist with development of policies and procedures for community
PROJECT MANAGER

- What to look for:
  - Project management experience of at least 7 years
  - Professional with cohousing or other group process experience, i.e. non-profits or other communities.
  - Experience with multi-family housing
  - Experience with development/new construction
  - Ability to build relationships with stakeholders
  - Possess leadership and team building skills
  - Strategic and critical thinker
  - Neutrality
PROJECT MANAGER

- How to select
  - Get referrals from other cohousing communities and/or non-profits
  - Pre-proposal Interview
  - Request proposal to include all services and costs
  - Check references: ask for client and peer references
  - Call Linda Herman Consulting

- What they cost
  - $75-$150/hr depending on experience and responsibilities
  - Range: 3%-5% construction costs
  - Fixed monthly budget if scope is clearly defined
ARCHITECT

- When they are needed: Early – ideally while looking for a site

- What they do:
  - Evaluate sites, due diligence
  - Space Programming - define criteria for the project: function, quality and quantity (i.e. Programming common space)
  - Conceptual Design for site, units, and common space
  - Design Development: Complete design
  - Contract Documents: For bidding, permits and construction
  - Submit for regulatory approvals and permits
  - Construction Administration
  - May hire required engineers: civil, geotechnical, structural, mechanical, electrical, plumbing
ARCHITECT

- What to look for:
  - Licensed in the state where project is proposed
  - Experience with multi-family housing in your state (building codes can vary state to state)
  - Experience with the local regulatory agencies
  - Experience with group decision-making process
  - Strategic and critical thinker
  - Referrals from local developers, builders, other professionals
ARCHITECT

- How to select:
  - Referrals to Project Manager
  - PM prepares and issues RFP
  - Interviews and see work
  - References – professionals and clients

- Contract:
  - Include all services to be provided by Phase

- What they cost:
  - Percentage of construction costs: 6-10%, with not-to-exceed (may vary by region)
  - Fixed fee by phase
  - Time and Materials
GENERAL CONTRACTOR

- When they are needed: End of conceptual design

- What they do:
  - Develop preliminary construction budget
  - Constructability review
  - Develop construction schedule
  - Assist with permitting
  - Bid the project
  - Construction
GENERAL CONTRACTOR

- What to look for:
  - Experience with construction type – multi-family, single family, etc.
  - Financial stability
  - Relationship with local building department and agencies
  - Has worked with project managers successfully – check professional references
  - Track record meeting budgets and schedules – professional or client references
  - Has worked on condominium projects in your state
GENERAL CONTRACTOR

• How to select:
  ➢ Determine type of project delivery
  ➢ PM issues RFQ – Request for Qualifications
  ➢ Interview #1 – do you like them?
  ➢ GC prepares conceptual cost estimate
  ➢ Interview #2 – do you still like them?
  ➢ References and see work

▪ What they cost:
  ➢ Bay Area: 5-15%, includes
    ▪ Overhead, Profit and Insurance – percentage over cost. Negotiate based on locality.
    ▪ General Conditions: GC staff and office
    ▪ General Requirements: temp facilities
  ➢ Change orders: negotiated percent over cost
  ➢ Include pre-construction services fee
Thank you for your time!

Questions?

Please contact us at 415-990-7194 or www.lindahermanconsulting.com