What Region are you from?

Start presenting to display the poll results on this slide.
Introductions
Core Team Supporting the IEDC and our Regional Partners

**Economic Development Support**
- **Amy Holloway**
  - Primary contact for Economic Development Advisory Assistance
- **Geraldine C. Lopez**
  - Other Primary contact for Economic Development Advisory Services
- **Melissa Glynn**
  - Primary contact for Public Sector Advisory Services
- **Andrew Kleine**
  - Other Primary contact for Public Sector Advisory Services
- **Andrew D. Phillips**
  - Project Leader for Economic Impact Analysis Advisory Services
- **Caroline Sallee**
  - Primary Contact for Economic Impact Analysis Advisory Services

**Reporting, Compliance and Project Management**
- **Brian Jarzynski**
  - Project Leader for Reporting, Compliance and READI Project Management
- **Will Miller**
  - Primary Contact EY Project Management Team Program Implementation, Compliance and Reporting
- **Robert Reeves**
  - Subject Matter Specialist – Compliance and Reporting
- **Matt Jadacki**
  - Subject Matter Specialist Federal Grants Management and Compliance
Project Management Objectives
Project Management Objectives

- Introduce leading practice tools and techniques to successfully enable READI program and project execution

- Consider how project management will support your future reporting requirements

  - Expenditure tracking
  - Progress monitoring
  - Performance monitoring
Setting the stage for successful execution - consider the flow of authority associated with the READI Program.

Regions are responsible for establishing project management capabilities in order to consolidate grants management reporting across multiple projects (potentially with multiple funding sources).
Terms and Relationships | Key components under PMO

Project management is applied to support investments to effectively produce results and align with overall objectives at the program and portfolio level.

**Portfolio**
- **READI Program** - Collection of Regional programs and projects working towards a set of overall objectives

**Program**
- **READI Regional Plans** - Collection of projects working towards a common objective

**Project**
- **Regional Projects** - A wider program of deliverables or a stand alone deliverable

**Workstream**
- **Within the READI Projects** - Collection of tasks completed by the funded project team to work towards an outcome
Project Management Objectives

Aligning responsibilities with each project management level:

**Portfolio**
IEDC READI

- Grants management tool
- Compliance management
- Evaluation process
- Monitoring of Regions
- State level engagement and reporting

**Program**
Regions

- Updating grants management tools
- Project monitoring plans
- Risk and issue monitoring
- Oversight of each project
- Regional communications and engagement

**Project**
Regional Funded Projects

- Project plans
  - Project budgets
  - Milestones
  - Expenditure tracking
- Performance objectives
- Evaluation process
- Management of contracts, etc
- Local engagement
Project Management Key Components

- Project Charter
- Roles and Responsibilities
- Project Planning
- Project Monitoring
- Risk and Issue Management
Regional Project Plan Charter Example

Project charters are good resources to communicate project expectations. Most Regions have already documented key charter elements. As part of setting up the GM Tool, points of contact will be required as well as any necessary informational updates.

- Project Description
- Background & Opportunity
- Scope
- Strategy & Risks
- Project Timeline and Milestones
- Budget and Funding
- Assumptions
- Performance Metrics
- Regional and Project PoCs
Suggested Regional Roles and Responsibilities

Project charters are good resources to communicate project expectations. Most Regions have already documented key charter elements. As part of setting up the GM Tool, points of contact will be required as well as any necessary informational updates.

Key activities
► Reviewing and monitoring of selected projects
  ► Establishing performance metrics
  ► Finalizing project plans including milestones
  ► Finalizing project budgets and funding plans
► Developing and maintaining Regional Plan Charter
► Engaging in grants management tool input and updates
► Review risk and issue reporting and assist with resolutions
► Identify, prioritize and escalate resource-related issues and risks
► Reallocate resources, as needed, if the projects require additional funds

Potential roles
► Regional READI steering committee
► Project administration for review meeting coordination and grants management tool updates
Project Planning

The most common visual representation of the project schedule is the Gantt chart (produced within MS Project) but other applications and tools can also be effective in conjunction or by themselves, including calendars, milestone charts, and timelines.
## Project Monitoring

**Tracking using consistent tools to reinforce accountability and visibility needed for success**

<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
<th>Process</th>
</tr>
</thead>
</table>
| Project Plans & Charters    | • Details include scope of work, interdependencies / other initiatives to coordinate with milestone planning and risk management, decisions needed, key community partners to work with, budget and funding considerations, etc. | • PMO providing template and preliminary content for each funded project  
• PMO organizing meeting to review workplans |
| Project Status Reports      | • Monitor progress and dependencies for each recommendation  
• Identify areas of work at risk  
• Consolidate status updates across projects to establish an overarching status  
• Update project tracking / grants mgt tool | • PMO driving consistent templates  
• Project leaders to complete template (with support of PMO) before each status meeting  
• Provide inputs to Grants Management tool |
| RAID Log⁷                   | • Identify and track ongoing risks, actions, issues, and decisions across all recommendations  
• Archive all RAID⁷ items that have been resolved or completed | • PMO and project management leads reviewing log and record updates, entering new items as needed |
## Risk and Issue Management

<table>
<thead>
<tr>
<th>Risk</th>
<th>Category</th>
<th>Occurrence Probability</th>
<th>Severity of Impact</th>
<th>Overall Project Risk</th>
<th>Mitigating Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>Projects are not executed timely</td>
<td>Schedule</td>
<td>M</td>
<td>H</td>
<td>H</td>
<td>• Tracking progress and identifying any obstacles with project owners and PMO to expedient resolutions and addressing delays</td>
</tr>
<tr>
<td>Material change in assumptions</td>
<td>Funding</td>
<td>M</td>
<td>L</td>
<td>L</td>
<td>• Costing has been negatively affected by inflation</td>
</tr>
<tr>
<td>Projects fail to achieve performance outcomes</td>
<td>Performance risk</td>
<td>M</td>
<td>M</td>
<td>M</td>
<td>• Tracking progress of initiatives against anticipated performance outcomes through meetings with project owners and addressing delays</td>
</tr>
<tr>
<td>Lack of clarity and detail in performance reporting</td>
<td>Performance risk</td>
<td>M</td>
<td>M</td>
<td>M</td>
<td>• Review of performance measures prior to reporting effort commences and updates to reporting approach and measures as necessary</td>
</tr>
</tbody>
</table>

### Risk Colors
- H: High risk
- M: Medium risk
- L: Low risk
Next Steps, Resources, and Future Sessions
Coordination and Resources

- **Workshops**
  - 2/15 Performance Indicator Training
  - Grant Management Tool Training

- **Resources**
  - Charter template
  - Risk and Issue template

- EY Training Sessions – Every Tuesday at 10 am through February 22
- Office Hours – Every Monday from 2 – 3 p.m. (EST) through May
- Monthly touchpoints with IEDC team – beginning March 2022
- Microsoft Teams Channel (to share information)
Regions Priorities through Q1

1. Begin prioritizing projects and/or identifying opportunities as a region
   a) These should be priorities regardless of funding source
2. Finalize regional organization structure and identification of fiduciary agent
3. Coordinate Community meetings with IEDC (meeting could include but not limited to the following).
   a) Provide feedback to IEDC on process, for us to improve
   b) Answer any outstanding questions
   c) Begin strategy conversations on plan priorities and implementation
   d) Identify show impact/potential of sites and projects
4. Attend EY training sessions on Tuesdays at 10 a.m. (EST)
Regions Priorities through Q2 and beyond

1. Begin coordinating priority project(s) to fund
   a) IEDC review and perform due diligence of project(s)
      i. ARPA eligibility
      ii. Impact analysis
      iii. Financial analysis
      iv. Identify additional funding sources if needed
   b) Approve Project, Deny or Provide Feedback
   c) Region then submits project through Grant Management Tool
   d) Repeat

2. Coordinate Monthly calls with IEDC and/or EY to brainstorm, collaborate, strategize

3. Quarterly READI Workshops

4. Attend Annual Statewide READI Workshops
2022 IEDC Timeline

► EY Training Sessions – Every Tuesday at 10 am through February 22
► Office Hours – Every Monday from 2 – 3 p.m. (EST) through May
► Grant Agreements – Completed by end of March 2022
► IEDC Community Meetings – Through end of February, we have already reached out to schedule
► Funding Projects – Beginning April 2022
► Monthly touchpoints with IEDC team – beginning March 2022
Send your questions to:

Readi@iedc.in.gov
# Future Sessions

<table>
<thead>
<tr>
<th>Session Topics</th>
<th>Date &amp; Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project management and execution</td>
<td>02/08/2022 - 10AM EST</td>
</tr>
<tr>
<td>Performance indicators and promoting equitable outcomes</td>
<td>02/15/2022 - 10AM EST</td>
</tr>
<tr>
<td>Grant management tool introduction and training</td>
<td>02/22/2022 - 10AM EST</td>
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</tbody>
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Questions?

Thank you for your time!

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