

“OPEN ME FIRST”

Project Management & Contracting 101



Spring, 2022

The on-line class materials in this file consists of the following items:

1. This “Open Me First” note
2. The Excel File “Goal Setting Decision Sheet”
3. The Excel File “AIA Form G-702 Application & Certification for Payment”
4. The Excel File “Check List Form”
5. The Copyrighted Power Point Presentation “Project Management & Contracting 101” in .pdf format.

Item #2, the “Goal Setting Decision Sheet” is an active Excel spreadsheet. It will be used in the **first class** as an opportunity for you to set some trial goals during the In-class Zoom session. Please open and familiarize yourself with this spreadsheet before the class. The purpose of this exercise will be to show how you changing your goals can have a profound impact on your project.

Item #3 and Item #4 will be used in the **second class** as an opportunity to create a trial budget for any project you might chose. The purpose of this exercise is two show two methods of recording and verifying contractor payments, one simple and one more complex. Accurate record keeping of payments and what they are for is essential to any project.

Item #5, the “.pdf” Power Point presentation “Project Management & Contracting 101” should automatically download on most computers. This file holds all the slides that will be used in the class.

I will gladly answer any questions at the end of each class or by later phone or Zoom appointment. Thanks for your interest.