

Technical Project Development Considerations

DISCLAIMER – This list summarizes the key considerations for technical, multi-year projects discussed by the participants at the virtual Technical Project Workshop. This list is not exhaustive or prescriptive.

Project Scope:

1. What is your project about and where is it located?
2. Identify specific steps to prepare your project for success.

Steps to developing / scoping a successful project:

- a. Identify project need, vision, and targets (clearly state the situation as an Issue or Problem Statement and how your project addresses it).
 - b. Set clear project goals and SMART (Specific, Measurable, Achievable, Realistic, Time-bound) objectives that extend over the length of your project.
 - c. Research and review existing information to guide your methodology / approach, identify information gaps, and incorporate lessons learned.
 - d. Identify methods to help organize and track your activities.
 - e. Identify key success indicators that you will use to measure outcomes during effectiveness monitoring to determine if your project is successful.
3. Identify partnerships and key stakeholders and consider how they could contribute to the success of the project.
 4. At the beginning stage of planning your project, what information and expertise do you identify as necessary to help guide your approach / methods?

Here are some ideas that you could address:

- a. Best management practices/ standard methodology for the work.
 - b. Identifying expertise (do you already have it on your team? Is there anyone else you need to bring in?)
 - c. What land authorizations or / or permits will you require?
 - d. Will you be engaging with any First Nations communities?
 - e. Identifying risks (land ownership, archaeological, rare species, invasive plants, ecosystem health, hydrology etc.).
 - f. Identifying constraints (budget, logistics, expertise, etc.).
 - g. Selecting the appropriate level of treatment / evaluation.
 - h. Baseline data collection and strategy for post-project monitoring.
5. How will you manage identified risks and constraints?
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Project Schedule/Workplan:

6. What key components do you need to include in the project workplan and schedule?

Here are some examples:

- a. Planning and design
 - b. Existing plans (e.g. Forest, Range, Invasive Plant management plans)
 - c. Indigenous and partner engagement
 - d. Permits
 - e. Surveys
 - f. Timing windows
 - g. Implementation – methods, personnel, equipment
 - h. Effectiveness Monitoring
 - i. Maintenance
 - j. Reporting and deliverables
7. How will you prepare your project schedule and workplan? Will you use specific data management systems? How will you organize the information?
8. What strategies will you use to help plan for contingencies?

Budget:

9. What key aspects do you need to include in the project budget?

Some examples:

- a. Leveraging funding (identifying other funding sources)
 - b. Administration and insurance
 - c. Staff time
 - d. Contractor fees, equipment and supplies
 - e. Expertise required (e.g. special surveys, professionals)
 - f. Travel (mileage, hotels, meals)
 - g. In-kind contributions
 - h. Effectiveness monitoring and maintenance (contingencies)
10. How will you prepare your budget? How will you account for multi-year tracking and financial reporting?
11. What strategies will you use to help plan for contingencies?
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Resources

Columbia Basin Trust [Non Profit Advisors Program](#).

Provides a variety of resources for non-profit operations including grant writing and [Grant Directories](#).

Columbia Basin Trust and Kootenay Conservation Program Winter Webinar series [Building Restoration and Enhancement Projects that Make a Difference](#).

Four-part webinar series held in February 2022 offering hands on, practical solutions to build resilience into your ecosystem restoration and enhancement projects. Three main topics include project idea development, climate resiliency terrestrial and aquatic, effectiveness monitoring.

Environment and Climate Change Canada. [Tools for applying for environmental funding](#).

Provides helpful tools to assist in completing funding applications such as [SMART objectives](#), climate calculators, species at risk, and fundraising.

Columbia Basin Climate Source. [Basinclimatesource.ca](#).

The Columbia Basin Climate Source is a one-stop destination for information about climate change, impacts, and action in this region.

Columbia Basin Trust [Ecosystem Enhancement Program](#).

Columbia Basin Trust [Climate Resilience Program](#).

Columbia Basin Trust Community Resiliency Investment Program – [Columbia Basin Wildfire Resiliency Initiative](#).

Kootenay Conservation Program. [Local Conservation Funds](#).
