

Simplified Project Management Toolkit

For Small Rural Communities Managing Infrastructure Projects

What This Toolkit Contains

This toolkit helps small rural communities manage state and federal infrastructure projects. It includes simple templates and checklists for the most important project management tasks.

Who Should Use This Toolkit

This toolkit is for:

- Small cities and towns without full-time project managers
- Rural communities managing their first major infrastructure grant
- Volunteer coordinators and part-time staff leading project work
- City managers who handle multiple responsibilities

Core Tools Included

Project Initiation Checklist

Use this checklist when your project receives funding. It covers the first 30 days after you receive your grant award.

Monthly Progress Tracker

Track your project activities, budget spending, and upcoming deadlines. Update this simple spreadsheet once per month.

Quarterly Report Template

Most grants require quarterly reports. This template helps you report progress, spending, and any challenges.

Project Closeout Checklist

Complete all required steps to officially close your project and meet grant requirements.

Getting Started

Step 1: Read Your Funding Agreement

Before you use any tools, read your complete funding agreement. Look for special conditions and requirements specific to your project.

Step 2: Identify Your Project Team

List everyone who will help manage the project. Include their role and contact information.

Step 3: Set Up Your Filing System

Create folders for project documents. Keep all grant-related paperwork organized from day one.

Step 4: Complete the Initiation Checklist

Work through each item on the Project Initiation Checklist during your first 30 days.



Common Mistakes to Avoid

- Starting work before you complete environmental review
- Skipping competitive procurement requirements
- Not reading special conditions in the funding agreement
- Poor record keeping from the beginning
- Making project changes without written approval
- Missing quarterly report deadlines

When to Ask for Help

Contact your Business Oregon project manager if you:

- Are unsure about any grant requirement
- Need to change your project scope or budget
- Encounter unexpected problems or delays
- Have questions about compliance requirements
- Need clarification on reporting deadlines

It is better to ask questions early than to make mistakes that are hard to fix later.