
Project Review Guidelines

Project Delivery Manual

Chapter 5

Project Management

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Revised:

These guidelines are intended to clarify the purpose of the monthly Project Review meetings, identify which projects should be discussed and when they should be discussed, and guide the content of these discussions. This information was distributed by Charlie Purcell in a 5-12-21 email.

What is the purpose of Project Review?

There are several purposes for Project Review:

1. Provide status updates on major projects.
2. Review and affirm decisions regarding important project issues such as project scopes, budgets, schedules, designs, public involvement, etc. Input is received from representatives of a diverse group of functional areas (e.g., districts, location and environment, roadway design, bridge design, right of way, contracts, traffic and safety, operations, etc.). Ordinarily, the Project Management Team (PMT) is responsible for making most project decisions in a collaborative manner that considers the input of all members of the PMT. However, if a PMT is not able to reach consensus on an important decision, then Project Review can serve as a helpful forum to receive additional input. Even so, Project Review is not intended to be the sole means by which important project decisions are made.
3. Share information to enable broader understanding across the agency of how project designs should be approached on a consistent statewide basis.

What types of projects should come to Project Review?

Any type of project may be brought up for discussion, but Project Review is best suited for projects that:

- Are likely to require an Environmental Assessment (EA) or Environmental Impact Statement (EIS)
- Require a Value Engineering (VE) study
- Have encountered or are likely to encounter significant public opposition or concern
- Are requested by the Deputy Director of the Transportation Development Division or District Engineer.

When should projects come to Project Review?

Projects should come to Project Review in advance of key decisions that need to be made in the scoping, development, or programming of the project, or at other milestones where a significant decision needs to be made. Examples of significant decision points or milestones include:

- In advance of the Concurrence Point process steps for projects requiring an EA or EIS:
 1. Purpose and need
 2. Alternatives to be analyzed
 3. Alternatives to be carried forward
 4. Preferred Alternative

Note: Some steps may be combined into one meeting; a separate meeting not required for each step.

- For projects that do not require an EA or EIS, in advance of formal public hearings or significant public information meetings, if significant controversy or public opposition is anticipated
- Decisions regarding VE study recommendations

Major projects may also come to Project Review just to provide a general status update, when requested by the District Engineer or Deputy Director of the Transportation Development Division.

What kind of information should be provided at Project Review?

The type of information to be provided will vary depending on the reason the project is coming to Project Review. The following list is not intended to be required for every project in every instance, but as applicable based on the purpose of the review.

General information:

- Location – show where the project is on a map
- Project purpose – explain the needs that are driving the project. Include supporting data such as traffic volumes, crash numbers, crash reduction calculations, bridge or pavement condition data, etc.
- Scope – explain in general terms the proposed solution(s) and how it addresses the identified needs
- When are the improvements forecasted to be necessary?
- Objective of the discussion – explain why the project is being brought to project review by describing the input that is desired or the decision that needs to be made
- Project Management Team (PMT) – identify the Project Manager and the other members of the PMT.

Schedule and status

- Describe the current project status or stage of development
- Identify the proposed letting date and year of programming
- Is the schedule being delayed or advanced, and if so, why?

Cost and Budget

- What is the current estimated cost or anticipated range of project costs?
- For Interstate capacity expansion projects, what is the current program amount or budget amount specified in the Interstate Plan?
- What elements of Performance-Based Practical Design have already been considered and what was the outcome of those considerations?
- Describe other efforts made to right-size the project. Are there any elements of the project scope that go beyond addressing the immediate and foreseeable needs of the project area, and if so, what is the justification for including the additional scope and associated cost?

Consultants (if used or are anticipated to be used):

- Which consultants are involved with the project?
- What work has already been contracted?
- At what point could the consultant work be paused if the project is not yet programmed or does not need to immediately advance to the next stage of development to stay on its current schedule?
- Who is the point person responsible for managing the work of the consultant?

Public involvement

- What public involvement activities have already occurred?
- Is the public perception of the project generally positive or negative?
- Who are the key supporters and opponents of the project?
- What issues are driving their support or concerns?
- What is the next step for public involvement or engagement?

Traffic Management and Constructability

- How will traffic be handled during construction?
- Are traffic impacts likely to be significant? If so, what has been considered to mitigate the traffic impacts?
- Are there challenges anticipated with constructability? Why or why not?
- If constructability challenges exist, how have they been (or how will they be) considered in the development of the project?

Other information

- Are there any special challenges associated with this project, and if so, what are they and how do you anticipate addressing these challenges? Examples may include: known or anticipated major utility conflicts or relocations, railroad coordination, or environmental constraints.
- What else should we know about the project that might not be obvious?
- Other information as specifically requested by the Deputy Director of the Transportation Development Division or District Engineer