Project Stakeholder Document Review Process

Each project managed by FDC office will have at least one review conducted by all stakeholders in the University community. At the beginning of each project the FDC Project Manager will coordinate with their TSG representative, the A/E and the Primary Customer representative to map out the review process for the specific project. The purpose of this procedure is to ensure, from the beginning, that there will be buy-in regarding how each project is reviewed. Each step in the review process given below can be adjusted to meet the specific needs of the project.

Step 1. **Planning**

- Project Manager works with A/E and TSG to determine if a review is necessary and set the date and duration of the review and to identify the appropriate stakeholders.

Step 2. **Notification**

- The Project Manager should submit review information (Exhibit 1, Exhibit 2) to the FDC Administrative Assistant prior to the anticipated start date of review.
- FDC Administrative Assistant sends out the notification to the stakeholders and A/E.

Step 3. **Document Reviewing**

- A/E submits the documents to the University (Exhibit 3).
- FDC Administrative Assistant uploads the electronic documents to the FDC review folder and updates the notification.
- Each stakeholder reviews the documents within the designated review time frame and submits the comments by the review deadline.

Step 4. **Comment Response**

- A/E provides a response letter to the Project Manager using the Review Comment Letter Template (Exhibit 4).

Step 5. **Review Meeting**

- Project Manager coordinates a comment review meeting if necessary.

Step 6. **A/E Response Letter Distribution**

- Project Manager distributes the final A/E responses to all stakeholders.
- Stakeholders review the A/E responses and notify the Project Manager if responses require further action.
- Project Manager is responsible for overseeing all comments and their subsequent resolution and/or implementation.

Resources

- FAQ
- Exhibits

Review FAQ

1. **How do I know who is my TSG project rep?** (*Step 1)*
   In Netlink, click on the project role tab. It should have the TSG representative listed. If no one is listed, contact your TSG team representative and s/he will help get someone assigned.

2. **Who are the stakeholders?** *(Step 1)*
   Customers, TSG, Operations, Utilities, PARE, Public Safety, Traffic & Transportation Management, etc.

3. **How many stakeholder reviews do I need to hold for my projects?** *(Step 1)*
   At least one review should be held before a construction price is obtained. Design/build projects may have two reviews, one at the criteria design phase and one at the construction documents design phase. Additional stakeholder reviews may be needed depending on the scale and complexity of the project.

4. **May I have multiple informal reviews of my project beside the stakeholders review?** (*Step 1*)
   Yes, multiple informal reviews are encouraged. There is no required format for informal reviews. For example, you may use a page-turn meeting, or distribute the documents to a smaller group of stakeholders for an informal review.

5. **What if my project does not need a review?** (*Step 1*)
   Discuss with TSG to confirm and TSG will notify FDC Administrative Assistant.

6. **How long, prior to the review start date, should the PM submit review information to the FDC Administrative Assistant?** (*Step 2*)
   Typically 10 days based on stakeholder needs.

7. **Why is advance notice necessary?** (*Step 2*)
   Stakeholders may have heavy workloads, so an advance notice will allow them to make necessary accommodations to review your project. It is recommended that the Project Manager have the review notice issued as soon as the A/E design contract is accepted.

8. **My A/E is late on delivering the documents; do I have to re-issue the 10-day advance notice?**
   No, you do not. Notify the FDC Administrative Assistant and have the new deadline updated.

9. **Does the review duration have to be 5 days?** (*Step 3*)
   Typically, yes. Durations longer than 5 days are usually for larger, more complicated projects. However, very simple projects, like projects <$200K, may use a page-turn meeting format to complete the review in one day.

10. **How should I rename the Review Transmittal and Review Comments documents?**
    Please use the project number and name to rename the documents mentioned above.

11. **How do I distribute the documents to reviewers?** (*Step 3*)
    Documents can be submitted via K: drive, Buckeye Boxes, flash drives, emails, etc.

12. **What if I can't get access to documents?** (*Step 3)*
    Contact the Project Manager.

13. **Will the paper copy of the review document still be available?** (*Step 3*)
    Distribution of paper copies are at the discretion of the Project Manager.

14. **To whom should I send my comments?** (*Step 3*)
    The notification will identify to whom the comments should be sent. Generally, the Project Manager should be copied on all submitted comments.

15. **How do I confirm the A/E has addressed everyone's comments?** (*Step 4)*
    This will be a joint responsibility of the Project Manager and the stakeholders. The Project Manager will ensure that the A/E responds to all comments and each stakeholder will confirm whether or not they agree with A/E response. The Project Manager is responsible for overseeing all comments and making sure that they are resolved or implemented.

16. **Are review meetings required?** (*Step 5*)
    The purpose of review meetings is to clarify and miscommunications and misunderstandings. If the A/E feels that they fully understand and accept the comments, then the review meeting may not be necessary. Typically, should be scheduled 5 days after the review comments are received. This ensures that the A/E has time to consider the comments, decide if they need clarification, and submit their responses all prior to the review meeting.

17. **Do I have to go through every comment at the review meetings?** (*Step 5*)
    No. Review meetings are most effective if attendees only discuss comments that need clarification or that ha a significant impact on the project.

18. **For a very simple project, do I still need to go through the stakeholder review process?**
    Yes. By going through the stakeholder review process, you are ensuring the project documents meet the standards and expectations of the University and the stakeholders.

19. **May I use a page-turn meeting in lieu of the stakeholder review process for a very simple project?**
    Yes. A page-turn meeting can replace Steps 3 through 5 if all stakeholders attend the meeting and can completely and concisely discuss the scope of the project within a few hours. Steps 1, 2 and 6 still need to be followed.

20. **What if a stakeholder has comments after the review duration ends?**
    The Project Manager should still collect the comments and relay them to the A/E. No A/E update to the comment letter is required.

21. What should the Review Documents include?
The review documents should include all pertinent information necessary for stakeholders to understand the purpose and scope of the project and/or for the contractors to more accurately determine a projected cost. (See Exhibit 3).

22. Are there any tools available?
Yes, please refer to the following design review exhibits.

Exhibit 1: Transmittal Data Sheet
https://fod.osu.edu/sites/default/files/0200_project_stakeholder_review_distribution_list.xlsx
Exhibit 2: Distribution List
https://fod.osu.edu/sites/default/files/0200_project_stakeholder_review_distribution_list.xlsx
Exhibit 3: Document Content Expectations
https://fod.osu.edu/sites/default/files/0200_project_stakeholder_review_distribution_list.xlsx
Exhibit 4: Review Comment Letter Template
https://fod.osu.edu/sites/default/files/0200_project_stakeholder_review_comment_letter.xlsx

End of FAQ