

**OGS Design and Construction  
Division of Design  
Program Review Process**

**“Frequently Asked Questions”**

**“Why is OGS D&C conducting program reviews?”**

In many respects, the program phase is the most important phase of a capital project. If the project intent isn't clearly understood by all parties; if clear recommendations aren't made; if all options aren't considered; if the estimate isn't valid- any one of these shortcomings can doom the project to failure. The program review process attempts to identify these types of issues.

**“What is the program review process?”**

The program review process is an informal peer review of the program report. The program report should be reviewed by the Team Leader prior to submitting the program for the board program review. The board of reviewers- typically the Business Unit Leaders- has an opportunity to read through the program report in advance of the review. During the actual review, the individual most familiar with the project (Designer, Project Manager, Team Leader, etc.) provides a very brief description of the project intent and any unique project issues. The board then asks questions on a range of issues (see “What do you look for in a program review?” for typical issues.) Generally the Designer decides how to follow up on significant issues- no formal follow-up to the review board is required.

**“What are the goals of the program review process?”**

The goals for each program review are as follows:

- Identify any significant technical deficiencies
- Ensure the standard program report format is followed
- Ensure the report is a complete, "stand-alone" document
- Ensure appropriate codes and guidelines are followed
- Ensure the recommendations are consistent with the project intent
- Ensure significant construction phase issues have been anticipated
- Ensure the estimate is appropriate

**“Do consultant Designers attend the reviews?”**

Consultant designers do not attend the program reviews. The Division of Design staff most familiar with the project (most often the Project Manager) attends the review, presents the project, and responds to questions. That individual then provides commentary to the consultant designer.

### **“Do Designers benefit from this process?”**

The Designer benefits from the process in several ways. The program review process is an opportunity for Designers to learn and to demonstrate to all the Business Unit Leaders the range of their technical and professional expertise. It is an opportunity for Designers to direct questions on both technical and procedural issues to the board. As a result of the review process, Designers should be more confident that major project issues have been identified and appropriately addressed. The review process also results in senior managers taking some responsibility for the recommendations in the program report- as a result of the review, the report truly is a product of OGS D&C, not simply the product of an individual Designer.

### **“Can a program report be submitted to the Client without a formal program review by the board?”**

ISO 9000 requires all 40,000 series projects \$200,000 or greater have a board program review. However, it is strongly recommended that all projects including S #'s be reviewed. It is recognized that on some occasions that the project schedule is critical and the board review process can be waived by the Business Unit Leader. For those projects the Business Unit Leader shall designate a peer review by the Business Unit. This may be the Business Unit Leader, Deputy Business Unit Leader or another Team Leader. The project is still required to be submitted to the board for a program review as a “lessons learned” review.

### **“Why is it important to have stand-alone reports?”**

Clients often use program and study reports as capital planning tools. As a result, there can be long delays between the issuance of the report, and the approval to move ahead with design. Staff changes can occur both in OGS D&C and in the Client’s capital planning group. A complete, detailed, stand-alone program report minimizes the potential for confusion and delays when projects are approved for design.

### **“Why is the format of the report so important?”**

As OGS D&C continually reinforce with our Clients the fact that we are a professional organization, the quality of our products becomes our most critical sales tool. We want to deliver a program report product that is instantly identifiable as the work of D&C, and a work that is of a predictable quality and format. And although the true value of a program report is in its technical completeness, if the report doesn’t look professional, our Clients may not give it a chance to stand on its technical merit.

### **“Isn’t it expensive to conduct these reviews?”**

The reviews are expensive in terms of staff time invested in the review process. However, the cost of the mistakes, confusion, or delay associated with even minor oversights at the program phase are viewed as a much greater cost to both our Clients and to OGS D&C.

### **“Are reviews required for ‘Q’, ‘S’, ‘M’, and ‘JOCS’ projects?”**

At this time, the focus of the program review process is on 40,000 series projects. At the discretion of the Team Leader or Business Unit Leader, appropriate ‘Q’ or ‘S’ projects and Professional Consultation Reports have been and will continue to be reviewed. The process has not yet been generally extended to ‘M’ and ‘JOCS’ projects.

### **“What do you look for in a program review?”**

There is no formal ‘checklist’ used for the program reviews. However, there are general areas that the board focuses on. These general areas include the following:

- A clear project intent
- Clear statement of findings
- Clear recommendations
- Do the recommendations address the ‘intent’ and are they appropriate given the ‘findings’
- Are code issues identified and addressed
- Are hazardous material issues addressed
- Are EO111 recommendations provided
- Sound technical judgment
- Is the estimate reasonable and sufficient
- Are unique construction phase issues identified (security, phasing, etc.)
- Are Client “standards” or “programs” accommodated
- Is the format correct
- Are any FOIL issues raised in the report

If you follow the Program Report Template and Checklist as a guide then many of the above issues are covered.

### **“What are you finding as a result of the reviews conducted to date?”**

The program reports reviewed to date are generally of very good quality. No systemic flaws have been identified. We can be reasonably confident that the program report product we deliver to our clients generally reflects positively on OGS D&C.

### **“How are you sharing the information learned in the reviews?”**

One of the most important aspects of the Program Review Committee has been *how do we share this information with staff?* During the review process, the Business Unit Leaders often hear and discuss elements of the Reports which may be specific to an individual Project yet may aid our staff on some future assignment.

We have begun compiling Program Reports and Studies which have been identified as good samples of high quality documents that can be used as benchmarks for future similar type projects. Currently, these Reports are available to OGS Staff @ V:\DesignAndConstr\Common\SampleReports. These Reports are divided into sub folders which correlate to the Project intent. It may be useful for the Project Manager to review the Reports and share with outside Design Consultants as an example of a good Report.