



# Plans Reviewer Training

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(Plans Review Task Team)



# Agenda

- ▶ Why? – Objectives, Background & Overview
- ▶ Who? - Roles & Responsibilities
- ▶ What? - Things to Know prior to Review
- ▶ When? – Production & Review Schedules
- ▶ Where? - Review Tools & Resources
- ▶ How? - Review Criteria, Expectations & Guidelines

# Agenda

## Why?

- Who?
- What?
- When?
- Where?
- How?



# Why?

➤ Training Objectives

➤ Background

➤ Overview



WHY?

# TRAINING OBJECTIVES



- ▶ **Bring consistency and efficiency to the overall review process**
  - ▶ By Preparing Reviewers to review submittals
  - ▶ By Providing Reviewers an understanding of the Review Process
  - ▶ By Providing Guidance & Best Practices
  - ▶ By Preventing/avoiding/minimizing unnecessary expenditure of time and money on comments

## WHY?

# WHY is this important???

- ▶ Every comment causes the Department and the Consultant to spend:

- ▶ Time
- ▶ Money
- ▶ Resources
- ▶ Effort



*(...so beware of comments that don't add value!)*

- ▶ Non-value added comments become expensive and can impact production
- ▶ Everyone must understand their role in the review process...and understand that the EOR is ultimately responsible for the final product

WHY?

# Training Objectives

- ▶ **Bring consistency and efficiency to the overall review process...** by eliminating comments that are:
  - ▶ Redundant
  - ▶ Editorial QC
  - ▶ Format QC
  - ▶ Inappropriate
  - ▶ Inefficient
  - ▶ Incomplete
  - ▶ Preferential
  - ▶ Untimely
  - ▶ Unphasely
  - ▶ Untrackable
  - ▶ Unnecessary
  - ▶ Uncoordinated
  - ▶ Unresolvable
  - ▶ Unmeaningful
  - ▶ Sarcastic
  - ▶ Outside the scope of the review
  - ▶ Outside the scope of work
  - ▶ Outside the scope of services
  - ▶ Non-value-added
  - ▶ Broad/General
  - ▶ Repetitive
  - ▶ Redundant

WHY?

So...why are we here???



## WHY?

# Because of the Comments

- ▶ None of your pay items show quantities (Phase 2).
- ▶ All of my comments are in the attached document.
- ▶ Your Notes to Reviewer sheet does not show up on the Index of Sheets.
- ▶ “F.D.O.T.” should be “FDOT”. Fix everywhere.
- ▶ Have you considered shifting the alignment to widen to the left instead of the right? (Phase 3)

## WHY?

# Because of the Comments

- ▶ Add the following plan note to emphasize FDOT Specification xxx-x...
- ▶ The curve data text size on Sheet 7 looks too small.
- ▶ The project is on a proposed bus route.
- ▶ I have the same comment as I had last time.
- ▶ The sign on Sheet S-8 is about as beneficial as throwing a rock at a tiger!



WHY?

## BACKGROUND

- ▶ PLANS REVIEW STUDIES presentation by District 4 Program Management at the Executive Workshop (2/2015)
- ▶ Plans Review Process studies (2012 - 2015)



WHY?

# Background

- ▶ PLANS REVIEW STUDIES Executive Workshop presentation addressed:
  1. Plans Review Comments Database Report
  2. Initial Engineering Design - Plans Review Process Study
  3. Plan Review Comment Analysis

WHY?

# Background

## 1. PLANS REVIEW COMMENTS DATABASE REPORT

- ▶ Reviews from September 1996 thru January 1998
- ▶ Final Plans Review in District 4
- ▶ At Phase IV/Production - Design related comments were 29% of the total comments

WHY?

# Background

## 2. INITIAL ENGINEERING DESIGN-PLANS REVIEW PROCESS STUDY

- ▶ Reviews from 2000 and 2001
- ▶ Conducted by Central Office Roadway Design
- ▶ Identify opportunities for improvement in the current plans review process.
- ▶ 85% of the engineering comments were made by seven primary functional areas
- ▶ 40% of the Phase I and Phase II review comments related to engineering.
- ▶ Only 3% of engineering comments resulted in plan changes

WHY?

# Background

## 3. PLAN REVIEW COMMENT ANALYSIS

- ▶ Reviews from 2013 and 2014 for Districts 1 and 4
- ▶ Analysis to investigate the effectiveness of current review processes
  
- ▶ Recommended
  - ▶ District to clearly document reviews and **train reviewers**
  - ▶ Only one set of comments comes from each group
  - ▶ Comment category should be based on the technical area of the review, not the group the reviewer is from
  - ▶ Additional training /documentation regarding what comments are appropriate during each project phase

**WHY?**

## Background

### Recommendation:

Identify a Task Team to review and implement the improvements suggested

### Innovators:

Innovation List Item #32:  
“Cut all Audit Functions in half  
– Plans Reviews, Part 1”



### Result:

Formation of Plans Review Task Team

WHY?

That's why we are where we are now...



...but to get where we're going, we need to know: why do we even need to review submittals?

WHY?

## OVERVIEW

- Why do we even need to review submittals?



## Overview

### WHY?

# Purpose of Reviews

- ▶ Subsection 20.23(3)(a), Florida Statutes requires a Quality Control Process.

(3)(a) The central office shall establish departmental policies, rules, procedures, and standards and shall monitor the implementation of such policies, rules, procedures, and standards in order to ensure uniform compliance and quality performance by the districts and central office units that implement transportation programs. Major transportation policy initiatives or revisions shall be submitted to the commission for review.



## Overview

### WHY?

# Purpose of Reviews

- ▶ Plans Preparation Manual states:
  - ▶ Each District shall have a **District Quality Control Plan** (V1Ch18)
  - ▶ Each Project shall have a **Project Quality Control Plan** (V1Ch18)



In-house and consultant designers and reviewers must recognize quality is the result of several processes. It requires many individuals performing many appropriate activities at the right time during the plans development process. Quality control does not solely consist of a review after a product is completed. Quality requires performing all activities in conformance with valid requirements, no matter how large or small their overall contribution to the design process. Good CADD techniques, attention to details and ensuring the plans are correct and useful to the contractor are also essential to quality.

# Overview

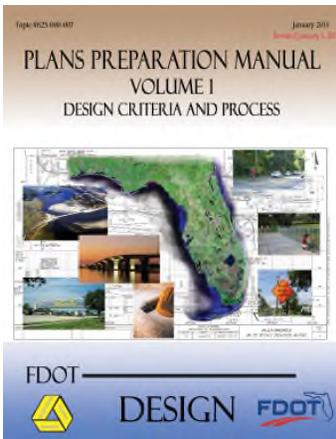
## WHY?

# Purpose of Reviews

- ▶ Plans Preparation Manual also states:

- ▶ About Reviewers (V1Ch16):

- ▶ **making timely decisions**
- ▶ **confirm that the requirements have been met**
- ▶ **transfer technical information**
- ▶ **confirming the project objectives**



- ▶ About the EOR (V2Ch2):

- ▶ **The technical accuracy** required for the design **is the responsibility of the Engineer of Record.**

## Overview

### WHY?

# Purpose of Reviews – What they are for:

Reviews are conducted to ensure:

- ▶ Project scope is met
- ▶ We get what we pay for
- ▶ Expectations met
- ▶ Department standards and criteria followed
- ▶ Compliance with other requirements (like permits, ADA)
- ▶ Clarity, consistency and functionality
- ▶ Biddability
- ▶ Constructability
- ▶ Quantities & calculations are reasonable/accurate
- ▶ Quality

## Overview

### WHY?

# Purpose of Reviews – What they're **not** for:

They're NOT for:

- ▶ doing an editorial check for format & spelling
  - ▶ incorporating personal preferences
  - ▶ redesigning the project
  - ▶ making first review at last submittal
  - ▶ focusing on other discipline issues
  - ▶ adding plan notes that repeat Standards or Specs
  - ▶ breaking your personal record for most comments made in a phase review
- ▶ **For example....**

## Review Criteria, Expectations & Guidelines

WHY?

### Purpose of Reviews



*A Health Inspector walks into a bar...*

*...(or a restaurant)...*

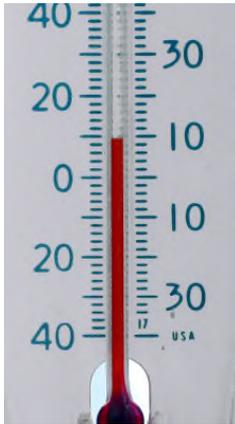
*...to review how the establishment follows health codes for:*

# Review Criteria, Expectations & Guidelines



WHY?

## Purpose of Reviews



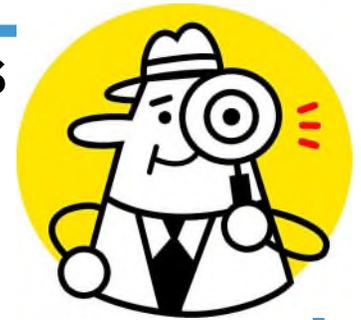
- *Cleanliness*
- *Food Preparation*
- *Food Storage*
- *Food Service*
- *Other code violations*



Employees must  
wash hands  
before returning  
to work.



# Review Criteria, Expectations & Guidelines



WHY?

## Purpose of Reviews

*The inspector is NOT there to comment on:*

- *Spelling errors on the billboard*
- *Mistakes on the menu*
- *Word spacing issues on the sign*



## Overview

### WHY?

**“But what if, after a cursory review, I see a bunch of format mistakes or typos???”**

- ▶ Notify the FDOT Project Manager
- ▶ The PM can:
  - ▶ request QC review documentation
  - ▶ document concerns on the Consultant Quality Evaluation
  - ▶ reject submittal

# Agenda

➤ Why?

➤ **Who?**

➤ What?

➤ When?

➤ Where?

➤ How?



# Who?

- ▶ Project Team Roles & Responsibilities



## Roles & Responsibilities

WHO?

### Project Team



- ▶ FDOT Project Manager (PM)
- ▶ Plans Reviewer / Lead Reviewer
- ▶ Engineer of Record (EOR) / Design PM

## Roles & Responsibilities

WHO?

### FDOT Project Manager (PM)

- Responsible for **Ensuring**:
  - Submittal properly loaded into the ERC system
  - Submittal package is complete
  - Consultant performed Quality Control
  - Review team includes appropriate individuals
  - Review team members are providing timely input
  - EOR responds to all plan review comments



## Roles & Responsibilities

WHO?

### FDOT Project Manager (cont.)

- Responsible for **Coordinating**:
  - Submittal review effort and timeline
  - Repetitive or conflicting comments
  - Non-value added comments
  - Interdisciplinary issues
  - Rejected responses with reviewer and EOR
  - Closure of comments prior to the next phase



## Roles & Responsibilities

WHO?

### Plans Reviewer

- **Train** - complete this training
- **Accept** - own this responsibility
- **Understand** – get to know the project
- **Plan** - budget time for reviews
- **Review** - conduct a timely review
- **Coordinate** - discuss issues with other reviewers
- **Comment** – make good comments
- **Submit** - prior to comment deadline
- **Resolve** - accept/reject comment responses
- **Discuss** – go to FDOT PM on rejected responses
- **Verify** - ensure comments were addressed



## Roles & Responsibilities

WHO?

### Discipline Lead Reviewer

- **Build** - assign reviewers to unit review team
- **Train** - ensure discipline review staff are trained
- **Coordinate** – discuss issues with PM and other disciplines
- **Filter** - review comments within unit
- **Consolidate** - submit comments as a unit
- **Monitor** - oversee discipline reviewers and their progress



## Roles & Responsibilities

WHO?

### EOR / Design PM

- **Designs** the project
- **Performs** Quality Control
- **Prepares** the submittal
- **Communicates** anything special about the submittal
- **Reviews** comments and provides responses
- **Coordinates** with FDOT PM on comment resolution
- **Implements** the agreed upon changes from comments
- **Accepts** responsibility for the design



# Agenda

➤ Why?

➤ Who?

➤ **What?**

➤ When?

➤ Where?

➤ How?



WHAT?

# Things to Know

- ▶ Plans Development Process
- ▶ Project Information
- ▶ Quality Assurance / Quality Control
- ▶ Submittal Requirements



## Things to Know

WHAT?

# Plans Development Process

1 - 2 - 3 - 4

- |               |                      |                       |
|---------------|----------------------|-----------------------|
| ➤ 30% Plans   | ➤ Phase 1 Plans      | ➤ Initial Plans       |
| ➤ 60% Plans   | ➤ Phase 2 Plans      | ➤ Constructability    |
| ➤ 90% Plans   | ➤ Phase 3 Plans      | ➤ Biddability         |
| ➤ 100% Plans  | ➤ Phase 4 Plans      | ➤ Plans Complete      |
| ➤ Final Plans | ➤ Final Plans (PS&E) | ➤ Production Complete |

And remember...

- Account for reduced number of submittals
- Except for the last submittal, the plans are **Incomplete**

## Things to Know

### WHAT?

# Project Information

## Scope of Work

- ▶ What is the Project Purpose and Need?
- ▶ What is the expected end result?

## Scope of Services

- ▶ What is in the Consultant's Scope of Services?
- ▶ What submittals are required?
- ▶ What deliverables are required at each submittal?
  
- ▶ *What about Design/Build (D/B) Projects?*
  - ▶ *Request for Proposal (RFP)*

## Things to Know

### WHAT?

# Project Information

- ▶ Scope Creep
  - ▶ What is it ?
  - ▶ What can you do to prevent it?



## Things to Know

### WHAT?

# Quality Assurance

## ► What is Quality Assurance?

- **Quality Assurance** (QA) is the planned, coordinated and continued activities performed to **measure** processes **against predetermined critical requirements**.  
(PPM, V1Ch18)

## ► What is the District Quality Assurance Plan?

- Where do you find it?
- What is in it?
- How does it apply to you?
- What are the Phase submittal expectations?

## Things to Know

### WHAT?

# Quality Control

## ► What is Quality Control?

- **Quality Control (QC)** Quality Control is the **process performed to ensure conformance with valid requirements**. This process includes quality planning, training, providing clear decisions and directions, constant supervision, **immediate review of completed activities for accuracy and completeness**, and documenting all decisions, assumptions and recommendations. (PPM, V1Ch18)

## ► What is the Project Quality Control Plan?

- Who prepares it?
- Where do you find it?
- What is in it?
- How does it apply to you?
- What are the Phase submittal expectations?

## Things to Know

### WHAT?

# Submittal Requirements

- ▶ Knowing what should be in a submittal will help you know what to comment on
- ▶ Scope of Services outlines submittals and deliverables
- ▶ Project Quality Control Plan outlines submittals
- ▶ Discipline specific requirements
- ▶ Plans Preparation Manual (PPM) V2Ch2 gives some guidance on what should be in each plan submittal

**Figure 2.1 Summary of Phase Submittals**  
Provide the sheets listed as applicable

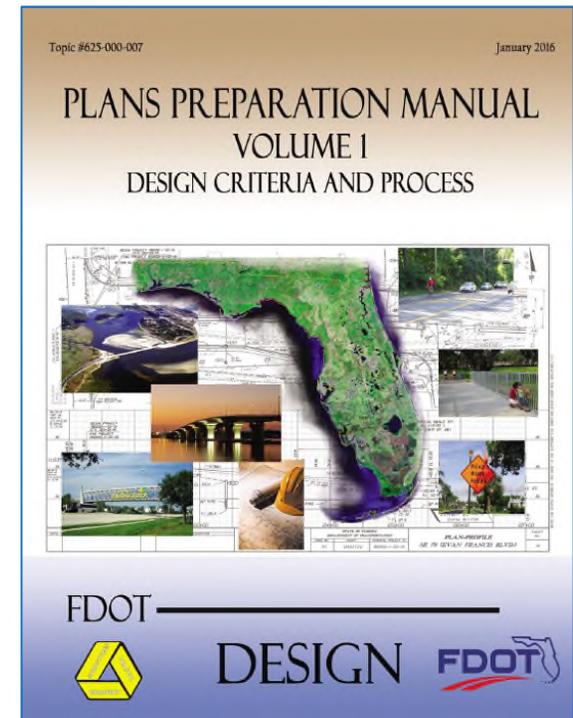
ITEM	PHASE	PHASE*	PHASE	PHASE
	I	II	III	IV
Key Sheet	P	P	C	F
Signature Sheet		P	C	F
Summary of Pay Items		P	C	F
Drainage Map	P	P	C	F
Interchange Drainage Map	P	P	C	F
Typical Section	P	C	C	F
Summary of Quantities			C	F
Summary of Drainage Structures		P	C	F
Optional Materials Tabulation		P	C	F
Project Layout	P	C	C	F
Roadway Plan-Profile	P	P	C	F
Special Profile	P	P	C	F
Back-of-Sidewalk Profile	P	C	C	F
Interchange Layout	P	P	C	F
Ramp Terminal Details		P	C	F
Intersection Layout/Detail	P	P	C	F
Drainage Structures		P	C	F
Three-Sided/Box Culvert Details			C	F
Lateral Ditch Plan-Profile		P	C	F
Lateral Ditch Cross Section		P	C	F
Retention/Detention Ponds		P	C	F
Cross Section Pattern		P	C	F
Roadway Soil Survey		P	C	F
Cross Sections	P	P	C	F
Stormwater Pollution Prevention Plan		P	C	F
Temporary Traffic Control Plans	P	P	C	F
Utility Adjustments		P	C	F
Project Network Control Sheets	P	C	C	F
Selective Clearing and Grubbing		P	C	F
Developmental Design Standards		C	C	F
Mitigation Plans		P	C	F
Miscellaneous Structures Plans		P	C	F
Signing and Pavement Marking Plans		P	C	F
Signalization Plans		P	C	F
Intelligent Transportation System (ITS) Plans		P	C	F
Lighting Plans		P	C	F
Landscape Plans	P	P	C	F
Utility Work by Highway Contractor Agreement Plans			C	F
Contract Time			P	F
<b>Toll Facility Plans</b>				
Site/Civil	P	P	C	F
Architectural	P	P	C	F
Structural	P	P	C	F
Electrical		P	C	F
Mechanical		P	C	F
Plumbing		P	C	F
Communications		P	C	F
Systems		P	C	F

**Status Key:**

**P** - Preliminary

**C** - Complete but subject to change

**F** - Final



# Agenda

➤ Why?

➤ Who?

➤ What?

➤ **When?**

➤ Where?

➤ How?



# When?

- ▶ Production & Review Schedules
  - ▶ Project Schedule
  - ▶ Review Schedule



# Production & Review Schedules

WHEN?

## Project Schedule

Schedule

➤ What is the Project Schedule?

Activity ID	Activity Name	Original Duration	Year			
			1	2	3	4
<b>Phase 32 Template PHASE 32 PROJECT TEMPLATE</b>						
	No Project Manager	841				
	No County	841				
	No Work Mix	841				
<b>Preliminary Engineering</b>						
250010	PRELIMINARY ENGINEERING BEGIN	1	PRELIMINARY ENGINEERING BEGIN			
256010	DESIGN TRAFFIC	25	DESIGN TRAFFIC			
235010	BIKE / PED / TOPS / SAFETY RECOMMENDATIONS	25	BIKE / PED / TOPS / SAFETY RECOMMENDATIONS			
164010	PREPARE SCOPE OF SERVICES	35	PREPARE SCOPE OF SERVICES			
450032	PH 32 TIP / STIP AMENDMENT	60	PH 32 TIP / STIP AMENDMENT			
164032	DESIGN FINAL SCOPE COMPLETED	1	DESIGN FINAL SCOPE COMPLETED			
299032	D3 DESIGN FEDERAL AUTHORIZATION REQUEST	1	D3 DESIGN FEDERAL AUTHORIZATION REQUEST			
452010	PH 32 DESIGN AUTHORIZATION	1	PH 32 DESIGN AUTHORIZATION			
<b>Design Consultant Acquisition</b>						
232032	CONSULTANT ADVERTISE	1	CONSULTANT ADVERTISE			
401032	CONSULTANT SHORTLIST	1	CONSULTANT SHORTLIST			
230032	CONSULTANT SCOPE MEETING	1	CONSULTANT SCOPE MEETING			
402032	CONSULTANT FINAL SELECTION	1	CONSULTANT FINAL SELECTION			
452032	PH 32 DESIGN ENCUMBRANCE	1	PH 32 DESIGN ENCUMBRANCE			
233032	P.E. CONSULTANT CONTRACT EXECUTED	1	P.E. CONSULTANT CONTRACT EXECUTED			
<b>Roadway Design</b>						
113010	KICK-OFF MEETING	1	KICK-OFF MEETING			
290010	COMMUNITY AWARENESS PLAN SUBMITTAL	1	COMMUNITY AWARENESS PLAN SUBMITTAL			
153010	PERFORM PAVEMENT SURVEY	20	PERFORM PAVEMENT SURVEY			
106010	PREPARE SURVEY (DESIGN / ROW / BRIDGE / UTILITIES)	60	PREPARE SURVEY (DESIGN / ROW / BRIDGE / UTILITIES)			
290020	APPROVE COMMUNITY AWARENESS PLAN	1	APPROVE COMMUNITY AWARENESS PLAN			
197010	PAVEMENT DESIGN	5	PAVEMENT DESIGN			
113020	PREPARE PH I (30%) DESIGN PLANS	40	PREPARE PH I (30%) DESIGN PLANS			
106020	REVIEW SURVEY (DESIGN / ROW / BRIDGE)	60	REVIEW SURVEY (DESIGN / ROW / BRIDGE)			
294010	PROCESS EXCEPTIONS / VARIANCES	1	PROCESS EXCEPTIONS / VARIANCES			
260010	TYPICAL SECTION 1ST SUBMITTAL	1	TYPICAL SECTION 1ST SUBMITTAL			
301010	REVIEW PH I (30%) DESIGN PLANS	15	REVIEW PH I (30%) DESIGN PLANS			
131010	PH I ROADWAY SOIL SURVEY / REPORT	45	PH I ROADWAY SOIL SURVEY / REPORT			
113030	PREPARE PH II (60%) DESIGN PLANS	60	PREPARE PH II (60%) DESIGN PLANS			
247010	LOCAL GOVERNMENT / OFF SYSTEM PROJECT AGREEMENT	60	LOCAL GOVERNMENT / OFF SYSTEM PROJECT AGREEMENT			
109010	SUBMIT POND SITING REPORT	1	SUBMIT POND SITING REPORT			
182010	REQUEST STRUCTURE NUMBER	1	REQUEST STRUCTURE NUMBER			
235020	BIKE / PED REVIEW	5	BIKE / PED REVIEW			

# Production & Review Schedules

WHEN?

## Project Schedule

- When are the phase submittals for this project?
- When are the submittal dates for other deliverables?
- When is the next submittal and what is expected?

Activity ID	Activity Name	Original Duration	Year				
			1	2	3	4	5
<b>Phase 32 Template PHASE 32 PROJECT TEMPLATE</b>							
	No Project Manager	941					
	No County	941					
	No Work Mix	941					
<b>Preliminary Engineering</b>							
250010	PRELIMINARY ENGINEERING BEGIN	1					
256010	DESIGN TRAFFIC	25					
235010	BIKE / PED / TOPS / SAFETY RECOMMENDATIONS	25					
164010	PREPARE SCOPE OF SERVICES	35					
450032	PH 32 TIP / STIP AMENDMENT	60					
164032	DESIGN FINAL SCOPE COMPLETED	1					
296032	D3 DESIGN FEDERAL AUTHORIZATION REQUEST	1					
452010	PH 32 DESIGN AUTHORIZATION	1					
<b>Design Consultant Acquisition</b>							
232032	CONSULTANT ADVERTISE	1					
401032	CONSULTANT SHORTLIST	1					
230032	CONSULTANT SCOPE MEETING	1					
402032	CONSULTANT FINAL SELECTION	1					
452032	PH 32 DESIGN ENCUMBRANCE	1					
233032	P.E. CONSULTANT CONTRACT EXECUTED	1					
<b>Roadway Design</b>							
113010	KICK-OFF MEETING	1					
290010	COMMUNITY AWARENESS PLAN SUBMITTAL	1					
153010	PERFORM PAVEMENT SURVEY	20					
106010	PREPARE SURVEY (DESIGN / ROW / BRIDGE / UTILITIES)	60					
290020	APPROVE COMMUNITY AWARENESS PLAN	1					
197010	PAVEMENT DESIGN	5					
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106020	REVIEW SURVEY (DESIGN / ROW / BRIDGE)	60					
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109010	SUBMIT POND SITING REPORT	1					
162010	REQUEST STRUCTURE NUMBER	1					
235020	BIKE / PED REVIEW	5					

# Production & Review Schedules

WHEN?

## Project Schedule

- At what point in the Project Schedule are the plans?
- What **should/shouldn't** be in this submittal?
- What deliverables are complete or due soon?
- What should you / shouldn't you comment on?

Activity ID	Activity Name	Original Duration	Year				
			1	2	3	4	5
Phase 32 Template PHASE 32 PROJECT TEMPLATE							
No Project Manager							
No County							
No Work Mix							
Preliminary Engineering							
250010	PRELIMINARY ENGINEERING BEGIN	1					
256010	DESIGN TRAFFIC	25					
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450032	PH 32 TIP / STIP AMENDMENT	60					
164032	DESIGN FINAL SCOPE COMPLETED	1					
296032	D3 DESIGN FEDERAL AUTHORIZATION REQUEST	1					
452010	PH 32 DESIGN AUTHORIZATION	1					
Design Consultant Acquisition							
232032	CONSULTANT ADVERTISE	1					
401032	CONSULTANT SHORTLIST	1					
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109010	SUBMIT POND SITING REPORT	1					
162010	REQUEST STRUCTURE NUMBER	1					
235020	BIKE / PED REVIEW	5					

# Production & Review Schedules

WHEN?

## Review Schedule

- ▶ What is the Review Schedule?
  - ▶ What is the review timeframe?
  - ▶ What are the review deadlines?



## Production & Review Schedules

WHEN?

### Review Schedule

- ▶ When is a submittal expected in ERC?
- ▶ When should you begin your review?
- ▶ When should you complete your review?
- ▶ When are your comments due in ERC?
  
- ▶ Budget review time accordingly  
(DON'T PROCRASTINATE!)
  
- ▶ Allow time for coordination and communication

## Production & Review Schedules

WHEN?

### Review Schedule

- Submittal → Review → Respond → Resolve → Close
- Review Timeframe is generally:
  - 20 business days for comments
  - 20 business days for responses
  - 5 business days for acceptance/follow up/rejection of comments
  - 5 business days for final acceptance and closure of comments/responses
- Review schedule requirements may vary by project

# Agenda

➤ Why?

➤ Who?

➤ What?

➤ When?

➤ **Where?**

➤ How?



# Where?

- ▶ Review Tools & Resources



## Review Tools & Resources

WHERE?

### Tools & Resources

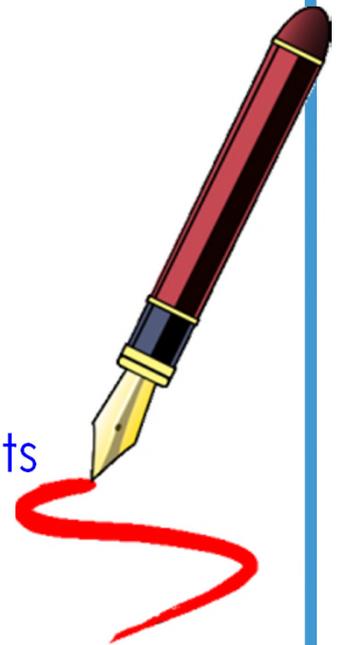
- ▶ ERC
  - ▶ PSEE
  - ▶ Scope
  - ▶ Schedule
  - ▶ Criteria
  - ▶ Standards
  - ▶ Specifications
  - ▶ Policies
  - ▶ Procedures
  - ▶ Rules
  - ▶ Statutes
  - ▶ Field Reviews
  - ▶ Video Log
  - ▶ Project Reports
  - ▶ R/W Maps
  - ▶ GIS
  - ▶ Value Engineering Study
  - ▶ Risk Register
  - ▶ Notes to Reviewer
  - ▶ RFP (D/B projects)
- ▶ Anything else?

## Things to Know

WHERE?

# Reviewer Tools

- ▶ What tools should you be able to use as a reviewer?
  - ▶ Electronic Review Comments (ERC) System - [www3b.dot.state.fl.us/ElectronicReviewComments](http://www3b.dot.state.fl.us/ElectronicReviewComments)
  - ▶ Project Suite Enterprise Edition (PSEE) - [fdotwp2.dot.state.fl.us/ProjectSuiteEnterpriseEdition/Pages/Home/Home.aspx](http://fdotwp2.dot.state.fl.us/ProjectSuiteEnterpriseEdition/Pages/Home/Home.aspx)

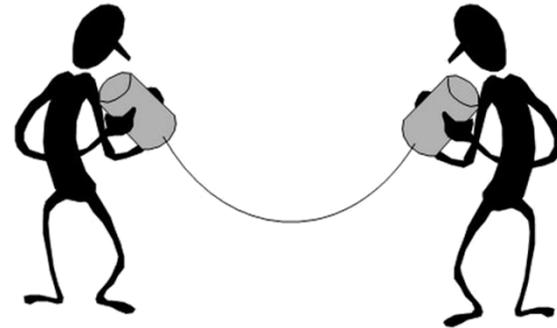


## Things to Know

### WHERE?

# Communication Tools

- ▶ What Communication Tools do you have at your disposal?
  - ▶ Talking in-person
  - ▶ Phone
  - ▶ Email
  - ▶ Teleconference / Online Meeting
  - ▶ ERC
  
- ▶ How should you communicate issues, questions or concerns?





# Agenda

- Why?
- Who?
- What?
- When?
- Where?

➤ **How?**





# How?

- ▶ Review Criteria, Expectations & Guidelines: Commenting

## Review Criteria, Expectations & Guidelines

HOW?

### Commenting

- ▶ Value-Added / Non-Value Added
- ▶ Phase Appropriate Comments
- ▶ Specialty Comments
- ▶ Off-specialty Comments
- ▶ Other Considerations
- ▶ Comment Follow-up

## Review Criteria, Expectations & Guidelines

### HOW?

# Commenting

- ▶ Value-added comment
  - ▶ Would implementation of comment result in savings in project cost or time, or improved safety
  - ▶ Enhances and adds quality to the project
  - ▶ Identifies a violation of a requirement (Requires a response)
  - ▶ Engineering comments (Requires a response)
  - ▶ Informational FYI – (Notate in ERC: “No Response Required”)

## Review Criteria, Expectations & Guidelines

HOW?

# Commenting

- ▶ Non-value-added
  - ▶ May not really need to be submitted as a formal comment (talk to PM)
  - ▶ Editorial or Format comments (Did EOR QC?)
  - ▶ Other “FYI” comments

# Review Criteria, Expectations & Guidelines

## HOW?

### Commenting

#### Phase Appropriate Comments

- ▶ Don't bring up things that are missing if they are not actually due at this phase
- ▶ Major conceptual comments should be the focus of the initial reviews
- ▶ At later submittals, plans should be reviewed to ensure that the initial comments were addressed and that newly added details are acceptable
- ▶ Don't comment on things you should have commented on at an earlier submittal (just because you didn't budget your time properly)
- ▶ Waiting until the Final Submittal to start your review (or to do your first thorough review), is TOO LATE!

# Review Criteria, Expectations & Guidelines

HOW?

## Commenting



## Review Criteria, Expectations & Guidelines

HOW?

### Commenting

#### Specialty Comments

- ▶ **Focus** on own specialty
- ▶ **Understand** own role and the project
- ▶ **Budget** review time accordingly
- ▶ **Coordinate** comments internally

## Review Criteria, Expectations & Guidelines

HOW?

### Commenting

#### Off-Specialty Comments

- ▶ **Make note** of issues related to other specialties
- ▶ **Review** comments by other reviewers in ERC
- ▶ **Coordinate** with PM & other specialty reviewer(s)

## Review Criteria, Expectations & Guidelines

HOW?

### Commenting

#### Other Considerations

- Understand the project
- Understand the review timeframe
- Budget your time
- When is a “typo” more than a typo?
- Reference the requirements
- Don't ask for plan notes that repeat or paraphrase the Standards or Specifications

## Review Criteria, Expectations & Guidelines

HOW?

### Comment Follow-up

- ▶ Accept / Reject Responses
- ▶ Review Timeframe Applies
- ▶ Verification / Validation
- ▶ Closing Comments

## Review Criteria, Expectations & Guidelines

### HOW?

## Examples - What's wrong with these comments?

- ▶ None of your pay items show quantities (Phase 2).
- ▶ All of my comments are in the attached document.
- ▶ Your Notes to Reviewer sheet does not show up on the Index of Sheets.
- ▶ "F.D.O.T." should be "FDOT". Fix everywhere.
- ▶ Have you considered shifting the alignment to widen to the left instead of the right? (Phase 3)

## Review Criteria, Expectations & Guidelines

### HOW?

## Examples - What's wrong with these comments?

- ▶ Add the following plan note to emphasize FDOT Specification xxx-x...
- ▶ The curve data text size on Sheet 7 looks too small.
- ▶ The project is on a proposed bus route.
- ▶ I have the same comment as I had last time.
- ▶ The sign on Sheet S-8 is about as beneficial as throwing a rock at a tiger!



# Summary

- ▶ Why?
- ▶ Who?
- ▶ What?
- ▶ When?
- ▶ Where?
- ▶ How?

# Plans Review



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**Thank you for attending**

**Plans  
Reviewer  
Training**

Florida Department of Transportation (FDOT)  
Plans Review Task Team

**QUESTIONS?**