



ITD Project Charter Guidebook

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Program Management Office
IDAHO TRANSPORTATION DEPARTMENT

Table of Contents

Introduction	3
Charter Lifecycle.....	3
Sections of the Project Charter.....	5
SECTION 1: Project Overview.....	6
SECTION 2: Risk Register	10
SECTION 3: Estimate Summary, Basis of Estimate, Project Status.....	12
SECTION 4: Design Standards	16
SECTION 5: Environmental Considerations	17
SECTION 6: Traffic	21
SECTION 7: Materials	24
SECTION 8: Bridge.....	24
SECTION 9: Utilities – Rail Road	25
SECTION 10: Right of Way.....	25
SECTION 11: Operations	26
SECTION 12: ETS-ITS	26
SECTION 13: Public Involvement.....	27
Appendix A: Charter Document Saving	28
Appendix B: Use of ProjectWise	29
Appendix C: How To Print and Sign the Charter.....	30

Project Charter Guidebook

Introduction

This guidebook explains why we use charters, the document lifecycle and details of specific areas. If properly utilized a charter will identify project risks in the planning stage, minimize scope and budget increase, and provide parameters for the design of the project.

The charter serves two key purposes:

1. A document where the department is formally authorizing work to progress on a project
2. Consolidates into one place all key information about a project

The Project Charter is a formal document that serves as a contract between the Project Sponsor and the Project Team, stating what will be delivered according to the budget, time constraints, risks, resources, and standards. The Project Charter empowers the Project Manager in their role and formally authorizes them to begin the project activities and obtain the resources to support or work on the project's activities. Most importantly, it is required to have a Project Charter in place BEFORE the project is included into the Idaho Transportation Investment Program (ITIP).

The Charter is designed to be a living document that is updated and refined during the project lifecycle. It starts in the planning section where the scope and limits of the project are defined, and initial risks recorded. The charter is updated as information becomes available, the work becomes more defined, estimates become more granular and risks are realized or mitigated.

Charter Lifecycle

The project charter template is an excel document located at [Charter Template Documents](#) in ProjectWise. Always use the template from this location to start with a blank project using the latest template.

Planning/Scoping Phase:

Charters are initially developed and signed in the planning and scoping section through the District Engineer (DE) to approve the project entering the program. The planning section broadly defines the project scope and location and develops an initial estimate so funding can be programmed. Additionally, each SME section provides input into their respective areas.

These areas include:

1. Environmental – District Environmental Planner
2. Traffic – District Traffic Engineer
3. Materials – District Materials Engineer
4. Bridge – HQ Bridge
5. Utilities/Railroad – Project Manager
6. ROW – District or HQ ROW section

7. Operations – District Operations Engineer or Area Forman
8. ETS-ITS – HQ ETS Section
9. Public Involvement – District Public Affairs Representative

At a minimum the Project Overview and Estimate Summary tabs should be completed. There are many small projects with limited scope and budget where much of the information in the Charter is not applicable. Those tabs that have no bearing on the project may be left blank and “hidden” in the spreadsheet to prevent them from printing.

The planning and scoping section reviews all risk identified by the various sections and ensures the risk register is updated with the probability and impact, risk response, mitigations and contingencies. Considering risks in the early stages of a project can make a significant impact on maintaining scope, schedule, and budget.

Development Phase:

Once handed off, the project manager review’s the charter for an understanding of the scope, potential risks, budget, and design standards.

Once a charter is signed a Charter Change Request (CCR) is needed if there are extensive changes to scope or budget. See the current CCR SOP for further details.

The charter is a living document that Project Managers keep updated. The excel version of the charter is regularly updated with risks, design standards, estimate top sheets and scope refinement. Every year during the ITIP update the estimate top sheet along with backup for CN should be printed as a pdf and saved as historical reference. *See Appendix A for instructions on saving.*

Construction Phase:

Once a project has been submitted for PSE the Plans and Specs govern the project not the charter.

Sections of the Project Charter



SECTION 1: Project Overview

The first section of the Charter is for project information. This is where the Project Manager gives the formal name of the project and any other terms that identify the project and the primary groups that will be involved with it. With this consistent terminology, it will be easier for all parties involved—such as the project team, stakeholders, and end users—to discuss and work on the project.

Export to PDF		: (Scoping Design Stage)		TOC	Next
Field	Project Overview Input		Notes	(Revision 2019-0404)	End
Key No:					
Project Name:			ROUTE, LOCATION DESCRIPTION		
Project Description:			Project Description HELP >>		
District:			Identifies the project's primary funding		
Route:					
Segment Code:					
Beginning MP:			Milepoint Logs <i>(Web page)</i>		
End MP:					
PM (Project Manager):			The Project Manager (responsible for the scope, schedule, budget)		
Owner Stakeholder:			Project Owner		
Sponsor Stakeholder:			Project Sponsor		
Other Stakeholder:			Other Project Stakeholder		
Funding Year:			Target date (YYYY) for which construction will occur		
Funding Source:					
Contract Type:	0.000		Pulled from [Basis of Estimate] sheet (Formula)		
Current CN Estimate:	\$0.00		Pulled from [Project Estimate] sheet (Formula)		
Total Project Estimate:	\$0.00		Pulled from [Project Estimate] sheet (Formula)		
FHWA Oversight:					
Work Authority:			Comes from Financial Services when funds are obligated		
Program Type:			See 'FY20ProgramUpdateManual.1.1.pdf'		
Project Standards:			Project Standards HELP >>		
GOAL 1:			GOAL 1 HELP >>		
GOAL 2:			GOAL 2 HELP >>		
Purpose and Need:			Purpose and Need HELP >>		
Scope of Work:			Scope of Work HELP >>		
Project Assumptions:					
Project Resource Plan:					
Project Constraint #1:			Describe any project constraints (up to 3)		
Project Constraint #2:			Describe any project constraints (up to 3)		
Project Constraint #3:			Describe any project constraints (up to 3)		
PW URN Link to: [Charter Appendix Documents Set]			Go to the ProjectWise [Charter Appendix Documents SET] >>		
				User Defined Data Area	

Project Name-This is the “official name” of the project. Make sure that it is unique and clearly defines where and/or what the project is so at first glance it is easily recognized. Here is a sample template that you can use to create a Public Name:

TEMPLATE:

- 1) Insert the main highway designation, if applicable.
- 2) General Project location or activity.
- 3) Insert the nearest city and/or county.

FOR EXAMPLE:

SH00 Main Street to Lake Shore Drive, Lunarville, Obadiah County

Project Description (Public Description)

The Project Description is also known as the “Public Description” which is found in OTIS. It is a short narrative of the project. A successful Project/Public Description should be concise and clear. Any ITD staff personnel and the general public should have a good idea of the activities the project will do and what the final product will be. Here is a sample template that you can use to create and write a Public Description:

TEMPLATE:

The (insert the highway and project name) is located near/in (insert the closest city) in (insert the county here) will (insert major outcome or deliverable) in order to (explain why they might care).

FOR EXAMPLE:

The State Highway 00 Main Street to Lake Shore Drive project is located within the city of Lunarville in Obadiah County will seal coat and do some minor curve improvements in order to improve ride quality and extend the pavement lifespan.

Beginning and Ending Mileposts – Use Linier Referencing System

To find a beginning or an ending milepost: <http://itd.idaho.gov/highways/milepointlog/>

Route - Remember there are some projects that do not have a specified route such as a planning project or a project that is has many locations.

Stakeholders -

The Project Manager is the primary contact who is responsible for the project.

The Owner is the Design Construction Manager or Bridge Engineer assigned for the project.

The Sponsor is the District Engineer who has oversight of the project.

If you have external stakeholders that you need to address, a separate Stakeholder register should be used.

Work Authority - This field holds the project accounting work authority number that comes from Financial Services when funds are obligated on the project and it has been set up in accounting. This number is what Financial Services uses for billing purposes. This may change during the project (i.e. ST to Fed or back to ST).

Program -This is the anticipated program funding category which typically follows the ITIP definition.

Project Standards -This field is for identifying the type of project you plan to develop.

- AASHTO – Use this for new/reconstruction on the NHS or interstate’s
- State – Use this for new/reconstruction on non – NHS roads, and all LPA Projects)
- 3R - Use this for resurfacing, restoration, rehabilitation on NHS
- 1R – Use this for rehabilitation on state roads
- Pavement Maintenance – Use this for surface treatment projects
- Other – Any other project standards not falling in the above categories

Goal 1 and Goal 2 -The goals specifically identify the primary and secondary objectives of the project.

Purpose and Need - A successful Purpose and Need statement should be concise and clear. Anyone reading the statement should have a good idea of the project purpose and how it will meet the department’s goals. Here is a sample template that you can use to create and write a clear statement of Purpose and Need:

TEMPLATE:

The objective of the *(insert project name)* is to *(insert major outcome or deliverable)*.

This will be completed by *(insert the project due date)*. This project will meet the department’s goal to (safety, mobility, and/or economic opportunity).

FOR EXAMPLE:

The objective of the SH-00, Main Street to Lake Shore Drive Project, Lunarville, Obadiah County is to repair the rutting that has occurred in the wheel paths and to extend the life of the existing ballast section on State Highway 00. Furthermore, preservation is needed occasionally throughout pavement lifecycle to improve ride quality and extend the pavement lifespan. This will be completed by delivering a PS&E package by October 2025 and constructing the project by the end of the 2026 construction season. This project will meet the department’s goal to improve safety and enhance the mobility of the traveling public.

Scope of Work - A successful Scope of Work (SOW) should be concise and clear. Anyone reading the statement should have a good idea of the activities the project will do (and/or not do) and its approach to completion. Here is a sample template that you can use to create and write a SOW:

TEMPLATE:

The scope of the (insert project name here and highway designation) from (insert location information). This will be accomplished by (insert project description or approach). The result of this project will be to (insert the anticipated results of the project).

FOR EXAMPLE:

The scope of the Main Street to Lake Shore Drive Project on State Highway 00 is to do a full-width sealcoat from mileposts 14.3 and 21.4 and some curve improvements from mileposts 16.1 and 16.5. This will be accomplished by performing a rut-box method fill-in in the wheel paths along with a full width sealcoat on State Highway 00 from mileposts 14.3 and 21.4. The advantage of doing the rut-box method is that it would maintain the roadway width of 30-feet without steepening the fore slope of the roadway. In addition, minor curve improvements will be done between mileposts 16.1 and 16.5. Guardrail will be added along the curve to reduce drive-off the road incidents along the curve. The advantage of doing the minor curve improvements will enable drivers to safely navigate a sharp curve without fear of sliding off into the lake when heavy water is present. The culvert bridge at milepost 18.3 will be inspected but no new culvert bridge will be included in this project. The results of this project will be a smooth roadway surface on State Highway 00 that is free from wheel path ruts and a more linear curve.

SECTION 2: Risk Register

The second section is for risk analysis. Risks import from the subject matter tabs such as Materials, Design Standards, Environmental, etc. This rollup of each subject area allows for a rating, risk response, mitigation and contingency plan for each risk. A risk owner is assigned for each deemed High or above.



Not all risks are threats to a project. Sometimes a risk is an opportunity and strategies can be developed to capitalize on these.

Risk Notes Rev. 2020-1209 (21a)		Probability	Impact	Risk Heat Map	Risk Response	Mitigation (How to Avoid)	Contingency (What happens if)	Risk Owner
Design Standards								
...								
Environmental								
...								
Traffic								
...								

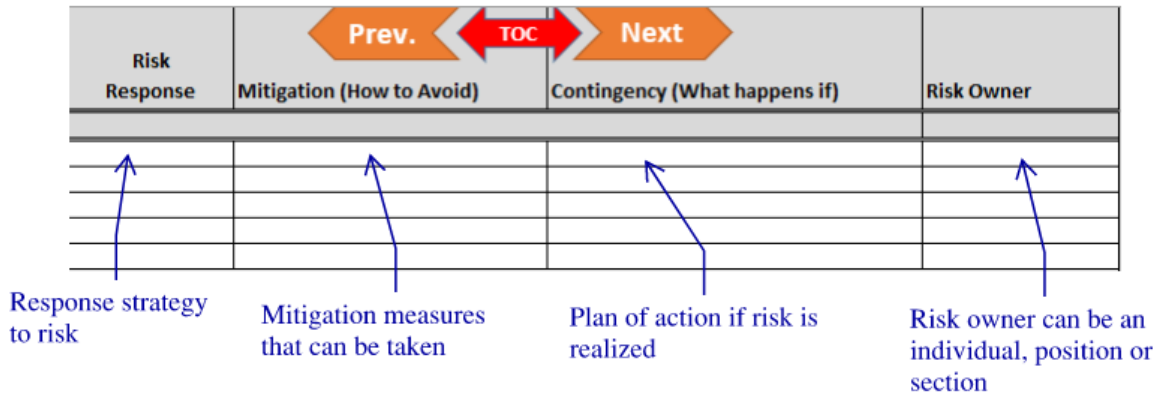
IMPACT	PROBABILITY Rating				
	1	2	3	4	5
Very Significant	M	M	H	VH	VH
Major	L	M	M	H	VH
Moderate	L	M	M	M	H
Minor	L	L	L	M	M
Insignificant	L	L	L	L	M

Figure 1 - Screen Shot of the Risk Register

Risks entered in the subject tabs will auto populate in the risk register. For each risk determine probability, impact, response, mitigation, contingency and a risk owner. See below.

Risk Notes Rev. 2020-1209 (21a)		Probability	Impact	Risk Heat Map
Design Standards				

Risk auto populated from subject tab
Probability of risk realized
Impact if risk is realized
Calculated risk level



Risk Response Definitions:

- Threat
 - Avoid, seek to eliminate risk
 - Transfer, pass ownership and/or liability to a third party
 - Mitigate, reducing the probability and/or severity of the risk below a threshold of acceptability
 - Accept, recognizing residual risks and devising responses to control and monitor
- Opportunity
 - Exploit, seek to ensure the opportunity happens
 - Share, allocate ownership of opportunity to third party best able to capitalize
 - Enhance, seek to increase probability and/or impact

Probability-Impact Matrix Description				Prev. TOC Next							
INFO ONLY. No User Input Required!											
	Impact Types	Risk Heat Map (Risk Rating / Severity)									
		Costs	Time	Compliance and/or Reputational (regulatory and policy / political and community)	Health & Safety	For Single Events: Probability over 5 years					
						< 10% (Less than 1 in 10)	10% to 25% (Avg. of about 1 in 6)	25% to 40% (Avg. of about 1 in 3)	40% to 60% (Avg. of about 1 in 2)	> 60% (Avg. of about 4 in 5)	
Rating (tude)	Very Significant	<ul style="list-style-type: none"> * Direct monetary costs in current-year dollars > \$20 M * State revenue reduction of 10% or more in a given fiscal year * Federal revenue reduction of 10% or more in a given fiscal year * Loss of a single major revenue stream - Fuel Tax, Vehicle Registration, DMV fees, etc. * A reduction in PCNs and associated funding of 25% or greater 	<ul style="list-style-type: none"> > 12 Months * True schedule impact (delay or acceleration, in months) to a "program year", relative to the intended completion/delivery date for that program year. (note: could lead to delayed construction payouts and/or a build-up of cash balance) * Disruption experienced by our teams due to changes in the program, in terms of the amount of extra time the teams have to expend (or save) in response. 	<ul style="list-style-type: none"> * Loss of life * Property damage or fines in excess of \$1M * An event that causes an ITD employee to be fired for negligence * Sustained negative media attention at state or national level lasting months * Irreparable loss of public confidence in ITD * Major impact to organization, (Governor's office, legislature as a body) taking over the business, passing legislation to control the department, change in the Director, changes in the Board Chair, using ITD as the excuse not to pass legislation. Statewide impacts 	<ul style="list-style-type: none"> * Multiple worker fatalities or permanent disabilities * Single public fatality or permanent disability * Significant community health impact * Permanent impact to flora or fauna population(s) in impacted area * Serious, long-term impairment of ecosystem function 	-->	M	M	H	VH	VH
	Major	<ul style="list-style-type: none"> * Direct monetary costs in current-year dollars from \$10 M to \$20 M * State revenue reduction between 5% and 10% in a given year. * Federal revenue reduction between 5% and 10% in a given fiscal year. * Major reduction of a single major revenue stream of 30% or more (Fuel Tax, Vehicle Registration, DMV fees, etc.) * A reduction in PCNs and associated funding of 20% to 25% 	<ul style="list-style-type: none"> 6 - 12 Months * True schedule impact (delay or acceleration, in months) to a "program year", relative to the intended completion/delivery date for that program year. (note: could lead to delayed construction payouts and/or a build-up of cash balance) * Disruption experienced by our teams due to changes in the program, in terms of the amount of extra time the teams have to expend (or save) in response. 	<ul style="list-style-type: none"> * Significant Non-Participation decisions by FHWA, leading to loss of funding * Property damage or fines in the range of \$100k to \$1M. * Loss of service * Impacts that result in attorneys from oversight agencies becoming involved * Sustained negative media attention at state or national level lasting weeks * Loss of public confidence in ITD for several months * Several of these groups (Governor's office, legislature as a body, local agencies, state agencies, major businesses) upset at the same time. Pressure to or threats to taking over the business, pass legislation to control the department, calls for changing the Director, changes in the Board Chair, using ITD as the excuse not to pass legislation, authorizing special audits * A State agency elevates an issue to the Governor's office. Statewide impacts. 	<ul style="list-style-type: none"> * Single worker fatality or permanent disability * Multiple workers hospitalized but recover * Serious but non-debilitating injury or illness to member of the public * Severe damage to flora or fauna population(s) requiring years to recover * Medium-term impairment of ecosystem function 	-->	L	M	M	H	VH
		<ul style="list-style-type: none"> * Direct monetary costs in current-year dollars from \$5 M to \$10 M * True schedule impact (delay or acceleration, in months) to a "program year", relative to the intended completion/delivery date for that program year. (note: could lead to delayed construction payouts and/or a build-up of cash balance) 	<ul style="list-style-type: none"> 3 - 6 Months * True schedule impact (delay or acceleration, in months) to a "program year", relative to the intended completion/delivery date for that program year. (note: could lead to delayed construction payouts and/or a build-up of cash balance) 	<ul style="list-style-type: none"> * Diminished decision-making authority (e.g., revocation by state or FHWA) 	<ul style="list-style-type: none"> * Single worker hospitalized 	-->	L	M	M	H	VH

Figure 2 - The Probability impact matrix tab provides guidelines to rate project risks. It is for information only and serves as a guide when rating the probability and impacts of identified risks.

SECTION 3: Estimate Summary, Basis of Estimate, Project Status

The third section is to identify the budget for your project. The estimate section includes the following three tabs.

- Estimate Summary – This is known as the estimate top sheet. It calculates what should be programmed for funding based on estimated cost and planning contingencies.
- Basis of Estimate – This sheet provides a summary of facts and assumptions used when creating the cost estimates.
- Project Statuses – This checklist identifies cost affecting aspects and if they have been addressed.

For an in-depth look at estimating and using the estimate top sheet see training provided by the PMO.

Estimate Summary

This is where the Project Manager compiles the costs for each project component and captures them into one project estimate summary. Key information to input includes:

- Date of Estimate/update
- Intended Bid Date
- Design Stage
- Contingency
- Inflation
- Base Estimate

The first section in yellow is used to input the base estimate assumptions which should be unadjusted, unloaded and uninflated. In this section, contingency percentages should also be determined commensurate with the level of project maturity, complexity and uncertainty. Recommended contingency levels are provided for each design stage, however, the project manager may elect to change these values to better reflect the certainty or uncertainty of the current base estimate.



At a minimum the estimate summary needs to be updated during the yearly ITIP update and a PDF copy saved in PW.

See screen shot below of key input areas.

Budget Phases

Development

- Preliminary Engineering by staff = PE
- Preliminary Engineering by consultant=PC
- Utilities = UT
- Right of Wat Acquisition = RW
- Land Purchase - LP

Construction Administration

- Construction Engineering = CE
- Consultant Construction = CC

Construction = CN

- CN: Construction: unadjusted, unloaded and uninflated
- CN: Construction Contingency: Set-aside amount for construction change orders and quantity overruns
- CN: Non-Bid Items: Set-aside amount for potential expenses such as contract incentives or escalation adjustments (fuel and asphalt).

Key Number: 00000 Project Name: 0

Date of estimate/update: Intended bid date: Design Stage: Planning

Contingency (based on level of development and complexity)		
Maturity Level or Design Stage	NA	Contingency
NA	NA	0%
1% to 10%	Planning	50%
10% to 25%	Scoping	40%
25% to 60%	Preliminary	30%
60% to 90%	Intermediate	20%
90% to 100%	Final	10%
100%	PS&E Submittal	0%

The values in this table represent suggested contingency and can be adjusted to reflect project complexity. Example: a seal coat in the planning stage may only need 15% contingency instead of 50%.

Output: 2

Anticipated Annual Wage Rate Adjustment: 3.0% (PE, RW, & CE)
Wage Rate Above Inflation: 1.0%
Effective Rate: 0.0%

Inflation

Years until intended bid date: 0.00 **ERROR!**

<https://www.usinflationcalculator.com/inflation/historical-inflation-rates/>
Annual Inflation (CN): 2.00%
Effective CN Inflation Rate: 0.000%

<http://www.in2013dollars.com/Housing/price-inflation>
Annual Inflation (LP): 2.75%
Effective RW Inflation Rate: 0.000%

Effective Rate = $(1 + \text{Annual Rate})^{\text{Year}^2} - 1$

BASE ESTIMATE

Base CN Construction estimate (unadjusted, unloaded, and uninflated):

CN - Change Order/Quantity Variance (CO/QV) (Typically 5% of CN estimate): 5.00% \$ -

CN - Non-bid Items (Typically 3.5% of CN): 3.5% \$0.00 or Actual Value >>> \$ -

(PE + PC) / CN: --

(CE + CC) / CN: --

The sum of PE and PC should range between 5-15% of the base CN estimate dependent upon project complexity.

The sum of CE and CC should range between 5-15% of the base CN estimate dependent upon project complexity.

Estimated PE cost:
Estimated PC cost:
Estimated CE cost:
Estimated CC cost:
Estimated UT cost:
Estimated RW cost:
Estimated LP cost:

TOTAL PROJECT BASE ESTIMATE: \$ -

The second section in green is used to calculate contingency. As long as the design stage and the base estimate values are supplied in the first section, this section should calculate contingency automatically. As mentioned earlier, if the project manager believes the contingency to be inadequate for the project, the percentage value can be modified in the first section of the worksheet.

CONTINGENCY

+ 50% based on design stage.

CN (Construction)	CN (CO/QV)	CN (Non-Bid Items)	UT	CC	CE	Total "CN"/CE/CC/UT
\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
				PC	PE	Total "PE"/PC
				\$ -		\$ -
				LP	RW	Total "RW"/LP
				\$ -		\$ -

+ 0% based on wages & time.

TOTAL PROJECT CONTINGENCY: \$ -

The third section in blue combines the base estimate from the first section and the contingency in the second section to formulate the estimated Present Value. These are the values that should be programmed and scheduled in the years they are intended to be obligated and expended. By doing so, this will aid in stabilizing the overall state program and will make the most efficient use of highway funds.

PRESENT VALUE (Base + Contingency): Amounts to be Programmed and/or Obligated *Rounded to nearest whole number*

CN (Construction)	CN (CO/QV)	CN (Non-Bid)	UT	CC	CE	Total "CN"/CE/CC/UT
\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
Total CN: \$ -				PC	PE	Total "PE"/PC
				\$ -		\$ -
				LP	RW	Total "RW"/LP
				\$ -		\$ -
Funds are to be <u>scheduled</u> in the years they are intended to be <u>obligated and used</u>.						
TOTAL PROJECT PRESENT VALUE:						\$ -

The fourth section is reserved for inflation and is based on three components located in the first section: (1) Date of Estimate/Update, (2) Intended Bid Date and (3) designated annual inflation for construction and land purchase. This section is labeled Future Value which combines the base estimate, contingency and inflation amounts and is for informational purposes only. Financial Planning and Administration (FP&A) sets the annual percentage and automatically applies inflation to the primary Present Value amounts in the program.

FUTURE VALUE (Base + Contingency + Inflation) *Rounded to the nearest whole number*

CN (Construction)	CN (CO/QV)	CN (Non-Bid)	UT	CC	CE	Total "CN"/CE/CC/UT
\$ -	\$ -	\$ -	\$ -	\$ -		\$ -
				PC	PE	Total "PE"/PC
				\$ -		\$ -
				LP	RW	Total "RW"/LP
				\$ -		\$ -
TOTAL PROJECT FUTURE VALUE (WITH INFLATION):						\$ -

Major Bid Items as a Percent of Total Construction Costs

The intent of this tab is to identify the major bid items and their percent of construction cost. This will allow ITD to share this information with the Association of General Contractors so they know what is coming and can plan for accordingly.

(Planning Design Stage)
Percent of Major Bid Items Rev. 2023-0130 (23)

Project Name:

Key Number:

Percent of Bid Items		
Bid Items	Percent	Comments
1 Seal Coat		
2 Deck Preservation		
3 Excavation		
4 Borrow/Base		
5 Plant Mix Paving		
6 Concrete Paving		
7 Structural Concrete		
8 Other Major Items (1)		
9 Other Major Items (2)		
10 Other Major Items (3)		
11 Other Major Items (4)		
Total:	0%	

Prev. **TOC** Next

Basis of Estimate

This tab details the premise, or basis, from which critical aspects of the project cost estimate were developed including cost and labor estimates, material availability, any assumptions or deviations, any studies or analysis used as a reference, and any other details which impact the cost estimate. The basis of estimate will also serve as an excellent tool to effectively communicate estimate assumptions to team members, reviewers and management. The more thorough the basis of estimate is, the better historic values will be as well as improve future estimating assumptions. To support the estimate, the following information can be provided in the Basis of Estimate.

- Similar Projects
- Major Cost Components
- Allowances
- Assumptions
- Exclusions
- Exceptions
- Risks and Uncertainty
- Mobilization

See the basis of estimate tab for a description of each item

Key Number: <input type="text" value="ORN22296"/>	Project Name: <input type="text" value="FY20 D1 PLANNING & SCOPING"/>
Date of estimate: <input type="text" value="5/21/2019"/>	Contracting Method: <input type="text"/>
Estimating Method: <input type="checkbox"/> Parametric-Based <input type="checkbox"/> Historical Bid-Based <input type="checkbox"/> Cost-Based <input type="checkbox"/> Risk-Based	
SIMILAR PROJECTS: List project(s) by key number used as comparison for estimate - if applicable.	
<input type="text"/>	

Project Status

The Project Status tab of the Charter can be used to help estimators define project maturity and identify the “known” aspects of the project. This will serve as another strong communication tool and should be considered part of the basis of estimate.

Project Name:		FY20 D1 PLANNING & SCOPING			
Key Number:		ORN22296	Date of estimate:		5/21/2019
Project Status at the time of this cost estimate					
	Questions	Responses			Comments
		Yes	No	N/A	
1	Has the environmental process begun?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2	Has a preferred alternative been selected?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
3	Are environmental mitigation measures included?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
4	Has an alignment been established?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
5	Has a grade been established?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
6	Have right-of-way requirements been researched and priced?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
7	Has a typical section been established?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
8	Have geotechnical site conditions and costs been researched?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
9	Has a drainage report and concept plan been prepared?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10	Has a noise analysis been performed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
11	Are sound walls included in the estimate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
12	Have retaining wall types been defined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
13	Has a safety analysis been performed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
14	Has a traffic analysis (capacity modeling, LOS, etc.) been performed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

SECTION 4: Design Standards

This section is used to identify any design standard considerations for the project. Information included in this area includes:

- The design standards as well as if design exceptions anticipated.
- Certain fields will auto populate from other tabs.
- Information on the current and future pavement such as the pavement width, proposed design alignment, design year, posted and design speed limits, current and future average daily traffic, posted structures and standards; traffic signals, and railroad crossing protection.

: (Scoping Design Stage) Field Design Standards Input		Prev	TOC	Next
		Notes (Revision 2019-0404)		
Terrain Type:		<< Drop down box		
Functional Class:		<< Drop down box		
Roadway Widths:		[Existing] and Proposed (includes shoulder width)		
Proposed Design Vehicle:		<< Drop down box		
Design Year:	--	Calculated: FY + 20 + 2 (From Project Overview Sheet)		
Traffic ADT:	--	Existing Proposed (From Traffic Sheet)		
Traffic DHV:	--	Existing Proposed (From Traffic Sheet)		
Posted Speed:	--	From Traffic Sheet		
Design Speed:	--	From Traffic Sheet		
Minimum Level of Service (Design Year):	--	From Traffic Sheet		
Access Control:		Q. What input are we expecting here? Type I to V is obsolete (Access control policy 4005 - 5/9/2013)?		
Proposed Maximum Superelevation:		Existing Proposed		
Max Grade:		Existing Proposed		
Max Curve Radius:		Existing Proposed		
Clear Zone:		Cz* Cut Slope:1 Cz* Fill Slope:1		
Design Exceptions:		<< Drop down box		
Design Standards Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Design Standards Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		



It is important to note that even if the project is not being funded by HSIP dollars, the following information is important when designing a project. Do not skip this section!

Design Exception Anticipated

Designers and engineers are faced with many complex tradeoffs when designing highways and streets. On occasion, designers encounter situations in which the appropriate solution may suggest that using a design value or dimension outside the normal range of practice is necessary. However, when this is not possible, that is when a design exception may be considered. A dropdown box offers the following choices: Yes and No.

Pavement Width

The term “roadway” refers to the area of the street right-of-way used for vehicular travel, including cars, trucks, bicycles, and transit. The roadway may also include a number of additional uses such as on-street parking, curbed structures such as medians and crossing islands, and utility access points. This includes the total pavement width including lanes and shoulders. This field requests the pavement width of the project.

Proposed Design Vehicle

This is the vehicle used in the design of the main alignment and the major intersections. Guidance for the proper vehicle to use for each project is given in the Design Manual Section 555.00.

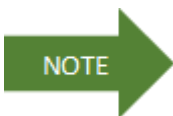
SECTION 5: Environmental Considerations

This section includes:

- The primary and secondary reasons for the project as it relates to the environmental documentation.
- Anticipated environmental deliverables such as cultural, Section 4F, noise, air quality and hazmat assessments.
- Project interactions with or alterations of wetlands, streams, navigable waters or floodplains.
- Identify species and habitat that may be impacted by the project and mitigation measures.

- Describing how storm water and runoff will be handled.
- Level of environmental documentation needed; Environmental Assessment, FONSI, Categorical Exclusion or Environmental Impact Statement.

: (Scoping Design Stage)		Prev	TOC	Next
Field	Environmental Input	Notes (Revision 2019-0404)		
Primary Need:		<< Drop down box		
Secondary Need:		<< Drop down box+ *** Can choose ONE or MORE		
Purpose and Need (from Project Overview):	--	Pulled from [Project Overview] sheet (Formula)		
Scope of Work (from Project Overview):	--	Pulled from [Project Overview] sheet (Formula)		
Is the project within a boundary of an Indian Reservation?		<< Drop down box		
If Yes, then Indian Reservation:		<< Drop down box		
Tribal Area of Interest?		<< Drop down box		
Describe Tribal Interest:				
Is the project located on a Federal land (Including easement)?		<< Drop down box		
If Yes, then Federal Agency and Field Office:				
Cultural or Historic Resources Present?		<< Drop down box		
Describe Cultural/Historic: Section 4(f) Resources Present?		<< Drop down box		
Describe Section 4(f):				
Potential for Hazardous Materials?		<< Drop down box		
Describe Hazardous Materials:				
Noise - Type 1 Project?		<< Drop down box		
Describe Noise - Type 1 Project:				
Noise - Sensitive Receptors in the ROI?		<< Drop down box		
Describe Noise - Sensitive Receptors in the ROI:				
Neighborhoods / Businesses Present?		<< Drop down box		
Describe Neighborhoods / Businesses Present:				
Potential for Controversy?		<< Drop down box		
Describe Potential for Controversy:				
Water Resources Present?		<< Drop down box		
Describe Water Resources:				
Biological Resources Present?		<< Drop down box		
Describe Biological Resources:				
Corps permit required?		User Defined Data Area		
Anticipated Environmental Decision:		User Defined Data Area		
Anticipated Deliverables:		<< Drop down box+ *** Can choose ONE or MORE		
Environmental Commitments:		List the Environmental Commitments		
Environmental Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Environmental Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		



Most questions are yes or no with an open text box to describe any yes answers. Complete all questions and then determine anticipated deliverables and anticipated environmental decision type.

Anticipated Deliverables

A drop down box allows you to select as many anticipated deliverables needed depending on the scope of the project. The following explains each one.

Cultural- Cultural environmental deliverables are anything that can have an effect on people or historic sites. It is necessary to determine to area of potential effect (APE).

Section 4F- Section 4F is a federal term that protects the following basic types of properties: publicly owned park and recreation areas that are open to the general public, publicly owned wildlife and waterfowl refuges, and public or privately owned historic sites. It is important to note that a property's Section 4F status is determined not by its name, but by the criteria that define it. Properties designated as 4(F) must be avoided unless no reasonable alternative is available. The criteria used to evaluate if a Section 4F applies to a property can be found: <https://www.environment.fhwa.dot.gov/section4f/properties.aspx>

Noise, Air Quality and Hazmat-Noise, Air Quality and Hazmat areas considered here. Sometimes projects will be developed close to residences or businesses that can be affected by increased noise. Other areas within the state may have air quality issues (like Pinehurst and the Treasure Valley). In those areas, air quality modeling may be needed to justify the project.

Miscellaneous- Here is a list of other miscellaneous environmental deliverables.

- LWCF (Land and Water Conservation Fund) Recreation Areas 6f Lands Report
- Visual Impact Report
- Prime Farmland Report
- Environmental Justice Report
- FAA Airspace Intrusion
- NA

Wetland/Lake/Stream Alteration-If your project plans to interact with or alter a wetland or stream, you will probably need to do a field survey, report or get a permit.

Corps Permit-Navigable waters are any body of water such as a river, canal or lake that is deep enough for a vessel to pass. If work is planned that will impact the navigability, then a corp permit will most likely be needed.

Threatened and Endangered Species and Habitat-A habitat is an ecological or environmental area that is inhabited by a particular species of animal, plant, or other type of organism. It is very important to make sure that this is noted in the Project Charter. In these cases, you will need to work closely with the Environmental Section to determine the special species or habitat and if a special plan will be required. The project may require a Biological assessment.

Floodway Floodplain-A floodway is a channel of a river or stream and the parts of the floodplain adjoining the channel that are reasonably required to efficiently carry and discharge the flood water or flood flow of a river or stream. The floodplain is the area adjoining a river or stream that has been or may be covered by the 100-year flood. The following may be needed:

- Field Survey
- Floodplain Encroachment Report

- Floodplain Encroachment Permit Application
- Floodway Encroachment Report
- Sole Source Aquifer Packet

Stormwater- The surface water that originates during precipitation events and snow/ice melts is called stormwater. When considering this section, determine if there will be any stormwater run-off that needs to be addressed and whether a storm water pollution plan (SWPP) or a pollution prevention plan (PPP) is needed.

Anticipated Environmental Decision

Select the most likely environmental decision needed for this project. This determination should be in consultation with the district environmental planner.

- Cat EX/ITD – Categorical Exclusion, ITD Approved
- Cat EX/FHWA - Categorical Exclusion, FHWA Approved
- FHWA EA FONSI - Finding of No Significant Impact (FONSI)
- FHWA EIS/ROD - Environmental Impact Statement (EIS) and a Record of Decision (ROD)

Environmental Narrative -This is an open box for you to put any environmental information you feel would be helpful to identify for example, there may be an area of special habitat for ground squirrels nearby and it would be helpful to remember that when construction occurs.

SECTION 6: Traffic

The sixth section identifies crash rate, posted speed, design speed, average daily traffic, present and future, as well as level of service, and safety recommendations.

: (Scoping Design Stage)		Prev	TOC	Next
Field	Traffic Input	Notes (Revision 2019-0404)		
Crash rate within project limits:				
HALs (High Accident Locations):				
Posted Speed:				
Design Speed:				
Traffic ADT Present:				
Traffic ADT Future:				
Traffic DHV Present:				
Traffic DHV Future:				
Minimum Level of Service (Design Year):		Transferred to [Design Standards]		
Traffic Signals:		Also needed is narrative box for description		
ETS (Enterprise Technology Services) Required?		<< Drop down box Also needed is narrative box for description		
HSCA Value:		Q. IN PSS THIS IS ON: Project Objective Scope and Strategic Goals PAGE?		
Proposed Safety Recommendations (from HSCA Analysis):		Recommendations based on HSCA Analysis		
HSIP Narrative:		<p>The Narrative MUST answer ALL these questions:</p> <p>(1) How the project is safety data-driven?</p> <p>(2) How does the project align with and help implement the strategies found in the Strategic Highway Safety Plan?</p> <p>(3) How does the project eliminate death and serious injury?</p> <p>FHWA will NOT approve any HSIP project without appropriate safety justification. Project Managers must answer each of the three questions found above. It is recommended that when formulating your answers, you list the question with the response.</p>		
Traffic Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Traffic Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Traffic Risk 3:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Traffic Risk 4:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Traffic Risk 5:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		

Crash Rate with Project Limits- A safety analysis of a crash rates within the project limits allows ITD to objectively determine whether a crash pattern within the project limits is significantly higher than the same crash pattern at other locations with similar geometric, traffic, and environmental factors. The crash rate comes from the Office of Highway Safety at: <http://itd.idaho.gov/ohs/stats.htm>.

Crash Base Rate- A safety analysis of a specific location requires the knowledge of “base crash rates”, also known in the as “expected values”, for identifying crash patterns at the study location. The base crash rates will allow ITD to objectively determine whether a crash pattern at a study location is significantly higher than the same crash pattern at other locations with similar geometric, traffic, and environmental factors. The crash base rate comes from the Office of Highway Safety.

Identify HALs (High Accident Locations)- High Accident Locations that are found within the project area should be described here. There is a blank box here for you to identify those locations.

Posted Speed- The posted speed should be the actual/current posted speed for the project as mph.

Design Speed- The design speed is the maximum safe speed that can be maintained over a specified section of a highway when conditions are so favorable that the design features of the highway govern. The selection of a suitable design speed will depend on the terrain and functional class of the highway.

The minimum design speeds are found in the AASHTO Green Book and in the State Standards. Freeways 2004 Green Book Page 503 NHS (Principal Arterial) 2004 Green Book Page 444 (Rural) & 470 (Urban) Non-NHS State Design Standards ITD uses the general rule of 75 mph for Interstate, 60 mph for ramps and state highways, or at least equal to the posted speed. If more than one speed zone exists on a project, list them with limits. They may be placed on a separate sheet if necessary. 3R Projects should have the Posted Speed listed and both the Average Running Speed and the 85th Percentile Speed listed instead of the Design speed. This should be obtained from the District Traffic Section. (See the Design Manual, Appendix A). Place the design speed of the road in this location.

Traffic ADT Present- Traffic volumes are the traffic engineer's measure or indicator of traffic volume is the average daily traffic (ADT). The ADT is the volume that results from dividing a traffic count obtained during a given time period by the number of days in that time period. Place the current average daily traffic (ADT) for the route in this location. The most current traffic flow maps can be found: <https://iplan.maps.arcgis.com/apps/webappviewer/index.html?id=e8b58a3466e74f249cca6aad30e83ba2>.

Traffic ADT Future- Place the calculated future ADT for the route in this location.

Traffic DHV Present- The design hour volume (DHV) is a two-way traffic volume that is determined by multiplying the ADT by a percentage called the K-factor. Values for K typically range from 8 to 12% for urban facilities and 12 to 18% for rural facilities. Neither the AADT nor the ADT indicate the variations in traffic volumes that occur on an hourly basis during the day, specifically high traffic volumes that occur during the peak hour of travel. The traffic engineer needs to balance the desire to provide an adequate level of service (LOS) for the peak hour traffic volume with proposing a design in which the highway capacity would only be utilized for a few hours of the year. This is where the design hour volume (DHV) comes in.

Traffic DHV Future- It is often necessary to determine the future design hour volume the infrastructure. Place the future DHV for the route in this location.

Traffic Signals- Are there traffic signals at this location? A dropdown box offers the following choices: Yes and No.

HSCA

The Highway Safety Corridor Analysis (HSCA) is a data-driven program for safety analysis on roadways and bridges throughout the state. The HSCA has been used to identify statewide priorities for safety needs and investments. Each District has a safety corridor map that shows the highest priority locations and an HSCA score for safety investment. The score developed by the Office of Highway Safety should be placed in this box. If you have any additional questions concerning the Strategic Highway Safety Plan

or how the HSCA score has been developed, please contact the Office of Highway Safety or the Transportation Systems Section.



The HSCA scores were updated and available in December 2015. You can find this information by going to the Office of Highway Safety SharePoint site and clicking on the “Documents” tab on the left. Go to the “HSCA Project” folder to access the information. Also in this folder are the county maps and tables. These might be helpful as well.

HSCA Narrative

If your project will be using Highway Safety Improvement Program (HSIP) funding, FHWA requires complete justification to be included as part of the Project Charter. FHWA expects that each Project Charter will state exactly how the project is safety data-driven; that the proposed project is based on the SHSP; and how it addresses safety issues.

Within the HSCA narrative box, it is encouraged that each project answers (at minimum) the following three questions:

1. How is the project safety-driven?
 - Base answers upon the Strategic Highway Safety Plan.
 - Site statistics and results such as the basis of crash experience, crash potential, crash rate, or other data-supported means.
2. How does the project align with and help implement the strategies found in the Strategic Highway Safety Plan?
 - Pinpoint safety problems either through a site analysis or systematic approach;
 - Identify counter measures to address those problems;
 - Prioritize projects for implementation; and
 - Evaluate projects to determine their effectiveness
3. How does the project eliminate death and serious injury?
 - Address identified safety issues within a highway safety corridor or a spot location such as an intersection or High Accident Location (HAL) or does it incorporate a system-wide approach such as rumble strips.
 - Each district has a corridor map outlining safety corridors (also known as the HSCA Project). Make sure to review these maps for pertinent system-wide safety corridor analysis.



FHWA will NOT approve any HSIP project without appropriate safety justification. Project Managers must answer each of the three questions found above. It is recommended that when formulating your answers, you list the question with the response. There is an HSIP Guidebook available from the Transportation Systems Section if you would like more details.

More safety information will be asked in the “Evaluation Design Standards” section such as crash base rate, crash rate with project limits, spot locations that exceed base rate, and high accident locations. This information is necessary for consideration for all projects, not just those using HSIP funding.

SECTION 7: Materials

The seventh section addresses the Materials considerations for a project. It includes existing pavement type, proposed treatment, and required materials reports.

		Prev	TOC	Next
Field	: (Scoping Design Stage) Materials Input	Notes (Revision 2019-0404)		
Existing Pavement Type:		AC or Concrete		
Proposed Treatment Type:		(crabs, overlay, reconstruction, etc...)		
Material Reports required:		<< Drop down box+ *** Can choose ONE or MORE		
Material Reports Narrative:		Add narrative box in to describe Materials Reports		
Materials Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Materials Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Materials Risk 3:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Materials Risk 4:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Materials Risk 5:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
		User Defined Data Area		
		User Defined Data Area		
		User Defined Data Area		

SECTION 8: Bridge

The eighth section addresses Bridge parameters. It will include a narrative, proposed structures, deck width, vertical clearance, sufficiency rating, design load, rail type and bridge risks.

		Prev	TOC	Next
Field	: (Scoping Design Stage) Bridge Input	Notes (Revision 2019-0404)		
Bridge Narrative:				
PROPOSED STRUCTURES:				
• deck width:		(c-c and o-o)		
• vertical clearance:				
• sufficiency rating:				
• design load:				
• rail type:				
Bridge Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Bridge Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Bridge Risk 3:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Bridge Risk 4:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Bridge Risk 5:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
		User Defined Data Area		
		User Defined Data Area		

There is a button in the TOC tab to increase or decrease the number of bridge tabs based on specific projects.

-- Set Bridge Count ++



SECTION 9: Utilities – Rail Road

The ninth section addresses utilities and railroad. It will be used to document the various utilities within the project limits.

: (Scoping Design Stage)		Prev	TOC	Next
Field	Utilities-RR Input	Notes (Revision 2019-0404)		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	-----> UTILITY Type:	These are needed for each utility/RR		
	Utility-RR Stakeholder(s):	Stakeholder(s) for this utility		
	Narrative:	Risks for this utility		
	Utilities-RR Risk 1:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		
	Utilities-RR Risk 2:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		

SECTION 10: Right of Way

The tenth section contains the Right of Way outline. It will be used with the Right of way section to outline the various ROW activities needed for the project.

: (Scoping Design Stage)		Prev	TOC	Next
Field	ROW Input	Notes (Revision 2019-0404)		
	ROW needed?	<< Drop down box		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, PUA, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	-----> ROW TYPE:	Fee, Permanent Easement, Temporary Easement, etc.		
	# Parcels:	Number of Parcels of this type		
	# Acres	Number of Acres of this type		
	ROW Narrative:	Additional ROW comments...		
	ROW Risk 1:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		
	ROW Risk 2:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		
	ROW Risk 3:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		
	ROW Risk 4:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		
	ROW Risk 5:	Risks (event or situation that may negatively impact the project IF IT OCCURS)		

SECTION 11: Operations

The eleventh section of the Charter lists the operations concerns or issues with the project. It will include a needs summary and identify the operations stakeholders.

		Prev	TOC	Start
Field	: (Scoping Design Stage) Operations Input	Notes (Revision 2019-0404)		
Needs Summary:		<i>(ex. Culvert conditions, signs, ditching, shoulders, etc...)</i>		
Operation Stakeholders:		Operations Manager, District Foreman		
Operations Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Operations Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Operations Risk 3:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Operations Risk 4:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Operations Risk 5:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
		User Defined Data Area		

SECTION 12: ETS-ITS

The twelfth section of the Charter is for HQ ETS-ITS. The project should be shared with ETS to determine if they have any input or needed additions to state infrastructure.

		Prev.	TOC	Next
Field	: (Planning Design Stage) ETS-ITS Input	Notes Rev. 2020-1209 (21a)		
ETS-ITS Needs Summary:		Describe the ETS-ITS needs.		
ETS-ITS Stakeholders:		Stakeholder(s) for this utility		
ETS-ITS Contact Person:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Contact Information:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Risk 3:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Risk 4:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
ETS-ITS Risk 5:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
		User Defined Data Area		

SECTION 13: Public Involvement

The thirteenth section deals with public involvement. Large projects often result in public interest and it is best practice to plan ahead for public involvement. The district public information officer can assist with developing this section when it is needed.

In this section you will identify the Public Outreach Planner (POP) track, POP level, POP score and consultant needs and budget.

Public Outreach Planner (POP) Track – A dropdown menu offers the following choices

- Corridor Plan
- Environmental & Design
- Construction
- Non-Construction Roadway Impacts
- Emergency/Disaster

: (Planning Design Stage)		Prev.	TOC	Start
Field	Public Involvement Input	Notes	Rev. 2020-1209 (21a)	
Public Involvement Needs Summary:		Describe the Public Involvement needs, eg. <ul style="list-style-type: none"> • Use POP (Public Outreach Program) • Consultant or In-House • May be Construction Contractor bid item • Phases • Budget Estimate 		
POP Stakeholders:		Stakeholder(s) for the Public Involvement. See the 'Stakeholder Register.xlsm'		
POP Track:		--		
Calculated POP Score (1-5):		This is the Calculated POP SCORE after answering each question.		
Selected POP LEVEL (1-5):		LINK to the Public Outreach Planner website >>		
POP Typical Project Description (LEVEL):	--	This is the Calculated POP LEVEL after answering each question.		
POP Typical Project Description (TRACK):	--	--		
POP Estimated Consultant Contract Budget *:	--	This is the Calculated 'Third-Party Contract' Budget based on POP LEVEL.		
POP Estimated Direct Expenses **:	--	This is the Calculated 'Estimated direct Expenses' Budget based on POP LEVEL.		
POP Estimated Budget Note:	--	This is the 'Estimated Budget Notes' based on POP LEVEL.		
Footnote:	* Assumes total labor associated with contract public involvement and communication support in each project phase. 2012 dollars are reflected in estimates, add 10% each year after 2012 for inflation. ** Does not consider signage, VMS boards, flagger support, temporary signals, or any other on-the-ground expenses associated with roadway construction and impacts.		Footnote	
Public Involvement Risk 1:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		
Public Involvement Risk 2:		Risks (event or situation that may negatively impact the project IF IT OCCURS)		



ITD Office of Communication maintains a website that provides an in-depth guide to the concepts in this tab. You can find the guide here:

http://projects.langdongroupinc.com/testing/ITDCommPortal/ITDPOP_1.html

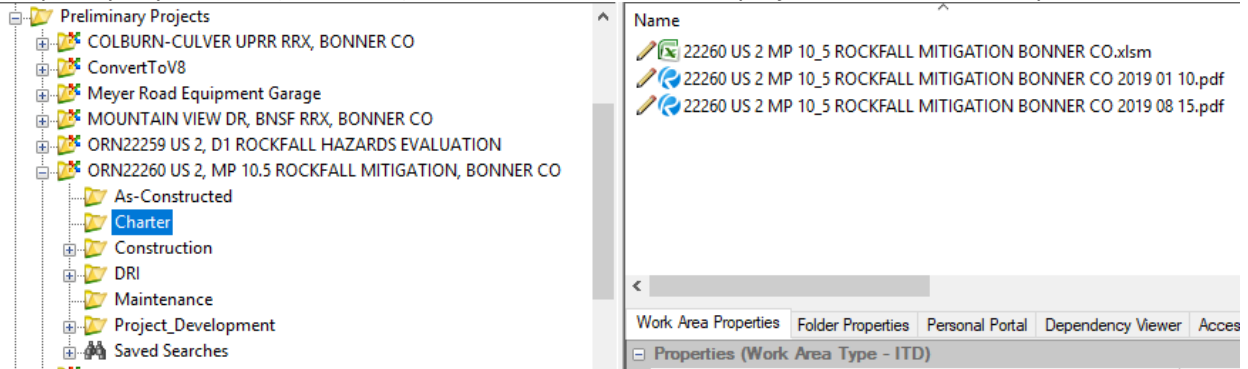
Appendix A: Charter Document Saving

The final section of this Charter Guidebook details the lifecycle of project charter. It will describe how it is created, stored, saved to PDF for signatures, and maintained.

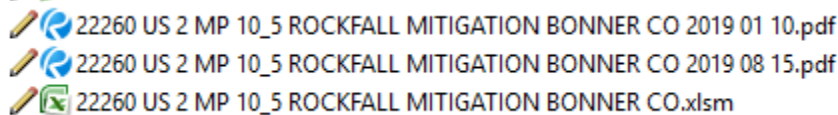
The charter template is in ProjectWise at this location:

[Charter Template Documents](#)

1. The template is “copied out” in ProjectWise (see Appendix A, Use of ProjectWise) to the Charter folder in the Project Folder for the Project. Initially it will be in the District Preliminary Projects folder under Location Name of the Project. Once it is programmed into OTIS, it will be given a temporary key number (ORNxxxxx) which will be added to the project Name. See example:



2. Once the charter is complete and ready for approvals, convert the document to a PDF format using the built-in macro, saving it in the Charter Folder within the project with the date (ie. 2019 08 10) appended to the end of the project name to identify and archive all versions of the document (see examples below).



3. Copy the URN to the excel charter document to the Charter Link to ProjectWise field in PSS. (See use of ProjectWise in Appendix A) This will enable you to Link to Projectwise to the charter file for updates.

[Charter link to ProjectWise](#) pw:\itdhq1app57.itd.state.id.us:PWITD\Documents\District 1\Preliminary Projects\ORN22260 US 2, MP 10.5 ROCKFALL MITIGATION, BONNER CO\Charter\22260 US 2 MP 10_5 ROCKFALL MITIGATION BONNER CO.xlsm

ProjectWise Link

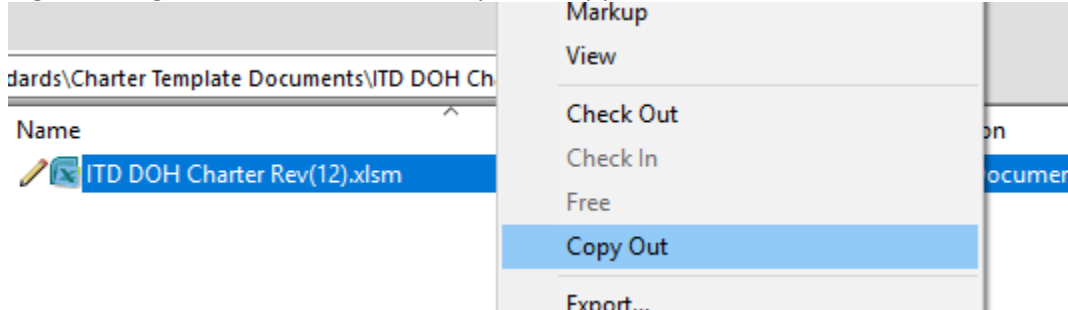
[Link to ProjectWise](#)

4. Use Bluebeam (preferred method, but can use Adobe) to create signature fields in the document and route for signatures (3). Everyone signing using the same software to eliminate issues between Bluebeam and Adobe.
5. Place the signed file in the charter folder.
6. Keep previous signed PDF’s for history of the project to have a record of changes in the charter.

Appendix B: Use of ProjectWise

1.) Using the **Copy Out** feature in ProjectWise

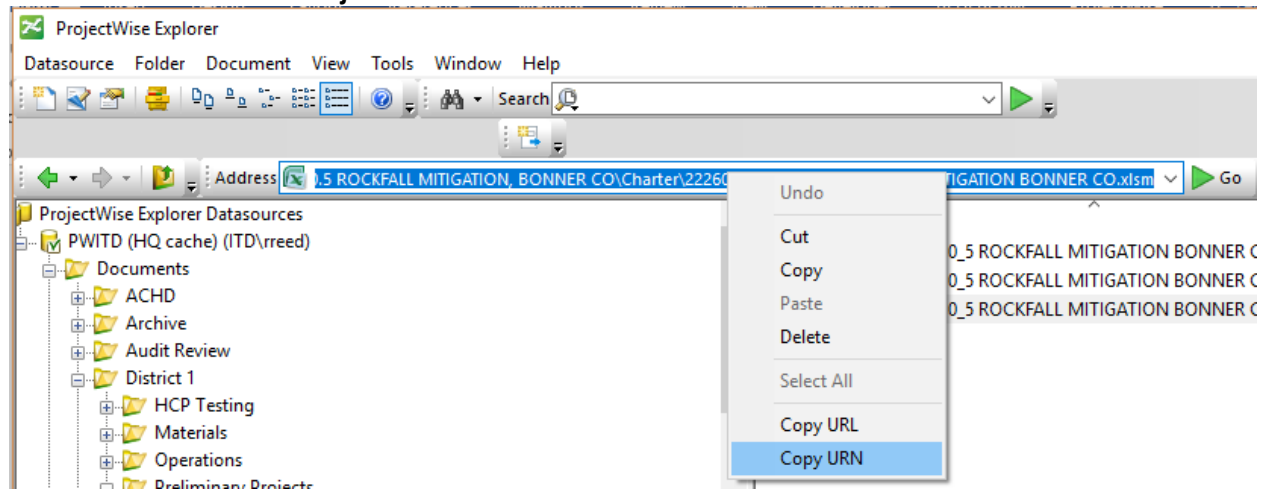
Right clicking on a document will allow you to copy it out to another location.



In this way, you can “Copy Out” the latest charter in the Standards folder, Charter Template Documents to the project charter folder.

2.) Using the **“Copy URN”** feature in ProjectWise.

By right clicking on the address field in ProjectWise, choose “Copy URN” and paste in the PSS field **Charter link to ProjectWise**.



Appendix C: How To Print and Sign the Charter

Table of Contents Rev.2020-1209 (21a)

Setup to Print in Black & White

Setup Page Break Previews

Export to PDF

2. Uncheck the top box to print in color

-- Set Bridge Count ++

3. Select export to PDF

1. Select the TOC tab

4. Select no to edit the cover page

Table of Contents

- [Project Overview](#)
- [Risk Register](#)
- [Probability-Impact Matrix](#)
- [Estimate Summary](#)
- [Basis of Estimate](#)
- [Project Status](#)
- [Design Standards](#)
- [Environmental](#)
- [Traffic](#)
- [Materials](#)
- [2 Bridges](#)
- [Utilities-RR](#)
- [ROW](#)
- [Operations](#)
- [ETS-ITS](#)
- [Public Involvement](#)
- [Help](#)

FORMATTING KEY (Overview & Discipline sheets):

- User Input Data
- Drop Down Box (Single Selection)
- Drop Down Box (Multiple Selections)
- User Defined Data Area
- Formula - Calculated Value (Locked)
- Notes & Hyperlink

Tip: Use 'Alt + Enter' to insert a newline in a cell.

Tip: Use 'Ctrl + Shift + Z' to Spell Check the unlocked cells on the active sheet.

Tip: Use 'Ctrl + Shift + I'

TOC | Project Overview | Risk Register | Probability-Impact Matrix | Estimate Summary

Microsoft Excel

YES: The PDF will be exported to the working folder:
C:\Users\jdorman\Desktop\Charter Stuff
Any file with the SAME name will be OVERWRITTEN!

The PDF file will be opened after it is published.
You can then sign the PDF and SaveAs to your TARGET folder.

NO: To EDIT or PREVIEW the [Approvals] sheet before exporting.

Yes No Cancel

4. Select no to edit the cover page

Export to PDF 

Hide THIS Sheet & go back to [TOC]

District CHARTER
Rev. 2020-1209 (21a)

For
Key:
0

7. Once editing the top sheet is complete select "export to PDF"



5. Enter the date charter is first printed for signature.

Date Submitted:
1/15/2020

Dates Revised:	Revision Description:
3/10/2022	CCR 1 Increase in CN due to rising construction cost

6. If this is a CCR enter the date printed and short description of the change.

Project Estimate	
Construction Estimate CN: \$0	Proposed Construction FY: 0
Total Project Estimate: \$0	Funding Source: 0
Design Stage: Intermediate	Date of Estimate: 1/0/1900

Approval Signatures

Project Manager	Date		
Owner	Date		

8. Save PDF into PW and email link to PM, Owner and Sponsor for digital signature.