Project Delivery Directive

To:	*Project Delivery Employees*	Number: PD-03
		References: *Director Policy 15-R1*
		Deputy Directive 12-R1
		Deputy Directive 23-R1
		Effective Date: 09/03/09
		Supersedes: *NEW*
		Review by: 09/03/12

TITLE: Completion of the Remaining Metric Projects on the California State Highway System (SHS)

DIRECTIVE

Any metric project currently planned to be advertised on the SHS during Fiscal Years (FYs) 2009/10 and 2010/11 must be identified by the Districts and then approved by the District Director, see Attachment 1. Projects that are thus approved must then be disclosed to the Chief of the Division of Design on or before October 30, 2009. Only those projects identified, approved, and disclosed per this directive will be allowed to continue to be advertised and constructed using metric units. In addition, the District Director on or before October 30, 2009 must submit for approval by the Chief Engineer a request to continue the use of metric units for any metric project that is currently planned to be advertised on the SHS after June 30, 2011, see Attachment 2.

BACKGROUND

Departmental policy established by Director's Policy 15-R1 and Deputy Directive Number 12-R1, both effective October 2006, state that the Department has adopted the use of U.S. Customary (English) units as its preferred system of units and measures and that a transition to the English system is to be accomplished efficiently, minimizing impacts on project delivery. This transition began in March 2005 and an exception process has been utilized since June 30, 2007 to monitor the number of metric projects being delivered to the Division of Engineering Services - Office Engineer (DES-OE). All of the exceptions granted under this process expired on June 30, 2009.

As of July 7, 2009, the Districts identified and reported that 91 metric projects had yet to be advertised on the SHS, see Attachment 3. Metric Contract Standards support by DES-OE and the technical owners will only be provided on a limited basis for these projects. As a result, the costs associated with delivering a metric project will continue to increase.

Attachments 1 and 2 have been created to identify those costs in a project specific manner. A discussion forum, the "Office Engineer Discussion Forum (a.k.a. OE Forum)" on the Department's intranet website is hosted by DES-OE to allow the Districts to communicate and share information on English Contract Standards updated in metric units. This allows the Department to collectively pool Headquarters, DES, and Region/District functional unit resources and eliminate the need to recreate it for each metric project remaining to be delivered. Safety-related Standard Special Provisions (SSPs) and Standard Plans (SPs), and other mandatory SSP and SP changes as identified by DES-OE, will be highlighted to indicate updated Departmental standards that are only in English units and must be converted into metric units for use on the remaining metric projects.

The metric 5th edition of the Highway Design Manual (HDM) will not be updated after October 30, 2009. However, until declared obsolete, it shall remain in effect for use only in conjunction with those projects identified on Attachment 3 that are advertised and constructed using metric units per the guidance in this directive. Exceptions from the design standards in the 5th edition of the HDM associated with the remaining identified, approved, and disclosed metric projects must continue to be discussed, approved and documented appropriately per current procedures.

DEFINITION

Metric project means any project, regardless of project sponsor or funding source, that uses metric units in its construction contract documents.

Construction contract documents are the documents and plans used to communicate to contractors the details of a project for bidding and construction purposes.

Contract Standards are the specifications and plan details used on a State-wide, routine basis in construction contracts that have been developed into standard special provisions and standard plans to ensure that best methods and practices have been clearly and consistently described, as determined through due diligence of the Department's experts, and are approved by the Deputy Division Chief of Engineering Services – Office Engineer for use.

Advertised on the SHS refers to those modifications or additions to the highway system, which are solicited through the development of construction contract documents that will be bid upon by contractors regardless of the project sponsor or funding source.

Safety-related SSPs and SPs, and other mandatory SSP and SP changes will be identified by DES-OE, with input from the technical owners, and

must be incorporated into the remaining metric projects as communicated on the OE Forum intranet website.

RESPONSIBILITIES

Chief Engineer:

- Establishes and ensures implementation of Department policies, procedures, and best practices to cease metric projects on the SHS.
- Reviews and approves or denies submitted exception requests for projects to be advertised on the SHS using metric units after June 30, 2011.

District Directors:

- Ensure implementation of this Project Delivery Directive by using the formats provided in Attachments 1 and 2, as appropriate, to document project decisions.
- Review and approve or deny the submitted exception requests for projects to be advertised on the SHS using metric units after June 30, 2009 and on or before June 30, 2011.
- Ensure that project sponsors, implementing agencies, and any other external partners working on SHS projects are informed of this Directive.
- Ensure that this Directive is shared with the departmental functional support units that are responsible for delivering timely and quality products and services related to the projects on Attachment 3.
- Provides signed "Project Analysis & Decision Documents" to the Chief Engineer to request continuing the use of metric units for all metric projects that will be advertised on the SHS after June 30, 2011.

Chief, Division of Design:

- Develops and implements procedures, guidance and tools to cease metric projects on the SHS.
- Provides statewide direction to ensure compliance with Department policies, standards, and best practices related to ceasing metric projects on the SHS.
- Monitors the delivery of the remaining metric projects until all the identified projects on Attachment 3 have been advertised on the SHS.
- Cease updating the metric 5th edition of the HDM after October 30, 2009.

- Provide direction that the metric 5th edition of the HDM may only be used for the projects on Attachment 3.

Chief, Divisions of Project Management, Engineering Services, Environmental Analysis, Construction, and Right of Way and Land Surveys:

- Develop and implement procedures, guidance and tools, as needed, to assist with ceasing metric projects on the SHS.
- Provide statewide direction to ensure compliance with this directive.

Deputy District Directors, Project Delivery Functions and Engineering Services Deputy Division Chiefs:

- Ensure policy and standards are met or exceptions have appropriate approval.
- Ensure incorporation of best practices into their functional operations.
- Advocate the development and review of the "Project Analysis & Decision Documents" for the remaining metric projects in a timely manner to allow the projects to be approved, as appropriate, on or before October 30, 2009.

Project Delivery Managers, Project Managers, and Functional Managers:

- Participate in the development of the "Project Analysis & Decision Document" to define project costs, schedule, resource, and quality issues reported.
- Ensure the successful delivery of the remaining metric projects in the most cost effective manner.
- Ensure the "Project Analysis & Decision Documents" for the remaining metric projects are completed accurately and in a timely manner to allow the projects to be approved, as appropriate, on or before October 30, 2009.
- Notify their Manager, District Director and Deputy District Directors through documentation in the "Project Analysis & Decision Document" of issues and problems related to delivering the remaining metric projects.

Supervisors and Employees:

- Participate in the development of the "Project Analysis & Decision Document" to define project costs, schedule, resource, and quality issues reported.
- Communicate to their Project Managers, Supervisors, and impacted Functional Managers issues and problems related to delivering the remaining metric projects so that they may be documented in the "Project Analysis & Decision Document."

9/3/09

RICHARD D. LAND
Chief Engineer
Deputy Director, Project Delivery

Date Signed