Leading Effective Projects with

Front-End Due Diligence

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Few projects, if any, go as well as initially planned. Unforeseen risks and complications arise, often requiring quick thinking and problem solving by the entire project team. However, thorough research and front-end due diligence can help to identify these risks early and determine the best mitigation strategies. It's important to remain open to change, be adaptable and to communicate effectively when leading projects. Even the smallest change can impact many different aspects of a project's scope can require additional work, increasing costs and even possibly introducing new risks that were not previously evaluated.

Community Outreach

One of the most proven ways of collecting project feedback is to introduce the proposed plans to the community early. This is often performed by distributing invitations and hosting an open house or town hall meeting. This can be a very productive method of collecting insight and the community's preference to various options during route selection and design. Specific opposition can also be identified and potentially avoided, if known. Another benefit to community outreach is that it provides an opportunity to collaborate with local leadership and express how certain improvements can directly benefit the residents, businesses and reliability of the infrastructure in the area. These efforts can be critical to the overall success of a complex project.

Stakeholder Identification & Engagement

Many projects begin by compiling a stakeholder list of all individuals and businesses impacted by the project plans. It's important for all interest holders to be identified and later confirmed by accurate title research. The Project Management Institute defines this step as "The process of identifying project stakeholders regularly and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence and potential impact on project success." (Project Management Institute, 2017). These efforts help to highlight concerns with available data and flag potential threats to the project schedule. Stakeholder engagement offers yet another and more direct opportunity for project representatives to speak with those affected and capture important information as the project continues to develop.

Survey and Environmental

Is the route feasible? Does the landowner have subsurface installations? Are there protected wetlands or species the project needs to avoid? Mobilizing survey and environmental teams in the beginning, helps to make determinations for similar questions and sets the groundwork for an effective project. The earlier these teams are engaged, the earlier they can identify the need for reroutes or redesigns. In recent years, there has been pressure to complete various phases of projects remotely as technology has improved, but rarely can these efforts replace the "hands-on" approach of physically being present and laying eyes on what will be affected by the project.

Title Research

As mentioned, performing title research is essential to accurate stakeholder identification and should be one of the first tasks completed once a preliminary route has been determined. Accurate ownership drives accurate communication between the project team and the impacted parties, ensuring the team captures 100% interest during acquisition. Title research efforts offer the greatest benefit to projects when a clear scope is identified early and maintained throughout the project lifecycle. Some projects have only required limited amounts of current owner research, which often leads to oversights of existing agreements and interests that fall outside the search parameters. For example, a 30- to 60-year title search does not cover the same timeframe that it used to. Many utilities that were constructed prior to the 1970s will not be discovered unless a more thorough search is conducted.

Long-Lead Items

During stakeholder identification, the team should note certain entities which will require a longer than average timeline to acquire. Some of the most common examples are road crossings, railroad crossings, foreign utilities, high profile landowners, major businesses and property without clear title. For any crossings and utilities, the project team will likely be subject to the processes, design requirements and timelines of the asset owners. A lack of planning by the project team will not constitute an emergency to these other entities. By identifying and opening communication with them early, it reduces the likelihood of any major delays or threats to the project schedule. High-profile landowners and major businesses have a high probability of requiring longer-than-average negotiating timelines, so early engagement is essential. Any property without clear title is guaranteed to slow the project down because the team cannot acquire the necessary agreements if ownership is unclear.

Risk Management

Lastly, project teams must work together throughout the various project phases to identify and report any risks they discover. Recognizing risks early is beneficial to the project as they can be communicated to those responsible for determining the appropriate responses. Making the necessary adjustments can help set realistic milestones, budgets and keep all associated with the project well-informed. Certain risks including stakeholder opposition, legal processes and complex ownership can add significant delays to project schedules and strain rigid budgets. No matter how thorough the preparation, unforeseen risks will present themselves. Project teams must remain agile and possess the capability to respond to these situations in a positive way. ✪

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