

High Level Schedule Guidance Instructions

Revised 10/01/2026

Purpose

The High Level Schedule Guidance workbook is a schedule-risk estimating tool that project managers use to build a high-level delivery timeline for a project. It supports consistent, defensible schedule estimates at any phase of a project — whether used early, before detailed scheduling is possible, as a gut check on an existing schedule, or later on to reconfirm a schedule as the project progresses.

Components

Guidance – Provides instructions on how to use the tool

Project Considerations – Initial project screening characteristics and phase-specific project considerations

Phases of Project Delivery Tabs:

NTP to DRPS

DRPS to Drainage Plans

Drainage Plans to RPC

RPC to URBOB

UBO (Begin to Complete)

UBO Complete to Let

Project-Level Summary - Provides a roll-up of the selected month durations from each phase tab into a total project-level timeframe.

Executive-Level Summary - Provides a condensed, higher-level summary combining phase groups together.

How to use the High Level Schedule Guidance tool:

1. Start on the **Project Considerations** tab.
 - a. Enter the STIP ID or SPOT ID.
 - b. In the **Initial Project Screening** table, select the characteristics that describe the project from the drop-down menus. Click in each cell in the

Project Characteristics column then use the arrow at the bottom right corner to open the drop-down menus. A selection must be made for each of the six Project Characteristics. This initial project screening will determine a suggested duration category for each project phase in subsequent tabs. If needed, use the Comments column to provide justification of the selection for future reference.

Select the characteristics below that describe the project. This initial project screening will determine a suggested duration category for each project phase in subsequent tabs.			
Initial Project Screening			
Discipline	Project Characteristics (Choose from dropdowns)	Description	Comments
RD/HY/RW/UT	Choose project scope	Small project scope: 1-3 plan sheets; up to 0.75 miles (assuming standard sheet around 0.25 miles) Medium project scope: 3-15 plan sheets (up to 3.75 miles for total design) Large project scope: 15-30 plan sheets (over 3.75 miles in length)	

- c. In the **Phase-Specific Project Considerations** table, evaluate additional considerations by discipline. If the project consideration is applicable to your project, check the box to the left of the project consideration. The '**Why**' column describes what each factor means (e.g., multiple alternatives, coastal hydraulics, major utility crossings) and includes rationale for schedule considerations. If needed, use the Comments column to provide justification of the selection for future reference. The project considerations you select will be automatically applied to the relevant phase(s).

Check the box(es) below to tag additional considerations for schedule decision.				
Phase-Specific Project Considerations:				
	Discipline	Project Considerations	Why	Comments
☐	EC/HY	New impervious area requiring stormwater management and outfall analysis	Additional impervious area requiring stormwater management due to lack of existing infrastructure results in outfall analysis required and potential stormwater control measures / BMPs	
☐	EN	Noise impact assessment resulting in the potential for mitigation	Noise walls (or the potential for noise walls) require additional coordination and plan development. Also must be completed prior to completion of environmental document so may hold up release of ROW funds.	

2. There are six phase tabs, each covering one segment of the delivery timeline: **NTP to DRPS, DRPS to Drainage Plans, Drainage Plans to RPC, RPC to URBOB, UBO (Begin to Complete), and UBO Complete to Let**. Work through each phase tab in turn.
 - a. If your project has already begun, identify which delivery stage your project is in. Open that specific tab first.
 - b. In the top summary table, note that the **Category** (Baseline Duration, Moderate Duration, High Duration) is pre-selected based on the Initial Project Screening characteristics from Step 1b.

- c. In the top summary table, the PM should select a **# Months Needed** value within the range of the Suggested Duration. The PM should review the Phase-Specific Project Considerations in the lower table (pre-populated from Step 1c) to make this decision.

		+ NTP to Design Recommendation Plan Set (DRPS) Approved			
PM Override	Automated Category	From Initial Project Screening:		Project Manager Notes	
		Category	Suggested Duration	# Months Needed	Comments
☐	☐	Baseline Duration	3-5 months		
☐	☒	Moderate Duration	6-12 months		
☐	☐	High Duration	13-18 months		

- d. If the PM decides that the suggested duration is not appropriate for the project, the PM may select the '**PM Override**' checkbox to choose a different Category. The PM should then complete the **# Months Needed** value in the new **Category**. If '**PM Override**' is selected, a justification must be provided in the Comments column.

- i. Note: When the 'PM Override' option is used, the row will be highlighted in orange. It is expected that the Automated Category selection will remain highlighted in yellow for reference.

- e. If additional project specific considerations exist that are not listed (unique stakeholders, environmental issues, funding constraints, utility conflicts, etc.), enter these in the **Additional Phase-Specific Project Considerations** table at the bottom of the page. These values will be listed in the Key Factors Influencing Timeline on the Project-Level and Executive-Level summary tabs.

3. Navigate to the **PROJECT-LEVEL SUMMARY** tab.

- This tab is for review purpose and no data input is needed.
- The top table summarizes the # Months Needed values from each phase tab and provides a total project-level time frame in months.
 - Any entries with a "--" indicate that there was no selection made for the # Months Needed value on the phase tab.
 - Text will appear to the right indicating if PM Override comments need to be provided.
- An Initial Project Screening Factors table is provided for reference below the top summary table to list the project characteristics selected from Step 1b.

- d. Individual tables for each phase (numbered 1-6) provide a summary of the selected Duration Category, # Months Needed, Red Flag Issues, and Key Factors Influencing Timeline.
 - i. The Key Factors Influencing Timeline list all project considerations that were checked in step 1c for the given phase.
 - ii. Red Flag Issues are specific project considerations which bring uncertainty to the schedule and are listed separately in red. These include:
 - 1. Impacts to railroad operations and railroad right-of-way
 - 2. Unexpected natural disaster
 - 3. Coordination with FERC required
- 4. Navigate to the **EXECUTIVE-LEVEL SUMMARY** tab.
 - a. This tab follows the same format as the PROJECT-LEVEL-SUMMARY tab but with aggregated phase information useful for leadership-facing reporting. The phases are aggregated into the following groups for the executive summary:
 - i. NTP to RPC (Phases 1-3)
 - ii. RPC to URBOB (Phase 4)
 - iii. URBOB to Let (Phases 5-6)
 - b. Review the top summary table for projected delivery timeframe by phase groups. A note will appear below the table if any of the individual phases are missing “# Months Needed” selections.
 - c. The Initial Project Screening Factors table is provided for reference, reflecting the information selected in step 1b.
 - d. In each phase group table below, review the selected Duration Category, # Months Needed, Red Flag Issues, and Key Factors Influencing Timeline to validate that high-level risk factors and overall schedule ranges reflect your selection across all phases.
- 5. Use the Document for Ongoing Check Ins. The guidance isn’t only for initial schedule development—PMs should reuse it at:
 - a. Phase transitions
 - b. Major scope changes
 - c. Preconstruction meetings
 - d. Risk workshops or management reviews