CRC Public Information QA/QC

General guidelines

Basic QA/QC for all Public Information materials and communications:

- Spelling and grammar check
- Review for correct use of template as appropriate
- Date modified and file location path included in document footers (file path can be removed for final versions)
- For sensitive or widely distributed materials, reviewers will always include at least one PI personnel not co-located with the Project Team (e.g. other PI staff from JD White, Inc.).

Reviewers for PI materials include:

- Public Information staff
- Project Team members
- Transportation Department staff (outside of the Project Team) as appropriate (ie, Patrick Cooney)

Review Process

The QA/QC and review process for all Public Information (PI) materials and communications includes use of the CRC Public Information Quality Log (attached). This sheet is completed by PI staff who is coordinating or managing the production of the specific material (material coordinator/manager). A new log sheet is completed for each review step in production, typically after each draft. Reviewers are identified by the Communications Manager or delegated and identified by another Task Manager. Edits and comments are marked by the reviewer(s) on the material being prepared. After these edits are made to the original document, they are confirmed by a PI staff person other than the material coordinator/manager. Both these steps are logged on the Quality Log Sheet.

When the final version of the material is complete and has passed a final review, this version, along with the log forms and the previous drafts, are presented to the CRC Project Team QA manager for a process audit.

When reviews or materials (such as email letters) are not conducive to such a review process, the material coordinator/manager will document the steps of review to the best possible degree. This may include printing out emailed edits to include in the QA/QC file.

CRC Public Information QA/QC – Process for Specific Materials

Specific Public Correspondence

Public Information staff coordinates public correspondence. Many responses are completed with review only from the respondent. Some responses are sensitive enough to warrant an additional review process lead by PI staff.

Reviews of general public correspondence are completed by:
- Respondent (responsible for final review)
- Public Information staff (if deemed necessary by respondent)

Correspondence with elected officials, other high profile citizens, or regarding sensitive issues (such as construction time periods, project cost amounts, as well as preliminary project design information) follow additional coordination and review. The Respondent identifies additional reviewers which may include:
- *Task Managers*
- *Chief Engineer*
- *Project Directors*

Media Relations

The Communications Manager and the Chief Engineer review and approve materials and information distributed to the media. Once the they have identified who will participate in the review, communications staff coordinate collecting these materials, the review process and sending the information to the media.

When necessary, additional reviews (as identified by the CM) for information sent to the media include:
- Task Managers
- Chief Engineer
- Project Directors
- Transportation Department staff

Publicity (press releases and news alerts as opposed to information requested for news features) are composed by communications staff who then seek review from those identified by the CM.
Reviews for publicity materials may be completed by:
- Task Managers
- Chief Engineer
- Project Directors
- Transportation Department staff

Government Relations

Public Information staff produces and coordinates information materials for government correspondence.
Materials for government correspondence, individual briefings and other government relations events, are reviewed by Project Team members as selected by the PIO. These can include:
- *Contract and Segment Managers*
- *Chief Engineer*
- *Project Director*

For larger government relations events, reviews by Transportation Department staff outside the Project Team are also considered and coordinated by PI staff.

General Public Information Materials

Edits and updates to general communications materials, such as updating the project Web site, require review and approval by CM staff before completion (B-Reviews). Major material productions and revisions involve a broader review process as coordinated by Communications staff (A-Reviews). This process starts with PI staff generating draft materials and then coordinating their review from appropriate Project Team members.

Reviews for PI materials may be sought from:
- Task Managers
- Chief Engineer
- Project Directors
- Other Project Team Members
- Transportation Department staff

The QA/QC process for A-Reviews of major communications materials:
1. Once a draft document has been prepared, have reviewed for accuracy by PI team
2. Designate one person to compile edits into a single document for each phase of review. Revise draft per internal PI review comments
3. Set meeting of all key project team members and provide hard copy of draft document for meeting
4. Provide brief overview of document organization, sources, key content, assignments for more careful review of specific sections by individual team members/set date for edits (acknowledging need for some staff to review with others)
5. Keep meeting notes reflecting group guidance (i.e. overall approach, general layout, titles and headings, graphics, etc.)
6. One person gathers hard copies of document from each person and compiles edits from team members into single document
7. Produce new draft based on compiled individual edits and group guidance
8. Have non project participant review document for clarity PI team reviews second draft document
9. Set next team review meeting

10. Repeat basic procedure for progressively refined drafts. The number required reflects the size, political sensitivity and complexity of the document
11. Keep one, clearly marked document showing edits for each draft phase (including how conflicting edits were resolved)
12. Keep notes from each review meeting

Meeting and Event Materials

Meeting and event materials are reviewed by the lead Project Team group, e.g. the Environmental group is the lead for Scoping Meetings. Drafts of materials are developed by PI staff who then coordinate review with the lead Project Team group as necessary. The lead group provides feedback through the review process, typically including several material review meetings and additional review requests. PI staff work with the lead group to identify necessary review personnel.

Outside of the lead Project Team group, PI staff may also seek additional reviews for meeting and event materials by:
- Contract and Segment Managers
- Chief Engineer
- Project Directors
- Transportation Department staff

Presentations

Drafts are developed by PI staff who then coordinate a review process, usually including presentation run-throughs. The presenter completes the final review with PI staff identifying and coordinating additional review.

Smaller presentations are commonly reviewed by:
- Public Information staff
- Other Project Team Members

Large (or sensitive) presentations may also reviewed by:
- Contract and Segment Managers
- Chief Engineer
- Project Directors
- Transportation Department staff

Committee Relations

Sensitive committee communications, especially involving high-level committee staff (such as elected officials), are first drafted by PI staff and then reviewed by identified Project Team staff. Other committee communications (such as meeting reminders) are reviewed by PI staff only, typically just the sender.

Review may also be sought for sensitive committee communications from:
- Task Managers
- Project Directors