

# Project Appraisal Guidelines

## Unit 3.0 Project Brief

February 2011

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1.0	February 2011	New Guidance

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## **1 Introduction**

- 1.1. This PAG Unit provides guidance on the purpose and contents of the Project Brief and outlines where it fits into the appraisal process.

## **2. Purpose of the Project Brief**

- 2.1. The purpose of the Project Brief is to formalise the objectives of the project and its intended outputs in terms of its key functional and operational outcomes.
- 2.2. The completed Project Brief, together with the Project Execution Plan, is intended to inform the Procurement Strategy for the scheme in accordance with the Project Management Guidelines.

## **3. The Project Brief and the Planning and Appraisal Process**

- 3.1. The Project Brief should be prepared and updated as required at four stages in the project planning process, namely: overall project planning; route option selection; preliminary design, and construction documents preparation / tender award stage. It is first prepared at the overall project planning stage, where it forms the basis for project planning initiation.
- 3.2. At each stage, the Project Brief should be reviewed by the relevant project engineer, who will check it for clarity and completeness. Each revision of the Project Brief should be then submitted to the NRA for approval.

## **4. Contents of the Project Brief**

- 4.1. The Project Brief should address the following issues:

- Project history;
- Need;
- Strategic fit and priority;
- Scope, constraints and interfaces;
- Objectives; and
- Functional and operational outcomes.

### *Project History*

- 4.2. The background to the project should be outlined. This should include references to relevant documents and their conclusions and recommendations.

### *Need*

- 4.3. The problems which the project is intended to address should be specified. Relevant documentation, information or data that supports the existence of the need should be briefly outlined. This section should also consider options other than road schemes (such as public transport and demand management / pricing where appropriate).

- 4.4. Ideally, the case for the project will have been identified as part of a strategy for a defined corridor or geographical area. In such cases, reference to that strategy will support the discussion of project need.
- 4.5. Where possible, the discussion of project need should refer to evidence-based analysis of transport requirements for a specific corridor or geographical area, and the future deficiencies that the proposed project is intended to address.

#### *Strategic Fit and Priority*

- 4.6. The compatibility of the proposed project with existing policies and plans should be set out. Any priority accorded the project in relevant plans and programmes should be noted.
- 4.7. The inclusion of the project in any of the following plans and policies should be referenced:
- The National Development Plan, 2007-2013;
  - Transport 21;
  - The National Spatial Strategy;
  - All Island Infrastructure Co-operation; and
  - Regional, County and local development plans.

#### *Scope, Constraints and Interfaces*

- 4.8. The geographical scope of the project should be identified. Its intended interface with other existing or planned transport projects should be set out, along with its dependency on other projects or initiatives. Any significant, known, physical or engineering constraints or assumptions should be noted.

#### *Objectives*

- 4.9. National transport planning is now focused on improving transport systems through a Common Appraisal Framework based on five criteria:
- Economy;
  - Safety;
  - Environment;
  - Accessibility and Social Inclusion; and
  - Integration.

The Project Brief should establish the objectives for the project in the context of these criteria.

#### *Economy*

- 4.10. The existing road may be inefficient or ineffective in terms of its use or maintenance costs. In terms of use, the road may, for example, have restricted capacity, operating speeds, or surface quality. Indeed the objective may be to provide a new transport

corridor where none currently exists. The project may also be aimed at securing wider economic benefits such as inward investment or urban regeneration. The Project Brief should identify the objectives set for the project in terms of these or other relevant factors.

### Safety

- 4.11. The existing road may have features that are giving rise to poor safety outcomes and the objective of the project may be to redress these features. If the route section has been identified as a high accident location by the NRA or in EuroRAP publications, this should be noted.

### Environment

- 4.12. The existing road may have negative environmental impacts along one or more dimensions and the objective is to mitigate these environmental impacts. These are: air quality; noise; landscape impact and visual intrusion; land use; biodiversity; cultural heritage/archaeology, and water resources.

### Accessibility and Social Inclusion

- 4.13. Current road systems may be providing poor access to people in remote areas or to deprived communities and the proposed project may help in remedying this.

### Integration

- 4.14. There may be need to better integrate the road with the rest of the road network or cross border road networks in terms of consistent quality or layout. Similarly, there may be a need to integrate the road network more fully with other transport modes e.g. with the rail mode, or to create cycling or walking facilities. Integration with existing land use / planning policies may also be an objective.
- 4.15. The Project Brief should clearly identify which of the objectives are considered of most importance or relevance for the project, based on the identification of need as indicated above.

### *Functional and Operational Outcomes*

- 4.16. The Project Brief should reference any design or other standards to which the finished project is expected to adhere. Relevant performance targets should also be indicated e.g. with regard to the level of service to be attained or a reduction in road accidents to more acceptable norms. A statement of how the project will support national transport strategies plans or programmes should be included.

## **5. Approval of the Project Brief**

- 5.1. After the completion of overall project planning phase, the NRA will use the Project Brief to determine whether to provide funding for further scheme development.