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Internal 'Call for Projects' Starts Capital Budget Preparation

- Deadline for capital project proposals is September 30
- Only about half of proposals will make the cut

By BILL HEARD, Editor

(Sept. 14, 2007) If your department has a big project in mind for FY 2009 – perhaps a major expenditure for new equipment or facilities – you've got until the end of this month to make your case for it.

The annual in-house "call for projects" is the first step in developing Metro's \$600 million capital program. Proposed projects that survive a rigorous evaluation process over the next three months will become the foundation of the FY 2009 budget.

Each year, the Office of Management and Budget receives between 300 and 350 internal proposals for capital projects, says OMB Executive Officer Michelle Caldwell. They compete for placement within the capital budget – but only about half make the cut.

"If anyone thinks they need a capital project in FY 2009 – or any time in the next five years – this is the time to do it," says Caldwell. "Metro maintains a five-year capital program for planning purposes and updates the plan each year."

Submitting a capital project proposal is simpler now than in previous years, according to Caldwell. Department project managers no longer have to cope with complicated computer programs or trade files back and forth to develop a proposal.

Complete an on-line form

The entire process can be accomplished by accessing the data system on the OMB website and completing an on-line form.

To give a project a leg-up in the evaluation process, Caldwell advises project managers to spend time developing the scope and justification for their project, including how it relates to Metro's strategic plan.

"You should do a cost/benefit analysis," she says. "Be realistic in what the project will cost and be ready to answer questions about it and defend your project. It's not a requirement that the project 'save' the agency money, although many do, provided the completed project brings value to the agency."

In the three months following the project submission deadline, the proposals are screened by Metro's subject matter experts, who also will rank them for submission to the next level – the Executive Investment Committee headed by CEO Roger Snoble.

The committee, which includes Snoble's direct reports, evaluates the

projects and fits them in to the funds available in the next fiscal year's proposed budget. So-called "below the line" projects are put off for inclusion in subsequent years' budgets or are rejected all together.

Grouped by subject matter

Capital projects are grouped by subject matter such as revenue vehicle purchases, facilities improvements, IT communications and non-revenue vehicles, along with "other" projects like signage and carpeting.

Examples of projects approved in the FY 2008 budget include:

- \$40 million to rebuild 250 buses,
- \$3.4 million for a new four-color printing press, and
- \$15 million for a new rail car wash and cleaning platform at Division 20.

The \$600 million capital program, along with Metro's \$1 billion bus and rail operating budget, make up a sizeable chunk of the agency's overall \$3 billion annual budget.

The four-month process of developing the annual capital budget is necessary, Caldwell says, because "we need to know which of our resources are going to be tied up in capital projects – both dollars and people. It's not only funding that limits our capital program, but also the people available to complete the work."