

PCX GUILD

OUR FRIENDS, THE REVIEW TOOLS

An Update on Current and Upcoming Review Tools

PCX Guild Tiger Team:

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Camie Knollenberg

Marc Masnor

Greg Steele

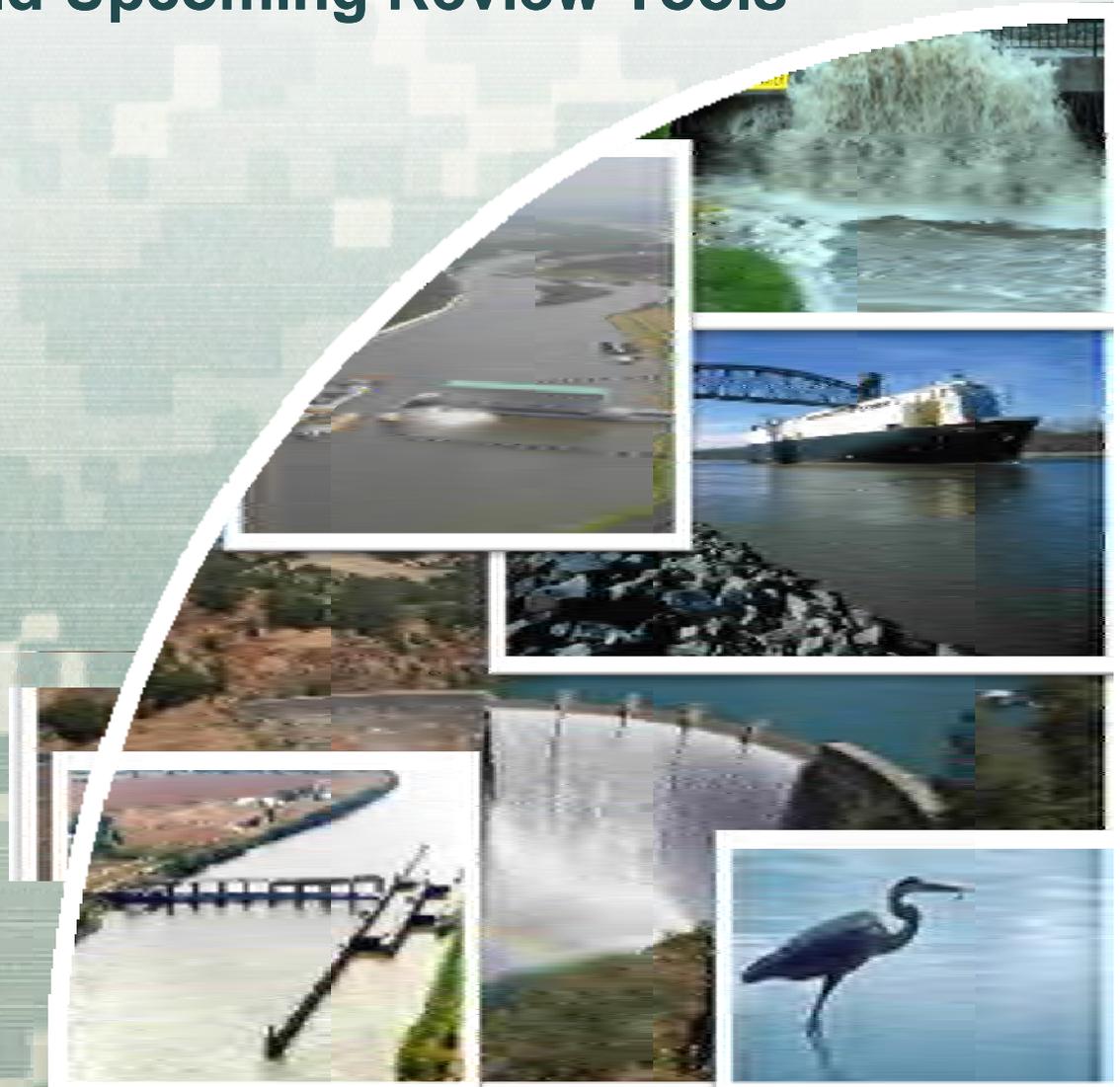
Steve M. Johnson

PCX Guild Webinar

18 December 2012



US Army Corps of Engineers
BUILDING STRONG



PCX Guild Webinar Objectives

(30-45 minutes)

- To provide an update of PCX POCs, and respective MSC PCX managers/leads for coordination of reviews
- To provide an overview of existing reference sites and review tools available
- To provide a preview of new or updated review tools
- Webinar discussion of review tools needs or wished for



Planning Centers of Expertise



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(304) 399-6938



Eric W. Thaut
Deputy Director
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(309) 794-5448



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Deputy Director
(718) 765-7071



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Associate Director
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Small Boat Harbor Planning
Sub-Center of Expertise

Note: 3 Additional Centers w/ Resources: Hydropower PCX, Cost Eng MCX,
& Risk Management Center (RMC)





Eric W. Thaut
Deputy Director
(415) 503-6852

FRM-PCX Regional Managers

Name (District)

Karen Miller (LRH)
Michelle Kniep (MVS)
Gene Sturm (NWO)
Dean McLeod (SPK)
Marc Masnor (SWT)

MSC Responsibilities

LRD / NAD
MVD / SAD
NWD / POD
SPD
SWD





Jodi Creswell
Operational Director
(309) 794-5448

ECO-PCX Account Managers

Name (District)

MSC Responsibilities

Sue Ferguson (LRN)

NAD

Jennifer Spencer (NAO)

SAD

John Ortlieb (MVP)

LRD,MVD,SAJ

Tomma Barnes (SAW)

NWD

Mike Scuderi (NWS)

SPD

Marshall Plumley (MVP)

SWD

Valerie Ringold (NWS)

POD

Nathan Richards (MVP)

Model Review

Camie Knollenberg (MVP)

IEPR





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WM&RS-PCX Leads

Name (District)

Ed Rossman (SAD)
Marc Masnor (SWT)
Cherilyn Gibbs (SWL)



Review References

DEPARTMENT OF THE ARMY
U.S. Army Corps of Engineers
Washington, DC 20314-1000

EC 1165-2-209
Change 1

CECW

Circular
No. 1165-2-209

31 January 2012

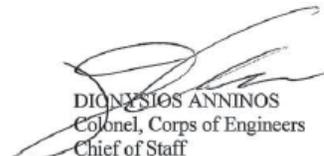
Water Resource Policies and Authorities
CIVIL WORKS REVIEW POLICY

1. This Change 1 to EC 1165-2-209, 31 January 2010, extends the expiration date to 31 January 2013.
2. The changed information is annotated as follows:

Page 1	Delete	Insert
	<i>EXPIRES 31 January 2012</i>	<i>EXPIRES 31 January 2013</i>

3. Parallel to USACE's ongoing assessment and monitoring of our review processes and EC 1165-2-209 implementation, two external audits are underway by the Engineer Inspector General (EIG) and the Government Accountability Office (GAO). These audits were originally scheduled for completion in 2011, but both have experienced schedule slippage. HQUSACE awaits the results of those audit results to inform any modification of the current review policy; accordingly, EC 1165-2-209's expiration date is extended. Based on observations to date, no significant changes in policy are anticipated when EC 1165-2-209 is replaced. The previous deviations outlined in CWPM 11-01 for certain Continuing Authorities projects are unaffected and remain in place. Points of contact for EC 1165-2-209 are Mr. Stuart McLean (202-761-4931) and Mr. Gary House (202-761-4692).

FOR THE COMMANDER:


DIONYSIOS ANNINOS
Colonel, Corps of Engineers
Chief of Staff

EC1165-2-209 Civil Works Review Policy

http://planning.usace.army.mil/toolbox/library/ECs/EC1165-2-209_31Jan2012.pdf

Being replaced by:
EC 1165-2-214 (signed
& dated 12/15/12)



Review References

Toolbox

<http://planning.usace.army.mil/toolbox/tools.cfm?Id=0&Option=Main>

PLANNING LINKS

Tools

Planners use many tools: templates, models, applications and more. This tab contains some helpful tools.

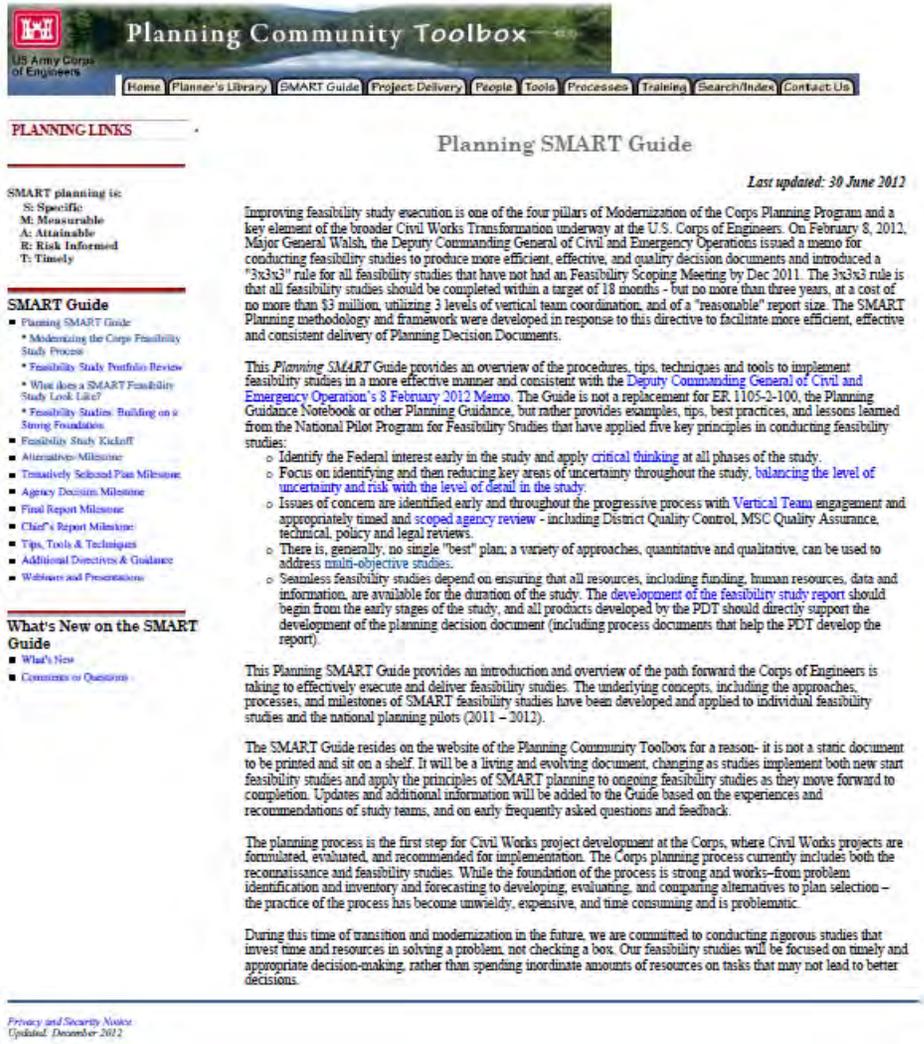
- **Agreements**
Feasibility Cost Sharing Agreements (FCSAs), Project Partnership Agreements (PPAs), Memorandum of Agreement (MOA)s, Memorandum of Understanding (MOUs), Model Agreements, Local Cooperation Agreements (LCA) and more.
- **Model Certification**
Certified and other national models, guidance, and PCX links.
- **Software**
HEC, IWR, and other Corps and Non-Corps software, and documentation.
- **Templates and Checklists**
Civil Works Review Board, Surveys, Review Plans, NEPA, Project Reports, etc.
- **Mapping Resources**
- **Civil Works Budget**

Privacy and Security Notice
Updated: December 2012

Check regularly
For updates &
New tools....



Review References



The screenshot shows the 'Planning SMART Guide' page on the 'Planning Community Toolbox' website. The page header includes the US Army Corps of Engineers logo and navigation links such as 'Home', 'Planner's Library', 'SMART Guide', 'Project Delivery', 'People', 'Tools', 'Processes', 'Training', 'Search/Index', and 'Contact Us'. The main content area is titled 'Planning SMART Guide' and is dated 'Last updated: 30 June 2012'. The page contains several paragraphs of text and a bulleted list of key principles for conducting feasibility studies. A sidebar on the left lists 'PLANNING LINKS' and 'SMART planning is:' with sub-points: Specific, Measurable, Attainable, Risk Informed, and Timely. Below this, there is a 'SMART Guide' section with a list of links including 'Planning SMART Guide', 'Modernizing the Corps Feasibility Study Process', 'Feasibility Study Portfolio Review', 'What does a SMART Feasibility Study Look Like?', 'Feasibility Studies: Building on a Strong Foundation', 'Feasibility Study Kickoff', 'Alternatives Milestone', 'Tentatively Selected Plan Milestone', 'Agency Decision Milestone', 'Final Report Milestone', 'Chief's Report Milestone', 'Tips, Tools & Techniques', 'Additional Directives & Guidance', and 'Webinars and Presentations'. At the bottom of the page, there is a 'What's New on the SMART Guide' section with links for 'What's New' and 'Comments or Questions'. A footer note states 'Privacy and Security Notice Updated December 2012'.

SMART Guidance

<http://planning.usace.army.mil/toolbox/smart.cfm>

Check regularly for Updates....





Existing Review Tools Refresher



Existing Review Tools

<http://planning.usace.army.mil/toolbox/tools.cfm?Id=137&Option=Templates and Checklists>

- *Review Plan Checklist for Decision Documents*
- *ATRT Lead Checklist*
- *Charge to PDT and Reviewers Template*
- *Decision Document Review Plan*





Upcoming New Review Tools



PCX Guild Tiger Team Charge

To develop and update review training and documents (tools) in support of the PCX Guild missions evolving planning processes, and in coordination and cooperation with other review SOP updating efforts such as:

- *Civil Works Summary Action Plan for USACE Inspector General. Findings and Observations of the Civil Works Review Process*



DQC & ATR Relationship

Quality ATR requires focus on the entire review process with the quality control foundation beginning at and with the District Quality Control.

A consistent and robust quality control process is in the balance and integration of DQC and ATR.



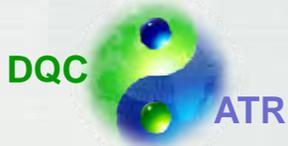
As part of this consistency, the **risk register** is proposed as a review tool 'connector' throughout the entire review process.



District Quality Control Training Tools

(Recommended; recognizing MSC/District sovereignty)

- DQC Primer (New)
- DQC Primer Training Presentation (New)



DQC Primer

District Quality Control Training Tools

What is it?

- A suggested disciplined approach to DQC

What does it do?

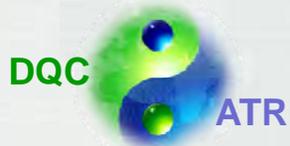
- Provides general best practices and “placemat” reference on DQC

How is it used?

- Provided by DQC managers to PDTs and DQC teams

What it is not

- A mandated process for DQC (MSC/District responsibility)



DQC Primer Training Presentation

District Quality Control Training Tools

What is it?

- An outline to a suggested disciplined approach to DQC

What does it do?

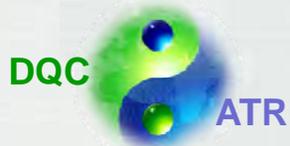
- Provides portable training on DQC

How is it used?

- Provided by DQC managers to PDTs and DQC teams

What it is not

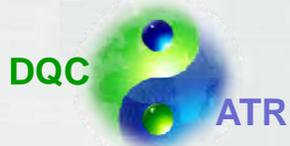
- A mandated process for DQC (MSC/District responsibility)



Agency Technical Review Training Tools

(Recognizing other efforts in SMART planning and EC 209 updating)

- ATR Review Report –Template (New)
- ATRT Lead Checklist (Update)
- ATRT Lead Training Presentation (New)



ATR Review Report Template

Agency Technical Review Training Tools

What is it?

- A template for ATR Review Reports

What does it do?

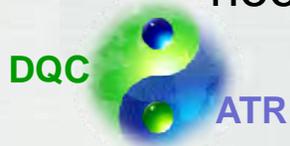
- Provides a standardized format and checklist for Review Reports

How is it used?

- Suggested to be used by ATRT Leads as a PCX Guild SOP

What it is not

- It is a template, not a cookie cutter, and needs to be adapted to the needs of the study and type of review being done.



ATRT Lead Checklist Update

Agency Technical Review Training Tools

What is it?

- An update to the previously released checklist

What does it do?

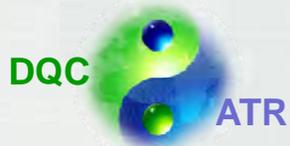
- Provides the steps and requirements of conducting a review

How is it used?

- ATRT Leads consult when scoping and conducting review

What it is not

- A scope or charge for an ATR



ATRT Lead Training Presentation

Agency Technical Review Training Tools

What is it?

- An outline of ATRT Lead roles and responsibilities

What does it do?

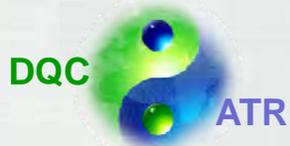
- Provides portable training for ATRT Leads

How is it used?

- Provided by PCX to ATRT Leads prior to reviews

What it is not

- A replacement for KSA's to successfully lead an ATR



Next Steps

These draft documents are scheduled to be finalized and PCX Guild approved by February 2013

Note: Draft Documents were provided with the Webinar reminder and will be loaded onto the FRM-PCX Website.





WEBINAR DISCUSSION REVIEW TRAINING & TOOL NEEDS AND WISH LIST



Please email additional thoughts and ideas to:
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Steve M. Johnson: Steven.M.Johnson@usace.army.mil





Questions?

