

New Planning Bulletin: SMART Planning Milestones

18 July 2013

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Agenda

- Introduction of New Guidance: Planning Bulletin 2013-03 - SMART Planning Milestones
- Lessons Learned So Far
- Read Aheads – What and Why
- Changes to Process with this PB
- Next Steps
- Q&A – online chat
 - You can type your questions any time; will answer at the end.



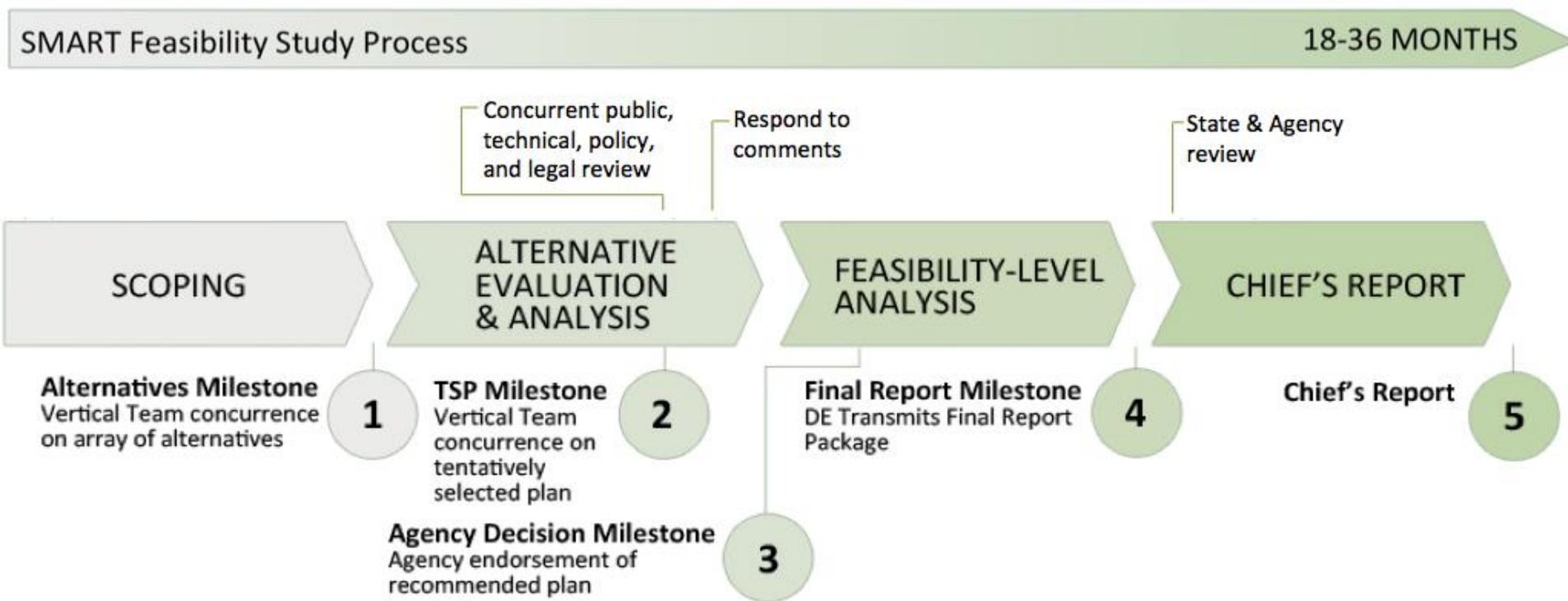
Recap of What's Different

- Milestones are **decision focused** not task oriented
- Risk and uncertainty is **acknowledged and managed**
 - Vertical team agrees on work to be done **before it is done**
 - Vertical team agrees on “**acceptable**” level of uncertainty
- All resources identified early and funding **committed**
- **Concurrent** Policy, Technical, Public Reviews
- Read Ahead's **inform** productive meetings and help develop Report



SMART Feasibility Study Process

In-Progress Reviews (IPRs) as needed



Milestones Mark Decisions



Lessons Learned

- Everyone (from districts to HQ) has learned a lot from SMART Planning
- A lot of Chief's Reports in the next 2 years presents opportunities for change
- Agency Decision Milestones coming up will change how we do CWRB
- Lessons learned from Milestones are reflected in new Planning Bulletin



PB 2013-03

- Planning Bulletin 2013-03: SMART Planning Milestones was signed 15 July
- Purpose and Structure of Agency Decision Milestone
- Civil Works Review Board
- Pre-Milestone Submittals / Read aheads



Role of PDT

- Tell Your Story in a clear and concise manner
- Identify and raise issues early
- Ensure appropriate quality control (DQC) is complete prior to milestones



Role of Leadership

- Define upfront information needed to make a decision
- Make decisions and reconcile differences to keep study on schedule
- Focus discussion and reviews on critical elements to decision
- Evaluate the Vertical Team Assessment of Risk and Uncertainty



Read Aheads

- Are laid out clearly in PB 2013-13
- Are Different for SMART Planning!
- Used to inform
 - No extensive review necessary
 - Not a check-the-box requirement
- Typical Read Aheads Include:
 - Report Synopsis
 - Decision Management Plan
 - Risk Register
 - Decision Log
 - Project Study Issue checklist



Milestone	Milestone Purpose	To Be Completed Prior to the Milestone	Pre-Milestone Submittals
1. Alternatives	Vertical team concurrence on evaluation criteria and focused array of alternatives.	Study Scope	Report Synopsis
		NEPA Scoping	Decision Management Plan
		Publish NOI ¹	Risk Register
			Decision Log
2. TSP	Vertical team concurrence on the TSP/LPP; Chief, Planning and Policy endorsement of TSP/LPP and path forward.	IEPR Exclusion request ¹	Report Synopsis
		DQC of Draft Report	Decision Management Plan
		LPP Waiver ¹	Risk Register
			Decision Log
3. Agency Decision	DCG-CEO and Senior HQUSACE leaders endorsement of the recommended plan that will be the focus of an increased level of design	ATR of Draft Report	Report Synopsis
		Public/Agency Review of Draft Report	Decision Management Plan
		District Legal Certification of Draft Report	Risk Register
		Policy Compliance Review of Draft Report	Decision Log
		IEPR of Draft Report ²	Briefing Presentation
4. Final Report	DE submittal of final report package	Final Integrated Report with Appendices and Supporting Documentation	Final Report Submittal Package
			Decision Log
			Project Study Issue Checklist
			Briefing Presentation
5. Chief's Report	Chief of Engineers approval of Final Report and signature of Chief's Report.	CWRB	Final Integrated Report with Appendices and Supporting Documentation
		State & Agency Review	Chief's Report Submittal Package
		Final NEPA Review	
		OWPR Documentation of Review Findings	
		Final HQUSACE Legal Certification	
		Final Policy Compliance Review	
		Chief's Responses to IEPR Comments ¹	

Notes

1. If applicable.

2. The IEPR panel has up to 60 days after the end of the public review of the draft to submit its report, and longer at the discretion of the Chief. IEPR may not be completed yet.



What's New?

Tentatively Selected Plan Milestone

- District Chief of Planning briefs the TSP to the HQUSACE Chief of Planning & Policy
- HQUSACE Chief of Planning & Policy endorses the TSP and proposed way forward
- MSC provides approval for DE to release draft report and NEPA documentation



Agency Decision Milestone



Focus on alternatives evaluation to identify a tentative plan for more detailed design

Focus on scaling the measures and features for the recommended plan/LPP



What' New?

Agency Decision Milestone

- District Commander recommends the TSP/LPP to the DCG-CEO and Senior Panel
- DCG-CEO endorses TSP and path forward
- Study will not proceed into feasibility-level design until endorsed



What's New?

Final Report Milestone

- Milestone = Division Engineers transmittal of final report package to HQUSACE
- DCG-CEO will convene Civil Works Review Board
- CWRB is scalable depending on the scope, complexity and risk of the Recommended Plan



There is more to do...

- Apply **Risk Informed** Decision Making
- Update guidance and procedures in coordination with Programs
- Develop senior planner resources, especially in policy review & mentoring
- Scalable Reviews and CWRB based on project complexity and risk
- Updated CWRB Standard Operating Procedures



Questions?

Type questions in the chat box. We will try to answer as many as time allows.

For more information:

<http://www.corpsplanning.us>



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