

NATIONAL PLANNING COMMUNITY
OF PRACTICE TRAINING

Working Together to Modernize Planning



JUNE 2 – 4, 2015, Atlanta, GA

*Delivering sustainable solutions to
America's water resource challenges.*

Our People, Process, Projects and Program



PLANNING SMART
BUILDING STRONG®



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Welcome to Atlanta! We hope you take full advantage of this learning and networking opportunity.

This workshop is a Community-wide training event for the USACE Planning Community of Practice. The focus of the training is "Working Together to Modernize Planning." This 3-day workshop will consist of large group presentations and discussion, exercises, and break-out sessions.

The training will provide District-level Planning leaders with the tools, information, and skills necessary to deliver timely, cost-effective and high quality essential water resources solutions. The training will emphasize the practices, policies and procedures that are being implemented by the Planning Community of Practice in support of Planning Modernization and Civil Works Transformation. Participants are expected to bring back materials, information and key training tools to colleagues in their District/MSC.

Plenary Sessions will address critical issue areas to the Planning Community, while breakouts will offer hands-on training and experiences, emphasizing the practices, policies and procedures necessary to address key obstacles to realizing our Campaign Plan goals for the Planning Community. Breakout sessions are organized along three themes identified at the 2014 Planning Summit as keys to achieving Planning Modernization: 1) Delivering on our Commitments – Project Delivery and the Planning Program; 2) Aligning Expectations – Decision-Making Roles and Responsibilities; and, 3) Sustaining Planning – Supporting and Building Planner Capability.

We hope you learn a lot this week and share what you have learned with your colleagues, project sponsors and stakeholders back home.



NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING AGENDA



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TUES 6.2.15	DELIVERING ON OUR COMMITMENTS	ALIGNING EXPECTATIONS	SUSTAINING PLANNING CAPABILITY
7:30am-8:30am		REGISTRATION OPEN <i>Hallway Posters & Learning Stations</i>	
8:30am-10:00am	WELCOME AND OPENING PLENARY: CIVIL WORKS PLANNING PROGRAM VISION AND WAY AHEAD — <i>BG Turner, DCG-CEO MG Peabody, DCW Mr. Steve Stockton, Mr. Tab Brown</i> [SAM NUNN C/D]		
10:00am-10:15am		Break	
10:15am-11:15am	Understanding the Breadth of the Planning Portfolio [MLK BUILDING A-1]	Review Roles & Responsibilities [MLK BUILDING A-3]	Workforce Development Mentoring, Planner Career Roadmaps and Training [SAM NUNN C/D]
11:15am-11:30am		Break	
11:30am-12:00pm	THE NORTH ATLANTIC COAST COMPREHENSIVE STUDY THROUGH THE LENS OF PLANNING MODERNIZATION — <i>Ms. Roselle Henn</i> [SAM NUNN C/D]		
12:00pm-1:30pm		Lunch	
1:30pm-2:30pm	RISK INFORMED DECISION MAKING — <i>Dr. Charlie Yoe</i> [SAM NUNN C/D]		
2:30pm-3:00pm	Break and Visit Posters/Learning Stations		
3:00pm-4:00pm	Building the Planning Portfolio: New Start Selection Process, ASA(CW) Perspective, and J-Sheet Development [MLK BUILDING A-1]	District Quality Control and Agency Technical Review: What You Should Know [MLK BUILDING A-3]	Using the Risk Register and Decision Management Plan to Understand and Communicate Risk and Uncertainty [SAM NUNN C/D]
4:00pm-4:15pm		Break	
4:15pm-5:15pm	LESSONS LEARNED IN RISK MANAGEMENT IMPLEMENTATION FOR DIVISION, BRANCH, AND SECTION CHIEFS — <i>Dr. Charlie Yoe</i> [SAM NUNN C/D]		



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WED 6.3.15	DELIVERING ON OUR COMMITMENTS	ALIGNING EXPECTATIONS	SUSTAINING PLANNING CAPABILITY
8:00am-8:30am	<i>Hallway Posters & Learning Stations</i>		
8:30am-9:30am	VIEW FROM WASHINGTON — <i>Mr. Doug Lamont, OASA(CW)</i> [SAM NUNN C/D]		
9:30am-9:45am	Break		
9:45am-10:45am	The First 90 Days of a New Feasibility Study [SAM NUNN C/D]	Understanding the 3x3x3 Rule and Exemption Process [MLK BUILDING A-2/3]	Moving from Flood and Coastal Storm Damage Reduction to Risk Management [MLK BUILDING A-1]
10:45am-11:00am	Break		
11:00am-12:00pm	Keeping up with Policy [MLK BUILDING A-1]	Lessons Learned in Concurrent Review and Issue Resolution Process Strategies [SAM NUNN C/D]	Building the Project Management Plan and P2 Tasks based on the Risk Register and Decision Management Plan [MLK BUILDING A-2/3]
12:00pm-1:30pm	Lunch		
1:30pm-2:30pm	BEYOND PLANNING: PERSPECTIVES & INTEGRATION ACROSS USACE COPS — <i>Mr. Bob Leitch, Mr. Bob Bank, Mr. Eric Halpin, Mr. John Cline, and Ms. Andrea Bias-Streat</i> [SAM NUNN C/D]		
2:30pm-3:30pm	Break and Visit Posters/Learning Stations		
3:30pm-4:30pm	Habitat Mitigation Planning, Monitoring and Adaptive Management in a 3x3x3 Environment [MLK BUILDING A-1]	Making, Documenting and Sharing Decisions [SAM NUNN C/D]	Virtual Teaming: Tools, Techniques, Tips and Etiquette [MLK BUILDING A-2/3]
4:30pm-4:45pm	Break		
4:45pm-5:15pm	ASK A LEADER AND HOT TOPICS Q & A [SAM NUNN C/D]		



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THUR 6.4.15	DELIVERING ON OUR COMMITMENTS	ALIGNING EXPECTATIONS	SUSTAINING PLANNING CAPABILITY
8:00am-8:30am	Hallway Posters & Learning Stations		
8:30am-9:30am	CRITICAL THINKING — Dr. Monique Turner [SAM NUNN C/D]		
9:30am-10:00am	Break and Visit Posters/Learning Stations		
10:00am-11:30am	Environmental Compliance and Interagency Coordination and Communication in a 3x3x3 Environment [MLK BUILDING A-1]	Critical Thinking and Its Application [MLK BUILDING A-2/3]	More than a Report: Telling the Planning Story to Multiple Audiences [SAM NUNN C/D]
11:30am-1:00pm	Lunch		
1:00pm-2:00pm	Large Scale Studies: Succeeding with Feasibility, Watershed, and Comprehensive Studies [MLK BUILDING A-1]	How to Effectively Write and Respond to Review Comments [MLK BUILDING A-2/3]	The National Water Resources Certified Planner Program and Agency Technical Review Certification [SAM NUNN C/D]
2:00pm-2:30pm	Break and Visit Posters/Learning Stations		
2:30pm-3:15pm	WORKING TOGETHER TO MODERNIZE PLANNING — Mr. Brian Harper, Mr. Wes Coleman, Ms. Sue Hughes [SAM NUNN C/D]		
3:15pm-4:00pm	LOOKING FORWARD: THE CORPS PLANNING PROGRAM IN 2020 AND BEYOND — Mr. Tab Brown, Chief HQ Policy & Planning [SAM NUNN C/D]		





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Our Thanks to ALL who made the 2015 PCoP Training a success!

OUR PLENARY SPEAKERS – for sharing your experiences and vision

- BG C. David Turner
- MG John Peabody
- Steve Stockton
- Tab Brown
- Bob Bank
- Andrea Bias-Streat
- John Cline
- Wes Coleman
- Eric Halpin
- Brian Harper
- Roselle Henn
- Sue Hughes
- Doug Lamont
- Bob Leitch
- Monique Turner
- Charlie Yoe

OUR WORKSHOP PLANNING COMMITTEE – for hours going above and beyond

- Jodi Creswell,
Workshop Lead
- Trish Anslow
- Dave Combs
- Janet Cote
- Angie Dunn

- Kathleen Evans
- Stephanie Groleau
- Sue Hughes
- Jim Hutchison
- Mike Magley
- Kim Otto
- Wilbert Paynes
- Jerica Richardson
- Erin Rooks
- Jeff Trulick
- Laura Vicinie
- Maria Wegner
- SAD's DA Interns and
the PA Class of 2015 for
onsite assistance this
week

OUR 61 BREAKOUT SESSION PRESENTERS AND TRAINERS – who are sharing their lessons learned in Planning Modernization and building a stronger Planning Community every day

- Cindy Barger
- Tomma Barnes
- Ken Barr
- Larry Cocchieri
- *Wes Coleman*
- Tammy Conforti

- Mark Cowan
- Travis Creel
- Jodi Creswell
- Angie Dunn
- Martin Durkin
- Steve Fischer
- Naomi Fraenkel
- Amy Frantz
- *Jerry Fuentes*
- Miki Fujitsubo
- Jeanette Gallihugh
- *Stephanie Groleau*
- *Evie Haberer*
- *Melissa Hallas*
- *Eric Halpin*
- *Charlie Hanneken*
- *Brian Harper*
- *Cliff Jones*
- *Lisa Kiefel*
- *Camie Knollenberg*
- Steve Kopecky
- Mark Kramer
- *Jeremy LaDart*
- Maria Lantz
- Bob Leitch
- Jeff Lin
- *Andy MacInnes*
- *Judy McCrea*
- *Rachel Mesko*
- Karen Miller

- Heather Morgan
- Dave Moser
- Scott Nicholson
- Patrick O'Donnell
- Kim Otto
- Valerie Ringold
- *Debby Scerno*
- Sara Schultz
- Amy Sharp
- Aaron Snyder
- *Greg Steele*
- Elliott Stefanik
- Jeff Strahan
- Cindy Tejada
- Eric Thaut
- *Jeff Trulick*
- Cindy Upah
- Tiffany Vanosdall
- Bret Walters
- *Maria Wegner*
- *Rebecca J. Weiss*
- Katie Williams
- *Ray Wimbrough*
- Michael Wyatt
- *Kendall Zaborowski*

*Italicized names are
presenters at more than
one training session.*



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Plenary Take Back Forms
& Handouts



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PLENARY SESSIONS

- Welcome and Opening: Civil Works Planning Program Vision and Way Ahead
- The North Atlantic Coast Comprehensive Study Through the Lens of Planning Modernization
- Risk Informed Decision Making
- Lessons Learned in Risk Management Implementation for Division, Branch and Section Chiefs
- View from Washington
- Beyond Planning: Perspectives & Integration Across USACE CoPs
- Critical Thinking
- Working Together to Modernize Planning
- Looking Forward: The Corps Planning Program in 2020 and Beyond





**US Army Corps
of Engineers®**



Brigadier General C. David Turner Commander, South Atlantic Division

Brigadier General C. David Turner became commander of the U.S. Army Corps of Engineers, South Atlantic Division on July 24, 2014. The South Atlantic Division is one of eight U.S. Army Corps of Engineers' regions providing engineering and construction services to the Nation. It is the regional business center in the southeast, the Caribbean, and Central and South America, with district offices in Wilmington, North Carolina; Charleston, South Carolina; Savannah, Georgia; Jacksonville, Florida; and Mobile, Alabama.

As the South Atlantic Division Commander, General Turner oversees the planning, design, and construction of projects to support the military, protect America's water resources, and restore and enhance the environment within a 250,000 square mile area which includes all or part of eight southeastern states.

General Turner was born in St. Louis, Missouri. He graduated from the University of Central Missouri with a Bachelor of Arts Degree in Mathematical Sciences. In 2014 he was named a University of Central Missouri Distinguished Alumni. He also holds a Master of Science Degree in Industrial Engineering from Wichita State University and a Master of Strategic Studies Degree from the U.S. Army War College. He is a Harvard Senior Executive Fellow.

General Turner most recently commanded the South Pacific Division of the U.S. Army Corps of Engineers. Previous assignments include Chief of Staff, Headquarters, U.S. Army Corps of Engineers; Chief of Staff for Combined Joint Interagency Task Force 435, Afghanistan; Commander, U.S. Army Corps of Engineers, Far East District, Seoul, Korea; and three tours on the U.S. Army Staff as the G-1 Engineer, Assistant Executive Officer to the G-3, and Chief, Base Realignment and Closure Division - an \$18B program and the largest transformation of the U.S. Army since WWII. He also served on the Joint Staff as Assistant Deputy Director of Operations, Emergency Action Officer, Global Nuclear Strike Advisor and Senior Operations Officer. General Turner has served in a variety of other command and staff assignments in the continental United States, Germany, Bosnia, and the Middle East. During the Gulf War he commanded Bravo Company, 1st Engineer Battalion (Mechanized). He also served as Liaison Officer and Assistant Operations Officer in the 1st Engineer Battalion. He served a combat tour as commander of the 14th Combat Engineer Battalion, Fort Lewis, Washington - with deployment to Operation IRAQI FREEDOM and redeployment to Fort Lewis. He served as Platoon Leader, Company Executive Officer and Battalion Engineer Equipment Maintenance Officer, 79th Combat Engineer Battalion (Heavy), Karlsruhe, Germany; Battalion Executive Officer in the 40th Engineer Battalion (Mechanized), Baumholder, Germany; and Brigade Operations and Executive Officer, 1st Armored Division Engineer Brigade, Bad Kreuznach, Germany. General Turner deployed to Bosnia during his second tour in Germany and has also served in the U.S. Army Corps of Engineers, Baltimore District as a Project Engineer and Project Manager.

General Turner's military education includes the Engineer Officer Basic Course; Armor Officer Advance Course; U.S. Army Combined Arms and Services Staff School; U.S. Army Command and General Staff College; and the U.S. Army War College.

General Turner's awards and decorations include the Defense Superior Service Medal; three Legion of Merit Awards; the Bronze Star Medal with Valor Device; two Bronze Star Medals; the Defense Meritorious Service Medal; seven Meritorious Service Medals; the Joint Commendation Medal; two Army Commendation Medals; two Army Achievement Medals; two Valorous Unit Awards; the Bronze and Silver Orders of the de Fleury Medal; the 2009 Black Engineer of the Year for Professional Achievement in Government; and the 2014 Black Engineer of the Year Stars and Stripes Army Awardee.



® U.S. ARMY CORPS OF ENGINEERS

**Major General
John W. Peabody**

***Deputy Commanding General for
Civil and Emergency Operations***



Major General John Peabody assumed responsibility as the Deputy Commanding General for Civil and Emergency Operations, United States Army Corps of Engineers on 18 October 2013. As such, he is responsible for a \$6 billion dollar annual program, largely related to water resources and related infrastructure. He exercises oversight of Corps' civil works activities conducted by over 23,000 military and civilian professionals operating in 8 engineer divisions and 38 districts nationwide. These professionals conduct research and development, as well as plan, design, build, operate and maintain water resource civil infrastructure with a replacement value of \$263 billion, including 707 dams, 4,933 recreation sites, 75 hydroelectric plants, over 12,000 miles of commercial inland waterways, 14,700 miles of levees, 926 harbors and enough water to supply the daily needs of 122 million people. Major General Peabody is also responsible to coordinate all emergency response missions and preparatory activities for civil disasters in support of FEMA and state and local authorities. He serves the Chief of Engineers and the Assistant Secretary of the Army for Civil Works as their principal military advisor for Civil and Emergency Operations.

A northern Ohio native, Maj. Gen. Peabody entered military service in 1980 upon commissioning as a second lieutenant in the Corps of Engineers, spending most of his career as a combat engineer.

He has had multiple staff assignments at the tactical, operational and strategic levels as a combat engineer, political-military advisor in US Southern Command covering Latin American issues, as the senior Engineer trainer at the National Training Center, and for Army Legislative Liaison. He has commanded combat engineer units at the company, battalion and brigade levels, as well as three Corps of Engineers Divisions for over eight consecutive years – in sequence, the Pacific Ocean, Great Lakes and Ohio River and the Mississippi Valley Divisions. He also served five years on the Mississippi River Commission, culminating as the 36th President of the Commission. He has had operational deployments to Honduras, El Salvador, Somalia and Kuwait and Iraq, including command of the 3rd Infantry Division's Engineer Brigade during the attack to Baghdad and subsequent transition to stability operations during Operation Iraqi Freedom I in 2003.

Awards and decorations include the Distinguished Service Medal, Legion of Merit, Bronze Star Medal with "V" device, Purple Heart, Joint Meritorious and Army Meritorious Service Medals, Armed Forces Expeditionary Medal, Iraq Campaign Medal, Humanitarian Service Medal, Presidential Unit Citation, Joint Unit Commendation Award, Army Superior Unit Award, Combat Action Badge, Master Parachutist Badge, Ranger Tab, and Army Staff Badge.

Maj. Gen. Peabody is a graduate of the United States Military Academy, the Command and General Staff College, and the Army War College with a master's degree in Strategic Studies. He also holds a Master of Public Administration degree from Harvard University and studied international relations and political sociology as an Olmsted Scholar at El Colegio de Mexico, Mexico City. Maj. Gen. Peabody holds a Professional Engineer License from the Commonwealth of Kentucky.

He and his wife, Kelly, spend their free time chasing their young daughter, Reagan.



Biography

Department of the Army



Steven L. Stockton, P.E.

Director of Civil Works
Headquarters, U.S. Army Corps of Engineers
Washington, D.C.



Steven L. Stockton serves as the Director of Civil Works, Headquarters, U.S. Army Corps of Engineers, Washington, D.C. In this position under the policy guidance of the Chief of Engineers and the Assistant Secretary of the Army (Civil Works), leads, manage and directs the policy development, programming, planning, design, construction, contingency and emergency response, operation, and maintenance activities of the Army Civil Works Program, a \$10 billion annual program of water and related land resources of the United States and oversees the work of over 25,000 civilian employees. He serves as Governor on the World Water Council Board of Governors, represents the USACE in the United Nation's Advisory Board High-Experts and Leaders Panel on Water and Disasters, and serves in several national and international water resources Committees.

Mr. Stockton was selected to the Senior Executive Service in January 1996. From August 1998 thru May 2005, he served as the Director, Engineering and Technical Services; Director, Programs Management; and Director, Regional Business; for the U.S. Army Corps of Engineers, South Pacific Division in San Francisco, California. From May until November 2004, Mr. Stockton was the Director, Business Management, U.S. Army Corps of Engineer, Gulf Region Division in Baghdad, Iraq. From his selection in January 1996 thru July 1998, Mr. Stockton was the Chief, Engineering Division, Civil Works Directorate, Headquarters, U.S. Army Corps of Engineers, Washington, D.C.

CAREER CHRONOLOGY:

- 1988 – 1996: Chief, Planning and Engineering Division, U.S. Army Corps of Engineers, Portland District, Portland, OR
- 1975 – 1988: Various positions including Branch Chief, Geotechnical Branch, U.S. Army Corps of Engineers, Portland District, Portland, OR
- 1972-1975 Naval Officer. Multiple Mediterranean and Caribbean deployments

COLLEGE:

- BS, Civil Engineering, Oregon State University, 1971

SIGNIFICANT TRAINING:

- Senior Executive Fellow, John F. Kennedy School of Government, Harvard University, 1991

CERTIFICATIONS:

- Registered Professional Civil Engineer, State of Oregon

AWARDS AND HONORS:

- Honorary Diplomate, Water Resources Engineer (Hon.D.WRE), by the American Academy of Water Resources Engineers, 2014
- Henry P. Caulfield, Jr. Medal for “Exemplary Contribution to National Water Policy,” 2011
- Silver de Fleury medal – Outstanding Leadership, Performance and management of the Civil Works Program, 2010
- The Nature Conservancy Outstanding Partnership Award, 2008
- Presidential Rank Award – Meritorious Executive, 2003
- Oregon State University, Academy of Distinguished Engineers
- Secretary of the Army’s Exceptional Civilian Service Award
- Meritorious Civilian Service Award (2)
- Superior Civilian Service Award (2)
- Commanders Awards for Civilian Service (3)
- North Pacific Division and the Portland District Engineer of the Year Award, 1982

PROFESSIONAL MEMBERSHIPS AND ASSOCIATIONS:

- Army Engineer Association
- Society of American Military Engineers
- American Society of Civil Engineers (Fellow)
- National Academy of Construction
- Governor, World Water Council

MAJOR PUBLICATIONS:

- U.S. Army Corps of Engineers 2012: *Preparing USACE for the 21st Century*, 2003
- U.S. Army Corps of Engineers: *Building Strong Collaborative Relationships for a Sustainable Water Resource Future: National Report*
- *Water in the U.S. American West, 150 Years of Adaptive Strategies*, Policy Report for the 6th World Water Forum
- Developed and published the powerful *Federal Support Toolbox for Integrated Water Resources Management*, a one-stop shop (Portal and Clearinghouse) for national and international water resources information (www.watertoolbox.us), public release on February 28, 2013.
- U.S. Army Corps of Engineers: *Building Strong Collaborative Relationships for a Sustainable Water Resource Future: Understanding Integrated Water Resources Management (IWRM)*, January 2014
- Water Policy, Official Journal of the World Water Council: Special Edition, Water and Disasters: *Case from the High Level Experts and Leaders Panel on Water and Disasters*, March 2015



Biography

Department of the Army



Theodore A. (Tab) Brown, P.E. **Chief, Planning and Policy Division and** **Southwestern and Mississippi Valley Divisions** **Regional Integration Teams** **U.S. Army Corps of Engineers**



Since January 2009, Mr. Theodore A. (Tab) Brown has served as Chief of Planning & Policy in the Headquarters, U.S. Army Corps of Engineers (USACE), Washington, DC. He also serves as the Leader of both the Southwestern Division and Mississippi Valley Division Regional Integration Teams in Headquarters. In this capacity, he provides leadership and oversight for Coastal Louisiana post-Katrina reconstruction and planning. Mr. Brown also serves as the leader of the USACE-wide Planning Community of Practice. In his current position, Mr. Brown formulates and coordinates Army Civil Works policy with the Department of Army, Federal agencies, and Office of Management and Budget (OMB); serves as Executive Liaison for the Chief's Environmental Advisory Board (EAB), and provides representation to other Federal Advisory Committees. Mr. Brown is responsible for leading efforts in the implementation of the 2007 Water Resources Development Act. He serves as principal Civil Works point of contact with congressional authorizing committees on policy and planning matters. He also formulates civil works environmental policy and develops new civil works planning and program initiatives for issues where water and related land resources, Corps experience and expertise, and multiple-objective problem solving potentially come together. He also served in this position in an acting capacity from November 2007 – May 2008.

PRE-SES CAREER CHRONOLOGY:

- Chief, Planning and Policy Division, Great Lakes & Ohio River Division, USACE Cincinnati, OH, 2002-2009
- Chief of Business Management Office, Great Lakes & Ohio River Division, USACE, Cincinnati, OH, 1999-2002
- Chief, Planning Branch, Nashville District, USACE, Nashville, TN, 1997-99
- Assistant Chief, Plan Formulation Branch, Huntington District, USACE, Huntington, WV, 1996-1997
- Developmental Assignment as Chief, Economic and Social Analysis Branch, Huntington District, USACE, Huntington, WV, 1995-1996
- Assignments as Senior Study Manager, Project Manager, and Quality Control Manager, Planning Division, Huntington District, USACE, Huntington, WV, 1988-1995

- Developmental assignment as Planning Program Manager, Ohio River Division, USACE, Cincinnati, OH, 1992
- Junior Fellow/Engineer Student Trainee, Special Studies Branch, Planning Division Huntington District, USACE, Huntington, WV, 1983-88

COLLEGE:

- Master of Business Administration, Marshall University, Huntington, WV, 1991
- Bachelor of Science in Civil Engineering, The Ohio State University, Columbus, OH, 1988

SIGNIFICANT TRAINING:

- USACE Planners and Project Managers Program, Fort Belvoir, VA 1994-95
- Junior Fellowship Program, Huntington District, USACE, Huntington, WV, 1983-84

CERTIFICATIONS:

- Registered Professional Engineer, State of Ohio

AWARDS AND HONORS:

- Commander's Award for Civilian Service 1999
- Outstanding Planning Achievement Award, Ohio River Division, 1996
- Outstanding Planning Achievement Award, Huntington District, 1996
- Outstanding Planning Achievement Award, Huntington District, 1995
- District Black Engineer of the Year Award, Nashville District, 1998
- District Black Engineer of the Year Award, Huntington District, 1996
- District Black Engineer of the Year Award, Huntington District, 1995
- District Black Engineer of the Year Award, Huntington District, 1992

PROFESSIONAL MEMBERSHIPS AND ASSOCIATIONS:

- Society of American Military Engineers

MAJOR PUBLICATIONS:

- Holding Back the Grundy Floods, *Military Engineer*, November/December 1991. co-author



PRESENTER BIOGRAPHY



Dr. Charlie Yoe

Professor of Economics, Notre Dame of Maryland University

Dr. Yoe's current areas of primary research are risk analysis and natural resource planning. A former USACE economist and project manager for over two dozen water resource planning projects, Charlie participated in development of the U.S. Army Corps of Engineers SMART Planning process, a current innovation designed to modernize water resources planning.

Dr. Yoe has developed and taught numerous courses in risk analysis, risk assessment and risk management for numerous other agencies of the U.S. federal government (DOD, EPA, DOE, FDA CVM, FDA CEDR, USDA APHIS, USDA FAS, USDA SCS, USCG, NSA) in a wide variety of risk analysis applications.

He is the author of two risk analysis and one planning textbooks as well as numerous articles, manuals, invited chapters, reference entries, and manuscripts. Dr. Yoe has applied risk assessment work in over 50 projects in risk areas as diverse as antimicrobial resistance, flooding, lahar flows, volcanic eruptions, coastal storms, ecosystem restoration, aquatic nuisance species, invasive species, cost estimation, economic analysis, budgeting, hydraulic fracturing, industrial hygiene, food defense, operation and maintenance, energy and power, dietary supplements, navigation, pest risk, business decision making, and others.



PRESENTER BIOGRAPHY



Mr. Douglas W. Lamont

***Deputy Assistant Secretary of the Army
(Project Planning and Review)***

Doug Lamont, P.E. is the Deputy Assistant Secretary of the Army (Project Planning and Review). He serves as principal advisor to the Assistant Secretary of the Army (Civil Works) on Corps of Engineers' water resources projects and on its planning and review processes. He is responsible for providing Army policy direction governing the planning and evaluation of Corps projects.

Previously, he was the Chief, Office of Water Project Review in the Headquarters, U.S. Army Corps of Engineers. He began his career in the Jacksonville District in the Planning, Engineering, and Construction-Operations Divisions. In Headquarters, Mr. Lamont's former positions included: Chief, New Starts Branch; Chief, Project Management Branch; and Chief, Policy Guidance & Application Branch.

Education: BA in Mathematics, BS Civil Engineering, and MS in Environmental Engineering. He is a Registered Professional Engineer in the States of Florida and Virginia, a Fellow of the American Society of Civil Engineers, and is an ASCE Diplomate, Water Resources Engineer (D.WRE).



PRESENTER BIOGRAPHY



Dr. Monique Mitchell Turner

***Associate Professor of Public Health,
The George Washington University***

Dr. Monique Mitchell Turner is an Associate Professor at the Milken Institute School of Public Health at The George Washington University. She received her Ph.D. in communication from Michigan State University. Dr. Turner has held faculty positions in Departments of Communication at the University of Oklahoma, University of Texas, and the University of Maryland. Dr. Turner's expertise is in risk communication, risk perception, and cognitive processing during risk—including informed decision making and critical thinking.

The former director of the Center for Risk Communication Research at the University of Maryland, Dr. Turner's research has been funded by organizations such as the Food and Drug Administration, the Joint Institute for Food Safety and Applied Nutrition (JIF-SAN), the Centers for Disease Control, Health and Human Services, and the Department of Homeland Security. Dr. Turner has written and published over 50 research papers, journal articles, book chapters and books on persuasion, health communication and risk perception. She was formerly the associate editor of *Communication Research Reports*, is the past chair of the Communication and Social Cognition Division of the National Communication Association and is the immediate past Chair of the Health Communication Division of the International Communication Association. She is currently Senior Editor of *Health Communication*.

The Civil Works Planning Program Our Vision and The Way Ahead

PRESENTERS: **BG C. David Turner, Commander South Atlantic Division**
MG John Peabody, Deputy Commanding General for Civil and Emergency Operations
Mr. Steve Stockton, Director of Civil Works
Mr. Tab Brown, Chief of Planning and Policy Division

ABOUT THIS SESSION

The main messages of this session are:

- Civil Works Transformation is critical for success of the Corps.
- Planning Modernization is working. We are seeing results in delivering on commitments, improving timely decisions.
- We must invest in our Planners – help others understand our strengths, maintain and encourage our brightest.
- Speaking with One Voice is the key to success: Challenge all of us to align expectations early and achieve Vertical Team alignment throughout.

1

WHAT I AM GOING TO TAKE BACK?

If something struck you as significant, note it here.



PLENARY CW Planning Program & Way Ahead

2 WHICH BRANCHES, SECTIONS, AND/OR INDIVIDUALS WILL THIS AFFECT IN MY DISTRICT?
List them here, note how it may affect them, and how you plan on sharing this information.

WHO NEEDS TO KNOW?	WHY DO THEY NEED TO KNOW?	HOW CAN I SHARE THIS INFORMATION?

3 WILL THIS INFORMATION AFFECT OTHER PARTIES OUTSIDE OF THE DISTRICT (NON-FEDERAL SPONSOR, OTHER AGENCIES, STAKEHOLDERS, OTHER)?
If so, list them here, note how it may affect them, and how you plan on sharing this information.

WHO NEEDS TO KNOW?	WHY DO THEY NEED TO KNOW?	HOW CAN I SHARE THIS INFORMATION?

4 ANY OTHER NOTES FOR YOUR DISTRICT?

PRESENTER: Roselle Henn, North Atlantic Division**ABOUT THIS SESSION****The main messages of this session are:**

- Planning Modernization tools were intrinsic to study success.
- Vertical Team integration was essential to maintaining an extremely aggressive schedule.
- NACCS Findings and Outcomes are being applied in the Sandy Program.

Why are these points significant for team members to know and understand?

- NACCS Findings and Outcomes have applicability to other Regions.

Supporting information and updates can be found at:

- North Atlantic Coast Comprehensive Study Report and Related Documents:
<http://www.nad.usace.army.mil/CompStudy.aspx>

1**WHAT I AM GOING TO TAKE BACK?****If something struck you as significant, note it here.**

PLENARY NACCS and Planning Modernization

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PLENARY Risk Informed Decision Making

PRESENTER: Dr. Charlie Yoe, Notre Dame of Maryland University

ABOUT THIS SESSION

The main messages of this session are:

- The world is increasingly complex and planning is evolving to meet the challenges.
- Embrace the uncertainty – prepare for life-cycle of decisions under uncertainty.
- Other agencies have struggled, and learned, as they've managed risk in complex systems.
- Managing for outcomes is more effective than trying to control complexities.
- Make an enterprise-wide commitment to strategic risk management; make it a part of everything that you do.

1

WHAT I AM GOING TO TAKE BACK?

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WORKING TOGETHER TO MODERNIZE PLANNING

2015 NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING WORKSHOP

PLENARY Risk Informed Decision Making

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

PLENARY

Lessons Learned in Risk Management Implementation for Division, Branch and Section Chiefs

PRESENTER: Dr. Charlie Yoe, Notre Dame of Maryland University

1

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2015 NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING WORKSHOP

PLENARY

Lessons Learned in Risk Management Implementation

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PLENARY View from Washington

PRESENTER: Mr. Doug Lamont, Deputy Assistant Secretary of the Army,
Project Planning and Review

ABOUT THIS SESSION

The main messages of this session are:

- Our current environment requires agility, flexibility, and a focus on National Priorities.
- Planning Modernization matters inside and outside USACE.

1

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PLENARY View from Washington

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Beyond Planning: Perspectives and Integration Across USACE CoPs

PRESENTERS: Bob Bank, Chief, Civil Works Branch, Engineering & Construction
Andrea Bias-Streat, Deputy Leader, Program & Project Management CoP
John Cline, Senior Realty Specialist, HQUSACE Real Estate CoP
Eric Halpin, Special Assistant for Dam and Levee Safety
Bob Leitch, Asset Management Program Manager

ABOUT THIS SESSION

The main messages of this session are:

- Other CoPs are actively supporting Planning Modernization.
- There is a role for planners and problem solving across the life-cycle of Civil Works Projects.

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Beyond Planning: Perspectives and Integration Across USACE CoPs

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PLENARY Critical Thinking

PRESENTER: Dr. Monique Turner, The George Washington University

ABOUT THIS SESSION

The main messages of this session are:

- Understand and employ common characteristics of a critical thinker.
- Recognize ways to improve individual and team non-biased critical thinking and decision making.
- Be aware of biases and their effects on decision-making.

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WORKING TOGETHER TO MODERNIZE PLANNING

2015 NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING WORKSHOP

PLENARY Critical Thinking

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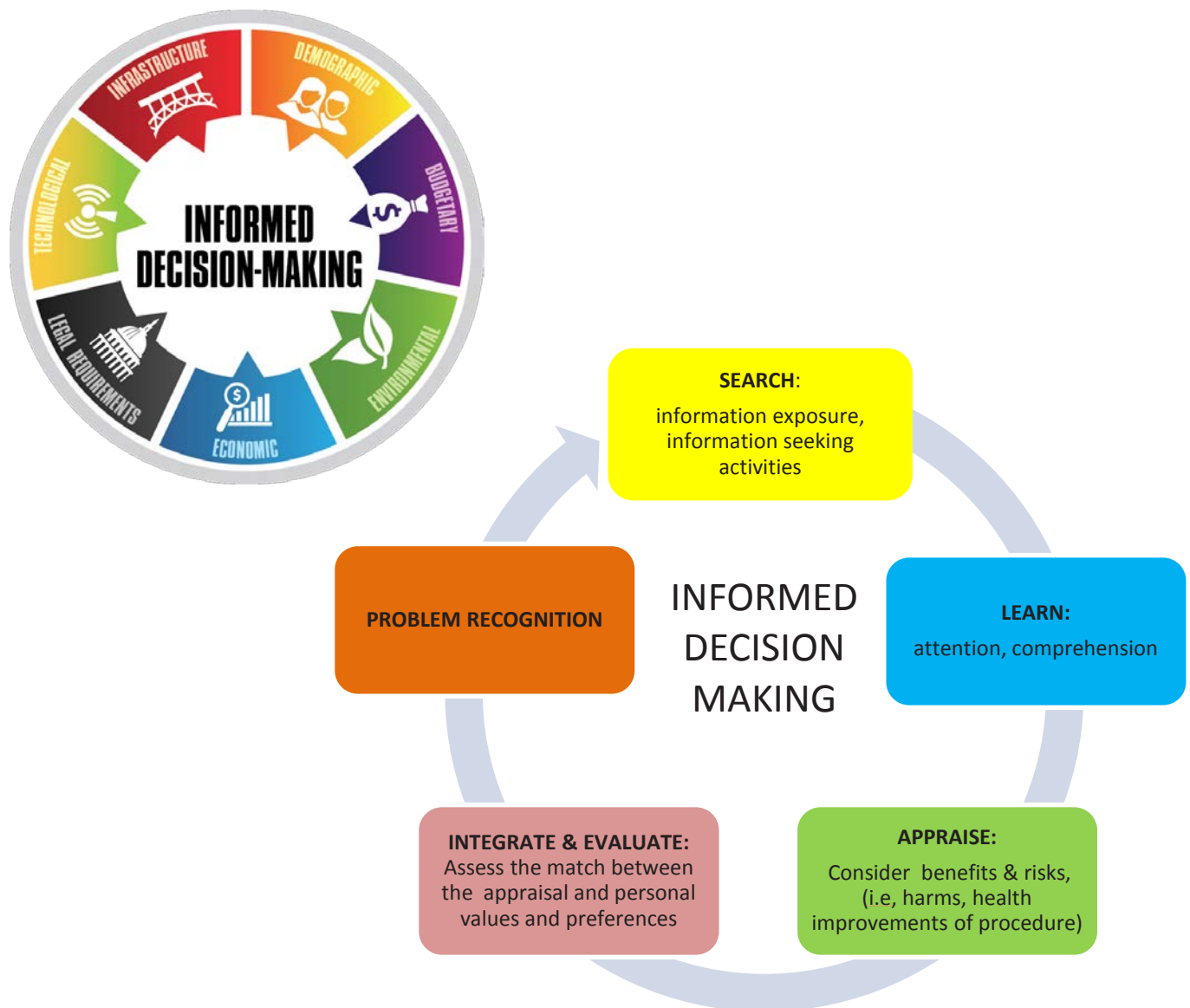
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Table 1: Definitions of critical thinking¹

Purposeful thinking in which individuals systematically and habitually impose criteria and intellectual standards upon their thoughts.
A composition of skills and attitudes that involve the ability to recognize the existence of problems and to support the truthfulness of the problems.
The propensity and skill to engage in an activity with reflective skepticism.
The process of purposeful, self-regulatory judgment.



¹ Tables recreated from knowledge gained from: Walker, S. E. (2003). Active Learning Strategies to Promote Critical Thinking, *J. Athl Train*, 38(3): 263–267.

Table 2: Dispositions of critical thinkers

DISPOSITION	DEFINITION
Inquisitiveness	One’s intellectual curiosity and desire for learning.
Open mindedness	Being tolerant of divergent views and sensitive to the possibility of one’s own bias.
Systematicity	Being orderly, organized, focused, and diligent in inquiry.
Analyticity	Prizing the application of reasoning and use of evidence to resolve problems, anticipating potential conceptual or practical difficulties, and consistently being alert to the need to intervene.
Truth seeking	Being eager to seek the best knowledge in a given context, courageous about asking questions, and honest and objective about pursuing inquiry even if the findings do not support one’s self-interests or one’s pre-conceived opinions.
Self-confidence	Trusting the soundness of one’s own reasoned judgments and leading others in the rational resolution of problems.
Maturity	Approaching problems, inquiry, and decision making with a sense that some problems are necessarily ill-structured; some situations admit more than 1 plausible option; and many times judgments must be made based on standards, contexts, and evidence that preclude certainty.

Table 3: Example of questions to ask in a critical thinking session

CATEGORY	KEY CONCEPTS	EXAMPLES of QUESTIONS
Knowledge	Memorization, description	What, when, who, define, describe, identify, state, show, how
Comprehension	Explanation, comparison	Conclude, demonstrate, rephrase, differentiate, explain, give an example of
Application	Solution, application	How would you...
Analysis	Induction, deduction, logic	Support your, what assumptions, what reasons, does the evidence support this conclusion, what behaviors
Synthesis	Productive thinking	Think of a way, propose a plan, develop, suggest, formulate a solution
Evaluation	Judgment, selection	Choose, evaluate, decide, defend, what is the most appropriate...

PLENARY Working Together to Modernize Planning

PRESENTERS: Brian Harper, Wes Coleman, Sue Hughes

ABOUT THIS SESSION

The main message of this session is:

- Summary and key messages of the three tracks - Delivering on Our Commitments, Aligning Expectations and Sustaining Planning Capability.

1

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WORKING TOGETHER TO MODERNIZE PLANNING

2015 NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING WORKSHOP

PLENARY Working Together to Modernize Planning

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PRESENTER: Mr. Tab Brown, Chief HQ Planning and Policy

ABOUT THIS SESSION

The main messages of this session are:

- Planning is well positioned to lead the Corps in formulating solutions to the Nation's challenging water resources problems.
- The role of planners as problem-solvers is important for the future of Civil Works.
- Planning Modernization is an important first step. We have accomplished a lot, and there is a lot that remains to be done.

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Looking Forward – The Corps Planning Program in 2020 and Beyond

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NATIONAL PLANNING COMMUNITY
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Working Together to Modernize Planning



DELIVERING ON OUR COMMITMENTS —
PROJECT DELIVERY &
THE PLANNING PROGRAM

Session Take Back Forms & Handouts



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Working Together to Modernize Planning

Delivering sustainable solutions to America's water resource challenges.
Our People, Process, Projects and Program

DELIVERING ON OUR COMMITMENTS SESSIONS

- Understanding the Breadth of the Planning Portfolio
- Building the Planning Portfolio: New Start Selection Process, ASA(CW) Perspective, and J-Sheet Development
- The First 90 Days of a New Feasibility Study
- Keeping up with Policy
- Habitat Mitigation Planning, Monitoring and Adaptive Management in a 3x3x3 Environment
- Environmental Compliance and Interagency Coordination and Communication in a 3x3x3 Environment
- Large Scale Studies: Succeeding with Feasibility, Watershed, and Comprehensive Studies



SESSION

Understanding the Breadth of the Planning Portfolio

PRESENTERS Eric Halpin, Katie Williams, Travis Creel, Bob Leitch, and Lisa Kiefel

ABOUT THIS SESSION

The main messages of this session are:

Participants will recognize the breadth of planning activities in our portfolio including:

- Investigations, including Specifically Authorized studies (Feasibility including GRRs; Watershed; and Comprehensive Studies) and Remaining Items (FPMS and PAS)
- Construction, including CAP and LRRs (VR)
- Operations, including Safety and Major Rehab

Why are these points significant for team members to know and understand?

- Planning is required throughout the project life cycle.
- Recognize when planning is needed.
- Understand the roles/responsibilities of the planner at the different stages.

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SESSION

Understanding the Breadth of the Planning Portfolio

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SESSION

Building the Planning Portfolio – New Start Selection Process, ASA(CW) Perspective, and J-Sheet Development

PRESENTERS Amy Sharp and Lisa Kiefel

ABOUT THIS SESSION

The main messages of this session are:

The game has changed! We need to get on board in order to succeed.

- Understand the Program cycle and what each stage means to your study.
- Understand the role execution plays in the program.
- Understand how to build a relevant portfolio: the budgeting process; new start selection process; prioritization within business lines; perspectives of ASA(CW), OMB and Congress
- Improve Product Quality – J-Sheet Workshop/Demonstration.

Why are these points significant for team members to know and understand?

- Understanding of the stages will enable Planners to plan better.
- Understanding the budget process will help us to build our portfolio.
- High quality products will result in more support from HQ and agencies outside the Corps.

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SESSION Building the Planning Portfolio

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SESSION The First 90 Days of a New Feasibility Study

PRESENTERS: Valerie Ringold, Rachel Mesko, and Rebecca J. Weiss

Q/A PANEL: Brian Harper and Evie Haberer

ABOUT THIS SESSION

The main messages of this session are:

Participants will learn the new procedures in beginning a feasibility study with no reconnaissance phase, including:

- Signing a Feasibility Cost Sharing Agreement (FCSA) up front before working on a Project Management Plan (PMP) for the study.
- After signing the FCSA, concurrent efforts in vertical team scope development/charette, developing the PMP, and reaching the Alternatives Milestone within a goal of 90 days from signing the FCSA. District Engineer needs to send out notifications to relevant non-Fed interests.
- Environmental Compliance actions to be done (NEPA scoping).

Why are these points significant for team members to know and understand?

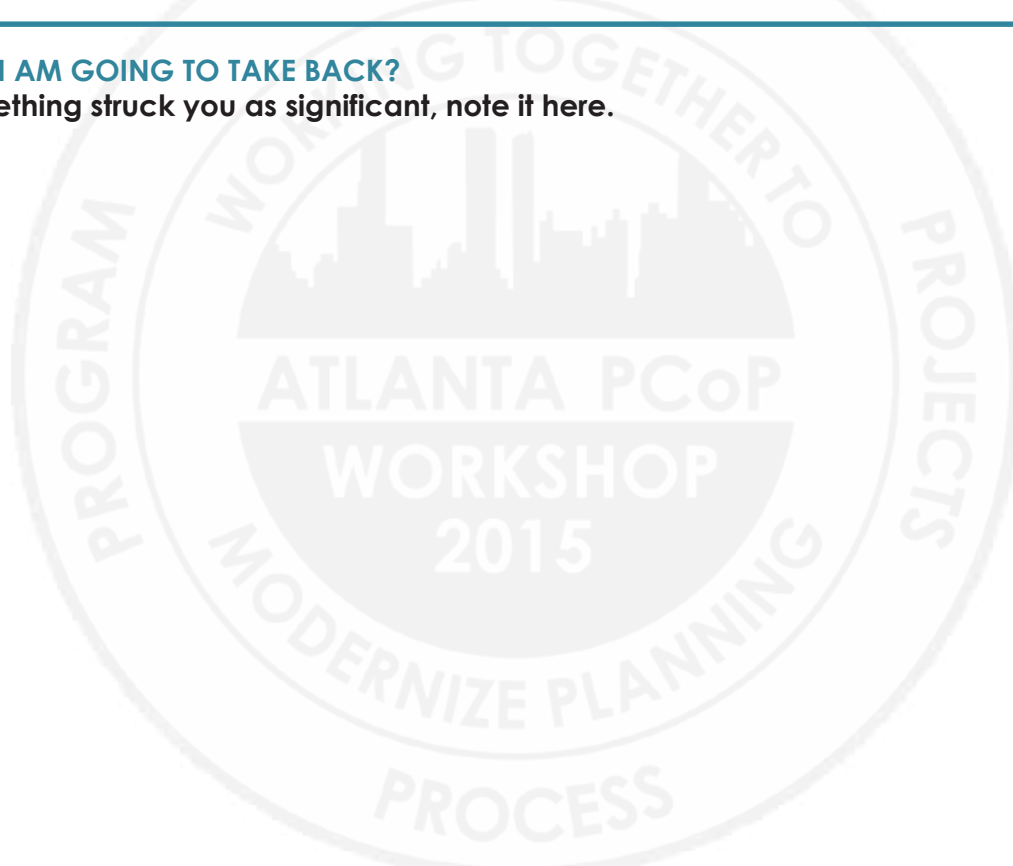
- Importance of developing and nurturing relationships & communicating with sponsors.
- Importance of having vertical team alignment.
- Scoping should be for next decision point.
- First 90 days sets the foundation for the study and first milestone.

Supporting information and updates can be found at:

- Implementation Guidance for WRRDA Section 1002:
http://www.usace.army.mil/Portals/2/docs/civilworks/Project%20Planning/wrda/2014/2014_sec_1002.pdf
- Single Phase Study Resources page on the Planning Community Toolbox

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SESSION The First 90 Days of a New Feasibility Study

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SESSION Keeping Up with Policy

PRESENTERS: Jeanette Gallihugh, Brian Harper, and Tammy Conforti

ABOUT THIS SESSION

Supporting information and updates can be found at:

- WRDAs and other Key Laws on the Planning Community Toolbox:
<http://planning.usace.army.mil/toolbox/current.cfm?Title=WRDAs%20and%20Related%20Laws&ThisPage=WRDALaw&Side=No>
- WRRDA 2014 Implementation Guidance:
http://www.usace.army.mil/Missions/CivilWorks/ProjectPlanning/LegislativeLinks/wrrda2014/wrrda2014_impguide.aspx

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SESSION Keeping Up with Policy

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SESSION

Habitat Mitigation Planning, Monitoring, and Adaptive Management in a 3x3x3 Environment

PRESENTERS: Jeff Trulick and Debby Scerno

Q/A PANEL: Tomma Barnes, Ken Barr, and Jeff Lin

ABOUT THIS SESSION

The main messages of this session are:

- Awareness of the policies directly impacting monitoring and adaptive management (AM) plans for habitat mitigation.
- Awareness of the policies directly impacting monitoring and AM plans for ecosystem restoration (ER) projects.

Why are these points significant for team members to know and understand?

- SMART Planning has not changed the requirements in regards to mitigation planning or monitoring and AM for mitigation and ER.
- The lack of policy compliant mitigation/ER monitoring and AM plans is common.
- Controlling guidance is found in PGN Appendix C, the implementation guidance (IG) for WRDA 2007, Sections 2036 and 2039 and more recently WRRDA Section 1040.
- Project mitigation is a formulated project feature just like any other project feature.
- Mitigation/ER should be based on functional assessments and perhaps models.

Supporting information and updates can be found at:

- WRDA and WRRDA Implementation Guidance on the Planning Community Toolbox: <http://planning.usace.army.mil/toolbox/guidance.cfm?Option=WRDALaw&Sort=YearDesc&Type=WRDA%20Implementation&Side=Yes>
- The Application of Adaptive Management to Ecosystem Restoration Projects (April 2012): <http://acwc.sdp.sirsi.net/client/search/asset/1020160>
- Corps' Ecosystem Restoration Gateway: <http://cw-environment.usace.army.mil/restoration.cfm>

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SESSION

Habitat Mitigation Planning, Monitoring, and AM in a 3x3x3 Environment

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SESSION

Environmental Compliance and Interagency Coordination and Communication in a 3x3x3 Environment

PRESENTERS: Rebecca Weiss, Evie Haberer, Steve Fischer, and Cindy Upah

ABOUT THIS SESSION

The main messages of this session are:

- Identifying timing components to complete environmental compliance within an integrated NEPA-SMART Planning framework.
- Identify which environmental tasks and products are required per SMART Planning milestone.
- “Early and often” is still the mantra for interagency coordination.

Why are these points significant for team members to know and understand?

- Environmental compliance is directly tied to appropriate timing in a feasibility study, both for uncovering issues that should be addressed for compliance, and for integration into formulation. The environmental resources and concerns help develop the problems, opportunities, measures and alternatives for evaluation (which is also required by NEPA).
- In order to meet SMART Planning milestones, and have the pertinent information available for informed decision making, a renewed emphasis on the timing of environmental tasks and products will lead to successful and environmentally compliant reports and milestone meetings.
- Early interagency coordination is the most efficient way to remain within scope and schedule is to engage with agencies from the start.

Supporting information and updates can be found at:

- Environmental Compliance and related webinars on the Planning Community Toolbox: <http://planning.usace.army.mil/toolbox/resources.cfm?Id=0&WId=213&Option=Planning%20Webinars>

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Env. Compliance and Interagency Coordination and Communication

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USACE
SMART
PLANNING

Environmental Evaluation

SESSION

Large Scale Studies: Succeeding with Feasibility, Watershed, and Comprehensive Studies

PRESENTERS: Ray Wimbrough, Cindy Tejada, and Steve Kopecky

ABOUT THIS SESSION

The main messages of this session are:

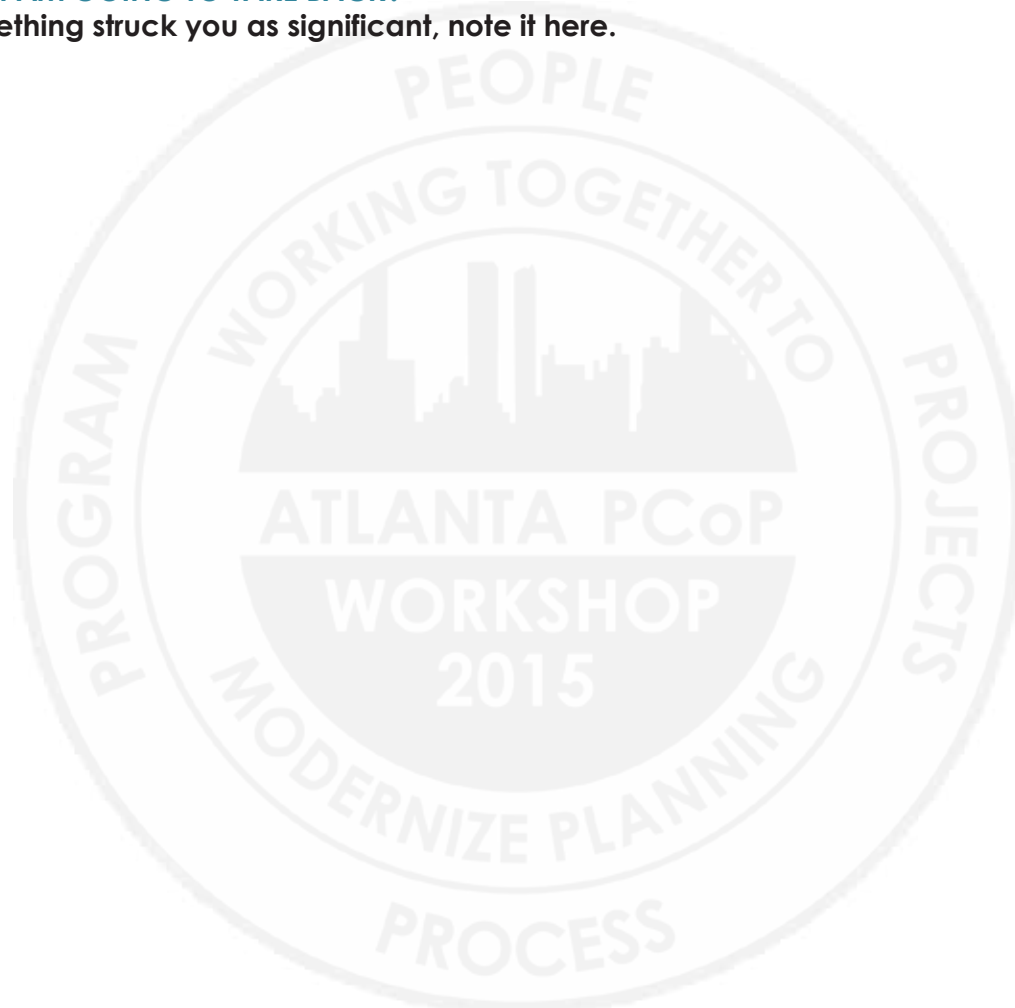
- Discuss the differences between large-scale Feasibility, Watershed and Comprehensive studies.
- Describe how to develop a formulation and evaluation strategy.
- Recognize the interagency and national-level engagement required with large-scale studies.
- Describe how comprehensive plans can fit in the USACE investment strategy.

Why are these points significant for team members to know and understand?

- Study authorities are highly variable.
- Vertical team alignment is critical.
- Meeting sponsor and stakeholder expectations can be difficult.
- Implementation can be more challenging than plan development.

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SESSION

Large Scale Studies: Feasibility, Watershed, and Comprehensive Studies

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NATIONAL PLANNING COMMUNITY
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Working Together to Modernize Planning



ALIGNING EXPECTATIONS — DECISION-MAKING ROLES AND RESPONSIBILITIES

Session Take Back Forms & Handouts



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ALIGNING EXPECTATIONS SESSIONS

- Review Roles & Responsibilities
- District Quality Control and Agency Technical Review: What You Should Know
- Understanding the 3x3x3 Rule and Exemption Process
- Lessons Learned in Concurrent Review and Issue Resolution Process Strategies
- Making, Documenting and Sharing Decisions
- Critical Thinking and Its Application
- How to Effectively Write and Respond to Review Comments



CIVIL
WORKS
REVIEW

SESSION Review Roles & Responsibilities

PRESENTERS: Stephanie Groleau, Andy MacInnes, Jeff Strahan and Cliff Jones

ABOUT THIS SESSION

The main messages of this session are:

- Identify and explain the types and timing of reviews (milestones) and expectations.
- Discuss how roles and responsibilities have been done in the past in response to guidance. Talk about how these roles are vital and evolving in planning modernization.
- The purpose of review is to provide a technically sound, legally and policy compliant recommendation for authorization or implementation.

Why are these points significant for team members to know and understand?

- In order for our agency to remain relevant, and continue to solve water resource problems, quality must be a priority.
- QA is a continuous process review, not a product review, and is inherently connected to DQC. Without a standard QA process, product quality is not consistent across the Corps.
- In order for reviews to be successful, review roles and responsibilities must be clear and the types of reviews must be connected.

Supporting information and updates can be found at:

- Planning Guidance Notebook, Appendix H:
<http://planning.usace.army.mil/toolbox/library/ERs/1105-2-100%20App%20H%20Policy%20Compliance%20Review.pdf>
- EC 1165-2-214, Civil Works Review:
<http://planning.usace.army.mil/toolbox/library/Ecs/EC1165-2-214.pdf>
- Feasibility Study Implementation Frequently Asked Questions:
<http://planning.usace.army.mil/toolbox/faqs.cfm>

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SESSION Review Roles & Responsibilities

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- 4** ANY OTHER NOTES FOR YOUR DISTRICT?

PRESENTERS: Greg Steele and Elliott Stefanik

ABOUT THIS SESSION

The main messages of this session are:

Participants will learn:

- The distinction between District Quality Control (DQC) and Agency Technical Review (ATR).
- DQC and ATR requirements - including the ongoing, targeted, scalable and iterative nature of DQC and ATR.
- Tips and techniques to execute DQC and ATR processes.
- How to access CoP and Sub-CoP lists of ATR certified reviewers.

Why are these points significant for team members to know and understand?

- Buying into review process results in more efficient, effective reviews, and ultimately, quality products.
- Understanding reviews/review processes translates to time and money savings for those reviews.

Supporting information and updates can be found at:

- Planning Community Toolbox, "Peer Review" page:
<http://planning.usace.army.mil/toolbox/current.cfm?Title=Peer%20Review&ThisPage=Peer&Side=No>
- Flood Risk Management PCX ATR Roster (SharePoint):
<https://cops.usace.army.mil/sites/PLAN/pcx/FRMPCX/Web%20Part%20Pages/ATR%20Roster.aspx>

1 WHAT I AM GOING TO TAKE BACK?

If something struck you as significant, note it here.

SESSION

District Quality Control and Agency Technical Review – What You Should Know

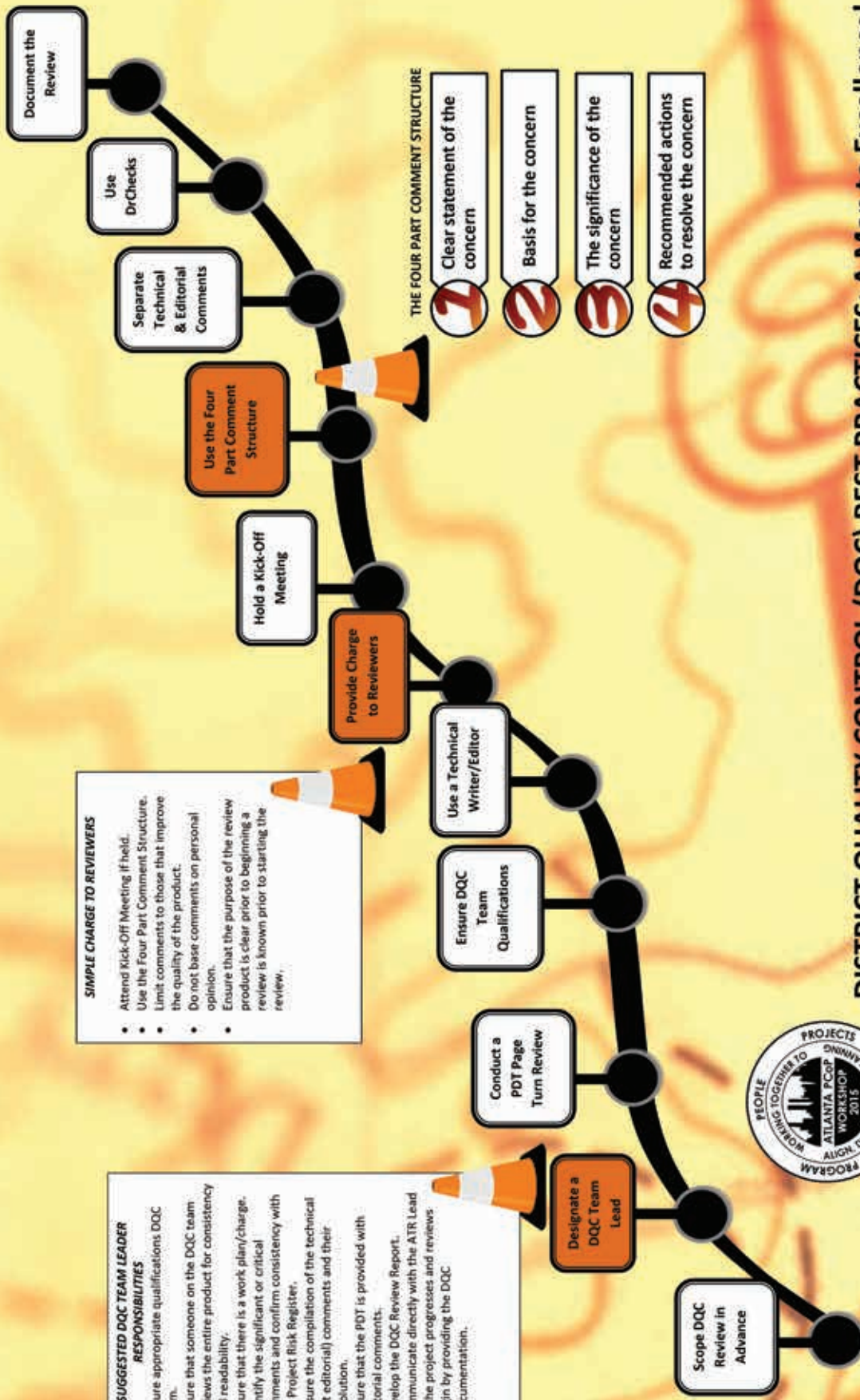
2 WHICH BRANCHES, SECTIONS, AND/OR INDIVIDUALS WILL THIS AFFECT IN MY DISTRICT?
List them here, note how it may affect them, and how you plan on sharing this information.

WHO NEEDS TO KNOW?	WHY DO THEY NEED TO KNOW?	HOW CAN I SHARE THIS INFORMATION?

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4 ANY OTHER NOTES FOR YOUR DISTRICT?



SUGGESTED DQC TEAM LEADER RESPONSIBILITIES

- Ensure appropriate qualifications DQC team.
- Ensure that someone on the DQC team reviews the entire product for consistency and readability.
- Ensure that there is a work plan/charge. Identify the significant or critical comments and confirm consistency with the Project Risk Register.
- Ensure the compilation of the technical (not editorial) comments and their resolution.
- Ensure that the PDT is provided with editorial comments.
- Develop the DQC Review Report.
- Communicate directly with the ATR Lead as the project progresses and reviews begin by providing the DQC documentation.

SIMPLE CHARGE TO REVIEWERS

- Attend Kick-Off Meeting if held.
- Use the Four Part Comment Structure.
- Limit comments to those that improve the quality of the product.
- Do not base comments on personal opinion.
- Ensure that the purpose of the review product is clear prior to beginning a review is known prior to starting the review.

- THE FOUR PART COMMENT STRUCTURE**
- 1 Clear statement of the concern
 - 2 Basis for the concern
 - 3 The significance of the concern
 - 4 Recommended actions to resolve the concern



DISTRICT QUALITY CONTROL (DQC) BEST PRACTICES: A Map to Excellence!

PRESENTERS: Wes Coleman, Charlie Hanneken

Q/A PANEL: Kendall Zaborowski, Cindy Barger, Mark Cowan, and Jeff Trulick

ABOUT THIS SESSION

The main messages of this session are:

Participants will learn the procedures and philosophy for developing a 3x3x3 exemption request:

- Explain the 3x3x3 Rule covered by implementation guidance for section 1001 and PB2012-04.
- Understand the philosophy behind developing a 3x3x3 exemption.
- List the criteria/qualifications for an exemption request and summarize the mechanics of the exemption process.
- Key/common stages when an exemption need is identified.

Why are these points significant for team members to know and understand?

- Decision for study exceeding 3x3x3 is a decision that relies on utilizing clear, logical, risk informed thought.
- There is no “one size fits all” study. Many are 3x3x3 compliant but some are not. It's about getting the correct level of detail.
- Importance of early and often vertical team involvement in scoping.

Supporting information and updates can be found at:

- Implementation Guidance for WRRDA Section 1001:
http://www.usace.army.mil/Portals/2/docs/civilworks/Project%20Planning/wrda/2014/2014_sec_1001.pdf
- PB2012-04: 3x3x3 Rule Exemption Process:
<http://planning.usace.army.mil/toolbox/library/pb/PB2012-04.pdf>
- Examples of successful 3x3x3 exemption packages will be available on the Workshop SharePoint site: <https://cops.usace.army.mil/sites/PLAN/PCoPtrn/>

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SESSION

Understanding the 3x3x3 Rule and Exemption Process

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

Lessons Learned in Concurrent Review and Issue Resolution Process Strategies

PRESENTERS: Bret Walters, Rachel Mesko, Wes Coleman, Judy McCrea

Q/A PANEL: Naomi Fraenkel, Jeremy LaDart, Andy MacInnes, Debby Scerno, and Pat O'Donnell

ABOUT THIS SESSION

The main messages of this session are:

- The tools available to manage and respond to number of comments received during concurrent review.
- The process for identifying and resolving conflicting comments.
- Available processes for resolving outstanding comments/issues.

Why are these points significant for team members to know and understand?

- Concurrent review is a new process and presents new challenges.
- Lack of timely issue resolution is often an impediment.
- Existing tools, guidance, and lessons learned from other PDTs can help avoid problems related to concurrent review and issue resolution.

Supporting information and updates can be found at:

- Planning Community Toolbox SMART Guide: The TSP Milestone:
<http://planning.usace.army.mil/toolbox/smart.cfm?Section=4&Part=0>
- PCoP Webinar Series: Different Perspectives on Concurrent Review (June 2013):
<http://planning.usace.army.mil/toolbox/resources.cfm?Id=0&Option=Planning%20Webinars>
- WRRDA 2014 Implementation Guidance:
<http://www.usace.army.mil/Missions/CivilWorks/ProjectPlanning/LegislativeLinks/wrrda2014/>
- Planning Bulletin 2013-03: SMART Planning Milestones:
http://planning.usace.army.mil/toolbox/library/pb/PB2013_03.pdf

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SESSION

Lessons Learned in Concurrent Review and Issue Resolution Process Strategies

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Review type	Comment ID	Response author	Document to be revised	Where change is needed (e.g., page, section)	Change needed	Who needs to make revision	"X" if done	Notes (e.g., info needed, next steps)
ATR	5911292	Cory Koger/Judy McCrea	Integrated document	Section CS-3 (page CS-1)	Editorial		X	
ATR	5912685	Jeremy Britton/Nick Malasavage	NA	NA	Outboard dike fragility curve		NA	Appendix F (part 1) and ES (S-14) already provided info needed.
ATR	5919725	Cory Koger/Judy McCrea	Integrated document	Page 3-30 (paragraph 2)	Add figure of bench evolution?		NA	no change needed
ATR	5919791	Cory Koger/William Delager	Integrated document	Page 3.64 (bullet 1.1)	Include baseline mercury monitoring and methyl mercury		NA	Reviewer's backcheck recommendation: "Concur, but I would like to see this discussion added as a paragraph in the Engineering Appendix so that it is documented that erosion has been evaluated by the PDT."
ATR	5921177	Rick Torbik/Nick Malasavage	Appendix G (civil design appendix)	?	Discuss need for or the reason for not needing wind wave force erosion	Nick Malasavage		
ATR	5923714	Frank Buonaluto/Judy McCrea	Integrated document	Executive Summary	Need to clarify study boundaries (0.2% ACE floodplain)		X	
ATR	5926310	Jodie Foster/Michael Hallisy	Appendix D (Economics)	Appendix D (section 2)	Add a diagram and text about existing conditions	Mike Hallisy		
ATR	5927717	Scott Miner/Judy McCrea	Integrated document	Section 10.2	Revise wording around cost-sharing requirements in items of cooperation	Judy McCrea		Need to coordinate with Office of Counsel
ATR	5927735	Scott Miner/Judy McCrea	Integrated document	Throughout report	Need economic justification for recreation features if WRRDA IG provided and NFS wants USACE to cost share USFWS rec features	Judy McCrea / Mike Hallisy		Mike has provided draft economic analysis results, which must be ATR'ed
ATR	5927739	Scott Miner/Judy McCrea	Integrated document, Real Estate Plan	Throughout report	Same as previous comment	Judy McCrea / Bonievee Delapaz		
ATR	5936460	Tanis Toland/William Delager	Integrated document	Chapter 9	Incomplete rec plan - missing real estate req and costs to guarantee permanent public access to Artesian Slough ped bridge? Also needs to be added to the real estate plan.	Bill Delager		
ATR	5936476	Tanis Toland/William Delager	Integrated document	Additional documentation - appendix item	Increase clarity about remaining NEPA steps	Bill Delager		
ATR	5936521	Tanis Toland/Judy McCrea	Integrated document	Chapter 3, 4, 9	Include documentation of USFWS recognition of co-lead status	Stacie		
ATR	5936530	Tanis Toland/Judy McCrea	Appendix I (MAMP)	Chapter 3, 4, 9	Review description of alternatives in Ch 3, 4, 9 and ensure consistency. Add critical information to Ch 3 from other chapters.		NA	no change needed
ATR	5936584	Tanis Toland/William Delager	Integrated document, Appendix J (CHAP report)	Chapter 4 of Int Doc and Appendix J	Include approach for invasive animals and water quality parameters	Bill Delager		Question to Bill - any changes to the AAHU's?
ATR	5947792	Gary Smith/Matthew Young	Cost estimating appendix	REP (page 6)	Provide new CHAP report and revise AAHUs in main report if needed	Matt Young		
ATR	5949118	Adam Oestreich/Bonievee Delapaz	Real Estate Plan	REP (page 6)	Adaptive Management Costs; document development of this cost	Bonievee Delapaz		
ATR	5949147	Adam Oestreich/Bonievee Delapaz	Real Estate Plan	REP, Section 4 (page 5)	anticipated duration of the Temporary Work Area Easements	Bonievee Delapaz		
ATR	5970673	Jim Neubauer	Cost estimating appendix	Risk analysis	need tract listing including acreage, estates, number of tracts, ownerships and estimated value	Matt Young		
ATR					Update risk analysis			

Review type	Comment ID	Response author	Document to be revised	Where change is needed	Change needed	Who needs to make revision	"X" if done	Notes (e.g., info needed, next steps)
HQ	1	Judy McCrea	NA		Provide HQ w/ATR report		X	
HQ	2	Judy McCrea	Integrated Document	throughout	Include text of WRRDA 14 Sec 1025 and its intent	Judy McCrea		
HQ	3	Judy McCrea	Integrated Document	Section 10.2	Correct the items of cooperation (same comment as ATR #5927717)	Judy McCrea		
HQ	4	Mike Hallisy	Integrated Document, Economics Appendix, Cost estimates		Use current (FY 15 or FY 16, as appropriate) price levels for NED/NER Plan and Recommended Plan in Final Report, Civil Works Review Board material, and Chief's Report. Provide an errata sheet and updated executive summary as needed.	Matt Young / Mike Hallisy / Judy McCrea		Will have multiple "done" marks to reflect multiple milestones - Final Report submittal, CWRB, and Chief's Report
HQ	5	Mike Hallisy	Economics Appendix	throughout	Change references to EC 1165-2-212, to ER 1110-2-8162	Mike Hallisy		
HQ	6	Judy McCrea	Integrated Document	Executive Summary, Chapter 1	Section 4027 of WRDA 2007 did not amend WRDA 1976. Actual statute language needs to be used in final report.	Judy McCrea		
HQ	7	Judy McCrea	Integrated Document and others	throughout	NED Plan is 12.5' levee (pending final decision at Agency Decision Milestone)	multiple PDT		
HQ	8	Judy McCrea	NA	NA	[comment related to levee alignment and sponsor support]		NA	no change needed
HQ	9a	Judy McCrea	MAMP	Sec 2.2	emphasize that implementation of any of the phases will provide significant ecosystem benefits	Judy McCrea	X	
HQ	9b	Judy McCrea	MAMP	multiple sections	Consistency w/ Sec 2039 IG; Division Commander determines when ecological success has been achieved (also ATR comment 5927896)	Judy McCrea	X	
HQ	10	Judy McCrea	NA	NA	Cost of proposed trail along SR237 should not be included		NA	no change needed
HQ	11	Bill DeJager / Judy McCrea	Final Report Package		Include: CAR, documentation of USFWS Refuge coordination in planning process, draft Refuge Consistency Determination, MOU w/USFWS and NFS	Bill DeJager		
HQ	14	Bonivee Delapaz	Integrated Document, Real Estate Plan	Table 9-5.3 of Int Doc, REP baseline cost estimate	Update cost to reflect USFWS Ponds A9-A15. Coordinate w/VT if LER required for ER component exceeds the NFS's cost share	Judy McCrea / Bonivee Delapaz		

Review type	Comment ID	Response author	Document to be revised	Where change is needed (e.g., page, section)	Change needed	Who needs to make revision	"X" if done	Notes (e.g., info needed, next steps)
IEPR	1.1	Bill DeJager	CHAP Report (integrated document too?)		1. Discuss why the CHAP model was selected and why other ecosystem restoration models or model variants were not used during ecosystem restoration alternative screening.	Bill DeJager		
IEPR	1.2	Bill DeJager			none		NA	
IEPR	2.1	Bill DeJager	CHAP Report		1. Provide information (e.g., alteration of data inputs) to support the basis for the assumptions used in the CHAP modeling effort.	Bill DeJager		
IEPR	2.2	Bill DeJager			none		NA	
IEPR	3.1	Bill DeJager			none		NA	
IEPR	3.2	Bill DeJager			none		NA	
IEPR	4.1	Patrick O'Brien	Integrated Document; Appendix E (H&H)	Sec 9.8 (Int Doc); Sec 4.8.2 (App E)	1. Provide a more thorough discussion of residual risk from fluvial and interior drainage in Section 9.8 of the main report and 4.8.2 in Appendix E. Indicate whether the proposed project would have an adverse impact (depths and/or duration of flooding) on the fluvial flooding.	Patrick O'Brien; Patrick O'Brien		
IEPR	4.2	Patrick O'Brien			none		NA	
IEPR	4.3	Patrick O'Brien			none		NA	
IEPR	4.4	Patrick O'Brien			??			
IEPR	4.5	Patrick O'Brien			??			
IEPR	5	Mike Hallisy			none		NA	
IEPR	6.1	Matt Young	Integrated Document; Appendix G (civil design)		1. Tidal Side Bench: Determine the most appropriate cost account for the bench (e.g., COA 11 as a FRM feature or CO6 as a transitional habitat feature). Modify the cost estimate and Integrated Document accordingly to correctly identify the feature. Reevaluate NER and restoration increment of the LLP plan.			
IEPR	6.2	Matt Young			none		NA	
IEPR	6.3	Matt Young			none		NA	
IEPR	6.4	Matt Young	Integrated Document; Appendix G (civil design)		4. Evaluate risk associated with the need for dewatering, especially in Reaches 2 and 3 adjacent to Pond A16, and adjust estimate or contingency.			
IEPR	6.5	Matt Young	Integrated Document; Appendix G (civil design)		5. Correct Appendix G text regarding the quantity of wick drain linear feet. Check cost estimate to ensure correct quantity of wick drain linear feet was previously provided and used in the estimate.			
IEPR	6.6	Matt Young	Integrated Document; Appendix G (civil design)		6. Evaluate assumptions regarding availability of borrow from other non-federal sponsor-owned FRM project sites and adjust cost estimate as necessary.			
IEPR	6.7	Matt Young	Integrated Document; Appendix G (civil design)		7. Evaluate the number and placement of ditch blocks or additional channels to achieve the objective to not strand fish. Conversely, modify the objective regarding stranding fish.			

Review type	IREAL M ID	Letter Name	Code	Response Auth	Response ID (IREALM)	Response Approved?	Doc to be Rev	What change is to be made?	Section/Package	Revised To:	Completed	Notes/Requested Support
Public	8843	024_SFBTr	6	Dawn	11488		Integrated Doc			Dawn		
Public	8843	024_SFBTr	7	Dawn	11489		Integrated Doc			Dawn		
Public	8836	031_EPA	7	Dawn	11483		Dawn			Dawn		
Public	8831	016_Caltrans	9	Dawn			Integrated Doc			Dawn		
Public	8831	016_Caltrans	10	Dawn			Integrated Doc			Dawn		
Public	8855	027_RWQCB	15	Dawn	11496		Dawn					
Public	8855	027_RWQCB	16	Dawn	11497		Dawn					
Public	8856	028_CCCR.SFB	17	Dawn								
Public	8856	028_CCCR.SFB	31	Dawn								
Public	8856	028_CCCR.SFB	32	Dawn	11499		Integrated Doc			Dawn		
Public	8836	031_EPA	12	Dawn/John/Brenda								
Public	8836	031_EPA	4	Dawn/SCVWD			Dawn					
Public	8852	037_Liccardo	1	DELETED	11451							
Public	8855	027_RWQCB	18	FWS (via Brenda)								
Public	8851	036_Leddy	3	John	11492		none					
Public	8855	027_RWQCB	10	John								
Public	8855	027_RWQCB	24	John								
Public	8856	028_CCCR.SFB	1	Judy	11384		Integrated Doc					change is same as 032_BCC 1
Public	8836	031_EPA	1	Judy	11382		Integrated Doc	Describe implementation schedule and Fed and non-Fed implementation responsibilities for cost/funding, construction, monitoring and adaptive management, and operation and maintenance	Exec Summary and Ch 9	Judy		change applies to multiple comments
Public	8789	011_SLC	2	Judy	11382		Integrated Doc					change is same as 31_EPA_1
Public	8836	031_EPA	2	Judy	11382							
Public	8856	028_CCCR.SFB	6	Judy	11385		NA	none	NA	NA	NA	change is same as 31_EPA_1
Public	8846	030_SJ	6	Judy	11382							change is same as 31_EPA_1
Public	8856	028_CCCR.SFB	7	Judy	11386		NA	none	NA	NA	NA	change is same as 032_BCC 1
Public	8856	028_CCCR.SFB	11	Judy	11384							change is same as 31_EPA_1
Public	8836	031_EPA	13	Judy	11379							change is same as 31_EPA_1
Public	8855	027_RWQCB	27	Judy	11383							change applies to multiple comments
Public	8847	032_BCC	1	Judy/Brenda/Bill	11384		Integrated Doc	annotated table of contents	Ch 1	Dawn		

PRESENTERS: Ray Wimbrough, Mark Kramer, Angie Dunn, Stephanie Groleau, and Charles Hanneken

ABOUT THIS SESSION

The main messages of this session are:

- Identify roles and responsibilities of the vertical team in aligning decisions-making expectations prior to analysis.
- List methods to identify and resolve issues within the vertical team.
- Identify the planning tools used for documenting and sharing project related decisions. (DMP, decision logs, memos, charettes, IPRs, etc.).
- Identify the relationship between of the DMP, RR, and PMP in assisting teams in making informed decisions.
- Describe the overall value of all planning tools and how they inform decision making.

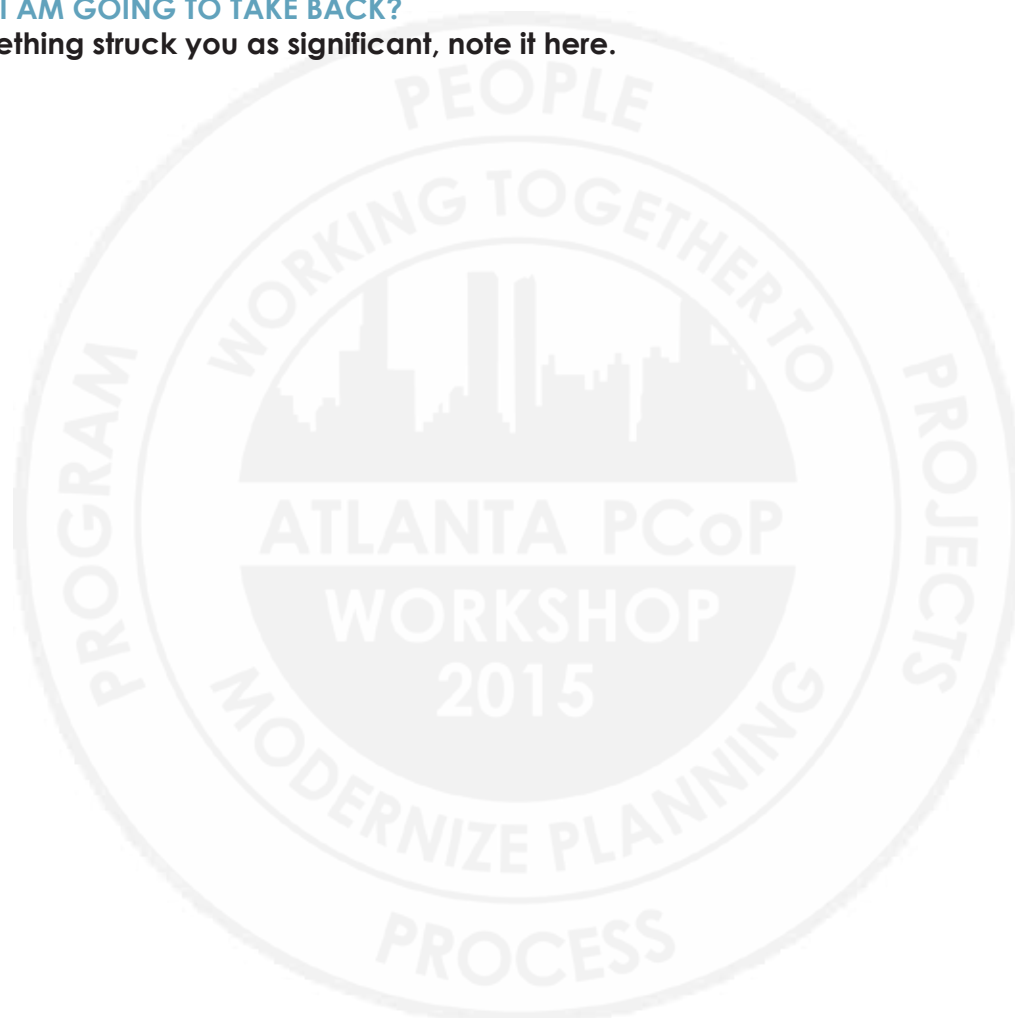
Why are these points significant for team members to know and understand?

- Define roles/responsibilities and provide transparency in the decision making process.
- Using planning tools to tell a succinct and complete story.
- Clarity of the expectations at all three levels of vertical team review for the final product.

1

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION Critical Thinking and Its Application

PRESENTER: Dr. Monique Turner

ABOUT THIS SESSION

The main messages of this session are:

- Understand what critical thinking means for Planning, planning activities, decisions, and products.
- Share methods to effectively describe creative and innovative team critical thinking that supports the iterative decision-making planning process.
- Recognize how biases affect team critical thinking.

Why are these points significant for team members to know and understand?

- Understanding, exercising and effectively communicating critical thinking will more readily align the Project Delivery and Vertical Teams, and improve the quality of reports and presentations.

1

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ALIGNING EXPECTATIONS | DECISION-MAKING ROLES AND RESPONSIBILITIES

2015 NATIONAL PLANNING COMMUNITY OF PRACTICE TRAINING WORKSHOP

SESSION Critical Thinking and Its Application

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- 4** ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

How to Effectively Write and Respond to Review Comments

PRESENTERS: Miki Fujitsubo, Camie Knollenberg, and Eric Thaut

FACILITATORS: Karen Miller, Amy Frantz, Greg Steele, and Jeremy LaDart

ABOUT THIS SESSION

The main messages of this session are:

- The requirements for and use of the 4-part comment structure.
- The key components of an effective comment response.
- When and how to document discussions between PDT members and reviewers.

Why are these points significant for team members to know and understand?

Comments and responses should be succinctly written and well supported. They should also:

- Enable timely resolution of concerns.
- Save time and money.
- Promote transparency.
- Improve the quality of planning products, decision making, and project implementation.

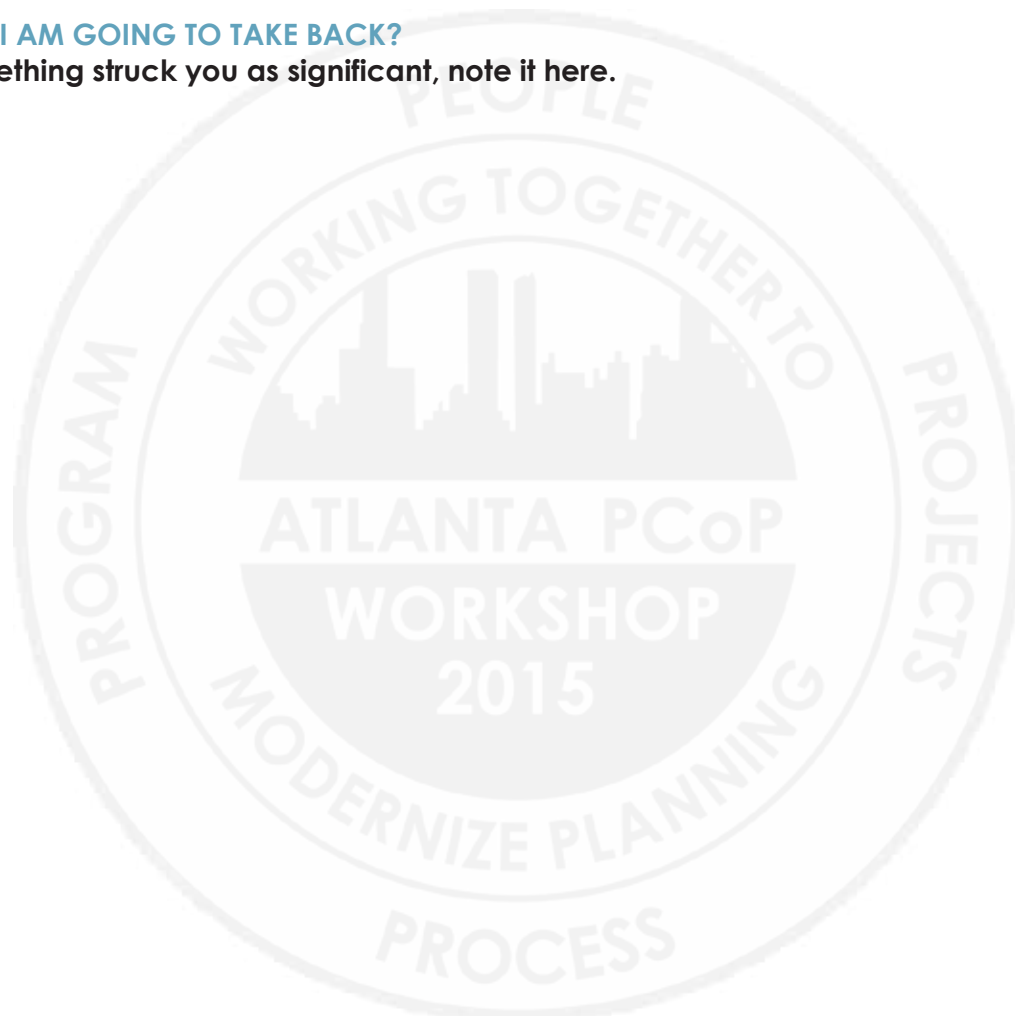
Supporting information and updates can be found at:

- Planning Community Toolbox, "Peer Review" page:
<http://planning.usace.army.mil/toolbox/current.cfm?Title=Peer%20Review&ThisPage=Peer&Side=No>

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How to Effectively Write and Respond to Review Comments

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ALIGNING EXPECTATIONS

How to Effectively Write and Respond to Review Comments

PEOPLE AND PROJECTS BENEFIT FROM EFFECTIVELY WRITTEN COMMENTS AND RESPONSES

Effectively written comments and responses:

- ✓ *Improve the quality of planning products, decision making, and project implementation,*
- ✓ *Save time and funding,*
- ✓ *Minimize schedule delays due to prolonged review engagements, and*
- ✓ *Make your life a little bit easier ... and less stressful.*

Effectively written comments and responses also promote communication and transparency, which:

- ✓ *Minimize potential misunderstandings between PDT members and reviewers,*
- ✓ *Document the review history so that previously raised concerns are not rehashed over and over,*
- ✓ *Inform decision makers about how concerns were resolved, and*
- ✓ *Result in an accountable and professional public record.*

COMPONENTS OF A COMMENT-RESPONSE RECORD



*Discussion – optional, use as appropriate

This handout describes the key components and best practices, including things to avoid, when writing effective comments, responses, and discussions.

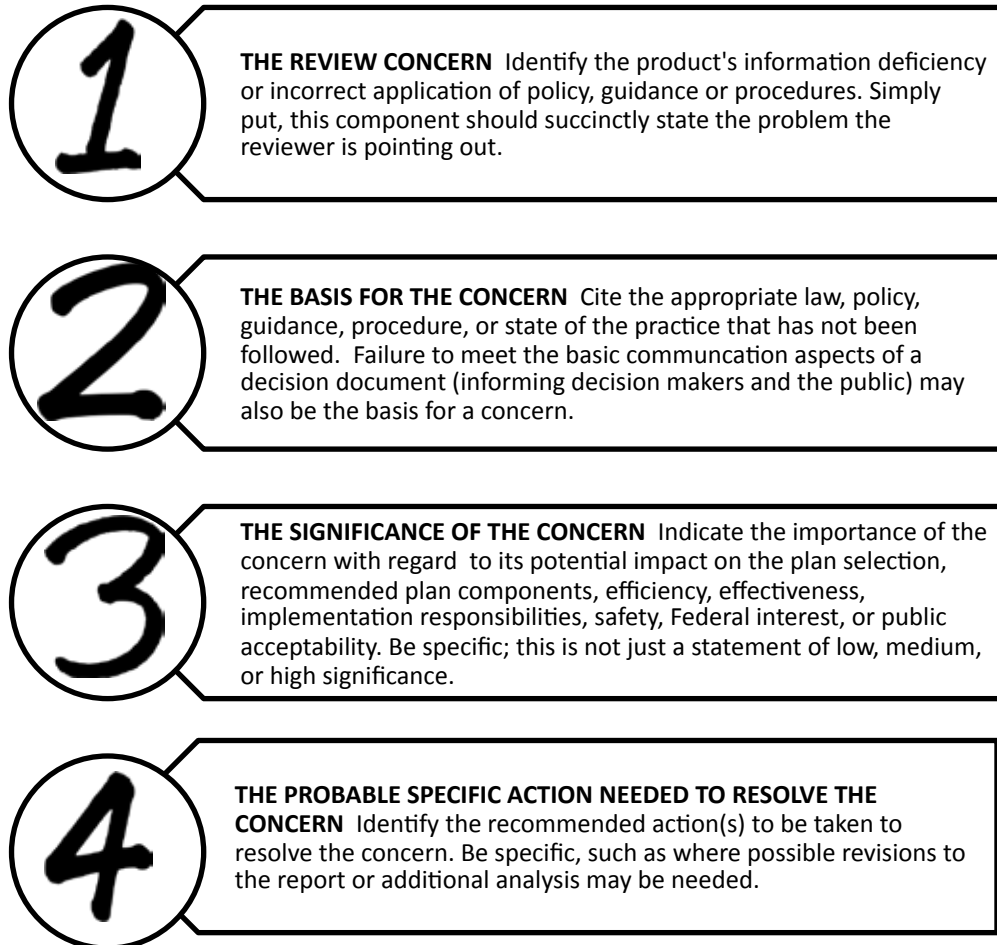
UNIVERSAL BEST PRACTICES

- ✓ Be succinct
- ✓ Be professional
- ✓ Be respectful
- ✓ Focus on improving the products, decision making, and project implementation
- ✓ Review proposed comments and responses to ensure consistency

EFFECTIVE REVIEW COMMENTS: BEST PRACTICES

- ✓ Review comments should be limited to those that are required to **ensure adequacy of the product**; that is, comments that **substantively improve** the quality of the planning product, decision making, or project implementation.
- ✓ Review comments should be **succinct** and enable **timely resolution** of the concern.
- ✓ The 4 key parts of an effective comment (**4 Part Comment Structure**) are outlined in Appendix C of EC 1165-2-214, Paragraph 3. i.
- ✓ EC 1165-2-214 requires use of the 4 Part Comment Structure for Agency Technical Review (ATR) and Independent External Peer Review (IEPR); however, its use **adds value to ANY level of review**.
- ✓ The 4 Part Comment Structure is a useful tool for writing effective comments; however, reviewers should still **think critically** when using the 4 part structure.

THE FOUR PART COMMENT STRUCTURE



*Well written review comments are the foundation of an effective review process
– just as well written problem statements are the foundation of an effective study process.*

WHAT TO AVOID WHEN WRITING AN EFFECTIVE REVIEW COMMENT

- Attempts to enforce personal preferences over otherwise acceptable practices
- The use of personal pronouns or opinions
- Criticism of an individual rather than comments on the product
- Any other issues that do not add value towards planning decisions and recommendations or do not make the plan safer, more functional, or more economical

DO NOT INCLUDE



Provide editorial and informal comments off-line; not as part of the formal comment-response record.

For example:

- Spelling, grammar, format or language
- Repetitive comments on the same subject
- Issues that will not contribute to the quality of decision making or the project
- Minor numerical errors that do not affect validity

These concerns can be most efficiently provided and addressed informally, and don't significantly benefit from use of the 4 part comment structure.

Effective use of the 4 Part Comment Structure can be challenging, and using all four parts may not always be practical depending on the nature of a given concern, but reviewers should endeavor to use the 4 parts to the whenever possible.

- For example, when addressing incomplete or unclear information, comments may seek clarification in order to then assess whether further specific concerns may exist. In such situations, comments generally would defer identifying a probable solution pending further clarification and discussion.



EFFECTIVE COMMENT RESPONSES: BEST PRACTICES

- ✓ Comment responses should clearly address the stated concern(s), with a focus on **improving the adequacy of the product**; that is, substantive improvements to the quality of the planning product, decision making, or project implementation.
- ✓ Comment responses should be **succinct** and provide **specific and relevant** information to enable **timely resolution** of the concern.
- ✓ Responses should clearly **explain the agreement or disagreement** with the comment, the **actions undertaken or to be undertaken** in response to the comment, and the reasons those actions are believed to **satisfy the stated concerns**.
- ✓ Responses should be provided by the product author or by an individual experienced in subject matter of the comment, but should also **reflect an organizational rather than individual perspective**.
- ✓ Responses should **summarize pertinent vertical coordination or guidance** that supports resolution of the concern.

5 KEY COMPONENTS TO AN EFFECTIVE COMMENT RESPONSE

Clear statement of agreement or disagreement with the comment

- Be professional and respectful in tone.
- Responses reflect the character of the team as well as the individual.

Address all stated concerns and actions

- Conduct a team quality review on all proposed responses for the entire document and appendices to ensure consistency and that all comments have been addressed adequately.

Provide information relevant to the concern, including supporting rationale

- Address relevant factors: who, what, why, where, how, and/or how much?
- Cite specific policy or technical standard to support response.

Summarize pertinent discussions with the reviewer or other subject matter experts

- Contact reviewer or PDT if clarification is needed or you cannot concur.
- Avoid back-and-forth in the review record.
- Keep the review lead informed of discussions, especially non-concur responses.


Describe how the concern has been (or will be) addressed in the document

- Include modified text in the response (if reasonable), OR
- Summarize proposed changes and provide revised document separately .
- Clearly cite where changes in document have been (or will be) made.

WHAT TO AVOID WHEN WRITING AN EFFECTIVE COMMENT RESPONSE

- Expression of personal opinions or perspectives.
- Use of personal pronouns
- Criticism of an individual rather than responding to the concern
- Becoming defensive.
- Unsupported statements
 - *Provide policy or technical basis*
- Ambiguous statements
 - *Be specific and direct, allow reviewer to react*

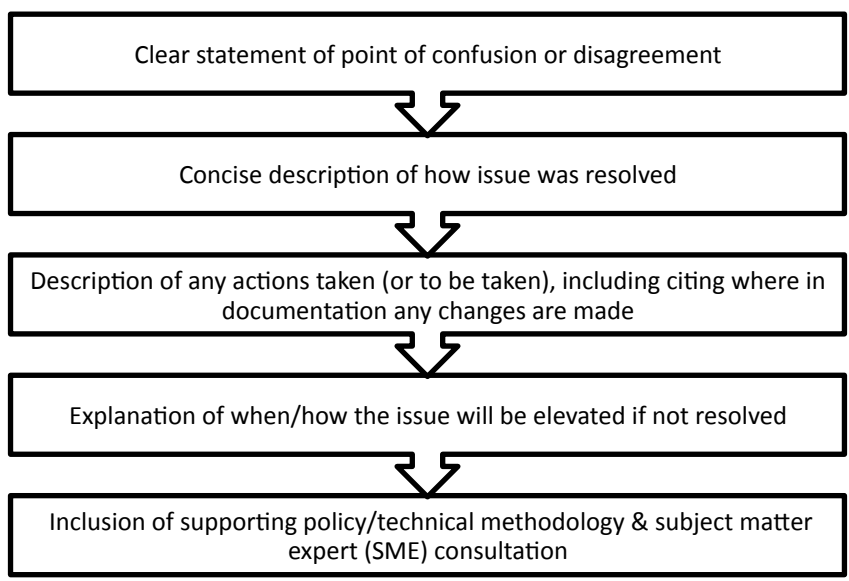
DO NOT INCLUDE



EFFECTIVE DISCUSSION DOCUMENTATION: BEST PRACTICES

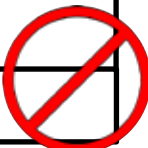
- Best practices mirror those for a comment response, and should:
 - ✓ **Summarize pertinent points** of discussion, including explaining how any disagreements were resolved (or elevated),
 - ✓ **Confirm understanding** between PDT member and reviewer,
 - ✓ Serve to **improve clarity and completeness** of the comment-response record, and
 - ✓ **Provide transparency** in the event the concern is raised later in the study or in another level of review, or should there be questions about the how the concern was resolved.

KEY COMPONENTS TO DISCUSSION DOCUMENTATION AND WHAT TO AVOID



- Verbatim record of back and forth discussion
- Expression of personal opinions/perspectives
- Criticism of an individual
- "Agree to disagree" statement; acceptable outcomes are the concern was:
 - *Resolved to the satisfaction of all parties*
 - *Determined to not be substantive after discussion*
 - *Elevated for resolution*

DO NOT INCLUDE



REASONS TO HAVE AND DOCUMENT A DISCUSSION

REVIEWER
<ul style="list-style-type: none"> • When: Prior to writing a comment. • Why: To seek clarification or additional information to better identify or describe a potential concern. • Value: Enables the reviewer to write a more effective comment or possibly to determine a comment isn't warranted. • Documentation: The discussion should result in an improved written comment.

PDT MEMBER
<ul style="list-style-type: none"> • When: Prior to writing a response. • Why: To seek clarification about a comment OR if the PDT member does not agree with the comment. • Value: Ensures understanding of the comment and helps the PDT member to provide a relevant and effective response. • Documentation: The response should include a succinct summary of the pertinent points of discussion that clarify the comment and/or the response.

REVIEWER
<ul style="list-style-type: none"> • When: During comment backcheck. • Why: To seek clarification about the response or to resolve disagreement. • Value: Ensures understanding of the response and how it did or did not address the concern. When applicable, also facilitates timely and effective resolution of any disagreements or identification of key issues to be elevated for resolution. • Documentation: Succinct summary of the pertinent points of discussion that clarify how the concern was addressed, how any disagreements were resolved, or the specific issues to be elevated for resolution.

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Session Take Back Forms



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SUSTAINING PLANNING CAPABILITY SESSIONS

- Workforce Development, Mentoring, Planner Career Roadmaps and Training
- Using the Risk Register and Decision Management Plan to Understand and Communicate Risk and Uncertainty
- Moving from Flood and Coastal Storm Damage Reduction to Risk Management
- Building the Project Management Plan and P2 Tasks based on the Risk Register and Decision Management Plan
- Virtual Teaming: Tools, Techniques, Tips and Etiquette
- More than a Report: Telling the Planning Story to Multiple Audiences
- The National Water Resources Certified Planner Program and Agency Technical Review Certification



SESSION

Workforce Development Mentoring, Planner Career Roadmaps and Training

PRESENTERS: Tiffany Vanosdall, Judy McCrea, Camie Knollenberg, and Kim Otto

ABOUT THIS SESSION

The main messages of this session are:

- Understanding the Planner Workforce Development program.
- How to access materials from the new Planning Core Curriculum (PCC).
- Formal (PROSPECT) and informal training opportunities beyond the PCC.
- Using Career Roadmaps to inform Individual Development Plans (IDPs).
- Opportunities for technical mentoring program participation.

Why are these points significant for team members to know and understand?

- Developing and maintaining planner capability is essential in ensuring quality products into the future. A variety of tools are available to assist in developing each planner, regardless of where they are in their career.
- Due to limited budgets, alternative delivery methods are being utilized to make training readily available to all planners.
- It is the responsibility of each planner and their supervisor to continually reassess training needs and develop a strategy to meet those needs.
- There's more to training than the Purple Book.

Supporting information and updates can be found at:

- USACE Learning Center: <http://ulc.usace.army.mil/>
- FY16 Purple Book: <http://ulc.usace.army.mil/downloads/purplebook2016.pdf>
- Plan Formulation career roadmap on SharePoint:
<https://cops.usace.army.mil/sites/PLAN/planform/Shared%20Documents/Career%20Roadmap%20and%20KSAs/Plan%20Form%20KSA%20and%20Training%20List%20post%20Dallas%20Meeting.pdf>

1 WHAT I AM GOING TO TAKE BACK?

If something struck you as significant, note it here.

SESSION

Workforce Development Mentoring, Planner Career Roadmaps and Training

2 WHICH BRANCHES, SECTIONS, AND/OR INDIVIDUALS WILL THIS AFFECT IN MY DISTRICT?
List them here, note how it may affect them, and how you plan on sharing this information.

WHO NEEDS TO KNOW?	WHY DO THEY NEED TO KNOW?	HOW CAN I SHARE THIS INFORMATION?
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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

Using the Risk Register and Decision Management Plan to Understand and Communicate Risk and Uncertainty

PRESENTERS: Brian Harper, Scott Nicholson, Kendall Zaborowski, and Jerry Fuentes

ABOUT THIS SESSION

The main messages of this session are:

- This session will describe the use of the Decision Management Plan and Risk Register to identify and clearly communicate study risks.

Why are these points significant for team members to know and understand?

- Don't like "surprises" during policy, technical, and public reviews? Then use these tools early to explain to others what you're going to do, how you're going to do it, and why. Put their feedback to use before you do the work, instead of after.
- Communication within the team and with the sponsor, resource agencies, and vertical team is facilitated by clear and objective evaluation of study risks.
- The DMP and RR can save time and money when they're used as complementary tools rather than viewed as checklist requirements.

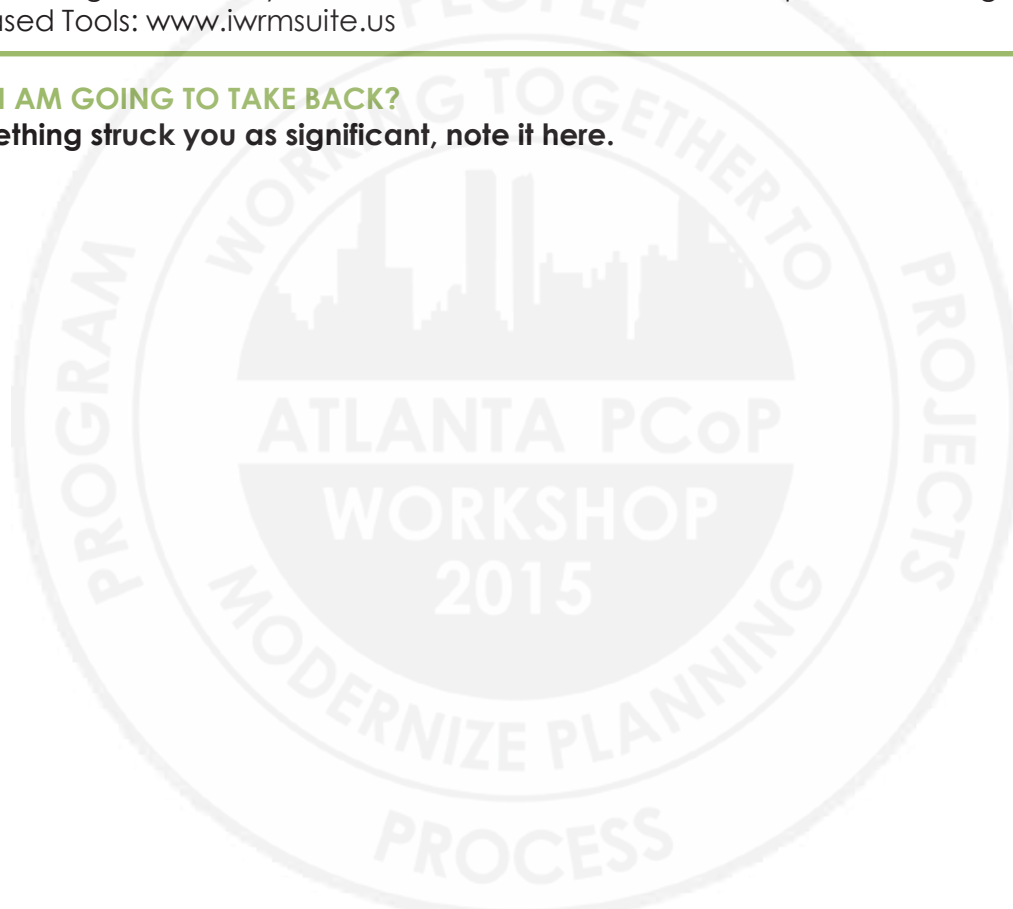
Supporting information and updates can be found at:

- SMART Guide Tools: <http://planning.usace.army.mil/toolbox/smart.cfm?Section=8&Part=0>
- Webinars on Risk Management in Planning – May 2013: <http://planning.usace.army.mil/toolbox/resources.cfm?Id=0&Option=Planning%20Webinars>
- Web-based Tools: www.iwrmsuite.us

1

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SESSION

Using the RR and DMP to Understand and Communicate Risk and Uncertainty

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

Moving from Flood and Coastal Storm Damage Reduction to Risk Management

PRESENTERS: Eric Halpin, Larry Cocchieri and Cliff Jones

FACILITATOR: Maria Wegner

ABOUT THIS SESSION

The main messages of this session are:

- Hurricane Katrina demonstrated the limitations of damage reduction. Monetary damages, primarily to structures, only account for one type of benefit/cost of projects.
- Planning after Hurricane Sandy demonstrated some of the move to a risk management framework, though some challenges remain.
- Flood and coastal storm risk are shared responsibilities. USACE can and should plan for shared implementation of risk management measures.

Why are these points significant for team members to know and understand?

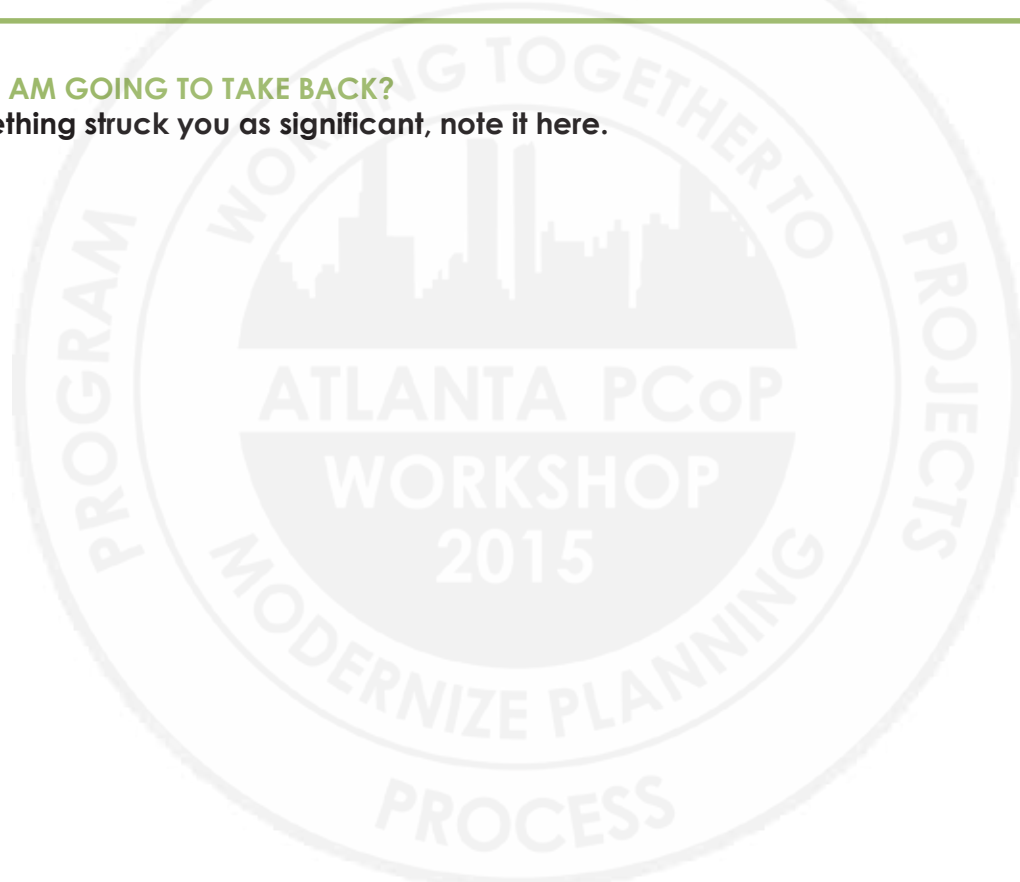
- USACE alone cannot manage flood and coastal risks.
- A risk management approach to coastal and flood risk requires USACE acknowledge uncertainties in terms of economics, human health and safety, the environment and other aspects that describe potential alternatives.
- USACE must be well-versed in risk and systems thinking and capable of engaging in and leading collaboration. (John Woodley, Jr.—April 16, 2008).

Supporting information and updates can be found at:

- Improving Public Safety: From Federal Protection to Shared Risk Reduction. Online at: <http://www.iwr.usace.army.mil/Portals/70/docs/frmp/FloodPolicyWhitePaperfEB08.pdf>

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SESSION

Moving from Flood and Coastal Storm Damage Reduction to Risk Management

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

Building the Project Management Plan and P2 Tasks Based on the Risk Register and Decision Management Plan

PRESENTERS: Melissa Hallas, Aaron Snyder and Stephanie Groleau

ABOUT THIS SESSION

The main messages of this session are:

- Focus on decisions, not tasks.
- The relationship between the Risk Register (RR), Decision Management Plan (DMP), and Project Management Plan (PMP).
- The evolution of a PMP from study start to the TSP Milestone.
- How risks and decisions evolve through the study process using the online tools available.

Why are these points significant for team members to know and understand?

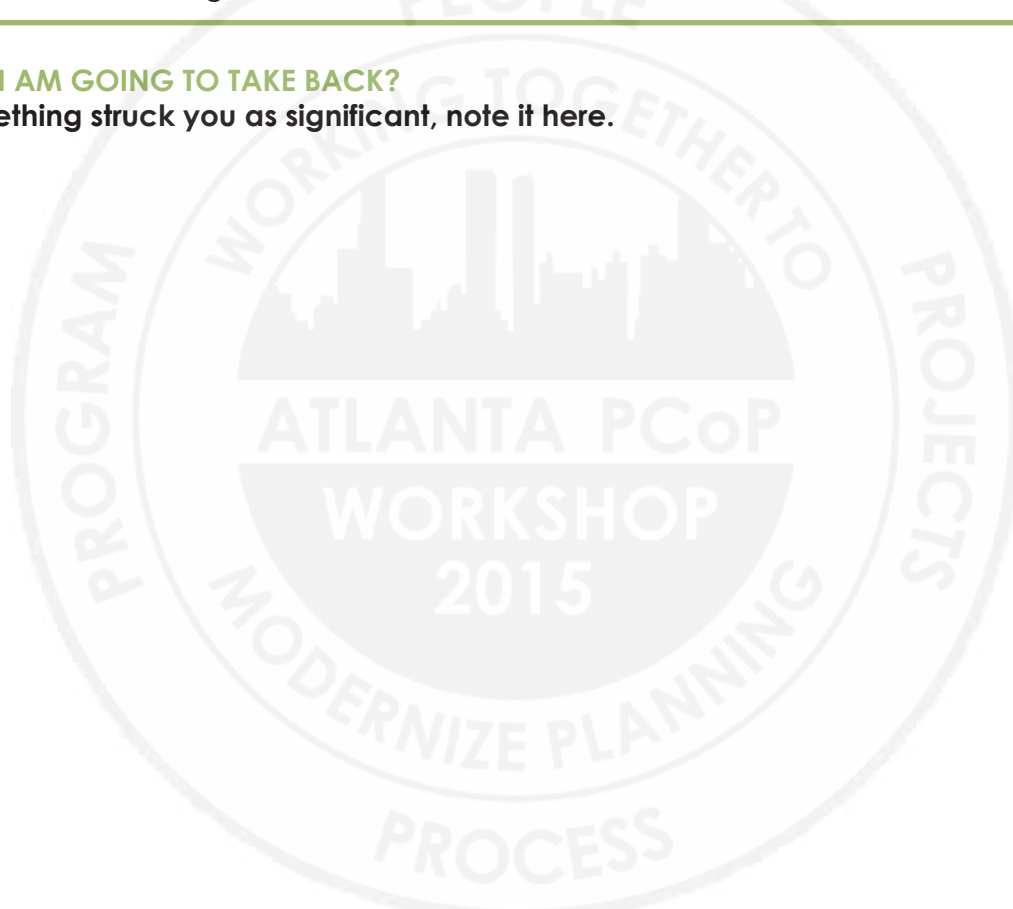
- Milestones will run much smoother if the work is done ahead of time in the RR, DMP, PMP, etc. and submitted as focused, well connected, read ahead material.
- The scope, budget, possible policy exemption(s), and recommended plan are all based on risk and uncertainty.
- These tools interlink Planning and Project Management.

Supporting information and updates can be found at:

- SMART Guide Tools: <http://planning.usace.army.mil/toolbox/smart.cfm?Section=8&Part=0>
- Risk Management in Planning: Tools and Application (May 2013 webinar): http://planning.usace.army.mil/toolbox/webinars/RiskMgmtApplication_16May2013.pdf
- Web-based Risk Management Tools: www.iwrmsuite.us

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SESSION

Building the Project Management Plan and P2 Tasks Based on the RR and DMP

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

Virtual Teaming: Tools, Techniques, Tips and Etiquette

PRESENTERS: Maria Wegner and Camie Knollenberg
Virtually: Maria Lantz and Martin Durkin

ABOUT THIS SESSION

The main messages of this session are:

- There are many technological tools for Corps Project Delivery Teams (PDTs) to deliver real-time methods of Virtual Teaming.
- There are many different platforms for Virtual Teaming and e-Collaboration to choose from.
- Use of technology can greatly enhance Virtual Teaming engagements.

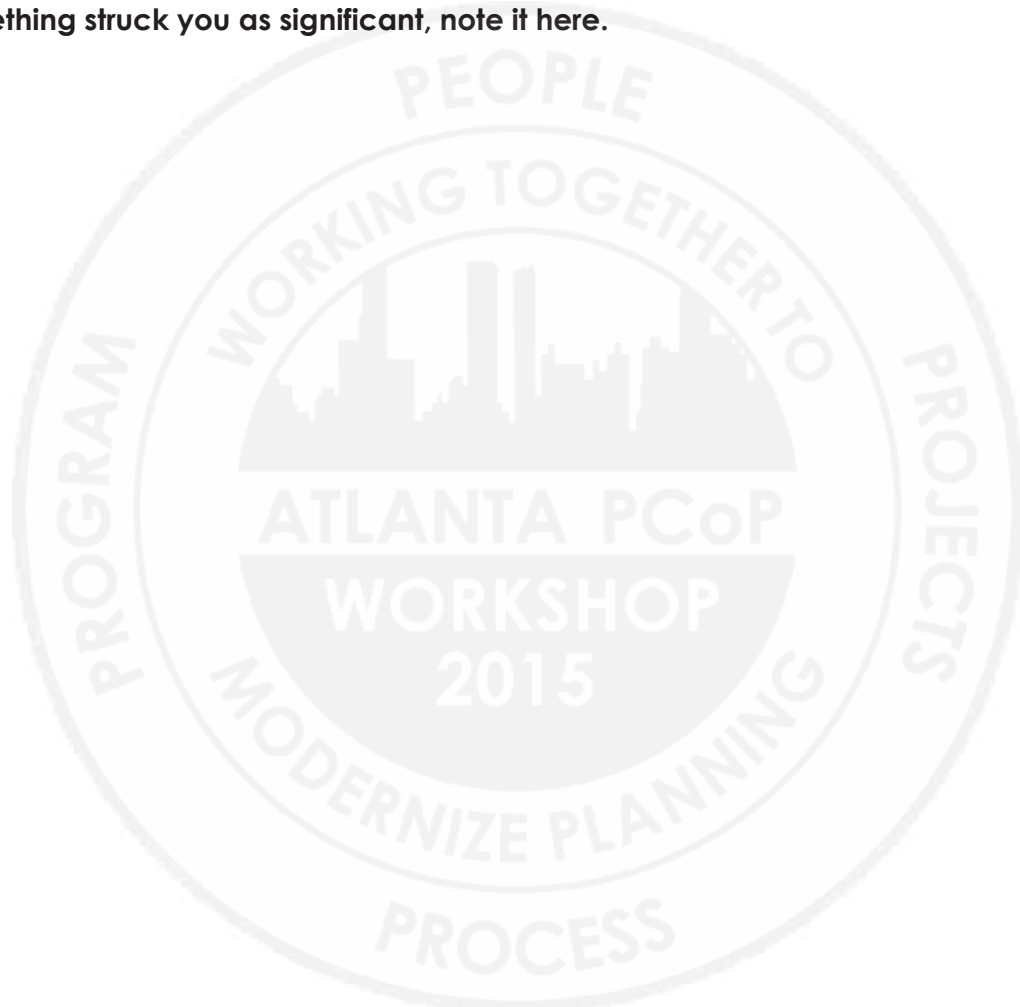
Why are these points significant for team members to know and understand?

- We must learn to make the most of every virtual engagement to accommodate reduced study budget, limited travel funding, and our agency's shift to a more regional and national workforce.
- With practice and planning, Virtual Team Engagements can be as effective as face-to-face ones with significantly less cost.

1

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SESSION

Virtual Teaming: Tools, Techniques, Tips and Etiquette

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

More than a Report: Telling the Planning Story to Multiple Audiences

PRESENTERS: Kendall Zaborowski, Sara Schultz and Jerry Fuentes

ABOUT THIS SESSION

The main messages of this session are:

- Knowing your audience is the key to telling a succinct and compelling planning story for a variety of internal and external interests.
- Use the information you have already generated in risk registers, decision management plans (DMPs), and other documents to build your report and other communication materials.
- Words are not enough to support the decision process.

Why are these points significant for team members to know and understand?

- Almost no one is going to take the time to read that report you just wrote, but you still need to communicate the information to a variety of people. How are you going to get that done?
- SMART planning tools used effectively make it easier to write your report and communicate critical information.

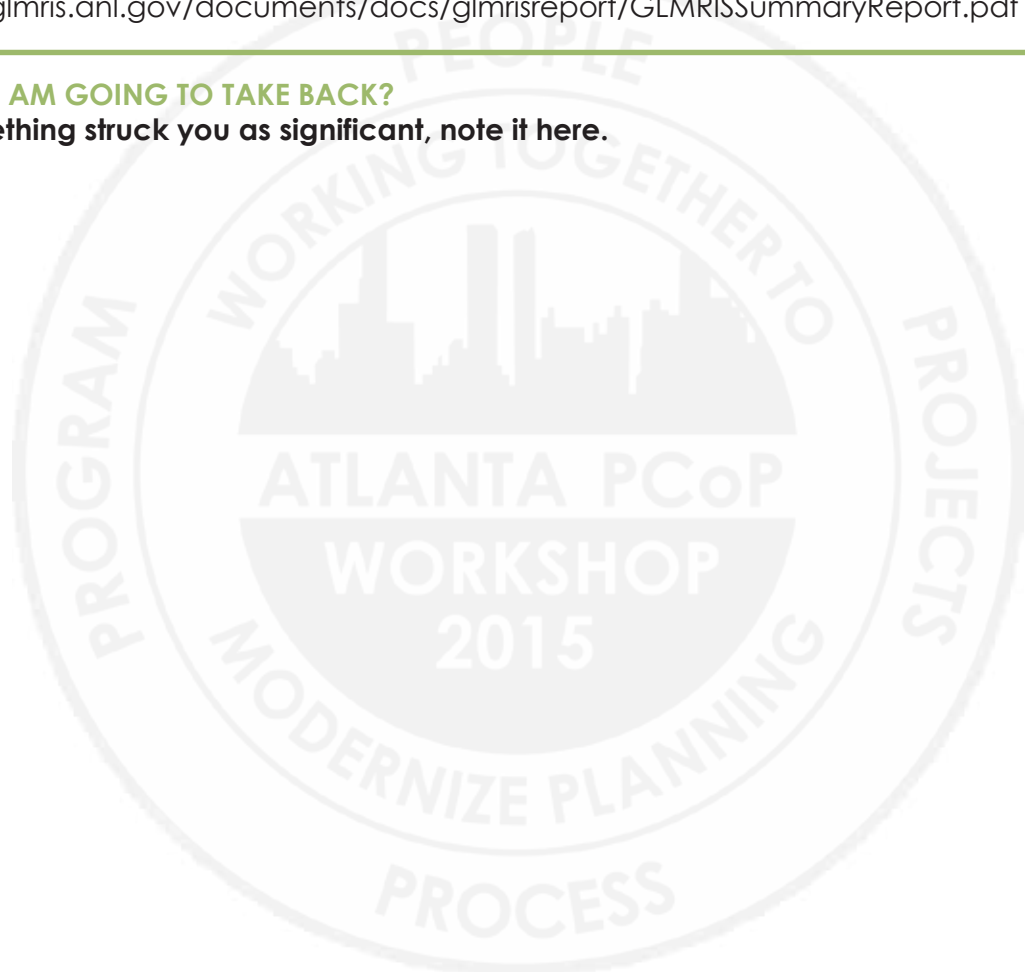
Supporting information and updates can be found at:

- Summary of the GLMRIS Report: Great Lakes and Mississippi River Interbasin Study. Online at: <http://glmr.is.anl.gov/documents/docs/glmrisreport/GLMRISSummaryReport.pdf>

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SESSION

More than a Report: Telling the Planning Story to Multiple Audiences

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4 ANY OTHER NOTES FOR YOUR DISTRICT?

SESSION

The National Water Resources Certified Planner Program and Agency Technical Review Certification

PRESENTERS: Michael Wyatt and Jodi Creswell

Q/A PANEL: Dave Moser, Maria Wegner, Heather Morgan, and Greg Steele

ABOUT THIS SESSION

The main messages of this session are:

- Participants will learn about purpose, procedures and process for new professional certifications within USACE: ATR Certification and the National Water Resources Certified Planner Program.

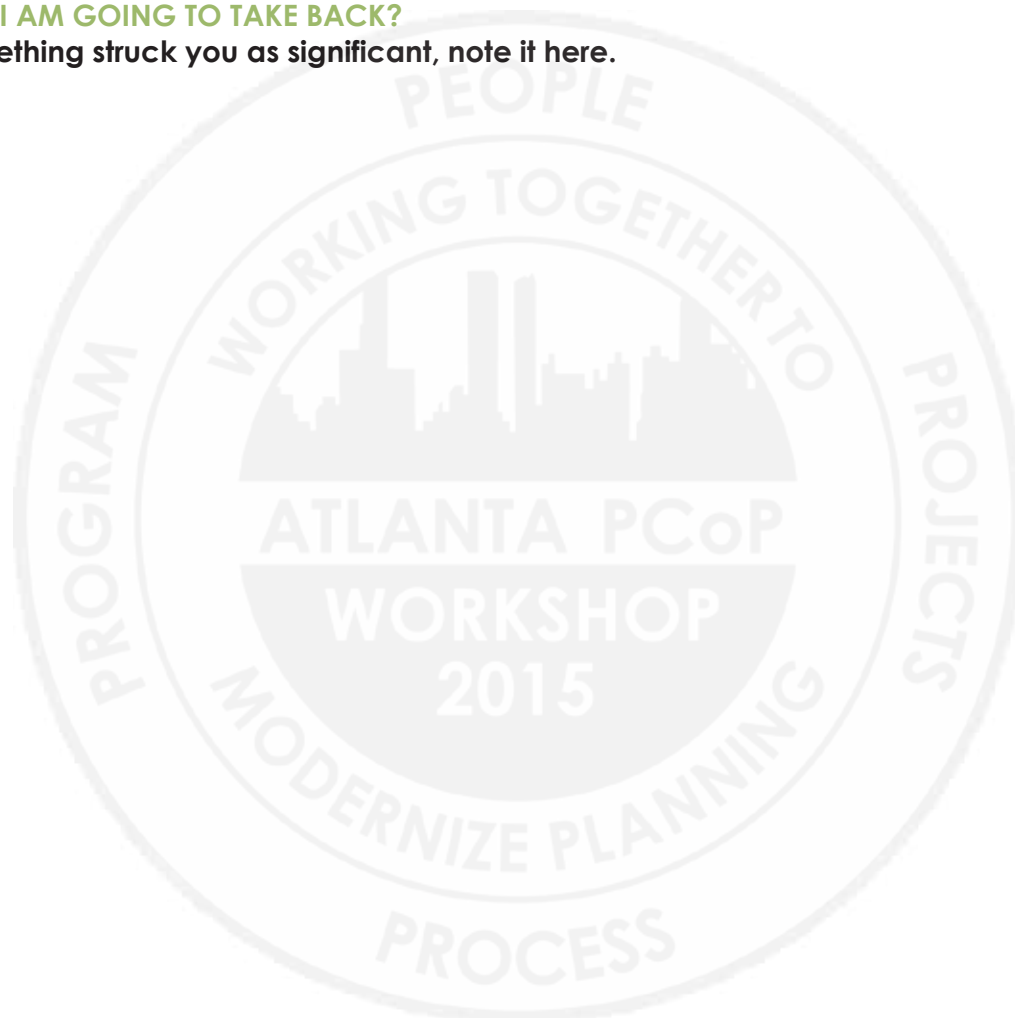
Why are these points significant for team members to know and understand?

- New certification opportunities for planners will allow for professional growth and development to planners within Districts.
- The role of Agency Technical Review (ATR) in the study process is changing and future participation on ATR teams will be limited to certified individuals.
- National Water Resources Certified Planner Program is an opportunity for lead planners to become regional and national assets as well as set a high standard for our industry.

1

WHAT I AM GOING TO TAKE BACK?

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SESSION

The National Water Resources Certified Planner Program and ATR Certification

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2015 PCoP TRAINING ATTENDEES

Lea Adams - Institute for Water Resources	Kim Carsell - Sacramento District	Kim Franklin - Nashville District
Rebecca Albert - Huntington District	Alfred Chai - South Atlantic Division	Amy Frantz - Huntington District
Julie Alcon - Albuquerque District	Brian Chewning - Mississippi Valley Division	Jim Fredericks - Northwestern Division
Danny Allen - Ft. Worth District	Noel Clay - Great Lakes and Ohio River Division	Tony Friona - ERDC
Trish Anslow - Little Rock District	Jodi Clifford - Los Angeles District	Jerry Fuentes - Sacramento District
Dave Apple - Jacksonville District	John Cline - HQ Real Estate CoP	Miki Fujitsubo - South Pacific Division
Lance Awsumb - St. Paul District	Larry Cocchieri - North Atlantic Division	Jeanette Gallihugh - HQ Planning and Policy
Josephine Axt - South Pacific Division	Al Cofrancesco - ERDC	Cassidy Garden - Kansas City District
Amy Babey - Louisville District	Wes Coleman - HQ OWPR	Elden Gatwood - Wilmington District
Bill Bailey - Savannah District	Dave Combs - Northwestern Division	Nancy Gleason - Seattle District
Anne Baker - Sacramento District	Tammy Conforti - HQ Levee Safety Program	Enrique Godinez - Northwestern Division
Bob Bank - HQ Engineering and Construction CoP	Susan Conner - Norfolk District	Doug Gorecki - HQ OWPR
Ronnie Barcak - Alaska District	Janet Cote - Norfolk District	Stephanie Groleau - Jacksonville District
Cindy Barger - Pacific Ocean Division	Mark Cowan - Sacramento District	John Grothaus - Kansas City District
Tomma Barnes - Pittsburgh District	Travis Creel - New Orleans District	Hank Gruber - North Atlantic Division
Ken Barr - Rock Island District	Jodi Creswell - HQ Planning CoP	Jennifer Guffey - Louisville District
Charyl Barrow - Seattle District	Brandon Davis - Vicksburg District	Evie Haberer - HQ OWPR
Kelly Baxter - Omaha District	Sue Davis - Chicago District	Melissa Hallas - Sacramento District
Andrea Bias-Streat - HQ Program and Project Management CoP	Nathan Dayan - Savannah District	Mike Hallisy - Los Angeles District
Dan Bierly - Baltimore District	Ed Demesa - Los Angeles District	Eric Halpin - HQ Dam and Levee Safety Program
Terry Birkenstock - St. Paul District	Idris Dobbs - Norfolk District	Mark Hammond - Great Lakes and Ohio River Division
Peter Blum - Philadelphia District	Mark Doles - Albuquerque District	Charlie Hanneken - HQ MVD RIT
Barbara Blumeris - New England District	Patrick Donovan - Huntington District	Marty Harm - Savannah District
Todd Boatman - Mobile District	Angie Dunn - HQ NWD/POD RIT	Brian Harper - Institute for Water Resources
Cindy Boen - Walla Walla District	Eddie DuRant - Norfolk District	Tonya Harrington - Detroit District
Sharon Bond - Louisville District	Susan Durden - Institute for Water Resources	Chris Hatfield - New England District
Chris Bouquot - Huntington District	Kathleen Evans - Risk Management Center	Beverly Hayes - HQ Planning CoP
Candida Bronson - Jacksonville District	Mike Fedoroff - Mobile District	Bob Heinly - Galveston District
Stacey Brown - HQ SAD RIT	Bob Finch - Honolulu District	Roselle Henn - North Atlantic Division
Tab Brown - HQ Planning and Policy	Steve Fischer - Northwestern Division	Tom Herbert - Nashville District
David Bucaro - Chicago District	Curtis Flakes - Mobile District	Laura Hicks - Portland District
Amanda Burt - Nashville District	Tim Fleeger - Pittsburgh District	Linda Hihara-Endo - Pacific Ocean Division
Eric Bush - Jacksonville District	Eugene Fleming - Chicago District	Keith Hofseth - Institute for Water Resources
Bruce Carlson - HQ Planning and Policy	Jodie Foster - Ft. Worth District	Allen Holland - Kansas City District
Justin Carlson - Huntington District	Adam Fox - Detroit District	Martin Hudson - Northwestern Division
	Naomi Fraenkel - North Atlantic Division	





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Kurt Keilman - South Pacific Division
Charissa Kelly - Southwestern Division
Deanie Kennedy - South Pacific Division
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Eric Laux - Omaha District
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Lauren Leuck - Institute for Water Resources
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Gene Lilly - Tulsa District
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Dan Linkowski - Chicago District
Kevin Logan - HQ Program and Project Management CoP
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Eric Lynn - Kansas City District
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Marc Masnor - Tulsa District

Marianne Matheny-Katz - OASA(CW)
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Scott Nicholson - HQ OWPR
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Patrick O'Donnell - South Atlantic Division
Kim Otto - Mobile District
Jenny Owens - Wilmington District
Wilbert Paynes - South Atlantic Division
John Peukert - Pittsburgh District
Shawn Phillips - Memphis District
Cherilyn Plaxco - Southwestern Division
Marshall Plumley - Rock Island District
Carla Quinn - Baltimore District
Gina Ralph - Jacksonville District
Courtney Reed - New Orleans District
Kara Reeves - Omaha District
Jerica Richardson - St. Louis District
Valerie Ringold - Seattle District
Andrew Roach - Baltimore District
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Heather Schlosser - Los Angeles District
David Schulenberg - Buffalo District
Sara Schultz - Sacramento District
Caitlyn Schwall - Mobile District
Amy Sharp - OASA(CW)

Jason Shea - New York District
Cathy Shuman - HQ NAD RIT
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Aaron Snyder - St. Paul District
Jason Spinning - Jacksonville District
Greg Steele - Norfolk District
Elliott Stefanik - St. Paul District
Sandy Stiles - New Orleans District
Jeff Strahan - HQ OWPR
Terry Stratton - South Atlantic Division
Eric Summa - Jacksonville District
Jennifer Switzer - Kansas City District
Cindy Tejada - South Pacific Division
Eric Thaut - South Pacific Division
Brad Thompson - Omaha District
Dave Tipple - Jacksonville District
Tanis Toland - Sacramento District
Danielle Tommaso - New York District
Jeff Tripe - Kansas City District
Jeff Trulick - HQ OWPR
Renee Turner - Mississippi Valley Division
Charlie Uhlarik - Detroit District
Cindy Upah - Omaha District
Tiffany Vanosdall - Omaha District
Eric Verwers - Ft. Worth District
Laura Vicinie - Institute for Water Resources
Joe Vietri - North Atlantic Division
Andrea Walker - HQ OWPR
Bret Walters - Charleston District
Marty Wargo - Buffalo District
Maria Wegner - HQ Planning and Policy
Rena Weichenberg - North Atlantic Division
Rebecca J. Weiss - Northwestern Division
Rayford Wilbanks - Mississippi Valley Division
Katie Williams - HQ SWD RIT
Ray Wimbrough - HQ NAD RIT
Michael Wyatt - Seattle District
Gary Young - Mississippi Valley Division
Kendall Zaborowski - Louisville District





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Working Together to Modernize Planning

Delivering sustainable solutions to America's water resource challenges.
Our People, Process, Projects and Program

We hope you learned a lot this week and share what you have learned with your colleagues, project sponsors and stakeholders back home.

Questions, suggestions, and feedback to the Planning Community on Practice are always welcome at hqplanning@usace.army.mil – we want to hear from you.

RESOURCES

- Working Together to Modernize Planning - 2015 PCoP Training SharePoint Site - <https://cops.usace.army.mil/sites/PLAN/PCoPtrn/default.aspx>

Presentations, handouts, take back forms and more will be posted here after the workshop.

- Planning Community Toolbox – www.corpsplanning.us

Tools for planners, including the Planner's Library, Planning SMART Guide, and helpful information and links for Planner Training, Processes, Tools and Communities.

- Integrated Water Resources Management Suite of Planning Tools – www.iwrmsuite.us

Online study tools, including Risk Registers, Decision Management Plans, and more.

- Planner Subject Matter Expertise Database - <http://sme.iwrmsuite.us/>

Find Planners with the experience you need – and be found by keeping your training and experience up to date – on this convenient website.



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