

# SMART Planning

## Documenting Decisions:

**Tips, Tools, Techniques  
and Lessons Learned  
in Report Writing**

**19 September 2013**



US Army Corps of Engineers  
**PLANNING SMART  
BUILDING STRONG®**





# BUILDING STRONGER REPORTS

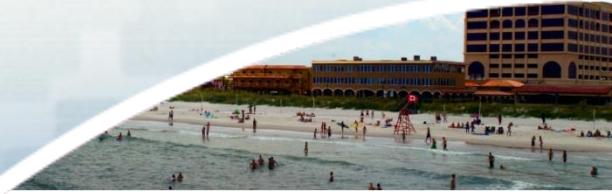
## Jacksonville District

Patrice Morey

Stacey Roth

Brad Foster

Stephanie Groleau



# PRESENTATION OUTLINE

- The High Points: Some Humble Advice
- Some Writing Tips
- Some Layout Tips
- The Importance of Ancillary Planning Products
- Examples





# SOME HUMBLE ADVICE

- Remember your audience(s)
- Past the “Stranded Planner,” planning is very much about communication
- Know your tools (Word, Powerpoint, Adobe, etc.)
- Graphics, graphics, graphics – the world is becoming increasingly time constrained and visually oriented - make friends with your GIS contact and your graphics expert
- Write as you go; schedule incremental edits
- First PDT meeting: bring maps and a writing checklist (consistency)



# SOME BASIC WRITING TIPS

- Be concise/up front (no waiting/searching for important conclusions)
- Provide context and relevance
- Use an old fashioned outline (or build powerpoint slides and write to them)
- Focus on telling the story first, then worry about grammar
- Write to the planning process AND ensure technical reviews are early
- Eliminate the use of “fluff” words
- Use the active tense as much as possible
- Keep average sentence length within 18 words
- Spell out acronyms once in each section
- Incorporate a glossary (helps limit text in the main document)
- Try to diagram or illustrate your story – it will help you to write the story in an unambiguous and concise manner (TRUST ME – I KNOW THIS TO BE TRUE)
- Treat your milestone draft as if it is your final



# SOME LAYOUT TIPS

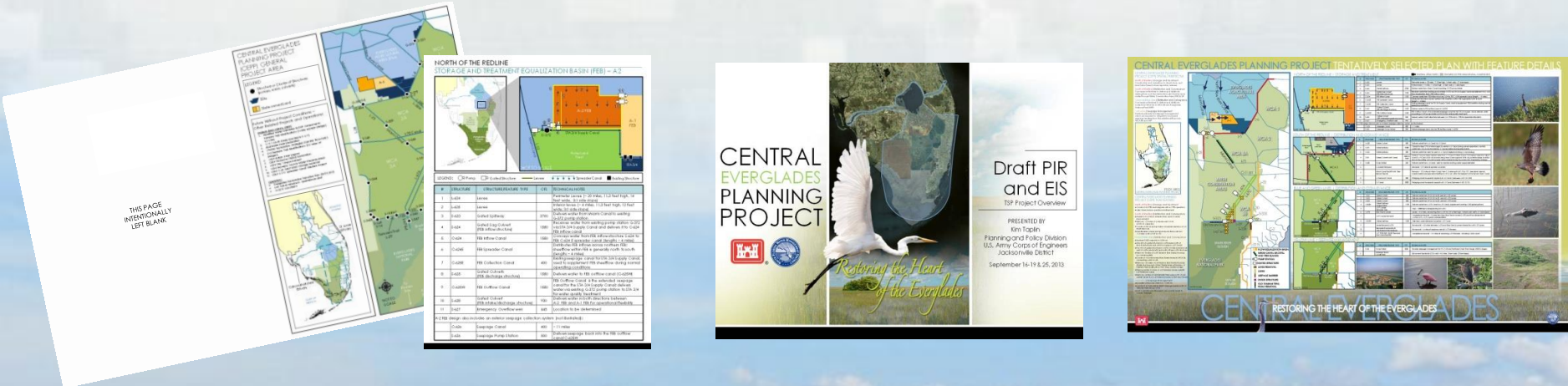
- Basic table of contents up front – save detailed versions for sections/chapters
- Provide a fold-out map at the end of each section
  - eliminates the need to page flip
  - saves pages
- “Let your maps and overlays do the talking” – illustrate on the maps what’s happening where and why
- Provide informative cut lines for images, diagrams, tables, etc. – tell the reader what you want them to get out of the graphic
- Be a teacher and ground your readers before they launch into the details of the report; some examples:
  - illustrated summaries of each section on your section dividers
  - executive summaries supplemented with summary graphics
  - text boxes with the bottom line up front at the beginning of each major section





# THE IMPORTANCE OF ANCILLARY PRODUCTS

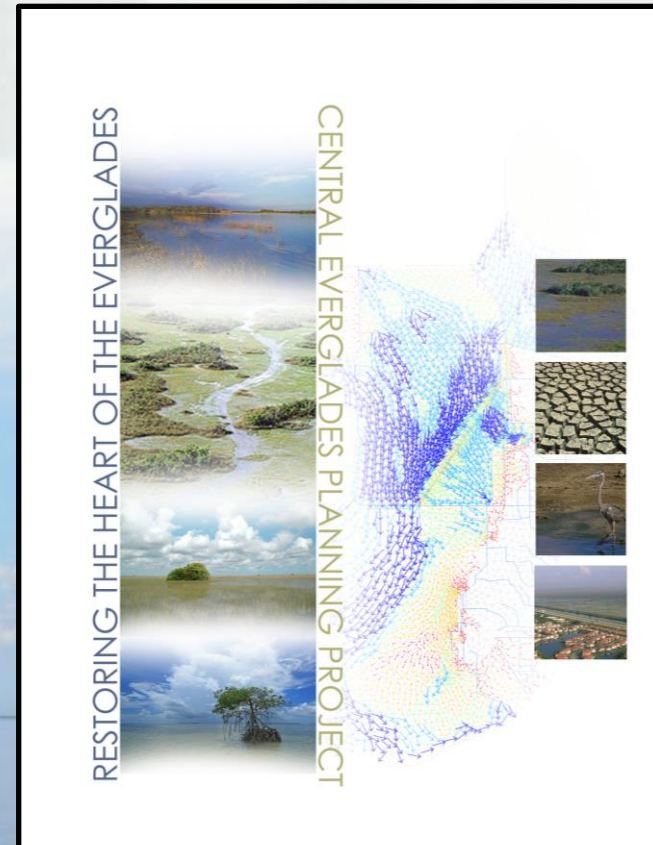
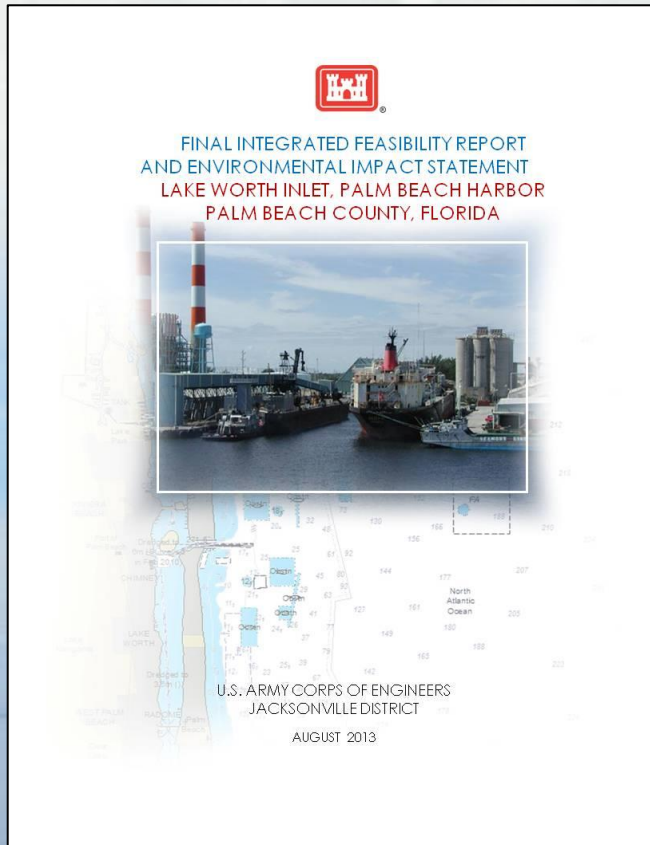
- Maps, graphics, powerpoints, fact sheets, summary placemats, posters, websites, multi-media, workshops, etc. – INTEGRATING SAVES TIME!



REPORT GRAPHICS ↔ POWERPOINT GRAPHICS ↔ PUBLIC WORKSHOP POSTERS



# SOME EXAMPLES



Two different missions, two different writing methods  
but used many of the same strategies





# Lake Worth Inlet Strategy

- CONTENT: PTL and NEPA Specialist were the only two writers – aimed for “one voice”; Synthesized conceptual points from the appendices for bottom line upfront
- OUTLINE: PTL, NEPA Specialist, and graphic editor streamlined the report outline. Our goal was to "be kind to the reader".
- FORMAT: PTL did formatting, with advice from editor.
- GRAPHICS: GIS maps in high resolution were used as a base for various needs (posters, power points, report)
- PRINTING: Work with the print shop to let them know which pages should be foldouts, etc, and review a proof before printing. Our cost to print one main report was \$33.



# Central Everglades Planning Project

- Pilot project to test application of 3x3x3 and SMART principles
- Huge and complex study: >30 major construction actions; 1.5M acres benefit; revise operations of ~50 structures; \$1.78B
- CEPP started with PowerPoint graphics, before there was an outline or text
  - Share strategies, processes, evaluation procedures with PDT, Public, Agencies, Vertical Team
  - Some of these graphics retained in the Draft Report
- REPORT OUTLINE: “owned” by PTLs; structure of report; target number of pages per section; assigned responsible authors
  - Draft Integrated PIR/EIS main report is 287 pages
- CONTENT: Many writers; no one had sufficient expertise to do it all; each chapter or appendix assigned a Responsible Author
- FORMAT: Rules established in advance (margins, font, footers, table format, methods for table and figure captions...); enforcement by Responsible Authors; back-checked by dedicated formatter throughout and repeated just before printing





# Central Everglades Planning Project

- WRITING:

- Details: If it does not absolutely need to be in the main report to tell and support the story, if it is “nice to know”, if only a few persons might need to know, move it to an appendix
- Reduce duplication: main report sections are not simply short versions of long appendices; minimize copy of blocks of text from appendices to main report; many appendices are not stand-alone reports
- Rewrite, rewrite, rewrite: by second authors on the team and by the formatter; apply the tips
- Incremental ATR: in addition to identifying technical issues, frequent ATR forces “write as you go”; the review of the Draft Report is the 7<sup>th</sup> ATR for CEPP

- PRINTING: Work with the print shop to let them know which pages should be color, foldouts, etc, and review a proof before printing. Our cost to print one main report was \$43. Appendices on CD.



# Lessons Learned from Jordan Creek Pilot Study

Little Rock District  
Trish Anslow



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# Objective

*‘what was supposed to happen’*

- All report documentation within a 3 inch binder
- Approximately 100 page main report
- Transparent communication with public
- Vertical Team Integration – effective and efficient Decision Making



# Outcome

## *‘what did happen’*

- Integrated Feasibility Report and Environmental Assessment
- Main report and appendices fit in a 3 inch binder
- Approximately 117 pages for Draft Report & EA, about 145 pages for Final
- Minimal Comments during Concurrent Review  
(Most from IEPR...who were not at all the IPRs ☺)
- VT tools – SharePoint, decision log, risk register
- Civil Works Review Board Decision – 1<sup>st</sup> attempt





# Valuable Lessons

- Integrated Report
  - Not everyone liked format, especially EPA and environmental reviewers
  - Format more like feasibility...could follow NEPA format
  - Drastically reduced size of document and eliminated redundancy
  - Used SharePoint or other format (CD) for reference documents
- Does size Matter?
  - 100 page report CHALLENGE!
  - ‘Do not underestimate the importance of appearance, IF you want your report to be read’ – Planning Manual pg. 234
  - GOAL: Be clear, concise, and compact



# Valuable Lessons

- Main Report Consistency
  - Assigned a 'LEAD' Writer – consolidator (the Lead Planner)
  - Got organized up front – annotated outline
  - Spoke with One Voice (and hopefully active voice)
  - Edit!!
    - Used our Librarian
      - Does your District have a writer editor/graphic artist?
      - Can you borrow one?
    - Worked weekends to stay on track because we did not schedule adequate time for consolidation and edit
  - DQC helped ensure Main Report and Appendices Consistent
  - Attempted for Main Report to summarize findings  
.....Tells the story





# Valuable Lessons

- Tell the Story (Chapter 14 – Planning Manual)
  - Words Matter
    - Considered Alternative names to avoid confusion (plans get screened out) – Used short description
    - Considered the audience
  - Beginning, Middle, and End
    - Build out from the annotated outline
    - We somewhat wrote as we went – Report Synopsis helpful
- A picture tells a thousand words
  - This included maps, plates, and graphics
  - Reviewers found tables most helpful (summaries and comparison in one place)



# Questions?

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

*For more information:*  
<http://www.corpsplanning.us>



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