

**Q&A: Documenting Decisions: Tips, Tools, Techniques and Lessons Learned in Report Writing  
SMART Planning Webinar Series #9  
September 19, 2013**

The September 19<sup>th</sup> webinar, part of a series of information-sharing webinars hosted by the Planning Community of Practice, shared tips, tools, techniques and lessons learned in feasibility study report writing from Jacksonville District and Little Rock District.

Patrice Morey, Stacey Roth, and Brad Foster from Jacksonville District and Trish Anslow from Little Rock District were the presenters of this webinar. Following the webinar presentation the presenters and Sue Hughes (PCoP HQ) took questions from the field via the “chat” function.



The questions and responses below are not a direct transcript; they have been reordered and edited for clarity. Additional questions and feedback are always welcome via the SMART Guide comment form online at: <http://planning.usace.army.mil/toolbox/smart.cfm?Section=10&Step=1>

**Additional Resources Shared by Webinar Participants**

A good mapping source available to the Corps is Simsuite: <http://simsuite.usace.army.mil/simsuite.index.htm>. Teams can create viewers for their project and customize the data shown. It draws from CorpsMap data.

The creation of infographics is available from a number of online creation tools (some of them free) such as

- Infogr.am - <https://infogr.am/>
- InfoActive - <https://infoactive.co/>
- PiktoChart - <http://piktochart.com/>
- easel.ly - <http://www.easel.ly/>, and
- IBM’s Many Eyes <http://www-958.ibm.com/software/analytics/manyeyes/>

**Submittal Requirements / Expectations**

**Is it acceptable to HQ to get appendices on CD? What about submittal packages?**

At the Office of Water Project Review (HQ), our current standard is six (6) hard copies of the report and environmental document, one hard copy of the appendices. You can also submit CDs for the reviewers so they have that as a reference. We have found that if a study needs Headquarters Engineering involvement, usually for a study involving a dam or levee, they do like to see that hard copy of the full report, including appendices. However, I would advise you to talk to your Vertical Team / Review Team,

work out the specifics on the numbers / formats of the report and appendices and be sure you have agreement on it.

From the district perspective, it's always a good idea to check in with the vertical team / review team to confirm the counts of hard copies they would like; there could be some special circumstances where they want an extra hard copy.

### **Balancing Main Report and Appendices**

**Short main reports need to rely on appendices for detail, but reviewers tend to read appendices not as supporting planning process documents, but as the conclusions. Any suggestions to avoid this confusion?**

The main report should focus on the conclusions – and state them clearly and up-front, with the appendices for support or supplemental data.

Reviewers do go back and forth a lot between the main report and appendices to get more detail or affirm the conclusions in the main report, and there is probably a mixed reaction on whether that is easier or harder to do with a hard copy vs. electronic. It's advised to talk to the vertical team / reviewers ahead of time to see what they would prefer.

### **Standards / Consistency**

**What does the Corps have in the way of graphics standards?**

For map standards, there are minimal standards for information on maps that are followed both by the Corps and GIS industry. Your GIS team should be able to help you.

The Corps used to have very specific graphics standards, but those seem to have fallen by the wayside. It seems that in the pursuit of being concise and kind to the reader, everyone is opening up more on what we can do graphically.

That said, EP 310-1-6, Corporate Information: Graphic Standards Manual, 01 Sep 1994 (original); 01 Jun 2006 (change 1), establishes a unified approach regarding the use of Corps logotype and preparation of visual communications. The manual covers the use of the logo in business cards, signs, publications, forms, vehicles, and miscellaneous items.

In Jacksonville, Patrice tries to use the same tools available to most Corps employees to develop reports and ancillary materials including posters: Word and PowerPoint. Although she also does use Photoshop to develop some special effect graphics, e.g., faded out pictures, the reports, posters, and presentations we talked about today were all done in PowerPoint and Word.

## **Is it possible to share the templates that you mentioned during the presentation?**

There are USACE approved templates out of Corporate Communications at HQ for brochures, PowerPoint presentations, posters, etc. Your Public Affairs representative should have access to those for you.

## **References & Resources**

Several Feasibility Report examples are posted on the SMART Guide at <http://planning.usace.army.mil/toolbox/smart.cfm?Section=8&Part=6>

- The [Jordan Creek Flood Risk Management Study](#) in Springfield, MO was one of the initial pilots to test applying the SMART planning approach and has a final integrated feasibility report with environmental assessment.
- The [Lake Worth Inlet Feasibility Study](#) is ongoing; a draft integrated feasibility report with environmental impact statement has been released. Lake Worth Inlet serves as the entrance channel to the Port of Palm Beach, FL.
- The [Rice Lake Habitat Rehabilitation & Enhancement Project](#) Report presents the results of a feasibility study undertaken to restore wetland, aquatic and floodplain habitat along the Illinois River. The report is an example of an appropriate level of detail for an ecosystem restoration study; the main report is 90 pages with 67 pages of report text.

A link to the Central Everglades Planning Project report will be added to that page on the Guide soon; the Draft Report can be found on the project's website at:

[http://www.evergladesplan.org/pm/projects/proj\\_51\\_cepp.aspx](http://www.evergladesplan.org/pm/projects/proj_51_cepp.aspx)

The Planning Manual (IWR Report 96-R-21) is a good resource for planners and writers, including Chapter 14, *Telling Your Story*.