

THE PLANNING MENTOR PROGRAM – ANOTHER HELPFUL RESOURCE FOR YOUR PDT!

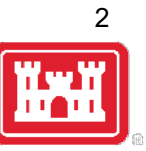
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PLANNING HAS A PROBLEM, BUT IT'S A GOOD ONE TO HAVE! ...*OUR PORTFOLIO IS EXPANDING!*



- \$ Annual Investigations Appropriations
- \$ Annual Workplan Funding
- \$ Senate “Congressionally Directed Spending” (CDS)
- \$ House “Community Project Funding” (CPF)
- \$ Biden Infrastructure Law (BIL or IIJA)
- \$ Disaster Relief Act-19 (DRA-19)
- \$ Disaster Relief Supplemental Appropriations Act (DRSAA)



STARTING A NEW FEASIBILITY STUDY?



- PDTs are challenged with activities outlined in Planning Bulletin 2018-01s for the first 3-4 months after FCSEA.
- Recent requirements for vertical alignment and a decision on 3x3 waivers in the VTAM occurs much earlier in the process than before (90-120 days).
- Greater emphasis on benefit evaluation across the four accounts, environmental justice, climate change, floodplain use and nonstructural plans...*to name a few!*



WHAT DOES THIS NUMBER REPRESENT?



127

Type your guesses in the chat!



10 August 2018 memo Bipartisan Budget Act of 2018 (BBA 2018) - Model Agreement for New Feasibility Studies
17 May 2017 memo Updated Implementation Guidance for Section 1002 of the Water Resources Reform and Development Act (WRRDA) of 2014, Consolidation of Studies
Webinar "Feasibility Study Initiation in Light of Risk-Informed Planning" 13 Aug 2018
Pre-Alternatives Milestone Meeting Checklist
DPM CW 2019-02. Operationalizing RIDM in Project Management Planning Phase. 02 July 2019.
Updated Implementation Guidance for Section 1002 of the Water Resources Reform and Development Act (WRRDA) of 2014, Consolidation of Studies issued 17 May 2017.
Feasibility Study Vertical Team Coordination: Key HQ and MSC Tasks. July 2022.
DPM CW 2019-02. Operationalizing RIDM in Project Management Planning Phase. 02 July 2019.
DPM CW 2018-05 (03 May 2018 Dalton memo)
Webinar "Operationalizing Risk Informed Decision Making in Project Management) Planning Phase)" July 2019
Memo "Guidance: Capturing Time and Cost Impacts, Comprehensive Documentation of Benefits in Decision Documents" 09 April 2021
ER 1105-2-100 Planning Guidance Notebook
16 November 2017 memo Implementation Guidance for Section 1184 of the Water Resources Development Act of 2016 (WRDA 2016) - Consideration of Measures
Planning Manual Part II (IWR2017R03)
PB 2018-01 Feasibility Study Milestones
ER 1165-2-217 Civil Works Review Policy
Planning Quick Takes: Timely Topics for Risk-Informed Planning Studies (Formerly Planning Mentor Handbook), Version 2.0. July 2021.
Memo - Interim Environmental Justice Guidance for Civil Works Planning Studies 13 January 2023
05 January 2021 - ASA(CW) memo - Comprehensive Documentation of Benefits in Decision Document
20 March 2018 memo Implementation Guidance for Section 1005 of the Water Resources Reform and Development Act of 2014 (WRRDA 2014) - Project Acceleration
EP 1105-2-57 Stakeholder Engagement, Collaboration & Coordination.
Memo: Interim Environmental Justice Guidance for Civil Works Planning Studies. 13 January 2023.
Vertical Team Alignment Memorandum (VTAM) Guidance 29 July 2022
Feasibility Study Vertical Team Coordination: Key HQ and MSC Tasks. July 2022.
19 July 2018 memo Implementation Guidance for Section 1001 of the Water Resources Reform and Development Act of 2014 (WRRDA 2014) - Vertical Integration and Acceleration of Studies (Revised)
PB 2013-02 Assessing Quality of Planning Models
EC 1105-2-412 Assuring Quality of Planning Models
26 September 2018 memo Implementation Guidance for Feasibility Studies for Executive Order 13807 Establishing Discipline and Accountability in the Environmental Review and Permitting Process for Infrastructure Projects (note EO 13807 has been rescinded but the IG remains)
Review Plan template on Planning Community Toolbox
PB 2013-02 Assessing Quality of Planning Models
Memo - Vertical Team Alignment Memorandum (VTAM) Guidance 29 July 2022.
WRRDA 2014 Section 1005
PB 2018-01(S) Feasibility Study Milestones Supplemental Guidance
Webinar "Integrated Communication Planning" held 02 April 2020
Webinar - "Section 106 and Planning Bulletin 2018-01" held 02 May 2019
WRRDA 2014 Section 1001(e)(2)
ER 5-1-11 USACE Business Process
WRDA 2007 Section 2034
ER 1105-2-100 Appendix C - Environmental Evaluation and Compliance



40 source documents used in compiling the list of 127 activities!





FUN FACT – PDTS ARE IN A RACE AGAINST TIME!



Time Considerations

90 days	12.85 weeks = 90 days
~90 days	13 weeks = 91 days
During 90 days	~24 weekend days (Mon start / Fri end)

During 90 days there are ~66 working days

1-2 Federal Holidays typically occur in each quarter. More in the last few months of a year. This further reduces the number of working days.

Over the Course of 3 Years

Weekend Days	312 days
Federal Holidays	33 days

345 days are non-work days



WHAT'S A PDT TO DO?

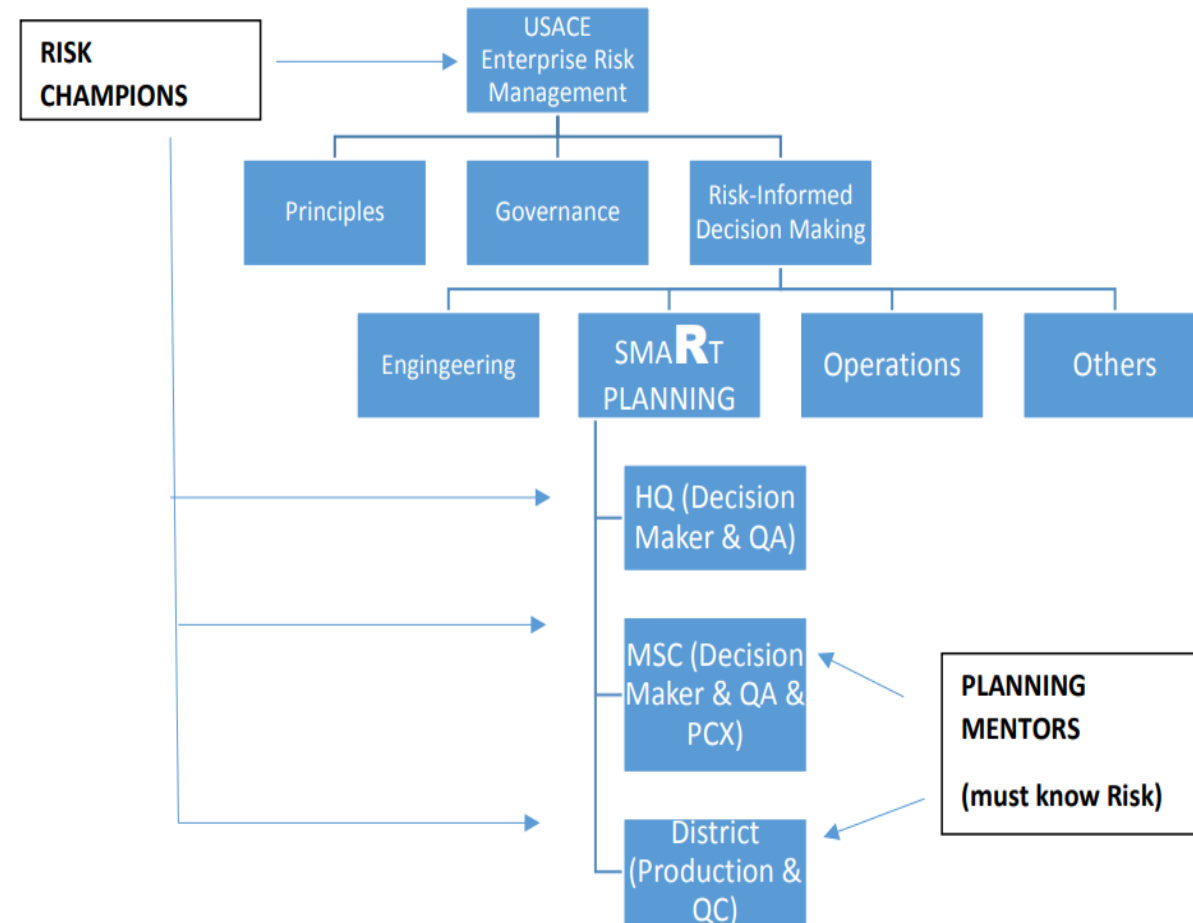




PLANNING MENTOR PROGRAM AS ENVISIONED



- The stated objective of the program was to **further drive the enterprise cultural shift to risk management**, and **to assist PDTs implementing the methodologies of risk-informed planning** as detailed in the Planning Manual Part II: Risk-Informed Planning.
- Concept was developed in conjunction with Risk Champions who were in essence the MSC Planning Chiefs.
- Originally solicited volunteers who sent an application. MSC planning Chiefs selected from their regions and pool was limited by funding for a meeting held in Feb 2018 to train in Risk-Informed Planning.

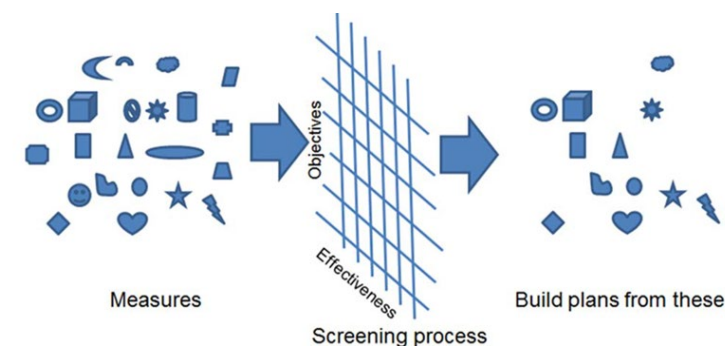




WHAT SUPPORT CAN A PLANNING MENTOR PROVIDE?



- Help with creation of six pieces of paper
- Active participation in planning for and executing scoping/charrettes (in-person attendance)
- Assist with first planning iteration (available data)
- Develop/review risk register entries with PDT
- Provide feedback/support for milestone preparation and read ahead materials
- Assist with plan formulation strategies, screening criteria, and the four accounts evaluation
- Assistance with mission or project purpose-related policies and evaluations, depending on areas of expertise



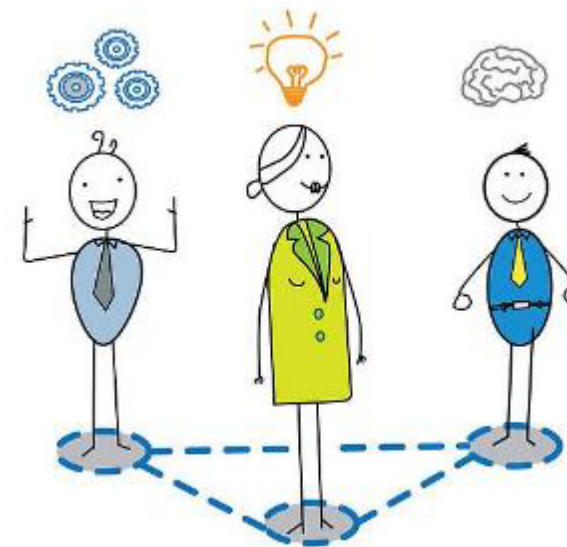
...AND OTHER SUPPORT AS NEEDED!



PLANNING MENTORS – WHO ARE THEY?



- Mentors can help newly formed PDTs navigate the risk informed planning process successfully, especially during the first 120 days of the feasibility study!
- Concept started in 2018 when a selected group of planners were trained as mentors in the application of risk-informed planning.
- Since 2017, Water Resources Certified Planners (WRCPs) have been identified as our most capable senior planners with skillsets that make them ideal mentors. We now have over 100 WRCPs!



Both groups
are available
to assist
PDTs!



RECENT EXAMPLES FOR FLOOD RISK MANAGEMENT AND DAM SAFETY MODIFICATION STUDIES



TWO RECENT FRM SCALES OF MENTORING



- Lumber NC – needed a planning mentor because the district planner was new and inexperienced and there was more intense level of effort required to assist the team. The mentor was involved on a day-to-day basis and in production.
- Waccamaw - needed a mentor for a junior planner. However, the junior planner only needs general oversight and review of products, so it is more an advisor/mentor role.

TAKEAWAY... the level of effort on behalf of the mentor is really scale-able to what the team needs



DAM SAFETY MODIFICATION STUDY - PLANNING ADVISORS



- Facilitate the process of executing a DSMS
- Facilitate the DSMS kickoff
 - Providing orientation and preparation for the PDT
 - Facilitating the first iteration scoping meeting
 - Provide understanding of schedule and scope of DSMS
 - Provide larger perspective of planning and process
- Lead team through the study process
- Provide Policy and Guidance direction
- Coordination efforts
 - Vertical team coordination
 - Milestone coordination
 - Review submittals
 - Final submittal for approval
 - Program coordination
- Provide templates and examples



SETTING UP FOR SUCCESS / BEST PRACTICES



DEFINING EXPECTATIONS



Enable & Operationalize Risk Informed Decision Making through SMART Planning

Planning Mentor – Judy McCrea
Charter for San Francisquito Creek study
Date: 3/16/18

A. CONTEXT:

The Planning Mentor program has been established as a resource to ensure PDT success in delivering of a project to solve a water resources related problem.

A trend analysis of the current Planning portfolio identifies that teams are struggling to meet early milestone time and cost commitments. The goal is for studies to reach the Alternatives Milestone within the first 2-3 months from signing of FCSA and the Tentatively Selected Plan Milestone within a year of signing the FCSA. Planning Mentors will assist teams apply risk-informed decision making and aligning the level of detail with the areas of uncertainty that must be reduced to make the decision at hand. Planning Mentors will train PDTs and support their ability to improve project delivery.

B. MISSION/OBJECTIVE

The mission of the Planning Mentor program is to provide a short-term boost to help coach, mentor and train Lead Planners and PDTs on risk informed decision making, emphasizing the 'R' in SMART, and utilizing the techniques and principles in the Planning Manual Part II: Risk Informed Planning (IWR Report 2017-R-03).

The overall objectives of a Planning Mentor are to:

- Coach and mentor lead planners on *all* SMART Planning principles and procedures.
- Coach and mentor PDTs through early iterations of risk-informed planning process and rapid risk analysis, applying the methodologies in the Planning Manual Part II: Risk Informed Planning.
- Coach lead planners & PDTs on risk management (assessment, communication, and mitigation).
- Build capacity and risk management competence by assisting PDTs to emphasize the 'R' in SMART Planning, empowering them to make risk-informed decisions.
- Mentor PDTs on how to tell the risk story.
- Share lessons learned to ensure the Planning and allied Communities of Practice continually improve.
- Support new start studies and high profile projects.

Consider signing a charter to nail down the assistance you need!

- Less formal arrangements might work for your PDT and situation. However, requests should include expectations for assistance!
- The concept is to provide roughly 40 hours of labor so however it makes the most sense to use it is up to the PDT, the Planning Chief and the Planning Mentor.
- Don't forget to include the PCX so they can stay involved with your study and mentor throughout the process!



SO WHY CONSIDER GETTING A MENTOR?



- If it has been a while since your district has completed a specifically authorized feasibility study...you might benefit from a mentor!
- If overall, your district planning staff is less experienced...you might try adding a mentor!
- If you have a new, weird, or different problem under your study authority...you could ask for a mentor!

A mentor can help you engage with the broader PCoP!



HOW DO I GET A MENTOR ASSIGNED?

- District Planning Chiefs make a request by sending an email to Karen Miller karen.v.miller@usace.army.mil and cc the MSC Planning and Policy Chief.
- PCoP “seed money” is available on a first-come, first-serve basis (\$5-10k per study) for mentor assignments.
- This initial PCoP funding will be made available for labor (if mentor is district funded) and travel can also be requested.

CALL 1-800-REQUEST-A-MENTOR-TODAY!





Open Discussion / Questions



QUESTIONS?



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