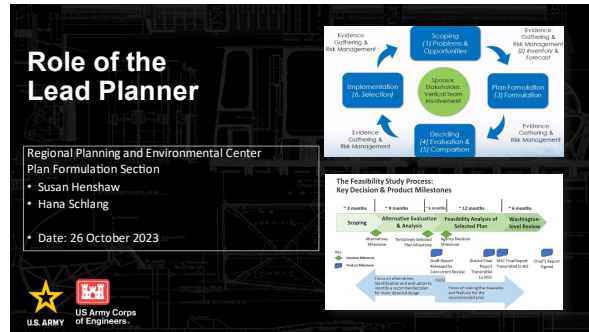


Planning Fundamentals: Role of the Lead Planner
26 October 2023
Q&A Summary

This webinar was part of the Planning Fundamentals Series and provided an overview of the lead planner's roles and responsibilities throughout a feasibility study. Presenters Susan Henshaw (Senior Planner) and Hana Schlang (Junior Planner) from the Regional Planning and Environmental Center (Fort Worth District) discussed lessons learned, resources, risk informed planning tools, and ideas for study team collaboration.



This summary of the Question/Answer session of the webinar is not a transcription; questions and responses have been edited and reordered for clarity.

What is the best platform for storing study documents (e.g., MS Teams, ProjectWise, a shared drive)?

It depends on what the lead planner and the team prefer. MS Teams and SharePoint allow for more than one editor to be in a document at once, and includes helpful features such as the ability to notify colleagues about comments intended for them via tags in track changes. While some find this risky due to looser version controls, others find this feature helpful, especially when there is a tight schedule and multiple people need to be in a document simultaneously.

Other document storage and maintenance options include platforms such as ProjectWise, which has tighter editing controls where only one person at a time can open and edit a document. Additionally, some teams find it helpful to make use of multiple platforms. For example, teams can use ProjectWise as a document repository for final products and use MS Teams or SharePoint for the working version of documents. Teams should keep in mind that different platforms have different archiving policies and timelines.

When there are updates to planning policy or guidance, do teams have to go back and update reports or documents that are already in progress?

It depends on the guidance and the project that is being worked on. Sometimes projects and products are grandfathered in under older guidance and don't need to be changed (i.e., some guidance will state "projects that begin after X date* must comply with the new guidance..."). In cases where a change in policy is based on a change in law, teams will typically have to make changes as required to comply with the new policy. When there are questions on whether to implement new guidance, the study team should identify how far in the process they are, and then schedule a meeting with their vertical team to get concurrence on the path forward.

Should MSC policy review members attend study team meetings, or are occasional in-progress reviews (IPRs) with MSC members enough?

It is not recommended to have MSC policy reviewers attend study team meetings unless they are explicitly needed. It is a good practice to include MSC reviewers on meeting invites so they are aware of the meeting and have access to the notes, but the only time they need to attend is if the team needs their support on a specific problem. Study teams may find it useful to schedule focused IPRs with policy reviewers; that said, teams shouldn't feel the need to schedule formal IPRs in order to meet with their

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MSC policy reviewers. Policy reviewers' doors are open, and they are available to chat through issues as needed.

What advice might be helpful for new planners working on their first study?

- Every project is different – expect new surprises with each project.
- Don't be afraid to reach out to others with experience and ask questions.
- Make sure to set aside time to research and understand new planning topics, guidance, and policies on your own – don't take what others tell you for granted.
- Particularly for larger studies, seek out a planning mentor through the relevant MSC, Planning Center of Expertise, or elsewhere.
- Don't reinvent the wheel. There are planners who have developed guides and other resources that can be beneficial to new planners.
- Be welcoming of comments from reviewers. It's a normal part of the review process to get a long list of comments – tackle each comment one at a time, usually the list isn't as difficult as it initially may seem.
- Help to improve planning processes by asking questions and challenging existing ways of doing things; sometimes what worked well in the past isn't the best way to do things today and tomorrow.
- Start writing – you may think the team is on the same page when discussing a topic, but can work to better understand any disconnects by having the issue written down.