

Planning Charrettes and Parametric Design Process AAR **Meeting Minutes**

Tuesday – 7 June 2011 Sessions

Ana Ortega, MILCON Business Process Manager, HQUSACE - Introductions and Welcome

Ms. Ortega welcomed the participants to the AAR. A review of the meeting goals, agenda and logistics followed. Each participant introduced themselves and stated their role in the Parametric Design process. See list of participants attached.

Lloyd Caldwell, SES, Chief, Military Program Integration Division PID – HQUSACE Perspective

Mr. Caldwell announced that Mr. Mike McAndrew (OSD) was coming in to find out how HQUSACE does PC Cost, Cost estimation, etc. He noted that USACE wanted him to understand how complex this process is, how it is a scientific process, and that USACE is doing estimating utilizing the best methodology available. Need to instill confidence and project USACE as a “value added” organization. Mr. Caldwell concluded his discussion with a question and answer session:

Donna Thompson (PDR Review Team): Question – From a field perspective it seems we are seeing an increase in the number of questions from DASA, OSD, and Congress related to our programming documents. Is this becoming the norm.?

Mr. Caldwell: Response - yes, we all need to be doing our best each time. People have an incorrect perception of us and what we do. The perception is that we are not good at our business- so we need to think about what makes us good and how we can be better.

John Jones (HQUSACE): Comment: How we do business is becoming more important. Communication is important; differences and inconsistency stand out more now that we are always connected (because of the speed of communication).

Victor Ramos (Seattle District): Question - We heard about MILCON budget getting cut, is there any truth to it?

Mr. Caldwell: Response - Projections show production coming down, but these projections are still larger than before the peak in the workload. The needs of the nation are substantial, so our workload will still be substantial. As we are now coming upon FY12, need to evaluate what was good and what do we want to take into the new FY. MILCON business process (MBP) to encompass everything we do, how COS operates, standard facilities, etc.

Michael Schultz, Deputy Chief, Military Program Integration Division PID – MILCON IPT Perspective

Mr. Schultz noted that the current process is revealing and resolving issues that impact scope and cost two years ahead of execution. Mr. Schultz also presented a POM Timeline and related this timeline to the products produced as part of our PDR/3086 process. The overall schedule is driven by submission of the President’s Budget and cannot be delayed or rescheduled because of MILCON. Need to be ready for Code releases and understand the importance of the March deadline. Mr. Schultz presented and discussed the MILCON Integrated Programming Team (IPT) and their role in the reviewing and prioritizing. He also discussed their use of the information provided by the PDRs and 3086s.

Discussion of slides: POM Timeline. MILCON IPT. HQDA MILCON IPT = Discussion of IPT Voting Members (see slide); HQDA MILCON IPT = Subject matter Expert Members (see slide).

Alan Terpolilli, OACSIM – ACSIM Perspective and overview of Planning Charrette and Parametric Design Processes and Products

Mr. Terpolilli discussed the ACSIM Perspective on Planning Charrettes and the Parametric Design Process/Products. His presentation included an overview of the Construction Management Branch at ACSIM, a discussion of MILCON goals, the importance of Planning Charrettes and the relevance of the Parametric Design products. Discussions included a review of the statistics on Planning Charrettes and PDRs. Mr. Terpolilli also discussed the plan to “scrub” the DD 1391’s for the FY 14 Program prior to release of design codes. Mr. Terpolilli concluded by noting that the Army policy is that ACSIM/Department of the Army is the ultimate client and that USACE must continue to tailor project to meet those needs.

Mr. Jon Winkler, HNC - Planning Charrettes (PC) Centrally Managed Program

Mr. Winkler provided an overview of the Centrally Manage Planning Charrette Program to include Roles and Responsibilities, Common Issues/Questions, and statistical review of the program. This discussion included an explanation of EKO & uses related to monitoring and tracking Planning Charrette schedules. Mr. Winkler also shared that a Standardized Project Work Statement (PWS) had been developed for Planning Charrettes. This requirements contained in the PWS apply to both Geographic Districts and Contract led PC’s.

TASK: HNC to publish PC PWS to EKO (Draft) and after LID & Energy revisions publish final draft to EKO.

Ashley Swann and Donna Thompson (PDR Review Team) - PDR Issues and Lessons Learned

Ms. Swann provided an overview and review of the FY 13 PDR Program. Ms. Swann provided the attendees with a presentation of the PDR statistics:

- 114 total PDRs
- Average Completion Time = 3.8 months
- Longest PDR Completion Period = 7 months

A recap of the Scope Discrepancy process was also presented.

Ms. Thompson reviewed Common Issues and Errors with PDR Submissions associated with the PDRs for the FY13 Program. This discussion included common errors:

- Incomplete PDR’s
- Lack of COS Concurrence
- Lack of Justification provided with Scope Discrepancies
- Lack of detail or definitive information

The use of the “Abbreviated PDR” (PDR Lite) was discussed in regards to the authority for use. The presentation concluded with a review of the PDR Checklist and discussion of the required elements for approval.

TASK: Coordinate with RIT to go over Directive process - turning off/on printing of DD1391 with code 3 release.

TASK: Districts requested more opportunities for training on PDRS system. Will investigate webinars.

Brad Wilkes (3086 Reviewer) and Mr. Ami Ghosh (Cost Engineering HOUACE) - 3086 Issues and Lessons Learned

Mr. Wilkes and Mr. Ghosh led a discussion of the ENG 3086 Process. This included discussion on the schedule for submission, a statistical review of the FY13 3086s, and issues with the vast majority of 3086's being submitted at the final deadline. Mr. Wilkes also discussed common quality issues with individual projects and the process. Issues include:

- 3086's submitted prior to PDR approval
- 3086 scope not matching the approved PDR scope
- Multiple returns for correction; Maximum # of returns = 6x

This discussion also included potential recommendations to alleviate the issues described above. Recommendations include:

- Development of Detailed 3086 Preparation Instructions
- 3086 training via Webinar
- Earlier release of 3086 guidance

Mr. Ghosh concluded with a presentation of emerging issues and changes in the 3086 arena. This included a discussion of the need for definitive guidance on the inclusion of "energy enhancements" to the projects. Mr. Ghosh indicated that each COS is also handling a potential increase to square footage for the incorporation of energy features without "approved" guidance. (i.e. the SF increase for a DFAC is at 8% - will ACSIM/DASA allow this level of increase).

TASK: Find out what ACSIM is doing with the marked up tab B? (Where do they go? Changes to design cost & dates, etc.)

TASK: Send message to MSC's to see if they are interested in training for 3086s or provide funding for Ami & Brad to visit the Districts.

TASK: 3086 Reviewers and PDR reviewers to coordinate an agreement on how sub-lines under primary are reviewed (inconsistency in agreements to scope).

Nelson Rulona and Al Young, HOUACE - MSC, District, & COS Issues/Discussion

Mr. Rulona and Mr. Young facilitated a presentation by each MSC to garner feedback on things that worked well, areas for improvement, and items that facilitated success in their respective regions. Each MSC presented their slides and shared their successes and issues; see slides for specifics from each MSC. In general, items that worked well:

- Weekly teleconferences and spreadsheet
- Good support from Reviewers, concise & quick responses
- PDRS Wizard

Items that need improvement:

- 3086 guidance
- PDR Lite guidance, i.e. when does it apply?
- Cost guidance for Energy Enhancing Measures
- Earlier Code releases

TASK: Provide clarification on the use of PDR Lite in FY14.

TASK: Coordinate with CERL possibly to investigate possibility of access to PDRS system while Scope Discrepancies are being addressed.

Wednesday – 8 June 2011 Sessions

Donna Thompson (PDR Reviewer) and Nelson Rulona (Program Manager, HQUSACE)- Summarization of Areas of Success, Areas requiring improvement, and corrective actions underway or required

Ms. Thompson began the presentation by asking participants for feedback on a proposal to develop a standardized Scope of Work for the PDR/3086 Preparation. MSC/District feedback was positive. A team will be formed to gather the required data and develop the PWS.

TASK: Send message to MSC's asking for a good example of PDR Scope of Work (looking for common baseline) and asking MSC to submit names to be part of the Tiger Team from their districts.

Ms. Thompson presented a review of PDRS to include the new web address, features, and changes. This was followed by a discussion of common challenges for Renovation projects and the need for additional information on COS Concurrence statements (name of COS POC, acquisition strategy, unique features).

Mr Rulona began a discussion of the PDR/3086 Process Metric. Mr. Scott Sawyer, HQUSACE, dissected the current metric and discussed various milestone and milezones (places where milestones can occur).

Mr. Rulona facilitated a discussion concerning endorsement of the PDR. HQUSACE will require endorsement of the PDR by the PM and the associated chain of command. A group discussion of the level of endorsement required ensued. Several Districts voiced concern over the idea of requiring DDPM or Engineering Chief endorsement. Military or Design Branch Chief was suggested as the person to sign off of the PDR. The FY 14 Parametric Design Guidance will address this requirement.

Mr. Young presented slides on issues concerning Acquisition Strategies. Discussion of acquisition strategy and the requirement for the COS to be involved in the acquisition process. Participants shared issues with the Acquisition approval process (timing, ability to change, flexibility, etc). Any code change after the Code 3 process will require a signed letter from the GD to ACSIM.

Ana Ortega, HQUSACE MBP Program Manager - Incorporation of Energy and LID in the FY13 projects and beyond

Ms. Ortega gave a presentation explaining the strategies employed for incorporating Energy Enhancements and Low Impact Development (LID) features into the FY 13 projects. In addition, Ms. Ortega reviewed the implementing guidance and current policies. Incorporation of these items within Planning and Design is required. Ms. Ortega reviewed the confines of how these items are addressed and funded during the planning stage versus the design stage. The presentation concluded with a discussion on how the energy and LID will be included in the FY14 Program and beyond.

Chevron Blond, COS Fort Worth District - Development and use of Energy Calculator Tool

Mr. Blond introduced a software application that Fort Worth District has developed for use in assessing alternative energy sources with minimal design level detail. This application is called the Simplified Total Energy Program or STEP. Mr. Blond walked the participants through a

sample project and reviewed the inputs required and outputs available to users. Mr. Blond shared POC information (listed in the slide deck) for those interested in utilizing this tool.

Doug Pohl, COS Manager Louisville District - Addressing Energy Enhancements during Charrettes

Mr. Pohl presented a concept for addressing energy enhancement measures during a charrette process. His presentation included a review of two pilot projects that were designed for the Army Reserve program. Mr. Pohl emphasized the need to change our design approach from a criteria focus to a process focus. Mr. Pohl walked the participants through the various steps of the process and focused on the various facility floor plan and site decisions and their impact on energy usage.

Scott Wick, Chief Architecture Branch, HOUSACE - Energy Enhancements

Mr. Wick reviewed the new Army Policy on Sustainable Design and Development and provided discussion on the requirements of ASHRAE 189.1. Mr. Wick reviewed the scope of the ASHRAE Standard, emphasized the topic areas covered, and reviewed the implementing guidance. The presentation concluded by offering resources available for additional information.

Paul Dicker, HOUSACE - Low Impact Development

Mr. Dicker presented an informational briefing on Low Impact Development (LID). This presentation included a review of the regulatory guidance and policies, definition of LID, discussion of individual features, and a review of Best Management Practices. Mr. Dicker also reviewed the LID requirements for both FY 13 projects and the upcoming FY 14 program. Participants were notified about an upcoming opportunity for training. An LID Webinar is scheduled for 22 June.

Nelson Rulona, HOUSACE - Preparing for the FY14 Program

Mr. Rulona held a discussion with the participants concerning the timeframe and contents of the pending FY 14 Parametric Design guidance. This guidance will include instruction on inclusion of LID & Energy measures. Guidance is scheduled to be sent out in the July/Aug timeframe. He noted that as of the AAR no finalized FYDP list was available. Mr. Terpolilli, ACSIM, noted that it would be at least 3 more weeks until lockdown of FYDP.

Mr. Michael Stygar, HQIMCOM noted that 6 sites have been approved to receive UAS projects (Stewart, Campbell, Bragg, Riley, Hood and Bliss). Hood & Riley are in FY11; Ft. Bliss will have 3 companies in it; 6-7 new DD1391s from a few weeks ago that are working to get into the FY15 program (possibly).

Questions and Wrap up – All Participants

Ms. Ortega thanked all participants for their time, participation and contribution to the process. All handouts & slides will be on the MRSI site and possibly on the Planning & Programming SharePoint site. She asked each participant to briefly share their view on the effectiveness of the AAR.

Final AAR thoughts from the districts:

Derek Cudd (SAS): great

Diego Martinez (SAS): great thank you for allowing us to participate

Joanne Crawford (SAD): Wants FY14 list... great job
Arturo Sosa (SWF): learned a lot... great forum, open discussion.
Doug Pohl (LRL COS): learned a lot about the PDR process.
Luke Cooper (LRL): Great session, a lot of new information, very informative.
Carol Zurowski (HNC PAX Supportt): a lot of progress has been made.
Bill Simpson (HNC Contract PDR Reviewer): great to meet the people that we have been talking to over the past few months.
Gena Turner (HNC Contract PDR Reviewer): a lot of valuable information, great meeting people we have been talking to.
Brad Wilkes (HNC 3086 Reviewer); Thank the districts & PDRs & ACSIM & IMCOM & HQ for all their help with 3086.
Jon Winkler (HNC Planning/Programming Program Mgr): Thanks Ana & Donna; feedback from MSC & districts are very helpful and allows us to focus on what we can improve.
Wes Bushnell (HNC Planning/Programming): learned a lot since he is new to the process.
Jimmie Jackson (Planning/Programming): first meeting, good information, using information to make PC's better.
Donna Thompson (PDR Reviewer LRL): Thank everyone from our process.
Al Young (HQUSACE): great job Nelson, Donna, Ana, great job.
Nelson Rulona (HQUSACE): thanks everyone for frank and open discussion, continuous improvement process, missing snacks.
Matt Scanlon: feedback from district and divisions has been very helpful, good schedule and kept on track.
Paul Dicker (HQUSACE): good meeting.
Mike Stygar(HQIMCOM): appreciate that he met the whole team from talking on the phone.
Donna Smigel (HQUSACE): Very informative, great to see the team, great job to everyone.
Mike Schultz (HQUSACE): great 2 days, this process has come a long way, now to fine tune things that have been put into place, great to see the whole team.
AlanTerpolilli (ACSIM): great set up for the next 2 days.
Scott Wick (HQUSACE): Happy to be here, good to see everyone.
Barry Bartley (HQUSACE): Nice to be here, good job.
Ronette Lee (POD): thank you for the opportunity to vocalize our problems and get info out there.
Roy Chung (POD): agree with Ronette & great to meet everyone.
Frank Chui: lots of information to take back to his district, nice to put faces with names & voices.
Joe Yee (SPK): this is 100% different than the 1st AAR he went to, moving well forward together to get things done and do a great job, nice progression. Victor: nice to vent opinions, good information & lots to share with district.
Dave Packard (NWD): Timing was great, preparation for presentations was great, very impressive, a lot to relate back to districts, the program is doing what it is intended to do & very pleased & optimistic about that, valuable process.
Bettie Corbitt (HQUSACE – NWD RIT): enjoyed being here, informative, good thing for RIT members to be a part of.
Fritz Kroesen (HQUSACE - NWD RIT): tells districts to take back their info and share with other PMs, 3086 team don't be too hard on districts because they need help and not bashing over the head, it's a learning process and that we are one team and ACSIM is our customer & IMCOM is the user, we need to present ourselves as one team to the customer. A very improved program over FY12, getting better every year.
Kristen Stroh (NAU): very invested group, hard working and helpful. COS, reviewers, HQ were very friendly and helpful.
Rob: nice to see faces behind names, very informative, outstanding team (HQ, HNC & LRL).

Conclusion:

Ms. Ortega concluded and noted that we are trying to work as a team, and to expect a learning curve in regards to LID & energy for next year's program. She thanked everyone for their participation and the meeting was adjourned.