# 22Q - FEASIBILITY PLANNING TECHNICAL MANAGEMENT

The management of the execution of the feasibility study will be accomplished by the U.S. Army Corps of Engineers, Jacksonville District, (USACE) in conjunction with the St. Johns River Water Management District (SJRWMD). Tasks will include preparation of work orders, specific work requests, funding, and overseeing the timely completion of study tasks and monitoring schedules. This includes: preparation of correspondence required to initiate and conclude study coordination with Federal, state, and local agencies; preparation and conduct of briefings, workshops, and informal meetings with Federal, state, and local officials, various agencies, and the public; and coordination and dissemination of review comments on the completed products and draft *Feasibility Report*. Management of the feasibility study team is an ongoing responsibility of the planning technical leader, i.e., scheduling meetings, identification of the major tasks to be completed, and coordination with team members on the development of study products.

The management of the feasibility study will also include an independent technical review. This review previously was performed by SAD, however, beginning October 1, 1995, USACE procedures for technical review were shifted from the USACE's Division level to the District level. In accordance with the new procedures, the Jacksonville District has prepared a Quality Control Plan (QCP) which describes the procedures to be employed to ensure compliance with all technical and policy requirements and describes the review process. Tasks and costs for implementing the technical review in accordance with the QCP are included in this account.

*Initiation of Feasibility Study* - Prepare and issue initial work orders to appropriate offices as indicated in the study network schedule. Periodically update work orders and submit additional requests.

*In-Progress Review (IPR)* - An IPR is an informal or formal meeting conducted at key points during the study to ensure delivery of a quality product which meets the agreed-upon requirements of the local sponsor, is on schedule, and is within budget. The product should also comply with all laws, policies, and technical criteria; establish clear lines of accountability; and include provisions for independent technical review. Appropriate functional and review team members will attend all IPRs after the start of the study. Subsequent to IPR meetings, each review team member is responsible for performing an Independent Technical Review of the assigned technical component. The review team leader is responsible for consolidating all comments and providing them to the study team for consideration and incorporation. A record addressing the disposition of all comments will be prepared and provided to the review team. The review document will be certified by the review team members and the functional chiefs.

*Independent Technical Review* - Before a USACE report is approved it must undergo

a policy and technical review and policy compliance review by the USACE Headquarters in Washington. Technical review is conducted to ensure the proper selection and application of clearly established criteria, regulations, laws, codes, principles and professional procedures to ensure a quality product. Technical review also confirms the utilization of clearly justified and valid assumptions that are in accordance with policy. An ITR team will be convened shortly after initiation of the IRLN FS. The ITR team will meet with the PDT several times throughout the IRLN FS, including prior to the Feasibility Scoping Meeting (FSM), prior to the Alternative Formulation Briefing, following the Scenario Development and upon completion of the draft IRLN FS Report. The ITR team may also meet as needed during the IRLN FS for an IPR or Issue Resolution Conference. This task includes the effort and costs of conducting a technical review in accordance with the QCP.

Quality control is the process employed to ensure the performance of a task meets the agreed-upon requirements of the customer and appropriate laws, policies and technical criteria, on schedule and within budget. Quality control for the IRLN FS will be accomplished through ITR.

There are a couple of options available for performing the ITR for the IRLN FS: utilizing capability of the USACE, SJRWMD or PDT or issuing a contract for the ITR work. In either case, ITR team members must be knowledgeable, skilled, and experienced team members for the discipline for which they will be providing ITR. The option for performing the ITR will be selected upon initiation of the IRLN FS.

Functional Division Chiefs are responsible for: (1) quality of work done by their personnel; (2) establishment of review team and team leader; and (3) resolution of conflicts between study team and review team.

The project manager and planning technical leader are responsible for overall commitments and study progress. The ITR team leader is responsible for coordinating and completing the ITR of the IRLN FS. The project manager and planning technical leader coordinate study issues and guide the Feasibility Study process. The planning technical leader will coordinate review efforts with the ITR team leader. Specific duties of the planning technical leader with respect to the review process include the following: (1) scheduling timely and sufficient periods for review of the IRLN FS; (2) notifying the ITR team leader of review conferences; and (3) managing responses to review memorandums - includes consulting with South Atlantic Division on policy issues as necessary, and forwarding all unresolved technical issues to the appropriate functional chiefs for final determination.

Technical team members are responsible for the technical analyses and appendices, and for development of the IRLN FS and the accompanying NEPA documentation. The USACE and SJRWMD technical team members are provided as follows:

USACE

| | | |
|---|---|---|
| Steven Robinson | USACE, DP-I | Project Manager |
| Pete Milam | USACE, DP-I | Assistant Project Manager |
| Erwin Wunderlich | USACE, PD-PN | Planning Technical Leader |
| Deborah Peterson | USACE, PD-PN | Senior Planning Lead |
| Rolando Altamirando | USACE, PD-PN | Technical Planner |
| Bob Henderson | USACE, EN-D | Engineering Design |
| Mark Wolff | USACE, CO-CS | Construction Services |
| Ray Clifton | USACE, EN-C | Cost Engineering |
| Mike Viessman | USACE, EN-GS | Geotechnical Studies |
| Brian Files | USACE, EN-HH | Engineer Hydraulic Data & Design |
| Mitch Granat | USACE, EN- HI | Hydraulic Investigation |
| John Pax | USACE, OC | Counsel |
| Dan Peck | USACE, PD-D | Socio-Economic |
| Steve Traxler | USACE, PD-EPlanning Division, Environmental | |
| Lynn Hichborn | USACE, RE-A | Real Estate Acquisition |
| Reena Mobley | USACE, CT | Contracts |

SJRWMD:

| | | |
|---|---|---|
| Troy Rice | SJRWMD | Project Management |
| Bob Day | SJRWMD | Technical Project Management |
| Joel Steward | SJRWMD | Technical Proj Mgt Water Quality |
| Ron Brockmeyer | SJRWMD | Habitat Restoration |
| Ralph Brown | SJRWMD | Construction Management |
| Ima Bujak | SJRWMD | Project Management |
| Marguerita Engal | SJRWMD | Governmental Coordination |
| Elizabeth Thomas | SJRWMD | Water Supply |
| Rich Burklew | SJRWMD | Water Supply |
| Len Freeman | SJRWMD | Real Estate |
| Getachew Belaineh | SJRWMD | Modeling |
| John Williams | SJRWMD | Legal |
| Ed Garland | SJRWMD | Public Outreach Coordinator |
| Robert Virnstein | SJRWMD | Seagrass Biology/Ecology |
| Lori Morris | SJRWMD | Seagrass Biology/Ecology |
| Whitney Green | SJRWMD | Watershed Modeling, BMPs |

The ITR team leader is responsible for coordinating all activities associated with the technical review. Duties will include the following: (1) determining the need for ITR team members' attendance at planning meetings and conferences, as well as ITR meetings; (2) compiling ITR comments and submitting them in writing to the planning technical leader and ITR team members; (3) maintaining a reading file for the use of the

ITR team; (4) working with planning technical leader and ITR team members to facilitate resolution of technical issues, and documenting these issues and resolutions; and (5) coordinating the written certification of the independent technical review by the ITR team members and appropriate functional chiefs.

The ITR team will be assigned after initiation of the IRLN FS. Each member of the ITR team is to have extensive experience in his/her respective field and to be highly qualified to review the report in accordance with the requirements and responsibilities discussed in the next paragraph. The anticipated disciplines to be assigned to the ITR team will complement those of the technical study team and will include:

Ecosystem Restoration
Engineering Technical Services
Environmental
Socio-Economics
Construction Cost Estimating
Geotechnical
Real Estate
Construction-Operations
Office of Counsel

The ITR team is responsible for performing an independent technical review of the IRLN FS, technical appendices, and NEPA documentation. The team will utilize ER 1110-1-12, "Quality Management," as a guide to conducting the technical review. Duties of the team include the following: (1) reviewing report contents for compliance with established policy, principles and procedures, using clearly justified and valid assumptions; (2) reviewing methods, procedures, and material used to determine appropriateness, correctness, and reasonableness of results; and (3) providing ITR team leader with documentation of comments, issues, and decisions arising out of the independent technical review.

Milestones for the conduct and ITR of the IRLN FS are provided below:

| | |
|---|---|
| Initiate Study | July 2002 |
| Initiate ITR | August 2002 |
| ITR/PDT Meeting Before Feasibility Scoping Meeting (FSM) | July 2005 |
| FSM | August 2005 |
| ITR/PDT Meeting Before Pre-Alternatives Formulation Briefing (AFB) | February 2006 |
| Complete Draft Feasibility Report | July 2006 |
| Complete ITR of Draft Feasibility Report | July 2007 |
| Final Feasibility Report | August 2007 |

*Feasibility Scoping Meeting (FSM)* – To ensure the feasibility study is focused and tailored to meet specific objectives, an FSM will be convened early in the study in conjunction with a PDT meeting. The FSM will bring USACE Headquarters, Division and District staffs, the SJRWMD, and resource agencies together to focus the feasibility study on key alternatives, to further define the depth of analysis required, and to refine study constraints. An FSM is one type of an IPR.

*Submit Preliminary Draft Feasibility Report* - Submission of the preliminary draft *Feasibility Report* and draft M-CACES (engineering) cost estimate to USACE's higher headquarters.

*Alternative Formulation Briefing (AFB)* - The AFB will be scheduled when the USACE District has identified a selected plan and is prepared to present the formulation and evaluation of alternatives. USACE Headquarters will confirm that the plan formulation and selection process, the identified selected and/or locally preferred plan, and the definition of Federal and non-Federal responsibilities conform to current policy guidance.

*Submit Draft Feasibility Report* - The USACE will transmit the draft *Feasibility Report* with the appropriate NEPA document and M-CACES cost estimate to the technical review team, USACE's higher authority, and the public.

*Submit Final Feasibility Report* - The USACE will transmit the final *Feasibility Report* and associated documents to the technical review team and USACE's higher authority.

*Study Management* - This activity includes on-going study management responsibilities throughout the feasibility phase of the study. The cost associated with this activity includes the tasks described in the opening paragraph of this account description. SJRWMD will be responsible for having the appropriate personnel attend all required meetings listed as milestones in the Project Management Plan schedule, managing the in-kind work to be provided under other accounts, and providing budgetary and schedule input for completion of the activities. The SJRWMD should also participate in the technical review. On-going coordination between SJRWMD and the USACE is critical, and SJRWMD costs associated with this coordination are included here.