Overview of the Worksheet

CHumphrey: To prepare you for Step 1, Megan is going to explain the different worksheets and columns in the Excel spreadsheet. It will make a heck of a lot more sense to you if you have the example spreadsheet or the blank sample in your participant guide. The example worksheet is something that Megan developed. It's probably going to be helpful to refer to it when you're filling out your own spreadsheet.

MStouffer: As mentioned earlier, these modules are meant to instruct you on how to complete the implementation framework spreadsheet, which is done in Excel. Your participant guide also has some useful tools that we will be referencing throughout the module.

As Cathy mentioned, a completed example spreadsheet is in there that shows many relevant examples and how they're addressed in each column of the worksheet. This Excel spreadsheet is where you'll capture all the work necessary to implement your RMP. The information that goes into this document comes from your approved RMP. It may also be found in any plans you've carried forward into your approved RMP, for example, a river management plan, allotment management plan, or other special designation plans. Make sure to grab and review all of these implementation plans because they also need to be included in the spreadsheet.

You'll be working exclusively in Excel and may need to add rows or format the sheet during your work. So please refer to the Excel Tips & Tricks, which can be found in your participant guide, if you get stuck.

I'll start with an overview of the worksheet and the column headings, and then we'll go over some examples of project entries, and finally you'll be ready to fill in your projects. We've provided an outline of resource categories in your participant guide. You can compare that to what I'm going to show you on the screen, which is how the worksheet actually looks in Excel. They're a little different, but you'll see the similarities.

First notice that the worksheet has six tabs at the bottom. Each tab represents a logical grouping of common types of BLM work. Each category is further subdivided into the resources and programs labeled plan outcomes. These are columns 1 and 2 on the Excel spreadsheet. They're filled out for you in the template we provided.

The resources and programs should seem similar to the section titles in most RMPs. They come from the DOI Strategic Plan, so typically they won't change. If you do want to make any minor modifications to the titles, you have to okay it with your state planning and environmental coordinator just to make sure you're keeping consistency within your state.

So we'll go through each category now. First is the **Natural Resources** tab. The Natural Resources tab is divided into Physical Resources and Biological Resources. The Physical Resources section is further divided into Air, Water, Soil and Geological Resources.

Under the Biological Resources, you have Forest and Woodland Health, Grasslands and Shrublands, Riparian and Wetlands, Invasive Non-native Species, Fish and Wildlife, and, finally, Special Status Species. All projects and management actions meant to address these resources, including habitat restoration and surveys and monitoring, should be included in this tab.

So next we have the **Heritage Resources** tab. This tab includes work associated with Cultural and Paleo Resources and Special Designations such as ACECs. You'll need to rename the ACEC rows with your particular ACEC names. We recommend that you add rows to include all of your ACECs. Special designations also include Wild and Scenic Rivers, Wilderness Areas, WSAs, Natural Historic Trails, and Wild Horse and Burro Herd Areas. The other row can be labeled and used for whatever other protected areas you might have, such as Lands with Wilderness Characteristics.

The third tab is **Energy and Minerals**. This tab includes Renewable and Nonrenewable sources of energy. Nonrenewable energy includes oil and gas, coal, and oil shale/tar sands. Renewable energy includes permitting and other activities related to geothermal, solar, and wind energy projects. Although renewable energy permits are treated as rights-of-ways in current policy, their workload is located here to better match the goal of energy production and highlight the different level of workload required versus a traditional right-of-way.

Locatable, Saleable, and Non-Energy Leasable Minerals go under Minerals. Depending on your planning area, you may want to be more specific and identify specific areas or types of minerals in column 2.

The next tab is **Range Management and Forest Products**. This is divided into Range Management and Forest Products. The workload associated with Range Management should be limited to the work needed to manage the range program—for example, renewal of grazing permits and range improvements, such as watering facilities.

Management actions that deal with Forage Production should be identified in the Natural Resources tab associated with the vegetation type you're treating, as they usually benefit multiple resources, not just range.

Forest Products includes both commercial activities, such as timber sales, and noncommercial activities, such as fuel wood permits and plant product gathering.

The next tab we have is **Recreation and Travel Management**. Recreation includes Special Recreation Management Areas and Extensive Recreation Management Areas. It also includes dispersed recreation, where special recreation permits might be issued. Travel Management includes facilities that support travel, such as signage and parking areas, as well as management activities, such as developing travel plans and road maintenance.

The final tab is the **Direct Community Services** tab. Direct Community Services is sort of a catch-all category. It includes Realty, Fire Management and Public Safety.

Realty includes both land tenure actions, such as disposals and acquisitions; and land use authorizations, such as rights-of-ways—the ones not associated with renewable energy development. It also includes unauthorized use such as dealing with trespass.

Also in this category are the activities related to managing wildfires. This would include developing fire management plans and monitoring FRCC. Similar to forage treatments, fuels treatments may be more accurately located in the vegetation sections that they are addressing due to the cross-benefiting nature of most of the projects.

Public Safety is also located in this tab and includes activities that relate to law enforcement, hazardous waste and abandoned mine lands. We developed these categories to work with most RMPs. However, you may have activities that don't fit very well within the categories. The six categories of work or tabs can't be changed. However, if you feel like you need to add or change any of the plan outcomes in Columns 1 or 2, then as we discussed, please check with your state P&EC first.

Some states have a strategy for consistency among its implementation plans, and you need to make sure that you're following it as closely as possible if you're in one of those states.

CHumphrey: So, as Megan mentioned, columns 1 and 2 in the Excel spreadsheet template are going to be filled in for you, as are the six tabs or worksheets.

Megan described the three-step process, but for those of you that are visual learners, I'll describe it in terms of the worksheet. So Step 1 consists of populating Columns 3, 4 and 5, which are Projects, PE Codes, and Where (geographic location). Column 13, Cross Reference, can be filled in during Step 1 or at any of the steps, whatever makes sense for you. Step 2 consists of populating Columns 6 and 7, which are Priority and Magnitude. And Step 3 is populating Columns 8-12, which are the next five fiscal years.

Megan is going to explain Columns 3-5 in detail and a little bit on Column 13 so that you'll know how to complete Step 1, and then she'll also go over the remaining columns just so that you have a big-picture understanding of all three steps of the process.

MStouffer: So starting with **Column 3**, called Projects, Tasks and Management Actions, is where you'll input the projects associated with implementing your resource plan. Filling out this column is the bulk of the workload for Step 1. Filling out Column 3 might seem like a daunting task, capturing all the work that's required under the RMP, but we've provided that example spreadsheet and a checklist of the types of work to accomplish outcomes that will help get you thinking about the types of actions needed to meet plan goals and objectives and that should be included in the spreadsheet. Both documents are in your participant guide.

The Types of Work checklist comes out of the BLM Strategic Plan Matrix. This list is a useful tool that connects work to budget strategies and potential PE Codes. It should be used to brainstorm the types of projects needed to implement plan goals and objectives. It could also be used at the end of the process to review the spreadsheet for completeness.

If you aren't familiar with PE Codes, they are Program Element Codes. They are the tools that are used to measure workload accomplishments. For more information on this, you can go to BLM's budget page on the Intranet. The URL should be on your screen. We've included the FY12 PE Codes in the Participant Guide.

Open your Participant Guide to the Types of Work to Accomplish Outcomes checklist. It will help you follow along when I talk about each type of work that's linked to the PE Codes. Remember that these are the current PE Codes for the FY12 fiscal year and that they can change from year to year. So be sure to use the current year's codes and adjust the checklists as necessary.

1. The first is Provide Outreach, and that involves the A codes.
2. Second is Assess Inventory Condition and Status, which are the B and C codes.
3. Performing Planning is mostly the D codes.
4. Authorizing Use involves the E, F and G codes.
5. Implementing BLM-initiated Actions is the G codes, H codes, I, J, and K codes.
6. Performing Monitoring involves the L and M codes.
7. And Managing Compliance is the N and O codes.
8. And finally, Managing Work/Partnership and Community Relations is the P codes.

So now I'll go through in a little bit more detail. **Providing Outreach** - again, these are the A codes. This would include projects such as brochure development, signage, and development of maps. Project codes such as AL, public outreach through interpretation and environmental education, or AJ, Native American consultations, would be included in this strategy category. You'll want to consider what types of outreach to provide for certain resources, particularly heritage or recreation.

Then there is the **Assess, Inventory Condition, and Status**. This will be represented by the B and C codes. This includes surveys of habitat, land health, and maybe public visitation surveys. It could also include cultural and wildlife surveys for implementation projects. Project codes such as BO, inventory of soil resources, or CC, assessments of air resource conditions, would be examples of this strategy.

Ask your team to think about what inventories are needed to be done before we implement certain projects and get started in planning.

Speaking of planning, the next category involves **Performing Planning**. These are the D codes. This includes any form of planning such as travel management plans, the DA code; ACEC activity plans, the

DF code; or maybe habitat management plans, DK. What plans did your RMP call for. Or maybe there is some planning that you'd like to do before moving on to other implementation activities.

The next strategy is **Authorize Use**. This involves the E, F and some G codes. This would include a lot of externally generated actions in which a party comes in with an application. Examples include permit renewals, EE; right-of-way authorizations, ER; leasing and development of oil and gas, the EI code. Review these PE Codes to see which apply to your office and make sure to include them in the worksheet as demand-driven work.

The next is **Implementation of BLM-initiated Actions**. These are the G, H, I, J and K codes that fit in this category. These projects might include restoration activities, habitat improvement projects or prescribed fires. These are things the BLM does to meet goals and objectives without impetus from the public or a third party. This could include maintenance of recreation sites, IA; or trails, ID; construction of vegetation treatments, the JA code; or processing land sales, KD. Here is where there will be a broad range of BLM activities. So you need to consider which of these are needed to meet the goals and objectives of your RMP.

Performing Monitoring is another strategy and includes the L and M codes. As opposed to assessment and inventories, monitoring refers to determining the effectiveness of a project and whether or not the BLM is meeting its objectives. This might include projects such as the monitoring of the effectiveness of a vegetation treatment or prescribed burn, MB; monitoring grazing allotments, ML; or conducting fluid mineral surface and environmental monitoring, MW. Monitoring effectiveness is something that the BLM has a hard time tracking. So make sure to include this workload in your strategy.

Then we have **Managing Compliance**. These are the N and O codes. It includes inspections and monitoring of implementation activities such as drilling inspections, NB; and review of existing right-of-ways, NH. This could also include law enforcement activities. Basically this strategy category refers to the activities BLM takes to make sure that third parties are following the rules. Note that with oil and gas, performing monitoring refers to studying surface conditions, while managing compliance refers to inspection and enforcement of conditions of approval and production values.

So the last strategy is **Managing Work and Partnerships and Community Relations**. These are the P codes. This includes the work involved in developing partnerships, cooperating on projects, and building relationships in the community. This could include sharing data and/or cooperating on fire management plans. There are no measurable codes for this category at present. Each code refers to providing program support and can include activities such as cooperation and other unmeasured workloads.

CHumphrey: So, as you can see, the checklist is fairly complete. If you keep it handy while you're filling in Column 3 with the projects, activities and management actions for each resource category, then it should help you think of all aspects of resource management that you may have overlooked otherwise.

And don't forget to include your nondiscretionary work that you do, such as processing APDs (applications for permits to drill), conducting cultural surveys, and anything else that's not explicitly in your plan but that are integral in meeting your plan goals and objectives, or BLM goals and objectives.

And don't forget to look at the example spreadsheet in your participant guide. It will be really helpful when trying to figure out how to word something or maybe what to include where.

All right, so let's move on to the other columns.

MStouffer: So, **Column 4** must also be filled out during Step 1, and this is where you identify those **PE Codes** that are associated with the work that you outlined in Column 3. These codes tie the projects to the BLM's budget system. Every activity in the BLM that they do must be tied to some project element. There may be multiple PE Codes associated with a particular project that was identified. You may choose to address all of these in one row or split them into separately identified tasks in their own row.

CHumphrey: So what's an example of a project that would have multiple PE Codes?

MStouffer: So, one example is a vegetation treatment. It might include a DF code, perhaps for planning for interdisciplinary activities. It might include the JM code, for implementing a fuels treatment outside of the wild-urban interface area. And it also would include maybe a JB code for constructing shrub and grass treatments. And, finally, you'd want to make sure that it also included that monitoring component, so the MT code, monitoring fuels treatments.

Column 5 should also be completed during Step 1. This is where you would identify the specific **geographic location** of each project if applicable. Locations can be as broad as the entire planning area or as specific as a particular ACEC, SRMA, management unit, or geographic feature. Not all projects will need a geographic location filled in.

CHumphrey: So, Megan, what if a project doesn't fit neatly under one resource category, or maybe it crosses across a couple categories; what would you do?

MStouffer: I'm so glad you asked that, Cathy. This is where we use that **Column 13, Cross Reference**. It provides a place to know other parts of the spreadsheet that might deal with a similar project or other resources that it might potentially affect. For example, if there is a special recreation permit for an annual event in your field office that requires a larger than normal law enforcement presence, you will want to include the permit in recreation but note that the cross reference in law enforcement also applies to direct community services.

CHumphrey: So that's all you need to do to complete Step 1. Megan is now going to briefly go over what goes in the remaining columns because we want to give you a context for what comes next. In your participant guide we included a sample spreadsheet, not to be confused with the filled out example

spreadsheet. The sample spreadsheet is just a one-pager, and it shows the columns that are color coded to the steps of the process.

It's important to keep the steps separate. It might be tempting to fill in some of the columns for Steps 2 or 3, but it's really best if you wait until your state planner approves Step 1 before you move on to the training for Step 2 and before you fill out the columns. So with that in mind, Megan, tell us about Columns 6 and 7.

MStouffer: Sure. So **Column 6** is where you rank the **Priority** of each project over the next three to five years. This is the primary part of Step 2. The priorities are Non-discretionary, High, Medium or Low. And ideally you'll end up with a good mix of high, medium and low projects so you're not getting this 90% of high, some medium and a couple low. Remember that you will be revising and reprioritizing each year.

Column 7, also in Step 2, is the **Magnitude** of the workload associated with each project. This refers to both the monetary and labor resources that would be needed. As Cathy said, we'll get into more detail on Priority and Magnitude in the next online module.

CHumphrey: And so now that just leaves us with the Step 3 columns.

MStouffer: Right. So the next five columns represent the next five fiscal years, and during Step 3 you're going to determine which fiscal years each project is expected to be accomplished. You'll use the priorities you set in Step 2 to determine when each project should be scheduled and how many targets are set for each year.

CHumphrey: Okay. So you should have a better understanding of the categories and the columns on the worksheet now. Megan explained what needs to be done in Step 1 and what you have to look forward to in Steps 2 and 3. And now that Brad's back, he's going to talk with Megan and I about some strategies for how to do Step 1.