**How To Do Step 1 (Methodology)**

MStouffer: Now let's talk about some strategies for completing Step 1. First, you'll need to decide how you'd like to break out the work. The identification of the work from the RMP can be done individually or in resource-based groups. We've had the best luck when small groups work side-by-side to do overlapping workloads and the ability to create consistency in how the work is identified. Each group could tackle one of the six resource tabs on the worksheet. However, depending on the workload and makeup of your ID team, one group could take on more than one tab, or maybe one tab will take two whole groups to complete it.

So let's hear from Brad Higdon on how they divided up the work for the Taos, New Mexico plan.

BHigdon: Thanks, Megan. We assigned two tabs per group. Natural resources and forest products and livestock management were combined due to the overlapping responsibilities for vegetation and habitat management. Heritage and recreation were combined since our ACEC SRMAs and travel management plans will be done concurrently in many cases. Then we combined our nondiscretionary workloads for energy and minerals with direct community services.

A couple people needed to float around amongst the groups. For example, our fire management specialists worked on natural resources and direct community services. Also, the heritage and recreation tabs proved to be too big for one group because of their workloads and should have been divided up into two separate groups for more efficiency.

CHumphrey: We recommend starting the process by going over at least the first resource together as one big group, and that way everybody will get on the same page regarding the process. You may want to document your rules of thumb as you go through the exercise. For example, you might want to start every sentence with an active verb just like the PE Codes.

MStouffer: Make sure each group has a computer with a blank excel spreadsheet loaded onto it. You can find it on the web site where you found this course. It works best if the person with the most Excel experience sits at the computer as there is some minor excel formatting that might need to be done. Don't forget to look at that excel tips and tricks in your participant guide.

As Cathy mentioned earlier, some of the documents you may want to have handy are the RMP (of course), any other plans that haven't been carried forward into the new one, current and past PTAs to help you think of work that gets done annually, the Participant Guide, the example spreadsheet, PE list, and strategies checklist.

BHigdon: In Taos, the most helpful aid for me was having the list of PE Codes on hand since fundamentally this is an exercise on linking the plan implementation tasks or activities with BLM's budget system. The PE Code list helped me to associate those tasks in terms of how they're funded, which is a very important practical exercise. And the list is a good brain teaser for the types of work you may need to include.

MStouffer: Carefully consider how you're describing each task in the worksheet. Remember that these sheets are meant to be a flexible tool for planning work each year. Another benefit is that the worksheets can inform new employees about what kind of work is going on in their office and their current priorities.

With this in mind, it's important to describe the work so that anyone can understand it. Avoid any shorthand terms an excessive use of acronyms or jargon. For example, under Riparian you wouldn't just say "Riparian treatments" because what does that mean? It may mean monitor. It may mean develop. In our example spreadsheet, we chose "Construct and maintain riparian treatments." As Cathy said, begin each action with an action verb.

BHigdon: In Taos, we were specific about our non-discretionary workload. We differentiated between processing applications, leases, or special recreation permits, and the monitoring of those actions. These are very different workloads with different priorities and program elements. So it's important to clarify.

MStouffer: It may be helpful to note the section of the RMP that an action came from. This could help a new employee find the specific background or the context of the action. Remember that identifying the geographic area can also be useful when setting priorities. For example, acquiring easements can be a field office-wide workload, but if you identify the specific areas where this could occur, they can be better prioritized later. So make sure the geographic areas are described consistently with the RMP and among the different resources. This will make it easier to identify priority areas later on.

CHumphrey: Brad, how did you do this for Taos?

BHigdon: In Taos, for example, if a particular area was in need activity-level planning as well as vegetation treatments, we identified them in the same terms so that it's obvious that multiple projects are being considered in the same area. This was helpful in identifying priorities later.

MStouffer: So really think about what it is you do in a year's worth of work—or even a day's worth—and try to capture that in the worksheet. Be inclusive. To determine if there is a workload you're missing, use the tools available to you such as the example spreadsheet, the PE Codes, and the strategies to accomplish outcomes checklist.

CHumphrey: We talked about having the entire interdisciplinary team start as large group to go through one resource together and then breaking into smaller groups to work on the rest of the resources.

After each small group is done inputting their information (that is, columns 3, 4 and 5) into the Excel worksheet, then the entire interdisciplinary team should get back together so that each small group can report out what they did to the large group. The goal is for everyone to get a solid understanding of the entire office workload and catch anything that might have been missed—duplications, inconsistencies, you know, that kind of stuff. And be sure to edit your worksheets as each group reports out.

MStouffer: This can also be a good time to identify any cross references for column 13.

CHumphrey: So following the report out and cleanup of the worksheets, you will have almost completed step 1 of the implementation strategy. All you'll need to do next is to have your state planning and environmental coordinator sign off on it. But ideally they'll be there with you, so they might even be able to approve your worksheets the same day!