

Introduction

CHumphrey: Hi and welcome to Module 3 of the Plan Implementation Training. My name is Cathy Humphrey, and I'm a Planning/NEPA coordinator here at the National Training Center in Phoenix.

For this module you will need copies of the Participant Guide, this year's Project Target Allocation, or PTA, last year's PTA, and your Excel spreadsheet. If you don't know what a PTA is, then somebody else in the room should, and if nobody does, then the right people aren't in the room. If you don't have those materials, you probably ought to stop the video, make copies for everybody, and then restart the video.

And similar to Step 2, Step 3 really does work best if it's facilitated. So if you don't have a facilitator, I would recommend that you find one before going on. And as mentioned in the other modules, this can be your state planning lead, a district planner, a project manager, assistant field manager, anybody that's got the skills, and preferably the person should know your issues and/or have been through the process before.

Now, in case it's been a while, here's a little reminder... Developing a strategy to implement your plan is a three-step process. In **Step 1** you identified the projects, tasks and management actions that would be required to implement your RMP and to complete your day-to-day duties. In **Step 2**, you identified the priority and magnitude of the work that was identified back in Step 1. And **Step 3**, which is this step, consists of scheduling the work over the next five years.

To successfully complete this module, you will schedule the project and tasks from Step 1 by identifying the units that need to be completed over the next five years. There's a little bit of flexibility in scheduling the work, but it's important to make sure that all the right people are in the room, and most importantly, a field manager or district manager, and probably somebody that's familiar with your field office budget should be present and engaged for the process because he or she should have some key knowledge of the budget and the priorities in your office and in the larger BLM context.

This scheduling exercise is a really good opportunity to involve your partners or cooperating agencies because they often have resources or information that can influence how the columns are filled out. But, of course, you know, it's up to you whether you involve any non-BLM participants in this exercise, but from our perspective, it only adds to their understanding of what your office is trying to accomplish and it could help strengthen your relationships, not to mention the potential added benefits to managing the resources.

So now I'm going to introduce you to our **instructors**, and you will remember them from Modules 1 and 2. Megan Stouffer has been with the BLM since 2007 as a Planning and Environmental Coordinator at the Washington office and state office level, and currently she's a Branch Chief for Planning and Assessment at the Colorado State Office. She has taught this implementation strategy training about 15 or 20 times.

MStouffer: Thanks, Cathy. It's great to be back for Step 3. We're going to get into the nitty-gritty of project planning now, and you seem to have survived Step 1 and Step 2, so hopefully you're geared up to start this challenge.

CHumphrey: Brad Higdon has been with the BLM since 1997, and since 2008, he has been the Planner in New Mexico's Taos Field Office. His field office recently went through this new streamline process, so I'm interested to hear you share your perspectives.

BHigdon: Thanks, Cathy. It's nice to be here, and I certainly appreciate the opportunity to learn from you and other members of the panel.

CHumphrey: Joe Meyer has been the Field Manager of the Casper Field Office in the High Plains District in Wyoming since 2008, and he has been in Casper since 1989. He was involved in developing and carrying out the plan implementation strategy for the 2007 Casper RMP as a staff assistant, assistant field manager, and assistant project manager. It's nice to see you, Joe.

JMeyer: Thanks, Cathy. From my experience, scheduling the work is the most difficult. It's relatively easy to develop a schedule, but for a number of reasons, it's much more difficult to meet those commitments. We sometimes experience significant shifts in demand work, budget, or national priorities which impact our ability to meet previously scheduled commitments. Also priorities can change rapidly such as the current updates to incorporate new sage grouse protective measures. This can result in the need to adjust scheduling or other projects that were already in the works. This is where the ongoing communication with cooperators is important, so everybody understands the reasons for changes to the implementation schedules.

CHumphrey: And Rem Hawes is currently the Field Manager of the Hassayampa Field Office here in the Phoenix District in Arizona. He was the Agua Fria Monument Manager when they developed the Plan Implementation Strategy for that area in 2010. He has been with the BLM since 1992, and Arizona's done some really fantastic things integrating the implementation strategy with budget, and he's going to talk more about that.

RHawes: Thanks, Cathy. It's great to be here. It's been very educational and informative to use the implementation matrix. I think we've begun to use it to good effect and look forward to talking with you about it and serving here with the panel. So good to be here.

CHumphrey: And that's our panel!

Since you're watching this module, that means you must have completed the first two steps in developing a plan implementation strategy and your state planning and environmental coordinator has approved Step 1. That means you've populated Column 3 of the Excel spreadsheet with the projects, tasks, and management actions from your land use plan; you've identified the project elements, or PE

Codes, in Column 4, you've indicated where each action will occur in Column 5, and you've determined the Priority and Magnitude in Columns 6 and 7. You may have also filled in Column 13 with cross references. But if that's not the case, then you need to go back and finish Steps 1 and 2 before moving on to Step 3.

However, you know, if you need a reminder on the history or the background of the implementation process, if you need a review of the Excel spreadsheet columns, if you need to bring somebody new up to speed, then feel free to go back, review the appropriate sections in the Step 1 module.

Okay, back to the spreadsheet. So out of the 13 columns that comprise your plan implementation strategy, the only piece left to complete is to fill in Columns 8-12. The heading of Column 8 is either the current or the upcoming fiscal year, and then Columns 9-12 are the four years after that.

Step 3 consists of scheduling the workload that you've identified by estimating the number of acres, units, miles, whatever, that you're planning to complete over the next five years. We recommend completing Step 3 shortly after Step 2, but timing the task with your budget schedule—that might dictate more when you tackle Step 3. So as long as the worksheet is completed within a year of signing your Record of Decision for your Resource Management Plan, then you'll still meet the requirement.

Now, Brad, since the Taos Field Office recently went through this process, how long after finishing Step 2 did you start on Step 3, and did you time it with your budgeting cycle? How did that work?

BHigdon: Well, we did allow a lag time between completing Steps 2 and 3 over the holiday season, and while that wasn't ideal, we were able to complete Step 3 in time for us to submit our projections for the next fiscal year into FBMS. So when scheduling Step 3, you might keep in mind when the FBMS submissions are due for the next fiscal year.

JMeyer: We didn't give enough consideration to the budget process as we developed timelines for implementation. In the past two years we focused much more on project timelines that can be aligned with the BLM budget process. And I think even more importantly for us is that we have worked with our cooperators to try to align with their budget process. The Wyoming Game & Fish Department is one of our more active cooperators. They can bring funding to a project, but their fiscal year is not the same as the federal fiscal year, so we need to try to adjust our timeline to accommodate their funding model.

RHawes: When we did this, we did it right after the Record of Decision was signed. We didn't, at the time, have any strategic timing with the budget process. I wish we could have completed this with that in mind. We now know that it would be very beneficial to do this planning timed with one of two crucial budget processes. That would be right before the budget planning submission or right before the planning target allocation, PTA, process when you're planning next fiscal year's budget. This is how we're using it now with the budget planning system and the planning target allocation process, and we're beginning to see positive results with it.