Introduction

CHumphrey: Hi, and welcome to Module 2 of the Plan Implementation Training. My name is Cathy Humphrey. I'm a Planning/NEPA Training Coordinator here at the National Training Center in Phoenix.

I want to make sure that everybody has a copy of the Participant Guide and you should have at least one copy of the example Excel spreadsheet per table. If you don't have these, then you need to stop the video and make copies because you want to be able to follow along now, right? You can find both documents on the web page where you launched this course.

Now, you may hear us talk about the implementation strategy as a spreadsheet or a worksheet or a matrix. It's all the same thing. Just remember, it's the Excel file that you're developing your implementation strategy in.

Now, another thing is Step 2 works best if it's facilitated. So if you don't have a facilitator in the room, I would recommend that you get one before going any further. And, you know, you're going to thank me later. Typically, the best person for this job is probably your state planning lead, your district planning lead, maybe assistant field manager, project manager. It needs to be somebody that has facilitation skills and probably the person should be familiar with your issues and maybe have been through the process before.

Now, just as a reminder, developing the 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 plan and to complete your day-to-day duties along with their geographic location, the project element codes, and those are shown in Columns 3, 4 and 5 of the Excel spreadsheet.

Step 2, which is covered in this module, requires you to identify the priority and the magnitude of the work that you identified in Step 1, and those will go in Columns 6 and 7.

And then next is **Step 3**. That consists of scheduling the work over the next 15 years, and that goes in Columns 8 through 12.

So if you're watching this module, that means that you've completed Step 1 and you've had it approved by your state planner. If that's not the case, though, you need to go back and finish Step 1 before going on to Step 2.

And then if you need a reminder on the history or the background of this implementation process, or if you need a review of the Excel spreadsheets, or maybe you need to bring somebody up to speed, a new person that's involved in the process, then you can just go back to Step 1 module and review the appropriate sections.

There are a couple **course objectives**. The first one is to review the Factors to Consider in Establishing Priorities. That's in your Participant Guide. And then you're going to modify them to fit your planning area. The second objective is that you'll identify the priority and magnitude for each project, management action, and task that you identified back in Step 1.

Now, for the **participants** for Step 2: while there's a little bit of flexibility in how the priority-setting exercise can be accomplished, it's really important that you involve all the right people. Most importantly, you need a field manager or district manager present and engaged for the process because he or she will have some key knowledge of the priorities in the office and the larger BLM context. The priority-setting exercise also provides a great opportunity to involve your cooperating agencies and your other partners because you know they'll have some insights and input into projects that they feel represent the public interest or that they can assist with.

Now, Step 1 was more of an internal paperwork exercise, but collaboration with your partners to identify priorities in Step 2 would really be useful. And depending on your relationship, you may either decide to initiate Step 2 just with your BLM ID team and then discuss and modify it with your partners or you might want to have your partners be involved at the very beginning of Step 2. The perspectives of the BLM manager and the external partners can help your team identify the broader priorities and ensure there's a balance between the internal and the external objectives.

Next I'm going to introduce you to our **instructors** who you might remember from Module 1: 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 the Branch Chief for Planning and Assessment at the Colorado State Office. She's taught this implementation strategy training about 15 or 20 times.

Hi, Megan.

MStouffer: Thanks, Cathy. It's great to be back for Step 2. This is the part where you really provide some context and some meaning to the organized tasks and projects you identified in Step 1. So it's really important to have all the right people in the room.

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

BHigdon: Sure, thanks, Cathy. Despite my experience in a couple different field offices as a planner, this is a completely new experience for me.

CHumphrey: Joe Meyer has been the Field Manager of the Casper Field Office in the High Plains District in Wyoming since 2008 and he's 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 specialist and an assistant field manager and an assistant project manager. It's nice to see you, Joe.

JMeyer: Thanks. You know, we were fortunate in Casper to have cooperators who were actively engaged in developing the 2007 plan revision, and they've remained committed well into the implementation phase of our plan. We continue to meet on an annual basis to evaluate our progress and to develop future priorities.

CHumphrey: Finally, Rem Hawes. He's currently the Field Manager of the Hassayampa Field Office here in 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. It's nice to see you.

RHawes: Thanks, Cathy. It's good to be here. Setting priorities was one of the most challenging things that we found when we were doing our RMP implementation, but it's also the one that I think pays off the most. So looking forward to being on the panel with you all.

CHumphrey: Great. All right, that's our panel. Welcome. So, the record of decision for your resource management plan has been probably been signed. You've populated Columns 3, 4 and 5 in the Excel spreadsheet. You've written down the projects, tasks, management actions from the plan. You've written down where they'll occur, the project elements, also called PE Codes. Some of you have probably filled out Column 13 for cross referencing among projects.

Now our next step is to determine both the priority and the magnitude of each project. Megan is going to start by explaining why it's useful to do this.

MStouffer: So, establishing priorities involves gathering the field office staff and managers to collectively discuss the present and future state of affairs in the planning area. Bringing everyone together integrates the office and enables the staff to visualize and understand how their individual tasks fit into the overall vision for the planning area. This step will foster a shared understanding of RMP commitments and implementation.

As much as we would love to have unlimited staff time and budget, the reality is that we have to make choices about which projects to start and which to fund. Having a shared understanding will help the field office decide where to focus precious time and resources when these choices need to be made. Determining the magnitude will help the office staff understand the resources in terms of staff time and dollars that are needed to implement those projects, giving an overall picture of the office's capacity to complete the work.

So once the priorities and the magnitude are set, they can be used to schedule the tasks in the out years. This schedule will help guide the implementation of the RMP and help to plan for workforce and budget. The schedule will also serve as a tool to track and evaluate implementation of the RMP.

Developing a shared understanding of the priority work areas and projects will also allow your office to more effectively allocate scarce resources, including time and money. Magnitude will give a clear idea of the resources that will be required.

Identifying priorities will also allow BLM offices to think broader than the annual budget process. It will give us an ability to look further into the future than that next fiscal year and create a more comprehensive strategy for setting targets and requesting funding. This process can also be flexible in order to incorporate priorities from outside the RMP process such as for leadership mandates and budget changes.

Priority setting and scheduling tasks in the out years will allow the BLM to identify potential scarce skills early, thus maybe helping the office identify mid to long-term hiring goals. Overall, identifying priorities for these tasks may allow an individual office to be in a better position during budget negotiations and competition for scarce funds. These strategies may allow the office to address more high-magnitude projects.

CHumphrey: The first thing that you're going to do in Step 2 is you're going to talk about what factors you'll consider when setting priorities. This is going to allow your team to get a shared understanding of the situation in your office and it should provide a baseline for setting priorities. What we're going to do is give you a short introduction to the factors, and then you're going to stop the video and talk about the specific factors that are relevant to your office. We've compiled a list of factors to get you started, and when you have a list that you're happy with, restart the video, and you can hear an overview of the priority-setting process.

There are lots of ways to determine priorities for the work that you identified in Step 1, and by the end of Step 2, you will have assigned high, medium or low priority for all the tasks that are discretionary and you'll have determined the magnitude of each task as high, medium or low.

When that's done, you'll move onto Step 3 and schedule the workload over the next five years, and then you'll finally be ready to implement!