

UNITED STATES DEPARTMENT OF THE INTERIOR
Bureau of Land Management
Oregon State Office
P.O. Box 2965
Portland, OR 97208

In Reply Refer to:

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January 10, 2003

EMS TRANSMISSION 01/15/2003

Instruction Memorandum No. OR-2003-031

Expires: 9/30/2004

To: District Managers: Burns, Lakeview, Prineville, Spokane, and Vale
Field Managers: Lakeview, Andrews, Three Rivers, Malheur, Jordan, Baker,
Central Oregon, Deschutes, Wenatchee, and Border

From: State Director, Oregon/Washington

Subject: Planning Update Report Format and Content

DD: 04/30/2003

Program Area: Land Use Planning and National Environmental Policy Act Compliance

Purpose: This Instruction Memorandum (IM) updates the policy on annual planning progress or update reports and recommends a consistent format, including a standardized Summary Table. Our intent is to develop, consistently document and publish plan implementation reports that can be used by the public, interest groups, Congressional and Interior staff and the media. Similar informational reports, based on annual fiscal year accomplishments, will minimize the need for some data calls, provide timely and useful information to the public, and create a supporting record to document that approved land use and activity plans are being implemented, monitored and reported. The annual reports will also allow consistent documentation of formal, approved plan evaluations and plan maintenance actions.

Policy/Action: While not required by regulation, it makes good sense to document annual progress in a format easily used by participants in the planning process, interest groups and other stakeholders. It allows us to document our cooperative projects, communicate consistently and effectively while providing a consistent "look and feel" to our reports within our two-state area. A similar format and summary table are being developed for the western Oregon planning area, which is covered by the Northwest Forest Plan. However, since those plans need to track decadal progress and environmental effects and have many more common Land Use Allocation commitments, a separate and more flexible approach is now being required for the eastern Oregon and Washington planning areas. Staffs are directed to use the standardized format and summary table, effective immediately, with planning update reports for fiscal year 2002 to be published by April 30, 2003.

This applies to all offices and resource areas, although field managers have the option to aggregate reports in single District-wide documents, where feasible, effective and useful to your readers. The National Environmental Policy Act (NEPA) register portion should summarize status of ongoing and planned environmental analyses (environmental assessment records and environmental impact statements), and list actions which were completed with a Determination of NEPA Adequacy, as authorized by Instruction Memorandum No. 2001-062. The NEPA register format should also

indicate which analyses are underway or were completed with cooperators, since this will help track and document such efforts, as required by the January 30, 2002 Council on Environmental Quality memorandum on *Cooperating Agencies in Implementing the Procedural Requirements of the National Environmental Policy Act*.

Timeframe: This policy is effective immediately.

Background: Planning Update Reports or their equivalents have been published in some Oregon/Washington field offices since 1988. Formats and content have varied widely, with no more directives than Annual Work Plan publication requirements, and off-the-top funding in OR-930 for publication. Minimum content requirements have been applicable program summaries, a register of projects subject to analysis under the NEPA and periodic inclusion of Rangeland Program Summary reports. Several annual reports have noted completion of land use plan evaluations and described plan maintenance actions, such as incorporation of new data, adoption of policies on PACFISH and INFISH, etc. At times there were valid rationale for postponing annual reports or limiting the documents to the NEPA register. However, we have learned that even in times of critical competing workloads, the data and program reports allow for more timely responses to Congressional inquiries, headquarters office data calls and are essential to maintaining program continuity. For example, we were able to successfully defend land use plan implementation actions in federal court by providing published planning summaries and NEPA registers that clearly indicated the scope of sensitive programs. The reports themselves indicated to the court that the plan implementation process was not a "secret program" and that the cumulative vegetation treatments and land tenure adjustment actions were not as statistically significant as claimed by the plaintiffs.

Manual/Handbook Sections Affected: No national planning or NEPA manuals or handbooks are affected by this policy. A pending 1610 manual supplement for Oregon/Washington is expected to specify roles and responsibilities for preparing and publishing annual planning up-date reports or their equivalent, and Annual Program Summaries, in western Oregon. This guidance is consistent with and supportive of the intent in Instruction Memorandum No. OR-2001-024 dated January 30, 2001, on *Public Access to Analyses, Decision Documents and Supporting Records*.

Coordination: This document was coordinated with applicable State Office program leaders, the Oregon/Washington Publications Committee and reviewed in draft by field office planners and NEPA coordination staff. The FY 2003 Annual Work Plan directives for the 1610 subactivity indicate that publication costs are already funded within the OR-930 operations plan and the field staff workload is funded within your base program allocations.

Contact: For further information, please contact Eric Stone at 503-808-6087. For assistance in document design, publication and posting on Internet sites, please contact Mike Hamel at 503-808-6211, Cliff McClelland at 503-808-6212 and Garry Haase at 503-808-6028.

Districts with Unions are reminded to notify their unions of this IM and satisfy any bargaining obligations before implementation. Your servicing Human Resources Office or Labor Relations Specialist can provide you assistance in this matter.

Signed by
Charles E. Wassinger
Associate State Director

Authenticated by
Mary O'Leary
Management Assistant

2 Attachment(s)

- 1 - [Recommended Table of Contents for Planning Update Reports](#) (1p)
- 2 - [Required annual planning update Table S-1](#) _____ RMP Planning Areas),
Summary of Management Actions, Directions and Accomplishments (5pp)

Distribution
WO-210

RECOMMENDED TABLE OF CONTENTS FOR PLANNING UPDATE REPORTS

1. Cover letter /Introduction/ What You Can Find in this Document
2. General Location Map or Figure (mono-color, with BLM administrative boundaries and offices)
3. Table - Summary of Management Actions, Directions and Accomplishments (see attachment 2)
4. Budget (a brief paragraph or optional table with major budget components and staffing levels)
5. Optional feature section with special legislation or noteworthy initiatives or partnerships
6. Air Quality
7. Soils and Water Quality
8. Terrestrial Habitat and Species Management
9. Aquatic Habitat and Species Management, including PACFISH and INFISH, if applicable
10. Pathogen, Disease, and Pest Management (including any predator control by non-BLM)
11. Invasive Species and Noxious Weed Management
12. Special Areas (designated and potential W&S rivers or wilderness, ACEC, NLCS units and caves)
13. Cultural and Paleontological Resources (may include Tribal coordination, graves protection, etc.)
14. Visual Resources
15. Urban or Rural Interface, if applicable (note #26 on wildland interface for fire)
16. Socioeconomic trends associated with major BLM supported activities and industries
17. Environmental Justice
18. Recreation, Off-Highway-Vehicles, Trails and Fee-Demonstration projects, etc.
19. Woodland and Forest Management and Timber Resources
20. Special Rangeland, Woodland and Forest Products
21. Energy and Minerals
22. Land Tenure Adjustments
23. Access and Rights of Way
24. Transportation and Roads
25. Hazardous Material
26. Wildfire and Fuels Management, fire rehabilitation or stabilization
27. Law Enforcement
28. Range Resources Management, including wild horses and burros, where applicable
29. Cadastral Survey
30. Education and Outreach (option on volunteer program if not in an appendix)
31. Research and /or summary of ongoing (significant) inventories
32. Intergovernmental and Interagency Coordination, Consultation and new agreements
33. Appendices
 - Plan maintenance actions, referencing dates and approving officials such as a State Office Instruction Memorandum or Information Bulletin
 - Environmental Analysis Register
 - Monitoring Report, including Rangeland Program Summaries and Rangeland Standards and Guidelines
 - Plan Evaluation history
 - Website summary listing approved plans, NEPA documents, assessments, etc.
 - Volunteer success stories or upcoming opportunities (optional)

2.0 SUMMARY TABLES

The Summary table located at the beginning of the document should be consistent between districts or planning areas. The content of these summary tables should have a base of presented information that is uniform across all districts. Additional information can be added where appropriate, but the base template of row and column headings should remain consistent. If a resource or program is absent or not applicable at this time, the line should be retained with a “not present, no action, not applicable” or equivalent entry in the columns to the right.

**Table S-1 ____ RMP Planning Area,
Summary of Resource Management Actions, Directions and Accomplishments**

RMP Resource Allocation or Management Practice or Activity	Activity Units	Fiscal Year 2002 Accomplishments or Program Status	Cumulative Practices, since RMP approval
Realty, rights-of-way, transportation systems			
Land sales	Actions/acres		
Land acquisitions by purchase, donation, withdrawal revocation, etc.	Actions/acres		
Land exchanges	Actions/acres acquired/acres disposed		
Recreation and Public Purpose actions	Number leases or patents/acres		
Utility rights-of-way authorized	Actions/miles		
Road rights-of-way acquired for public /agency use	Actions/miles		
Road rights-of-way granted	Actions/mile		
Roads constructed or authorized	Actions/miles/acres		
Roads decommissioned/obliterated	Actions/miles/acres		
Roads closed/gated	Actions/miles		
Wind energy feasibility studies/rights-of-way	Actions/acres		
Withdrawals completed	Actions/units		
Withdrawals revoked	Actions/units		
			Attachment 2-1

Minerals and Energy Resources			
Oil and Gas leases/ storage agreements	Actions/units		
Geothermal leases	Actions/ units		
Other mineral leases (specify type)	Actions/ units		
Locatable minerals	Mining plans approved/ units		
Locatable minerals	Patents issued/ acres		
Salable mineral materials	Sites opened/closed, acres		
Salable material sites available, sites/ acres	Sites/ acres		

Designated recreational rock-hounded or panning, sites/ acres	Sites/ acres		
Abandoned mine lands,	Sites remediate		
Recreation and Off-Highway-Vehicle Use Ares			
Developed camping	Sites/ spaces available, sites/units		
Developed day use	Sites available		
Maintained off-highway-vehicle staging areas	Sites available		
Maintained off-highway-vehicle trails or routes	Units/ miles		
Maintained hiking trails or routes	Units/ miles		
Maintained equestrian trails or routes	Units/ miles		
Maintained back-country discovery or scenic routes	Units/ miles		
Interpretive sites or trails	Units/ miles		
Cultural and Paleontological Resources			
Cultural resource inventories completed	Sites/ acres		
		Attachment 2-2	

Paleontological resource inventories completed	Sites/acres		
Cultural /historic sites on Historic Register, sites managed	Sites managed		
Cultural/historic sites nominated to Historic Register	Sites or Districts nominated		
Cultural/historic sites restored, recovered or stabilized	Sites		
Hazardous Materials and Sites			
Hazardous material sites identified, under treatment or remediation completed	Units		
Rangeland and Woodland Resources			
Livestock grazing permits or leases	Total/renewed units/ animal unit months		
Livestock animal unit months banked or relinquished	Units/acres		
Livestock fences constructed	Units/ miles		
Livestock fences removed	Units/ miles		
Water developments maintained (wells, springs, pipelines, etc.)	Units		
Wild horses and burros removed and adopted	Number of head		
Wild horse and burro herd composite populations(s)	Authorized management level/ estimated current population		Not applicable
Prescribed burning - wildlife habitat and forage management	Actions/acres		
Noxious weeds chemical control	Sites/ acres		
Noxious weeds, estimated biological control	Sites/ acres		

Noxious weeds, by other control methods	Sites/ acres		
			Attachment 2-3

Invasive species control by prescribed fire (option to specify species in text section)	Sites/ acres		
Invasive species control by mechanical (option to specify species in text section)	Sites/ acres		
Invasive species control by prescribed fire (option to specify species in text section)	Sites/ acres		
Brush field/hardwood conversion	Sites/ acres		
Woodland species restoration (option to specify species in text section)	Sites/ acres		
Forest Management and Forest Health			
Regeneration harvest or fire salvage	Acres		
Commercial thinning/density management/ uneven age harvest	Acres		
Timber sale volume offered for sale	MM board feet/ MM cubic feet		
Timber sale quantity harvested	MM board feet/ MM cubic feet		
Special forest products sales, sales and quantities (by product type) (e.g. boughs, fence posts, corral poles, fuel wood)	Actions/units by type		
Site preparation - prescribed fire	Sites/ acres		
Site preparation - other (specify)	Sites/ acres		
Prescribed burning - hazard reduction	Sites/ acres		
Natural or artificial ignition prescribed fire for ecosystem enhancement	Sites/ acres		
Animal damage control	Sites/ acres		
Vegetation control - mechanical/hand	Sites/ acres		
Planting - regular stock, acres	Acres		
Fertilization, acres	Acres		
			Attachment 2-4

Special Management Areas			
Areas of Critical Environmental Concern	Areas monitored		
Significant caves	Sites inventoried/ evaluated/ monitored		
Designated Wilderness areas	Areas monitored		
Wilderness Study Areas, areas monitored	Areas monitored		
Designated Wild & Scenic Rivers, areas monitored	Areas monitored		
Administratively suitable Wild & Scenic Rivers, areas monitored	Areas monitored		
National Monuments (if any), areas monitored	Areas monitored		

Attachment 2-5