

# **Oregon and Washington Service First Field Visit**

**July 9 – July 19, 2007**

**Jennifer Eberlien, Margaret Petersen, and John Keith**

## **OBSERVATIONS AND RECOMMENDATIONS**

The primary purpose of this field visit was to adequately ground the new interagency Service First Coordinator in field issues. This visit is not part of an official review, but is instead a way to familiarize the Washington Office (WO) coordinator with the state and region's successes and concerns and gather information that will help the national coordinator prioritize work load. The national coordinator will present a status of the Service First initiative, including the issues presented here, with WO Branch Chiefs, Assistant Directors, Directors, and Deputy Chiefs for the Bureau of Land Management (BLM) and the Forest Service (FS).

The following represent observations and recommendations heard by Eberlien, Petersen, and Keith during our field visits.

### **NATIONAL ISSUES**

Overall, employees suggested that the WO Service First Coordinator (WO Coordinator) needs to provide more information, direction, and tools for Service First programs, projects, and units. The WO Coordinator needs to "get the word out" regarding Service First.

#### **RECOMMENDATIONS:**

- Develop a user-friendly, interagency website that would serve as a communication venue and toolbox for Service First issues.
- Attend regional or state agency meetings to educate and inform about Service First possibilities.
- Create a monthly/quarterly newsletter that would highlight Service First successes and challenges.

A lack of national policy and direction alignment in five critical areas comprises field Service First units' effectiveness.

#### **Issue 1: Radio Operations**

Units in Oregon report that radio operations are the most critical priority. Field units called attention to the inability of the line officers responsible for the safety and environment of employees to effectively influence radio operations through the Information Solution Organization (ISO).

Two years ago when a repeater issue emerged in Lakeview, the Regional Forester (RF), State Director (SD), and ISO leadership reviewed the problems with radios. Consequently, a radio backbone strategy was developed and signed at the region and state

level in close coordination with the ISO. The goal was to create an interoperable radio system that both agencies can use and share with partner agencies such as Oregon Department of Forestry. A strategic plan relocates mountain top repeaters to assure coverage; analyzes ways to share frequencies better; and seeks ways to standardize equipment.

Under the radio backbone strategy, any decisions on converting a field unit to Radio Control over Internet Protocol (RCOIP) were to be made only after reliability issues were resolved. Conversion would be a joint line management decision between the Forest Service (FS) and Bureau of Land Management (BLM). The RCOIP was recently installed in the Ochoco/Deschutes area without notifying either the BLM or FS. With this installation, the Central Oregon Fire Management Staff lost the frequencies it used in its interagency environment and currently have no reliable battery backup (the recent installation was a dead battery). To fix this safety issue, Prineville BLM agreed to purchase a battery and install it in the FS system.

A concern was raised that it appears the ISO cannot deviate from their project work plans. The ISO is not required to support interagency work and does not respond to local Service First requests. The BLM has offset some of the radio and technology problems that the FS is facing. BLM technicians are fixing FS radio problems and in some areas buying parts and supplies that the ISO is not able to fund during the fiscal year to ensure that the FS system functions.

Field units have patched together the radio technology problems as best they can. The bigger problem is the misalignment of ISO and agency management needs, which in the radio situation has created some high-risk safety environments. Line officers have no oversight role in mission-critical accomplishments. This is a serious service gap.

The Deputy Regional Forester shared that she is making progress toward addressing the ISO service and communication issues. Working with the WO and ISO leadership, a draft communication plan that addresses the lack of communication and line officer decision-making pathway on the agency's information and radio technology has been completed.

Questions have been raised as to whether the BLM and FS have committed to install a microwave backup system for the Fremont-Winema as a patch to solve the radio problems for that forest and BLM District. There is some confusion over this agreement that needs to be researched to bring it to conclusion.

#### RECOMMENDATIONS:

- As a lead, Region 6 continues to be an active agent to solve the ISO communication and decision-making/line officer link for the agency. The WO Coordinator will research whether these RCOIP installation issues are occurring in other parts of the country and get a national view on this issue.

- Work with Information Resource Management (IRM)/ISO staff to ensure there are provisions within the ISO/IRM framework that authorize work on other agencies' equipment or have other agencies' employees work on FS equipment and needs.

## **Issue 2: Information Technology and Operations**

Employees working in Service First environments continue to be frustrated by using two agency computers and business systems to accomplish their workload. Each unit noted ongoing problems with dual systems; e.g., time sheets, email, training, websites, databases, personnel management and administration procedures; that are exacerbated by having to use two computers.

Units were interested in learning more about the “baby steps” that are being taken through the Joint IT Platform discussions. Staff is delighted to learn about the six steps that were recently approved for action at the last joint BLM/FS information officer meeting. These actions include access to: the BLM's Management Information System (MIS), Paycheck/Quicktime, Lotus Notes functions, databases and video/teleconference ability.

Although the FS and BLM technology problems are more common, there are similar access issues between bureaus within the Department of the Interior. The National Park Service (NPS) Lake Roosevelt staff and the BLM's Spokane District Manager echoed the same technology problems.

The 1Geospatial Information System (GIS) staff shared the discrepancies between the BLM and FS regarding software approval, testing, and roll-out to the field units. For example, the FS is much slower testing and rolling out new GIS software when compared to the BLM (a year difference). This timing difference causes problems for responsive training and field use and coordination.

### **RECOMMENDATION:**

- WO Service First coordinator continues working with 1 IT joint platform. As they are raised, bring field issues and concerns to the 1 IT Team for resolution.

## **Issue 3: Business processes**

This is one of the top Service First/interagency concerns expressed by the field. Current business processes are creating confusion, burden shift, and loss of interagency effectiveness because of the time increase to process agreements and move funds between agencies. One unit noted that it “used to be a piece of paper and a phone call” and the agreement and the reimbursable code would be in hand. Agreements take longer because they are handled by more people, many of which have not been as involved in the agreement process in the past. Newcomers to the agreement process face a steep

learning curve that changes often as the agencies continue to align processes to receive “clean” audit findings. Combine these issues, and many feel they have no control over the agreements process.

Managers also express frustration with the fact that it is difficult to determine how to do an agreement, what the process is, or who a person should call in the first place. Although everyone understands that time is needed to work out all the kinks in organizational change, managers do not know who to call to find answers to their questions or to get instructions to proceed with agreements. As one BLM District Manager noted, it took forever to just find someone that could explain the agreement process, let alone do the work to produce the agreement.

The lack of a reliable, automatic agreement and payment tracking system for the FS strains the field. There are fears that when the BLM switches to its new financial database, Federal Business Management System (FBMS), tracking problems will appear for the BLM as well. Field units view offsets as a way to achieve similar results instead of using a formal agreement, but lack of (State Office/Regional Office (SORO)) guidance on how to do offsets minimizes their use.

The recently developed FS personnel tool EmpowHR cannot be accessed by BLM supervisors. Currently, the supervisor of record has to be an FS employee and in many cases that becomes the Forest Supervisor, which causes unnecessary responsibility for that position. It is unclear if this is a technology issue or a lack of consideration for interagency needs. BLM employees need to be able to access FS EmpowHR to effectively hire and manage employees.

#### RECOMMENDATIONS:

- Meet with Albuquerque Service Center (ASC) and BLM staff in the grants and agreements and financial arenas to clearly articulate the problems and issues and work on solutions. A joint FS and BLM visit from SORO staff to ASC and BLM’s Denver office would help clarify field issues to national staff.
- Evaluate the organizational framework so that the burden shift is minimized. Work on an interagency basis as these issues arise. Consider burden shift and other business process issues when contributing comments to the large-scale organizational studies that the BLM and FS are undertaking.
- Evaluate current business process desk guide materials to ensure simplicity, ease of understanding, and easy access to required materials.
- Investigate if EmpowHR can be amended to include BLM employees as supervisors of record for FS staff and allow BLM employees access to the EmpowHR program.
- SORO needs to release offset direction to the field.

#### **Issue 4: Recognizing Organizational Impacts and Capacity Changes**

Both the FS and BLM are in the middle of organizational changes (Transformation and Managing for Excellence respectively). National offices need to be aware of how

organizational changes affect the Service First positions that the field level, particularly, relies on. Service First is the business model that the field level uses to manage resources efficiently and provide good customer service. That said, the Service First initiative is not a stand-alone program, but a tool that can be woven into what makes sense and works the best for all agencies. If organizational changes are made at a national level to provide better service and greater efficiency, then there must be a strategy of how to execute those national organizational changes at the local level where Service First authority is used the most.

Units also recognize that the Administrative Officer (AO) position is a key integrator in interagency partnerships. Will the AO position be radically affected by the ongoing organizational efforts?

#### RECOMMENDATIONS:

- Raise the importance of the business processes necessary to meet Service First organization goals and foster recognition that one agency's organizational shifts affect interagency work. Meeting with FS Transformation and BLM Managing for Excellence staff to relate these concerns.
- Validate whether current organizations are most effective to complete grants and agreements work. Evaluation occurs at local levels, but validation also needs to be evaluated in the Transformation and Managing for Excellence initiatives. For example, is it better to dedicate employees that would work on specific types of agreements, such as those for interagency or Service First projects? Is it better to have a pool of experts for these types of agreements or for everyone on the grants and agreements staff to know a little about Service First grants and agreements?

#### **Issue 5: Incentives**

Units appreciate incentives to focus interagency efforts, especially in times of limited funding. Take advantage of other agencies' national initiatives that would leverage funding and partnerships such as the NPS centennial challenge and FS Kids in the Woods initiative.

#### RECOMMENDATION:

- Continue acknowledgement and recognition for all interagency work including Service First partnerships.
- Continue to offer existing and establish new grants, awards, and other incentives for Service First. Take advantage of partner agencies' opportunities where appropriate such as the NPS' Centennial Challenge grant program.

### **BLM STATE AND FS REGIONAL OFFICE ISSUES (SORO)**

A lack of program integration and consideration of how direction affects Service First programs and delivery compromises effectiveness. SORO needs to manage potential negative effects resulting from separate policy direction even when these policies

originate at national levels. A more active filtering role by SORO, in addition to improved program integration and direction, will improve the Service First work environment and limit the need for workarounds at the unit levels.

### **Issue 1: Map pricing**

Units are concerned about the inconsistency in map prices between the BLM and FS for visitor recreation maps. There are additional concerns for frontliners who will hear the majority of complaints about the price differences. In addition, units shared that there may be issues related to different accountable property tracking mechanisms between the two agencies.

A concern was raised about the interagency Klamath Falls winter trails map which has an accuracy error (it is not part of the region's visitor recreation map series) and how to price that map. The SORO is very aware of the recreation series map pricing issue and staff are preparing a decision paper for RF and SD.

#### **RECOMMENDATIONS:**

- The SORO leadership needs to issue final directions on map pricing as soon as possible. A white paper on the map price issue is being developed for review.
- The SORO staff needs to investigate if there are discrepancies in how the BLM and FS account for property (maps). If there are inconsistencies, develop a compatible policy that will bridge the gap between the two agencies' policies.

### **Issue 2: Career Enhancement and Workforce Management**

Service First employees have identified different hiring practices, competitive abilities of employees, GS-grades for similar appearing duties, and supervision span of control between the BLM and FS. Interagency experience was regarded by District Managers and Forest Supervisors as an enhancement to career competitiveness. Within the downsizing environment of the FS, BLM managers have been able to take advantage of desired skill sets by hiring or contracting with FS employees in the same geographic area.

Sometimes it may look obvious to share positions, but in the end, sharing doesn't necessarily make sense. For example, three units have experimented with joint Public Affairs Officers (PAO) (Medford, SORO, and Lakeview) because managers desired to have one message and one-stop shopping for the public and media. After test periods, all three offices decided to hire separate PAOs because of the high workload levels and the conflicting WO guidance and direction. Also, the SORO and WO recognized that there were difficulties for some employees in accepting an FS or BLM person as the spokesperson for the other agency.

Medford completed an organizational study with the help of Cal Joyner and other SORO staff to look at positions through a Service First lens. Medford managers suggest that it is really helpful to do an initial workforce analysis that looks at Service First opportunities.

In Spokane, discussions are occurring about which positions to share in Spokane such as the partnership coordinator and frontliner services between the BLM and FS. The NPS, Fish and Wildlife Service (FWS), BLM, and FS all want to partner on projects that focus on children and outdoor education (“Kids in the Woods” or “Children in Nature”) initiatives.

**RECOMMENDATIONS:**

- Continue monitoring the effects of Service First workloads and career opportunities for employees.
- Be vigilant on managing the additional workload that may come with a Service First position. Manage one position working for two agencies; not two positions for one person.
- Allow for experimentation and testing of new concepts so that lessons can be learned and shared with others; e.g., joint PAOs or joint safety officers.

**Issue 3: Training certification**

Units appreciate that either the BLM or the FS Privacy Act Training and IT security Training can be applied toward both agencies’ mandatory requirements. This change allows a Service First employee to only take one agency’s training and not have to complete both.

**RECOMMENDATION:**

- Expand the dual training application toward mandatory requirements to all types of training that are based on joint government initiatives or direction (i.e., Civil Rights).

**Issue 4: Cross-pollination**

Unit managers recognize the value of having experience in and working for another agency. Working or “cross-pollinating” in another agency fosters better understanding relationships.

**RECOMMENDATIONS:**

- Consider increasing the number of crossover details at the SORO level.
- Continue to have the Deputy Regional Forester and Associate State Director direct, promote, and advocate for Service First issues.
- Seek opportunities for integration by establishing clear assignments to consider additional commingled programs such as the 1 GIS Management Position (Linda Colville).
- Seek opportunities for interagency leadership team meetings including regular SORO meetings.
- Explore a leadership meeting with Forest Supervisors, District Managers, and Park Superintendents in Oregon – similar to how the State of Washington administrators meet.

## **Issue 5: Assure an inclusive interagency approach**

All Service First units noted inconsistencies in policy and direction that challenge their abilities to effectively operate with other agencies. A problem is created when the SORO or WO does not evaluate how policies will affect interagency work at the field level. An employee stated, “As long as Service First is a minority program, we will be catching up with policy that hinders or undoes what we have created to establish better service.”

The following examples of policy inconsistencies serve to illustrate what the field is seeking in terms of better program policy integration.

- Managers need cross-training in other agencies’ policies. For example, Appropriate Management Response (AMR) training by the FS did not include BLM managers (one unit thought perhaps it was a scheduling problem). Units noted that having AMR taught only to the FS side of the interagency house did not make sense if people are working in a shared environment. Another example is a recent delegation of authority problem on a fire that was probably the result of lack of training of one manager in the other agency’s procedures and responsibilities. At a minimum, employees, particularly those with delegated authority, need to be fluent in both agencies’ policies as this helps them interpret key actions together.
- Fire cost containment policy discrepancies caused Spokane District concern about its relationships with the state and counties. During fire management negotiations, it quickly became apparent that the FS and BLM have different philosophies and directions on how to approach fire cost containment. This lack of understanding or training creates an awkward negotiating environment.
- Having two separate agency safety reviews scheduled for the same week for one interagency safety coordinator causes timing problems.

### **RECOMMENDATION:**

- The SORO leaders hold the directors and deputies accountable for creating compatible interagency policy where possible to lessen field unit confusion.

## **Issue 6: Collocation**

Units continue to seek ways to manage facility costs and create greater interaction between agency employees. Many noted interests, concerns, and opportunities in collocation. These include:

- Prineville is considering sharing office space together. Currently there is county interest in the Prineville District building.
- In Medford, ground had been broken for a new addition that will accommodate an interagency office at the BLM Medford office site. This culminates 13 years of patiently working together to co-locate facilities. One observation was that the extended time frame allowed staff to adjust warehouse, maintenance, and fire resource space to a more appropriate level. Interim moves, e.g., survey crews,

allowed familiarity with how an interagency environment works. Staff was disappointed by the tighter than desired office space as a result of more Full Time Equivalent (FTE) positions in the BLM's 2010 organization than the building was designed for. Orchestrated and deliberate steps kept the Medford office in focus and on schedule.

- The Spokane District and FWS expressed an interest in collocation. Local agencies were interested in collocating frontliner services to reach the greater constituency base in Spokane.
- Agencies receive funding differently, and at different times, for capital improvement projects. Because there is no coordinated funding process, collocation is all the more difficult.
- Wenatchee Area FWS and FS enjoy the benefits of collocation and state it enhances the opportunities to work more effectively together.
- SORO has the opportunity to explore co-mingling of staffs in the new building.

#### RECOMMENDATION:

- Carefully consider how or when to use situational increased space approvals for units when others have been tightly managed through strict oversight by national and SORO offices to protect units from future unnecessary facility costs.

### **Issue 7: Program integration and delivery**

Units noted that although they are fully implementing the tools that the Service First authority conveys, a bigger challenge is integrating programs at the SORO level so that Service First units can build upon joint SORO priorities. Different priorities and budgets from two agencies could be mitigated by having joint initiatives through program integration at the SORO level. At least one person noted that the strong coordinated direction from the RF and SD helps to prioritize work at the field level.

#### RECOMMENDATIONS:

- Evaluate options for joint budget delivery, e.g. taking advantage of FS Strategic Budget Objectives Business Plans and BLM operations planning to promote Service First projects and emphases.
- Align funding and coordinate the budget through out-year planning. Submit projects together where it makes sense.
- Create a strategic plan for programs or projects that cross boundaries, e.g. fire and river management.

#### **COMMENDATIONS**

- Clearly, those that work in Service First are doing it because they believe in the mission of customer service, saving tax payers dollars or avoiding future costs, and creating more effective government services. This is a passion-driven effort. One statement was that we “won’t go back” to working independently – we must work together into the future.

- Units recognized that the Recreation Resource Advisory Councils and the Political Savvy Course are successful interagency collaborations at a national and regional level.
- The 1GIS program is recognized as a strong Service First program that issues compatible policy, making it easier for field units to accomplish their work.
- The SORO leasing team (Dee Morrison and Susan Sepulveda) have worked hard to enable some creative solutions, e.g., the City of Springfield and the National Guard.
- The Regional Forester and State Director staffs' direction and support are noted by the field.
- Theresa Cashman, Lakeview AO, provided creative opportunities for employees to address and work through Service First issues at the local level.
- Medford sold the McAndrews property and broke ground for the new building and in doing so dispelled false impressions about what Service First is all about. This project takes strong leaders to maintain consistency and persistence. Congratulations to Medford District and the Rogue-River/Siskiyou NF for their success. Particular kudos to Eric Hodnett, David Hughes, and Teresa Gallagher Hill for spearheading the spirit and effort behind collocating.
- In the face of many leadership changes, Prineville District and Ochoco NF have continued a Service First approach. The legacy is being built.
- The Entiat River Watershed Restoration Project is an impressive multiple private, state, county, and federal partnership that has been skillfully organized over a long period of time. The participating agencies, private landowners, and Chelan County deserve much credit for the persistence and tenacity of maintaining this partnership over the years.
- The FWS units are engaged in Service First tool applications much more than is recognized nationally. Part of this engagement is due to FWS employees who have worked in more than one federal agency as part of their career path and who recognize the possibilities.
- The Okanogan-Wenatchee National Forest staff gave an excellent safety briefing prior to heading out in the field and driving. Kudos for their emphasis on safety!

## OVERALL IMPRESSIONS

- The Service First in this SORO is more mature than in other parts of the country. The units are using the full spectrum of options available.
- Recognition that some positions or workloads do not suit Service First authority as well as others such as the PAO position due to different policies and big workloads.
- Service First is an option and a tool and leadership must allow for flexibility in application. Sharing positions works in many areas, while collocation or commingling of staff will not work in all locations.
- The most restrictive policy is not always the best. Do not always adopt the most restrictive method or policy thinking it will work. Oftentimes, it creates unnecessary work.

- Units need to be strategic in approach and take advantage of opportunities as they manifest.
- Where it is working, people have a passion, although the Service First philosophy is also becoming institutionalized. All recognize the importance of maintaining a legacy. Where Service First practices are just beginning, some creative steps to institutionalize the concept may be needed. Those units that are fully integrated will probably always work as a Service First environment.
- Service First is a tool or an initiative and not a program in itself. The agencies need to ensure that there are not positions for BLM, for FS, and a third position for the Service First portion of the job.
- Partnerships that revolve around regulatory actions or policies are not as prominent as those that involve managing land units, but are just as important. The partnerships between FWS, BLM, and FS are critical for streamlining and providing better service and management in the end, although it may not directly involve land units.