**ePlanning Support**
**For the Bureau of Land Management's**
**National Greater Sage-Grouse Planning Strategy**

Use of the ePlanning system will be required for all new NEPA/Land Use Plan starts associated with the National Greater Sage-Grouse Planning Strategy. This ePlanning Strategy will describe the general approach and will be accompanied by a subsequent Instruction Memorandum that describes the specific requirements and uses of ePlanning for this national planning effort.

**Introduction to ePlanning**
The ePlanning application is an internet-based approach to creating, managing, sharing, and reviewing documents created in compliance with the Federal Land Policy and Management Act (FLPMA) and National Environmental Policy Act (NEPA) requirements for environmental analysis and land use planning (LUP). ePlanning facilitates the creation of NEPA and planning documents in a collaborative team-based environment and supports easy incorporation of text, figures, graphs, and maps into these documents.

Although created primarily to support the Bureau of Land Management (BLM) land use planning and NEPA processes, ePlanning is flexible enough to support a range of federal agency planning projects. Finished documents and map products can be made available to Cooperating Agencies and to the public via the Internet for review and comment. Cooperating Agencies and members of the public can submit online comments in a secure environment and agency staff can then utilize tools within ePlanning to sort, analyze and respond to these comments. The BLM mandated the use of ePlanning for all new LUP starts in 2009.

**Use of ePlanning**
The BLM Washington Office (WO) estimates that six new Environmental Impact Statements (EIS) will be developed during the course of the National Greater Sage-Grouse Planning Strategy, with the potential to amend more than 70 existing Resource Management Plans (RMPs). All BLM offices will be required to use ePlanning for the development of any new Land Use Plan/NEPA documents (e.g. Final EISs, Records of Decision, Resource Management Plans, and RMP amendments) initiated as part of the National Greater Sage-Grouse Planning Strategy.

The BLM WO will not require existing or on-going plans to be transitioned into the ePlanning system. However, there are numerous benefits to offices that decide to input existing LUPs into ePlanning, which include stakeholder and public access to existing RMPs and other background information through the internet.

**Project Website**
ePlanning offers the capability of developing a "project website" that allows 24-hour access to anyone with an internet connection and serves as the repository for supporting information including, documents, maps, meeting information, links to websites, and links to other projects.

The new National Greater Sage-Grouse Planning Strategy-related EISs will be published on the internet through ePlanning project websites. Because access to the internet is not yet a reality for a significant portion of the public, ePlanning is intended to be used as an additional tool for distributing documents to the general public and Cooperating Agencies - it is not intended to be the sole option. ePlanning supports the conversion of documents to electronic media such as CDs and DVDs and supports

preparing documents for printing and hard copy distribution.  In addition to publishing documents on the project website, offices are encouraged to use other methods for distribution of documents to the public.  ePlanning project websites will display a common look and feel to external users, while allowing sufficient flexibility for customization to meet the unique needs of individual projects.

### NOI/Scoping

The NOI was published on December 9, 2011 with the scoping period ending on March 23, 2012. Scoping documents (e.g. comments, Scoping Report) will be incorporated into the ePlanning system and made available to the public once the scoping period has concluded.

### Asset Library

ePlanning allows text to be developed, approved, and stored in the ePlanning electronic Asset Library and made available (intact) for reuse among multiple documents.  This will be especially important for many sections of the NGSG documents, (e.g. Purpose & Need and Background sections).  NGSG Project Managers will be responsible for determining what content is required to be used consistently across all documents and will coordinate with the National Operations Center (NOC), Division of Resource Services (DRS) management for inclusion in the ePlanning Asset Library.

### Alternative development

As detailed in the National Greater Sage-Grouse Planning Strategy charter, the BLM is committed to science-based, resource-based management actions for the Greater Sage-grouse.  ePlanning will offer the ability to store relevant technical information so it can be used consistently across all NGSG projects. The ePlanning Asset Library can store text and information for reuse among documents.  In addition, any electronic information – papers, studies, inventories, etc. – can be centrally located on one ePlanning project website and made electronically accessible to all others.  As alternatives are developed across planning regions, the use of ePlanning will facilitate the interdisciplinary development and review of alternatives.  National Greater Sage-Grouse Project Managers will determine requirements for alternative development as part of the planning process.

### Effects Analysis

ePlanning provides versioning control of documents as one of its core components.  It involves a simple, check-in, check-out system of subsections of a document allowing the document to be worked on simultaneously by team members.  Keeping the documents in one electronic "place" will streamline the ability to make changes easily, regardless of physical location or source of information, and will facilitate keeping information up-to-date.  These features will assist the iterative and interdisciplinary process required for effects analysis across offices and regions.

### Public Commenting

Consistency in comment responses across the NGSG planning area will be critical to the process and ePlanning will be invaluable in ensuring that consistency.  ePlanning incorporates a popular commenting function that allows the public to electronically comment directly from the document, accessed on the internet.   ePlanning also allows the interdisciplinary team to store, sort, analyze, and prepare comment responses.

As with distribution of documents, the ePlanning commenting function should serve as an additional or optional commenting tool for the public to use.  Comments may also be submitted traditionally (by mail, fax and e-mail) and can then be added into ePlanning to ensure that a complete electronic record of comments is maintained.

**Final Documents**
ePlanning provides a central location to store all of the project information including draft document, internal and external comments, responses to comments, and supporting documentation, which greatly facilitates the development of final documents including Final EISs, Records of Decision (RODs), and RMPs and RMP Amendments.  Specific Records of Decision can be developed in ePlanning as decided by the NGSG Project Managers.  The use of ePlanning will facilitate further consistency among the documents as they are finalized.

**Protests and Appeals**
Protest resolutions are currently developed in ePlanning and a track record of success is in place for this function.

The BLM requirement to use ePlanning for the development of all new planning and NEPA documents related to the NGSG Planning Strategy will help to ensure a complete electronic record of the process is created.
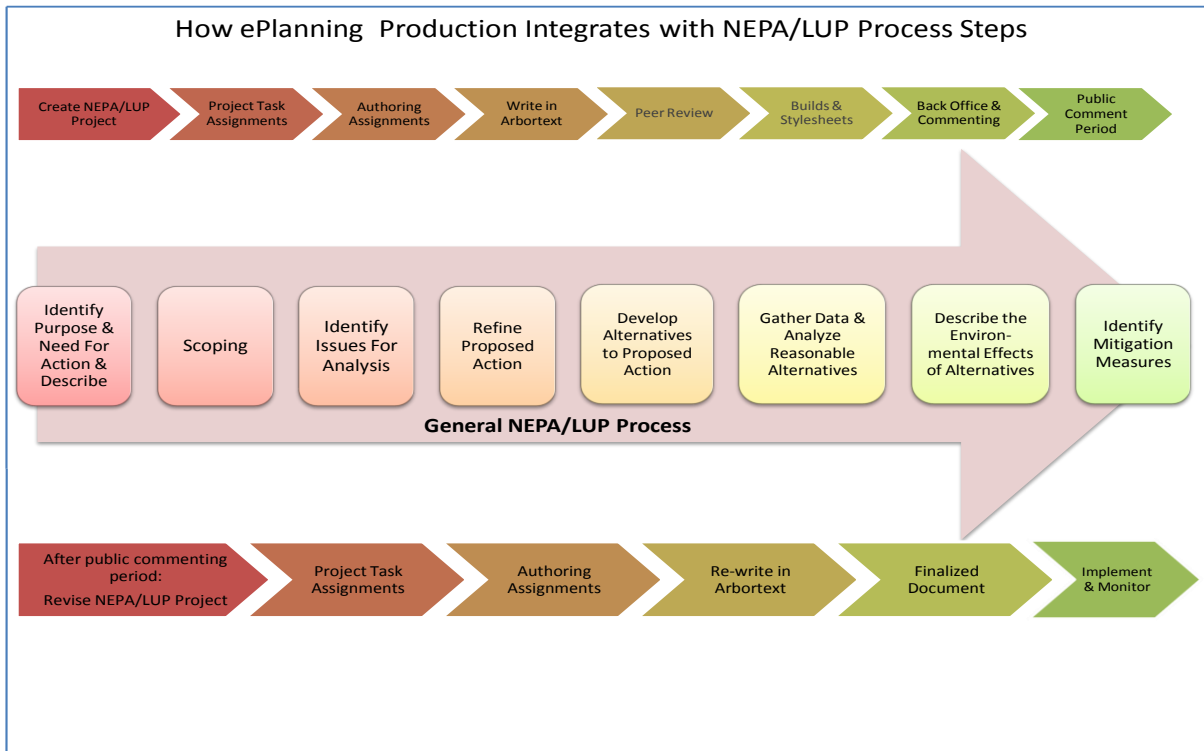
**Training**
The NOC DRS, with support from the NOC, Division of Information Resource Management (DIRM), will provide training to the field and to Cooperating Agencies, as needed/requested.  The initial requirement for ePlanning training is a 3-day *ePlanning Basics* training course.  One NOC DRS trainer can train 12-15 users per session and the course can be taught locally.  Larger sessions can be accommodated through coordination with the NOC DRS.

On-line training is also available to assist the BLM teams, Cooperating Agencies, and the public in navigating and commenting in ePlanning.  Training videos have been developed for various aspects of ePlanning, and can be accessed through the National Training Center website.  Links to these videos, and to additional ePlanning information, are also available on the NOC's ePlanning Community of Practice Sharepoint site:  http://teamspace/sites-oc/eplanningcp/default.aspx.

Please direct questions or comments to Jane Peterson, ePlanning Program Manager, WO-210, (303) 236-3404; Marci L. Todd, Division Chief, Division of Decision Support, Planning and NEPA (WO-210), (202) 912-7292; Jamie Sellar-Baker, Branch Chief, Program Operations, National Operations Center, (303) 236-0402; Roxanne Falise, Division Chief, Division of Resource Services, National Operations Center, (303) 236-2700.

**ePlanning and NEPA/LUP**

## How ePlanning Production Integrates with NEPA/LUP Process Steps

Create NEPA/LUP Project → Project Task Assignments → Authoring Assignments → Write in Arbortext → *Peer Review* → Builds & Stylesheets → Back Office & Commenting → Public Comment Period

**General NEPA/LUP Process**

- Identify Purpose & Need For Action & Describe
- Scoping
- Identify Issues For Analysis
- Refine Proposed Action
- Develop Alternatives to Proposed Action
- Gather Data & Analyze Reasonable Alternatives
- Describe the Environmental Effects of Alternatives
- Identify Mitigation Measures

After public commenting period: Revise NEPA/LUP Project → Project Task Assignments → Authoring Assignments → Re-write in Arbortext → Finalized Document → Implement & Monitor

## ePlanning Components

**Front Office** (Custom code) –this is the public facing portion of ePlanning. Allows access to LUP/NEPA registers as well as associated web pages, and allows public commenting on documents

**CommentWorks** (COTS software) Used to process & analyze submissions/comments; allows users to prepare summary statements & responses to comments

**Back Office** (Custom code, Arbortext and Documentum software) Populates the BLM NEPA and Land Use Planning registers, creates required websites, and provides the Content Management System (workflows).

**Adobe** (COTS software) – used to make pdf versions of ePlanning output

**Documentum/WebTop** (COTS software) Enterprise (internet-based) Content Management -indexes the content for searching, manages multiple versions, provides role-based user access and privileges, and moves documents along a define-delegate-develop-review-update-approve-publish workflow. Documentum's Web Application Environment is more commonly called **Webtop**

**Arbortext** (COTS software) –XML-based software used to produce ePlanning content which can then be converted to PDF, HTML, Word, etc.. Allows users to create, manage, and publish information for various audiences and media.

**ArcGIS** (COTS software) – used to produce maps for inclusion in ePlanning document

Front Office — Comment Works
Documentum — Webtop
Arbortext
ArcGIS
Adobe
Back Office

Attachment 1-4