ePlanning Version 2.0 Volume 2, Issue 1

E-Gov for Planning and NEPA

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BLM

The Year in a Nutshell

Image courtesy of grace-ed.org

It has been more than a year since the last installment of the *ePlanning Version 2.0* newsletter. Many developments have occurred with respect to ePlanning in the last year. This installment of the ePlanning newsletter will cover some of the highlights, such as:

- Training materials were revamped for NEPA, which couldn't have been done without the dedicated help of a handful of field staff (see ***Training Updates*** on **page 5**). In addition to new materials, the ePlanning training program has linked with the National Training Center (NTC) and has established new evaluation mechanisms to continually improve our training materials and methods.
- The ePlanning Core Team doubled in staff (see ***Changes—The ePlanning Core Team*** on **page 6**).
- The Division of Decision Support, Planning and NEPA (WO-210) requested volunteer offices to implement ePlanning in FY2009. Offices from Alaska, Colorado, Idaho, Nevada, Wyoming, and the Washington Office volunteered to "try on" ePlanning or to continue to use it. In addition to working hard to implement ePlanning, these offices have provided valuable feedback to improve the ePlanning tool (for more, see ***Creative Approaches to Implement ePlanning*** on **pages 2 and 3**, ***ePlanning from a Field Office Manager's Perspective*** on **Page 5**, and **Impressions *From the Field*** on **page 7**).
- Sixteen ePlanning training sessions occurred in Alaska, Colorado, Idaho, Nevada, Wyoming, and the Washington Office — over 150 individuals were trained in ePlanning. Also, in August of 2009, the first *ePlanning Super User Training* was conducted in Denver.
- This summer, the National NEPA and Land Use Planning Registers were populated with documents produced via ePlanning (see ***LUP and NEPA Registers*** *on* **page 3**).
- Several software updates have been made to improve the tool's stability and functionality (for more, see ***The Life of an ePlanning Help Desk Ticket*** on **page 4**).

ePlanning in 2010

Looking forward to the 2010 fiscal year, ePlanning priorities revolve around 1) the Training Program, 2) User Support, and 3) continued improvements to the software functionality and stability. During 2010, we will see software updates to newer versions of Arbortext and Documentum, which should improve usability for BLM staff. We will continue to support offices and staff that are currently using ePlanning, even as we are preparing to support additional ePlanning users.

WO-210 has determined that all new RMP starts in 2010 are required to use ePlanning. In addition to training and supporting the offices affected by this decision, we will continue to work with volunteer offices interested in implementing ePlanning beginning in 2010. Volunteer offices will be considered based on individual offices' commitment to implementing ePlanning upon conclusion of training and existing training capacity.

Offices with a planning start in 2010 should plan for about 1 week of initial training time and about 2.5 weeks of additional training over the life of the RMP process. Offices that want to implement ePlanning for NEPA can expect training to require 1 to 2 weeks.

If you have questions about ePlanning in 2010, please contact **Jane Peterson**, WO-210 ePlanning Program Manager, at 303.236.3404 or Jane_H_Peterson@blm.gov. If you would like to schedule training sessions in your office, please contact **Tina McDonald**, ePlanning Team Lead, at 303.236.0508 or Tina_McDonald@blm.gov.

NATIONAL SYSTEM OF PUBLIC LANDS

Creative Approaches to Implement ePlanning: Nevada and the Las Vegas Field Office

BLM Nevada is implementing ePlanning for NEPA in the Southern Nevada District and is planning to implement ePlanning in additional offices in 2010. This summer, dozens of Nevada employees were trained in ePlanning over the course of several weeks. Nevada's *Best in the Desert Racing Association's "TSCO Vegas To Reno - The Long Way" Race* Environmental Analysis was the first document published in the National NEPA register and several other NEPA documents are being produced using ePlanning. Given the complexity of the ePlanning tool, how is Nevada seeing success with ePlanning?

Southern Nevada District Employees "graduate" from ePlanning Training. You can read more about ePlanning in Nevada on the Nevada BLM Blast.

It appears that Nevada is doing this by creating both formal and informal ePlanning support positions within the state and investing time in local support for its staff.

Marguerite McKee serves as the ePlanning Planning and Environmental Coordinator for Nevada. She is leading the BLM Nevada ePlanning effort and serves as a liaison between the district and state offices. Marguerite coordinates training; assists the districts and project managers with managing NEPA and planning processes; and provides GIS and technical support. Marguerite also serves as a central point of contact between the state and the NOC staff, voicing concerns about the application and suggesting areas of improvement. According to Marguerite:

> *The concept of integrating the information that comprises our planning documents to make them more accessible intrigued me the first time I heard about it.*
>
> *Serving as the ePlanning Coordinator is challenging, but it is also an exciting opportunity that will allow me to lead BLM Nevada on a journey to use new technology to work smarter and more efficiently.*

While Marguerite is coordinating the ePlanning effort for the state, Carrie Ronning is helping to implement it on the ground for the Southern Nevada District. Carrie is the MSHCP Coordinator for the Las Vegas Field Office and is a resident ePlanning Super User. Carrie helps staff who may be having trouble using ePlanning by providing one-on-one support; holding weekly brownbag sessions to recap training or provide Tips & Tricks; and providing valuable feedback to NOC staff on the weaknesses and strengths in the ePlanning application, training, and support. Some Tips & Tricks that Carrie has established in her office include:

- Using Documentum Quickflows to route documents to be authored.
- Using the Affected Resource Form for internal NEPA scoping and filling a niche created by NEPA Las Vegas.
- Creating tricks to reuse Interdisciplinary Team information from project to project.
- Encouraging users to train each other, which helps to build confidence and camaraderie, improves problem solving, and creates Super Users in each field office and division.

In implementing ePlanning, BLM Las Vegas will be retiring an older NEPA sharing application, *NEPA Las Vegas*. According to Carrie, ePlanning does more than NEPA Las Vegas – NEPA document information is better organized – but also requires individual specialists to know more about the nuances of the NEPA process. Because of this and the learning curve associated with the ePlanning software, according to Carrie:

> *NEPA is in the spotlight. We are asking ourselves across divisions if there is a better way to do business within the boundaries of the NEPA Handbook and the workflow in ePlanning. There are growing pains but every day I see improvements. More and more projects are getting entered, tasks are being completed, and documents are getting signed.*

Both Carrie and Marguerite recognize that there are challenges yet to overcome to implement ePlanning in their state. But, Nevada is seeing success with ePlanning because of dedicated staff willing to learn and a few key roles to support those staff.

Creative Approaches to Implement ePlanning: Alaska and the Fairbanks Field Office

In Alaska, ePlanning is being utilized in both the Fairbanks District Office and the State Office to create, edit, and publish documents related to the Eastern Interior RMP (EI RMP). In September, the *Analysis of the Management Situation* was published using ePlanning. Some staff in Alaska have been involved in ePlanning V. 2.0 for several years. The EI RMP Interdisciplinary (ID) Team was trained first in ePlanning in April of 2008. Follow-up training occurred this summer and several staff have received one-on-one training and support remotely from the ePlanning Team at the NOC.

Jeanie Cole — the EI RMP Team Lead — has taken a hybrid approach to implementing ePlanning with the EI RMP ID Team. Some team members completed their AMS work in ePlanning while others did not. For those staff not comfortable using ePlanning, Jeanie helped transfer their data from MSWord to the ePlanning content editor, Arbortext. Additionally, the EI RMP ID Team approached ePlanning as a smorgasbord, using some of the tools when it was determined that it could save time, and using non-ePlanning tools when those were deemed more efficient. While the role-based features of ePlanning are not Jeanie's favorite, she does like how the tool contains automated versioning of documents, which helps organize the large documentation required in an RMP process

Jolie Polett, the Alaska State P&EC, feels that this smorgasbord approach to ePlanning is a good one for now. She recently used portions of ePlanning for State Office review of the EI RMP *Analysis of the Management Situation*. And while Alaska is not yet 100 percent comfortable with the complete ePlanning application, she finds great benefit in the transparency in government that it engenders via a centralized planning and NEPA registry.

For Alaska's EI RMP effort, mixing and matching aspects of ePlanning with traditional methods of creating RMP documents has proven to be a solid approach.

LUP and NEPA Registers

We are very excited to report that a small handful of Planning and NEPA documents have been created in ePlanning V. 2.0 and are available to the public. NEPA documents are housed in a National NEPA register and Planning documents are housed in a National Land Use Planning (LUP) register.

Documentation for both the *Agua Fria National Monument-Bradshaw Harquahala RMP* and the *Eastern Interior RMP* can be found in the National Land Use Planning Register. You can find NEPA documents from Idaho and Nevada (and the list is growing) in the National NEPA Register.

We sincerely appreciate the dedication of individual offices to learn and use ePlanning from start to finish!

A screenshot from the BLM Planning Page, showing a link to the Land Use Planning Register.

NATIONAL SYSTEM OF PUBLIC LANDS

The Life of an ePlanning Help Desk Ticket

Your Input Helps to Improve the Application

We receive more than 100 ePlanning Help Desk tickets per month. While some of those tickets can be quickly answered with a phone call and a demonstration of how to troubleshoot a problem, other tickets uncover software **bugs** or **enhancements**. While bugs are genuine defects in the software code, enhancements are areas in which the user experience could be "enhanced" or made easier by modifying a software function.

Each week, ePlanning Team members meet at the NOC to discuss newly received help desk tickets, bugs, and enhancements. Tickets related to bugs and enhancements are clumped into groups — for example, items related to the Annotation Services (used for the PDF review process) are grouped together, as are tickets related to Arbortext or Documentum. Every month or so, the ePlanning user representatives and the software support staff examine these tickets, define the barriers to work that they create, and obtain an estimate of how much time is needed to create a fix or enhancement. Priority is given to bugs/enhancements that would most affect/enhance the ePlanning user experience. In these reviews, about 10-15 bug fixes or enhancements are grouped together into a software "patch."

Patches — The ePlanning Cat — wants you to know that Help is only a click away!

Once a patch is defined, software code writing commences for each fix/enhancement within the patch. Once the patch is ready, it is installed in the **ePlanning Test Environment** (the same place where ePlanning training sessions are conducted). The patch is installed here first to ensure that 1) it works as intended and, 2) there are no unintended consequences to other parts of the ePlanning Tool. After installation in the test environment, ePlanning user representatives and software developers conduct rigorous testing to ensure that the bug fix or enhancement really is doing what it was designed to do. After several hours of testing and fine-tuning, the patch is ready to be made "live" in the **ePlanning Production Environment**.

The BLM National Help Desk is your portal to help improve the ePlanning application. You can access the National Help Desk from your desktop or from Lotus Notes.

If you use ePlanning, no doubt you have received an occasional email indicating that the ePlanning application will be taken down for scheduled maintenance. Usually, this "maintenance" is a patch installation. While these maintenance periods can last anywhere from a few hours to a whole business day, they represent a month or more of preparation and testing.

Dozens of individual bug fixes and enhancements have been applied since the inception of ePlanning. The most recent patch installed (September 2009) included the following improvements to the ePlanning tool:

- Copy and paste function works faster. In test, copying the CX template from the asset library and pasting it into a project takes approximately 1 minute instead of 33+ minutes.
- The spell checker now works on the comment form.
- The comment form will now accept Microsoft Office 2007 files to be added as attachments.
- If a user attempts to add an invalid file type to a comment submission, they will receive a warning letting them know which file types are acceptable.
- All of the required fields are now identified on the comment form; before they were not, which created confusion for the public.

ePlanning from a Field Office Manager's Perspective

Q&A with Karen Kelleher, Wenatchee Field Office Manager
Wenatchee, Washington

How long have you been involved with ePlanning?
Since shortly after its inception. I reviewed some of the early concept documents while working in DC prior to the pilots starting. I was the planner for the Phoenix South/SDNM RMP, which was a pilot for ePlanning.

What role does ePlanning play in your day-to-day and strategic work?
At the Wenatchee FO, we are not yet using ePlanning. However, we expect to begin using it in the near future. In Phoenix we used various pilot versions of ePlanning to publish public review versions of our range of alternatives, scoping reports, and the DRMP of the Bradshaw-Harquahala RMP. We also did some document editing in those early versions of ePlanning, but at the time the word processing front end was not as sophisticated as it is now.

What do you think the main advantages/benefits of ePlanning are?
I think the single greatest benefit is the enhanced opportunity for public involvement in both our large planning efforts and our site specific projects. ePlanning provides excellent information for the public to use in assessing what we are doing and in allowing the public to provide valuable and insightful comments. When I was in Phoenix, we used ePlanning to publish several elements of our plans and found that it provides many more members of the public access to our information in a format that they could readily use. It also facilitated management and processing of public comments in a controlled and standardized way.

I also think that the controlled editing by multiple staff members is a valuable feature. This capability will allow us to efficiently manage and complete documents. We used the editing capability available in Version 1; and, while primitive compared to the newer version, we still found it helpful in managing a large document with many writers. In the future, having documents in ePlanning should also help us to avoid duplication of work since we should be able to search for similar documents and reuse pertinent information.

What has been the most difficult aspect of ePlanning?
Probably how long it has taken for us to get from the early pilot versions to a functional Bureau wide version.

How do you plan on motivating your staff to use ePlanning?
We've already discussed with our staff the timing for when we will start using ePlanning and the advantages of using ePlanning. In general, our staff understands the helpful aspects of ePlanning and is open to the idea of its use. In my opinion, ePlanning is easy to understand and use, so I don't expect major problems in converting to its use.

Training Updates

Image courtesy of Shapingyouth.org

Last summer — based on user feedback — the ePlanning Core Team began to revise the ePlanning Training program. Feedback from staff trained in 2008 indicated that the course should be longer with concrete course materials.

The training materials and methods were redesigned with the following goals:

- Make the materials more relevant to BLM NEPA processes.
- Make the training more consistent.
- Provide materials that make it easy for students to recall what they learned in a training session.

The ePlanning Training Workbook has been used in more than a dozen training sessions and is receiving positive feedback.

Several BLM field staff contributed significant time and energy to help create the workbook, including:

- **Connie Chitwood**, CO
- **Jeanie Cole**, AK
- **Chris Horyza**, AZ
- **Cathy Humphrey**, NTC
- **Matt McCoy**, ID
- **Sky Murphy**, CA
- **Carrie Ronning**, NV

We would not have been able to make training progress without them!

Ch...Ch...Ch...Ch...Changes — The ePlanning Core Team

As more offices and more BLM staff use ePlanning, the ePlanning support staff is growing in number.

Victoria Smith joined the ePlanning Team in January of 2009 as an ePlanning Facilitator. She came from 3 years in the public safety industry, implementing 911 Computer-Aided-Dispatching systems. Prior to that, Victoria worked at the BLM's California State Office as the Fire GIS Lead. She started her career with the National Park Service in the Youth Conservation Corps program and has also worked in the federal government as a Park Ranger and a GIS Specialist. She appreciates once again being in the federal service.

Ron Cross is originally from Douglas and Casper, Wyoming. He retired from the U.S. Navy after completing 21 years within the submarine and diver communities. After the Navy, Ron moved to Denver to attend graduate and post-graduate school. After receiving a PhD in Business with an emphasis in Organization and Management Development, Ron joined the BLM as an ePlanning Facilitator in February of 2009.

Udom Hong (pictured right) joined the ePlanning Team in April of 2009 as an ePlanning Facilitator. He received a BA in Biology from Gustavus Adolphus College in St. Peter, MN. After college, he spent a few years working in a laboratory for the American Red Cross. He moved on to study Global Environmental Policy at American University in Washington DC, where he received an MA Since moving to the Front Range and starting at the BLM, he has thrown himself into the ePlanning world, so much so that he brought the ePlanning Training Workbook to Cambodia on a recent vacation.

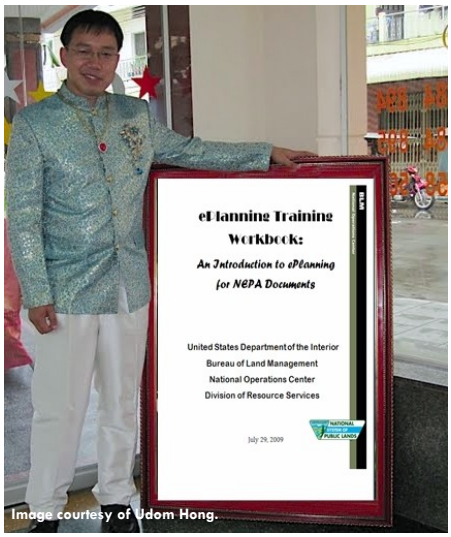

Image courtesy of Udom Hong.

Tina McDonald is the new section chief over the ePlanning facilitators and business representatives. In addition to helping with ePlanning, Tina is an Outdoor Recreation Planner at the NOC, responsible for supporting the Recreation Management Information System (RMIS) and working with RMIS users in the field. Before being transferred to the NOC, she worked for the Washington Office Recreation and Visitor Services staff and for the Colorado State Office as the lead recreation planner for operations. Tina began her BLM career in Carlsbad, New Mexico.

Image courtesy of Randy Hayes.

The ePlanning Family. Back Row, from Left, Mary Beth Stulz, Chris Alm, Udom Hong, Ron Cross, Randi Lupphold, Leah Baker, Tina McDonald. Front Row, from left: Victoria Smith, Jane Peterson.

Jane Peterson joined WO-210 as the ePlanning Program Manager in August, working from the NOC. Jane spent the first 9 years of her federal service as an Environmental Compliance Manager with the Air Force. She came to the BLM in 2001, working as the P&EC in Grand Junction and as the Team Lead for the McInnis Canyons RMP. She has managed several projects, including five Colorado Oil Shale R&D and Demonstration projects, the White River Field Office RMP Amendment for Oil and Gas Development, and initiated a coal mine expansion EIS. In 2007, Jane moved to Nevada to be the Energy Project Manager for the Ely office. She also spent time as the Renewable Energy Project manager in the Carson City Office District Office and as the Renewable Energy Coordinator for the Nevada State Office.

Mary Beth Stulz, **Leah Baker**, **Randi Luphold**, and **Chris Alm** continue to support ePlanning users.

Impressions from the Field

Jon M Beck
Planning and Environmental Coordinator, RMP Team Lead
Boise District Office, Idaho

Jon Beck reviews the Four Rivers Planning area at an RMP Workshop in Boise.

What's your role at BLM?
I am a Planning and Environmental Coordinator (P&EC) for the Boise District and the planning Team Lead for the Four Rivers RMP revision. Our interdisciplinary team is unique because it includes BLM and contractor employees who had to learn the ePlanning process before starting the RMP. Contractors did their training using a CD from the NOC, but they received program support through help desk tickets like all other BLM employees.

After participating in training, what was your initial impression of the ePlanning system?
After my first training, I was optimistic about ePlanning. I thought it would be a time saver for IDT members and the public. I liked the possibility of a transparent planning process in which the public would have access to planning documents, GIS maps, and all other documents we use to make our decisions. Since my first exposure to the program over 2 years ago, the team has improved the program and has added modules so that the functionality I was hoping for is now a reality.

Has that impression changed with the use of the system?
My first impression was that ePlanning (Webtop and Arbortext) was a cumbersome program that accomplished the same results as our current word processing program. I now understand that it is far superior to MSWord for document preparation in its ability to: 1) create a digital project record; 2) reuse content; 3) manage document versions; 3) control document access; 4) assign tasks; 5) publish documents to the web; and 6) accept digital comments.

What do you think of system functionality and support?
The support is great, and the functionality is improving. I have never had a problem with the support. The ePlanning staff is knowledgeable and professional. If they can't fix my problem over the phone that day, my problem is usually fixed within the week.

What do you think of the XML editor, Arbortext?
The XML editor is easy to use after you overcome your bias that it is not MSWord. Text is easy, but when you want to add the extras (bulleted lists, graphics, tables) it will take a few tries before you become comfortable at the task. The more you do it, the better you become.

What do you like most about ePlanning?
I like controlling who has access to the document; assigning tasks; the fact that multiple people can work in different sections of the document at the same time; the style sheets that eliminate the need for formatting a document for publishing. I like receiving comments digitally into CommentWorks. I like the web pages that give the public access to our documents.

ePlanning Support Sites

ePlanning internet (External)

ePlanning intranet (Internal)

ePlanning Community of Practice SharePoint Site

BLM Land Use Planning website

Have you been using ePlanning and would like to share your experiences with other BLM staff? If so, contact Tina McDonald at 303.236.0505 or Tina_McDonald@blm.gov.

Do you like this quarterly newsletter? Would you like to read more? Fore additional information, check out the links to previous versions of *ePlanning Version 2.0,* located here.

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