

# BLM 2009 National Land Use Planning Conference Portland, Oregon

## RMP Budget & Project Schedule Development

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# RMP Budget & Project Schedule Development Roadmap — *what you'll learn in this presentation:*

- Contracting
- Keys to successful schedules and budgets
- Tackling prime scheduling hurdles
- Lessons Learned



# Contracting – To Contract or Not To Contract

- Through Needs Assessment, identify in-house specialist skills available and outside skills needed
  - WO IB 2005-138: Meeting Staffing and Skill Needs Associated with Planning and NEPA Projects
    - Contains “decision-making tree” for deciding whether to seek contractor assistance
  - Consider using resource capability checklist to determine contracting needs



# Sample Resource Capability Checklist

	Lack of Skills in FO	FO Staff Overcommitted	Lack of Skills in Other FO or SO	Other FO or SO Staff Overcommitted	Lack of GIS that is Essential to RMP	Lack of Baseline Studies Essential to RMP
Air	X			X		
Soils						
Water		X				
Vegetation						
Fish & Wildlife						
Special Status Species						X
Cultural Resources						X
Paleontological Resources	X		X			
Visual Resources						
Wildland Fire Mgmt						
Lands with Wilderness Characteristics outside WSAs		X			X	X
Forestry		X				X
Livestock Grazing						
Recreation & Visitor Services						
Trails & Travel Mgmt		X		X	X	
Lands & Realty						
Energy & Minerals		X				
ACECs						
Wilderness & WSAs						
Wild & Scenic Rivers	X		X			X
Public Health & Safety						
Socioeconomics	X			X		X

# Contracting – What Contractors Excel At

- Data collection
- Writing/editing skills
- Document preparation/management
- Facilitation of alternatives development
- Project/administrative record management
- Mailing list management
- Public notices/newsletters
- Public comment tracking & analysis
- NEPA and Appendix C adequacy
- QA/QC



# Contracting – What Contractors Excel At *(continued)*

- Technical skills not available or too time-consuming to do in-house, such as:
  - Further development of affected environment based on AMS
  - Impact analyses
  - Socioeconomic analyses
  - Air quality analyses
  - Wild & scenic rivers eligibility and/or suitability studies
  - Public/stakeholder group facilitation & logistics
  - Cultural resources inventories
  - RFDs and mineral potential reports
  - Biological Assessments



# Contracting

- Minimizing contract modifications
  - Write a solid statement of work
  - Hire an experienced contractor
  - Avoid changing direction midway
  - Be realistic about what BLM can and cannot do within scheduled time frames
- What motivates contractors?



# Keys to Successful Schedules & Budgets

- Detailed schedule as communication tool
  - Identifies major steps in planning process
  - Requires detailed tasks for each step of process
  - Identifies linkages among tasks and “domino effect”
  - Identifies which tasks can be overlapped
  - Shows complexity of planning process
  - Enables management to see the consequences of delays on schedule



# Sample Schedule – Simplified (MS Word)

Task	Time Span	Start Date	Finish Date
<b>Task 1:</b> Preliminary DRMPR/DEIS (compiled and completed)	5 months	6/16/2008	11/14/2008
<b>Task 2:</b> Review of Preliminary DRMPR/DEIS (District and SO)	14 days	11/14/2008	11/28/2008
<b>Task 3:</b> TAFO Revises Preliminary Draft RMPs/EIS (1 <sup>st</sup> Revision)	14 days	12/01/2008	12/15/2008
<b>Task 4:</b> Field SOL Review of Preliminary Draft (prior to sending to WO)	21 days	12/15/2008	01/6/2009
<b>Task 5:</b> WO-WO SOL Review Preliminary Draft-with explanatory notes if changes are req. by Field SOL	30 days	01/07/2009	02/06/2009
<b>Task 6:</b> TAFO Revises Preliminary DRMPR/FEIS (2 <sup>nd</sup> Revision)	14 days	02/09/2009	02/23/2009
<b>Task 7:</b> TAFO Prepares NOA and briefing materials; NMSO reviews	7 days	02/16/2009	02/23/2009
<b>Task 8:</b> Revise/Finalize NOA and briefing materials; forward to WO	81 days	02/24/2009	5/15/2009
<b>Task 9:</b> Director's Briefing	Last 2 weeks of April	-	-
<b>Task 10:</b> Print DRMPR/DEIS	21 days	05/18/2009	06/08/2009
<b>Task 11:</b> Mail DRMPR/DEIS	1 day	06/08/2009	06/09/2009
<b>Task 12: Release Notice of Availability-DRMPR/DEIS</b>	<b>1 day</b>	<b>06/08/2009</b>	<b>06/09/2009</b>
<b>Task 13:</b> 90-day Comment period and public meetings	90 days	06/09/2009	09/07/2009
<b>Task 14:</b> Public Comment Analysis	45 days	09/08/2009	10/22/2009
<b>Task 15:</b> New Data/Needed Changes	Concurrent w/above task	-	-
<b>Task 16:</b> Website/Public Update	1 day	11/9/2009	11/10/2009
<b>Task 17:</b> Prepare Preliminary Draft PRMPR/FEIS	21 days	10/23/2009	11/12/2009
<b>Task 18:</b> Review Preliminary Draft PRMPR/FEIS (District, SO,)	14 days	11/13/2009	11/27/2009
<b>Task 19:</b> Revise Preliminary Draft PRMPR/FEIS (1 <sup>st</sup> revision)	21 days	11/27/2009	12/17/2009
<b>Task 20:</b> Field SOL Review of Preliminary PRMPR/FEIS (prior to sending to WO)	21 days	12/18/2009	01/08/2010
<b>Task 21:</b> WO-WO SOL Review PRMPR-\\FEIS-with explanatory notes if changes are req. by Field SOL	30 days	01/08/2010	02/08/2010
<b>Task 22:</b> Revise PRMPR/FEIS (2 <sup>nd</sup> Revision)	14 days	02/09/2010	02/23/2010
<b>Task 25:</b> Prepare NOA & briefing materials/NMSO reviews	7 days	02/23/2010	03/02/2010
<b>Task 26:</b> Revise/Finalize NOA & briefing materials; forward to WO	61 days	03/02/2010	05/01/2010
<b>Task 27:</b> Director's Briefing on PRMPR/FEIS	1 <sup>st</sup> /2 <sup>nd</sup> week of April	-	-
<b>Task 28:</b> Print PRMPR/FEIS	21 days	05/03/2010	05/24/2010
<b>Task 29:</b> Mail PRMPR/FEIS	1 day	05/25/2010	05/26/2010
<b>Task 30: Release Notice of Availability-PRMPR/FEIS</b>	<b>1 day</b>	<b>05/21/2010</b>	<b>05/21/2010</b>
<b>Task 31:</b> Protest Period	30 days	05/21/2010	06/21/2010
<b>Task 32:</b> Governor's Consistency Review	60 days	05/21/2010	07/19/2010
<b>Task 33:</b> Protest Resolution	90 days	06/21/2010	09/20/2010
<b>Task 34:</b> Begin-Complete Drafting ROD	120 days	05/21/2010	10/18/2010
<b>Task 35:</b> Internal Review of Draft ROD	14 days	10/18/2010	11/01/2010

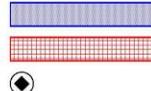
# Sample Schedule – Detailed (MS Project)

Working Document																		
ID	Task Name	Duration	Start	Finish	2007				2008				2009					
					Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4		
1	<b>Notice to Proceed</b>	0 days	Mon 3/5/07	Mon 3/5/07	3/5													
2	<b>Phase I: Project Management &amp; Scoping</b>	740 days	Fri 3/2/07	Thu 12/31/09														
3	<b>NOI Published in Federal Register</b>	0 days	Fri 3/2/07	Fri 3/2/07	3/2													
4	<b>Task 1: Kickoff Meetings</b>	27 days	Mon 3/5/07	Tue 4/10/07														
5	1.1.A - Kickoff meeting conference call	1 day	Mon 3/5/07	Mon 3/5/07														
6	1.1.B - Kickoff Meetings (BLM/Tetra Tech ID Teams)	2 days	Mon 3/26/07	Tue 3/27/07														
7	1.1.B.a - Kickoff Meeting at KFO	1 day	Mon 3/26/07	Mon 3/26/07														
8	1.1.B.b - Kickoff Meeting at GSFO	1 day	Tue 3/27/07	Tue 3/27/07														
9	1.1.C - Kickoff Meeting Record	7 days	Tue 3/27/07	Wed 4/4/07														
10	1.1.D - Project Management Plan	10 days	Wed 3/28/07	Tue 4/10/07														
11	1.1.D.a - Submit Final PMP and Schedule	10 days	Wed 3/28/07	Tue 4/10/07														
12	<b>Task 2: Administrative Record (AR)</b>	738 days	Tue 3/6/07	Thu 12/31/09														
13	1.2.A - AR Index (include in PMP)	10 days	Wed 3/28/07	Tue 4/10/07														
14	1.2.B - Maintain AR	738 days	Tue 3/6/07	Thu 12/31/09														
15	1.2.C - Transfer AR to KFO and GSFO	0 days	Thu 12/31/09	Thu 12/31/09														
16	<b>Task 3: Data Management (on-going task)</b>	12 days	Mon 3/26/07	Tue 4/10/07														
17	1.3.A - Data meetings	2 days	Mon 3/26/07	Tue 3/27/07														
18	1.3.B - BLM provide Tt with Existing GIS Data (on-going)	2 days	Mon 3/26/07	Tue 3/27/07														
19	1.3.C - Data Inventory/Revision Strategy	10 days	Wed 3/28/07	Tue 4/10/07														
20	<b>Task 4: Mailing List/Public Notices/Newsletters</b>	646 days	Mon 3/5/07	Mon 8/24/09														
21	1.4.A - BLM Provides Draft Mailing lists	2 days	Mon 3/26/07	Tue 3/27/07														
22	1.4.B - Maintain Mailing lists (on-going)	630 days	Tue 3/27/07	Mon 8/24/09														
23	1.4.C - Newsletters	451 days	Mon 3/5/07	Mon 11/24/08														
24	1.4.C.a Newsletter #1 (Scoping Results)	5 days	Wed 6/20/07	Tue 6/26/07														
25	1.4.C.b Newsletter #2 (Travel Mgmt Process)	5 days	Thu 11/29/07	Wed 12/5/07														
26	1.4.C.c Newsletter #3 (Preliminary Alternatives)	5 days	Mon 2/25/08	Fri 2/29/08														
27	1.4.C.d Newsletter #4 (DRMP/DEIS)	5 days	Tue 11/18/08	Mon 11/24/08														
28	1.4.C.e Newsletter #5 (PRMP/FEIS)	5 days	Mon 3/5/07	Fri 3/9/07														
29	<b>Task 5: Scoping &amp; Scoping Meetings</b>	43 days	Fri 3/2/07	Wed 5/2/07														
30	1.5.A - Scoping Period (collect comments)	61 edays	Fri 3/2/07	Wed 5/2/07														
31	1.5.B - Issue News Release	0 days	Mon 3/12/07	Mon 3/12/07	3/12													
32	1.5.C - Publish Newspaper Ads (1 week before mtgs)	4 days	Mon 4/2/07	Thu 4/5/07														
33	1.5.D - Scoping Meetings in Rifle, Carbondale, Gypsum	3 days	Tue 4/10/07	Thu 4/12/07														
34	1.5.E - Scoping Meetings in Granby, Kremmling, Walden	3 days	Tue 4/10/07	Thu 4/12/07														
35	1.5.F - Scoping Meeting Records	6 days	Fri 4/13/07	Fri 4/20/07														
36	1.5.G - Cooperating Agency Meeting #1 (GSFO & KFO)	2 days	Tue 4/3/07	Wed 4/4/07														
37	<b>Task 6: Travel Management Strategy / Involvement</b>	95 days	Fri 4/13/07	Thu 8/23/07														
38	1.6.A - Outreach Strategy	20 days	Fri 4/13/07	Thu 5/10/07														
39	1.6.B - Public Meetings (up to 16)	30 days	Fri 6/15/07	Thu 7/26/07														
40	1.6.C - Documentation of public input from meetings	20 days	Fri 7/27/07	Thu 8/23/07														

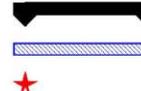


US Bureau of Land Management  
Kremmling Field Office and  
Glenwood Springs Field Office  
Resource Management Plans and EIS

Task  
BLM Review/Action  
Milestone



Summary  
Ongoing Task  
Meeting

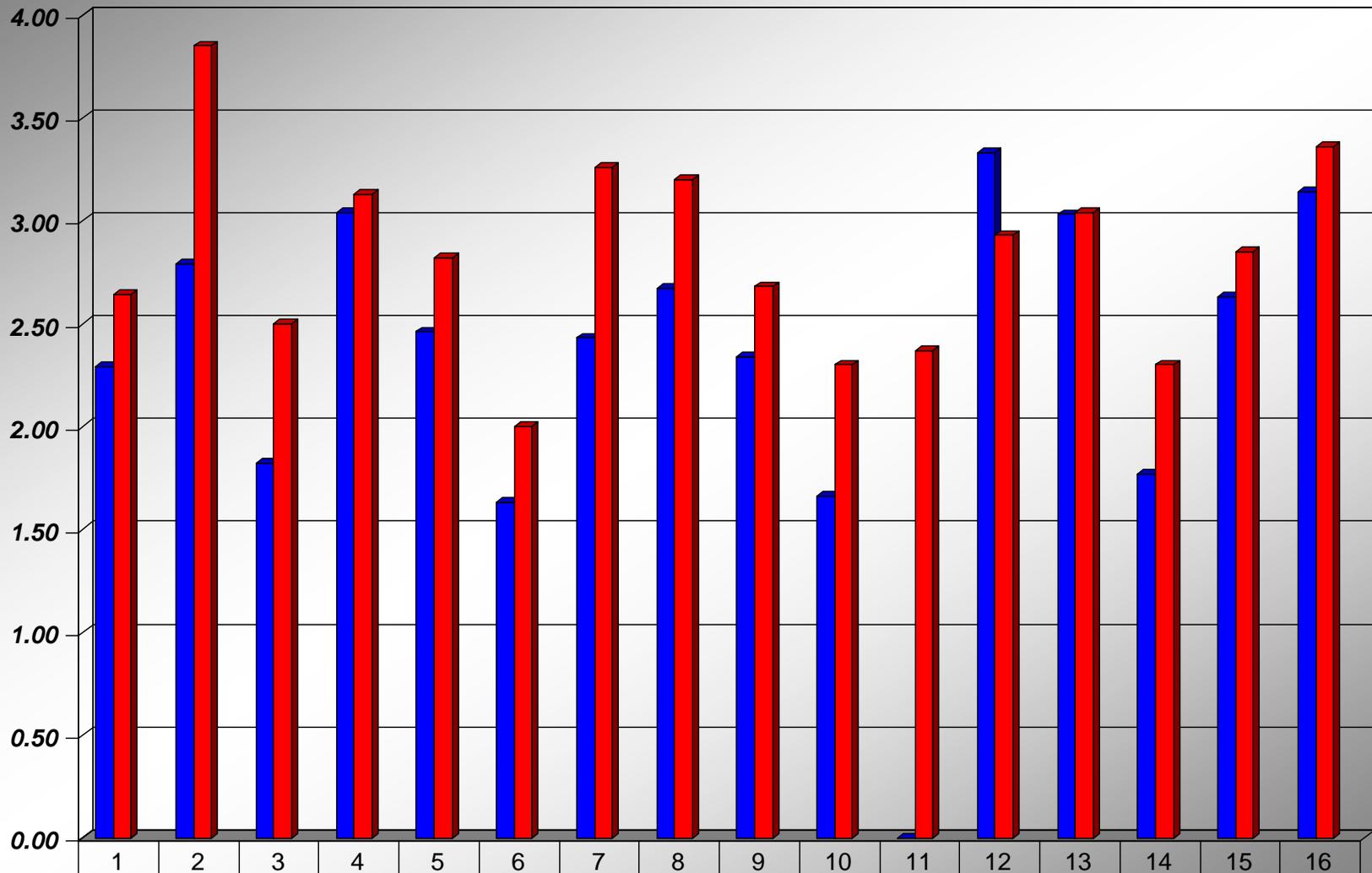


Public Involvement  
Tt-BLM Collaborative Task



# Scheduling Hurdles

1. Need for specific studies
2. Multiple review cycles
3. Lack of management support
4. Issues with quality of analysis or deliverables
5. Ineffective communication
6. Other non-RMP job commitments of the RMP project manager
7. Other non-RMP job commitments of the ID Team
8. Need to complete or update GIS data
9. Involvement of Cooperating Agencies
10. Additional public involvement
11. Coordination with federal, state and local regulatory agencies
12. Contracting problems
13. Changes in policy or guidance
14. Inconsistency with laws, regulations or policy that requires additional analysis
15. Changes in the alternatives
16. Other



■ Cost Factors	2.29	2.79	1.82	3.04	2.46	1.63	2.43	2.67	2.34	1.66	0.00	3.33	3.03	1.77	2.63	3.14
■ Schedule Factors	2.64	3.85	2.50	3.13	2.82	2.00	3.26	3.20	2.68	2.30	2.37	2.93	3.04	2.30	2.85	3.36
Difference	0.35	1.06	0.68	0.09	0.36	0.37	0.83	0.53	0.34	0.64	0	0.4	0.01	0.53	0.22	0.22

# Tackling Scheduling Hurdles

- Primary scheduling hurdles
  - Tiers of reviews / multiple review cycles
  - Other non-RMP job commitments of the ID Team
  - Need to complete or update GIS data
  - Issues with quality of analysis or deliverables
  - Special studies
  - *Federal Register* notice reviews
  - Change in alternatives



# Tackling Scheduling Hurdles *(continued)*

- Ways to save time or accelerate schedule
  - Overlap reviews of deliverables or components
  - Overlap tasks
  - Get up-front SO buyoff on special studies needed
  - Coordinate with SO and WO counterparts throughout planning process
  - Compress non-critical path tasks
  - Enter into cooperating agency MOUs that identify schedules
  - Delegate additional tasks to contractor
  - Produce CDs instead of hard copies



# Lessons Learned

- Use contractors for specific tasks and as an extension of BLM team
- Write a solid contractor statement of work
- Schedule = budget
- The key to successful schedules and budgets = a detailed schedule
- Overlap tasks where possible to compress schedule



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