

SERVICE FIRST LEARNING JOURNEY TO OREGON - September 20-24, 2010
Observations and Recommendations, Service First National Coordination Office
Date: October 22, 2010

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PREAMBLE

The Service First Learning Journey to Oregon took place at the request of the Bureau of Land Management (BLM) Colorado State Director, dovetailing with a like information request from other Service First agency executives. Goals were to fact find for best management practices and clarify differing organizational structures in Service First units. A team of State, field and National Operations Center personnel from Colorado, and the Service First National Coordinator, visited three BLM/US Forest Service (USFS) collocated offices: the BLM State Office/USFS Regional Office in Portland; the BLM Lakeview District/USFS Fremont-Winema National Forest Office in Lakeview; and the USFS Rogue-Siskiyou National Forest/BLM Medford District Office in Medford.

Insights gained include the differing approaches taken by BLM and USFS field offices over the last ten years to use and integrate Service First in the two states. Not surprisingly, there are both similarities and distinct differences. In Oregon, Service First action was enhanced by the Northwest Forest Plan, which tasked the four agencies to collaboratively work together on complicated, ecosystem-wide socio-economic and resource issues within the range of the Northern Spotted Owl. Service First was also enabled by the similarity of the geography - adjacent lands, similar habitats and ecosystems; and finally by the fact that field units did not have all the financial, personnel and expertise resources that were needed. Leveraging with partners became a management strategy to assure success. In Colorado, in addition to the latter two factors above, Service First originated as a "trading post" concept where goods and services were freely exchanged. This grew from a shortage of human and fiscal resources on a state-wide basis, and recognition of redundancies between the work of the agencies, particularly BLM and FS. These factors may be of purely historic interest, or possibly relevant for those States/Regions considering increasing their use of Service First.

OBSERVATIONS

View from PORTLAND - USFS Regional and BLM State Offices

"Once we were in a common level and landscape, managers come to know each other, and support each other's programs even if it isn't a program in common. There are fewer conflicts."

What makes "good business sense" is the metric used for determining where and when to use Service First authority in Oregon. It is institutionalized to a degree that interagency work is "just happening". Employees feel empowered to do what is needed with Service First partners without asking permission. Sometimes partnership projects have been exploratory and have been dismantled when they did not work as envisioned. These instances were not seen as a threat to the overall relationship. For example: public affairs responsibilities were once shared between the agencies at the State/Region level, but after

a period of experimentation, became separate positions. This was primarily due to unmanageable workloads, and partly due to perceived confusion on the part of media with one person speaking for two agencies. The USFS and BLM at the State/Regional level share printing capabilities, tourism and outreach expertise, as well as a Service First liaison position. It was, however, frequently stated that managers must ensure they are not giving a shared employee workload for two, which results in burnout and turnover. Work priorities must be jointly and fairly set between engaged managers. Heavy workloads have on occasion been unfairly attributed to Service First.

Because of integration of Service First concepts and working conditions at the State Office/Regional Office (SO/RO) level, when field units need assistance, SO/RO staff already know and understand what Service First authority allows. This helps the field navigate administrative processes, resolve issues of varying policies, and address a variety of complex challenges that can arise with new partnership opportunities and different agency cultures. This integration at the SO/RO level enables them to assist field offices in a timely manner without the need for additional background briefings on what Service First authority is or how to work in that type of environment. *“The expectation from the field is that we are doing (Service First) at the SO/RO level, so they should too.”*

And, with commitment to Service First at the SO/RO level, field units feel they have a voice and means to air any concerns and challenges they are experiencing. All field offices in Oregon have a Service First relationship, so this has become part of the culture of the area. Their mantra relative to working across agency lines seems to be *“Where there’s a will, there’s a way”*.

Leadership sees a distinct advantage to the fact that they primarily share the same geographic boundaries, with like management responsibilities. Also, the fact of being collocated (BLM and USFS in one building) enables and encourages the interagency approach in Oregon. *“When the person I need to work with is available only on the telephone, they are just a voice, an organization or a set of positions. Here, I know what (he) had for lunch. He’s right down the hall.”*

Specifically, leadership of the four agencies in Oregon has institutionalized Service First as follows:

1. The four executives routinely coordinate on Service First, as a “Regional/State Leadership Team”.
2. An annual meeting is co-hosted to which leadership team members of each agency are invited.
3. Interagency funding is provided for all field units to further Service First projects and initiatives.
4. The USFS Regional Leadership Team (RLT) and BLM State Leadership Team (SLT) have agreed that one person’s time will be dedicated to coordinating Service First in the State and Region. This person moves easily between the executives to facilitate implementation and assist field offices as needed. She coordinates items 2 and 3 above, as well as facilitates the development of policies to address some Service First issues at the state/regional level for all four agencies. These policies include financial “offset” planning that units may use to document interagency sharing of personnel or resources in addition to or in lieu of using

- agreements to transfer funds; reinforcement of the national policy to require “one training” for Service First employees to reduce redundancy; and the development of a collocation space policy to address differences in space allocations.
5. The USFS and BLM are collocated in Portland, and have committed to remaining together in an upcoming move. In addition, staff in printing and fire and aviation management is co-mingled. The U.S. Fish and Wildlife (FWS) Regional Office is a short light rail ride away.
 6. Several SO/RO positions are shared, working on behalf of both agencies. Again, this enables the SO/RO to better relate to Service First challenges at the field level.

The bottom line is that the Portland office sees an advantage in applying different partnership authorities that would not otherwise be available to them. Managers from either agency have the freedom and flexibility to choose which tool “from the toolbox” to use to make the best decision.

View from LAKEVIEW - BLM District Manager and Forest Supervisor Offices

The BLM District Manager (DM) and Forest Supervisor (FS) here have delegated authority to each other, primarily as back up. Funding is kept separate but some services are shared. A lot of management decisions happen “in between” managers meeting for two reasons: in general staff is Service First oriented, and the dual delegated Administrative Officer acts for both the DM and FS. They have formed a “Leadership Team” that usually meets once a month. It includes the FS and Deputy FS, shared administrative officer (AO) and Fire AO, DM and Assistant DM, shared executive assistant, FWS Project Manager and Deputy. Customer service is a primary goal. Almost the entire administrative division is comprised of shared staff.

Service First “breathes” here. Their mantra is “*Do what makes sense*”. Managers will back off trying to force an employee to work across agency lines if the employee just doesn’t have the ability or willingness. Managers are willing to wait until they retire, and meanwhile put their efforts where they will pay off. They take opportunities to advance Service First when the “right people are in place at the right time”. They consciously make new selections with partnership background, experience and interest in mind so they “don’t go backwards”. They like being able to choose the most effective process to use, regardless of which agency’s authority is being used. Example: The USFS’s *Avue* system does not yield as many applicants at USAjobs for some positions, so they will then hire under BLM authority. The BLM was also able to use FWS authority to help manage wild horse populations that traverse both agencies’ lands.

Shared work include one shared property specialist who works in both agency’s systems; a shared vehicle pool for use by interagency office staff; one receptionist at the front desk who can access both systems for issuing permits, selling products, etc.; and a shared graphic artist who develops interpretive media for both agencies. Public Affairs Officers are no longer shared due to work overload and a lack of priority setting by previous managers.

If dual delegation authority were removed, managers stated that each agency would have to get new positions and new equipment. Some years ago, there was a perceived lack of understanding from the

RO/SO level of the complexities of managing Service First units in the field, which led to at least one DM/FS level manager taking a lateral position “back to a one agency operation” that was less stressful. It was also stated that nearly all attempts to centralize services and administrative processes at national levels affect, and mostly harm, Service First efforts in the field. *“It rips us apart.”* It’s awkward that BLM has a local Information Technology (IT) person who is not authorized to work on USFS machines.

They take advantage of the state/regional financial offset planning policy, and then do a formal agreement if need be. This enables the office to generate only 6-7 formal agreements a year for roads, fire, safety, and a soil scientist position, for example. Managers also take advantage of the RLT’s training policy that eliminates duplication. Employees are required to take whichever agency’s training is the most stringent, which is then approved by the supervisor through a manual override in the other agency’s system.

It became cost prohibitive for FWS to collocate with BLM and USFS, so the FWS visitor center and refuge headquarters is a few miles away.

View from MEDFORD - BLM District Manager and Forest Supervisor Offices

The philosophy of this office is not to force things into a Service First framework if it doesn’t make sense; and where it does make sense, to remain committed to the process. Parts of the DM/FS operation are Service First, but not all management actions were combined. *“We are deliberate on doing only what is an advantage to both agencies.”*

The high quality and well-outfitted facility within which this dual-agency Service First culture thrives was developed and implemented in multiple phases over a 14 year time period. Initial driving factors to collocate include BLM staff being vastly overcrowded, two national forests being combined with resultant organizational changes, the opportunity to reduce commute time for many staff by moving their offices closer to the resource, and a commitment of FS funds for the site, which contributed toward the joint renovation of the BLM-owned space. Interagency teams and committees developed move-in procedures and steps, and created joint internal policies on office closures due to weather, fitness and cubicle rules, Combined Federal Campaigns, etc., as well as for customer service at the shared front desk and lobby. *“Decide whose authority you are using, and then put the interagency teams together.”* They are moving toward sharing fleet. *“Compare potential cost savings to what makes sense... Spend energy where you get your return.”*

Leadership turnover over the 14 year timeframe *“never really slowed things down...When questions came up about whether to continue with collocation, we still kept going...The building supports less thinking of agency lines than the resource at the program lead level.”* SO/RO involvement was critical to resolve differing agency policies on space for Medford, which felt that the collocation also at the SO/RO level enabled someone to *“simply walk down the hall to help the field offices out.”*

At the District Manager and Forest Supervisor’s level, staff is co-mingled, not just collocated. The DM and FS and their deputies share a common waiting area, with plans to share one executive assistant. The building’s wiring called for each cubicle’s data ports to be keyed to both agency’s jacks, for maximum

flexibility in office allocations. Initially, there was fear on both sides of being absorbed by the other agency. It was stated that initial resistance from staff to sit with their counterparts would not be met with the same resistance today. Yet management did not force anything. When it came to the refurbished Grant's Pass office, the approach was "management would love to see you co-mingle, but we aren't going to force you." The newly relocated BLM resource area staff's desire to "get their own identity back" instead of co-mingling with the District Ranger staff was respected, with recognition that there was no true advantage to co-mingling these differing functions. *"If you get employees together and let them work together, over time they will develop the relationships and knowledge of where it makes sense to work together."* Dual delegation is not done at this level.

Approximately six agreements are done each year to transfer funds between the agencies using the financial offset planning option. Employees are technically shared primarily through detail appointments, versus one person sharing the same duties for both agencies. Their experience is that if "you have the same authorizing legislation, it's much easier to have one person do the job", as is the case with their shared Biomass position.

"The measure is whether you feel like you are getting the benefits of the work sharing, not whether is it 50/50 fiscally cost shared...There hasn't been a feeling of unfairness, but if there were, management can deal with it." Formal agreements are less necessary when like positions are co-mingled, as is the case with grants and agreements staff. As physical distance between people from different agencies increases, things tend to need to be more formal. Trust is built when relationships are strong and supported.

PARTICIPANTS

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RECOMMENDATIONS FOR REGIONAL AND STATE LEADERSHIP

1. Create a joint Regional/State Leadership Team.
In States/Regions where field units are actively engaged in the interagency approach, and particularly where Service First authority is used, forming a team of the four agency executives “walks the talk” of Service First, provides a forum for resolution and opportunities and supports strong working relationships at all levels.
2. Establish an annual Service First project funding program.
From base funds, each of the four agencies annually contribute funds for Service First at the field level to reward and encourage efforts and tangibly demonstrate support.
3. Hold regular Leadership Team meetings; invite field managers.
Hold annual or semi-annual leadership meetings that include District Managers, Forest Supervisors, Park Superintendents/other unit managers, Refuge Project Managers/other unit managers in the State and Region to acknowledge successes, address challenges, seek opportunities and establish common priorities and projects. *“You can’t see eye to eye unless you meet face to face.”*
4. Establish a Regional/State level Service First Coordinator.
Agency executives designate a shared State/Region level Service First coordination role, possibly as collateral duty, to fully address state, region and field needs and resolve issues. Priorities are jointly set and workload is balanced. It could be a rotating assignment between agency staff, or a detail appointment.
5. Fill vacancies at all levels with partnership-experienced and -oriented people
In units where interagency work is encouraged, managers should evaluate candidates for experience/inclination toward the partnership approach. *“We (in Oregon) have all the personalities that Colorado has; if people want to make it work, it will. But those with perceived power and persuasion can hurt it.” “A partner-oriented personality is needed in Service First positions.”*
6. Persevere toward collocation.
Executives and managers should continue to work through barriers to collocation whenever possible. Once it’s done, it’s harder to unravel relationships and a *“We’re in this together”* attitude is strengthened. The 2000 GAO report clearly stated collocation as one of the most effective ways to facilitate relationships and the interagency approach to managing resources and providing customer service.
7. Review policies for potential use in your State/Region.

While national solutions are being worked out, regional policies can streamline and ease the challenge for field units (whether colocated or not). The financial planning offset policy vastly reduces the number of formal agreements needed. The national space allocation policy helps any unit in a collocation process regarding cubicle size, etc. Managerial discretion in early dismissal for holidays and weather emergencies reduces tension over conflicting national policies between agencies.

8. Consider collaborating at a larger scale through programs such as the “Western Collective”.

The Western Collective is an effort started by the USFS that sets agency goals for “going green”, such as reducing energy use, recycling and overall reducing carbon footprints. Perhaps there are additional benefits if the agencies coordinate their efforts, particularly in colocated offices.

RECOMMENDATIONS FOR NATIONAL LEADERSHIP

1. Support and enable the above recommendations for Regional and State leadership.
2. Consider adopting recommendations 2, 3, 5 and 6 above on a national scale.
3. Support and provide resources to enable videoconferencing at the field level.
4. Support and provide resources to implement piloted IT solutions to enable one computer to access multi-agency systems, combined with the Access Authentication project (of the Interagency Interoperability Oversight Group). This will result in standardized methodology, support documentation and guidelines for implementation which will enable any office that needs dual access to get it.
5. With support and involvement from Regional, State and field offices, consider establishing a “Field Network for Service First”, using the Western Collective model. Investigate the benefits to improved networking among and between Service First units, including meetings, information exchanges, cooperating on addressing common issues, working with the national coordinator, etc.
6. Additional national policy is needed through executing budget direction from each agency. This could greatly enhance efficiency by corporately sharing Service First authority and models for its use.