

April 2003



**A PLAN TO ENHANCE
PARTNERSHIPS IN THE**

Pacific Southwest
REGION



FS GRANT STRATEGISTS

A USDA FS LICENSED ENTERPRISE UNIT

STRATEGIC PLAN

A Plan to Enhance Partnerships in the Pacific Southwest Region

April 2003

Developed by:

Adam Rich
Amy Gowan
Betsy Carroll
Bernie Weingardt
Chris Nota
Danny Ebert
Dennis Orbus

Dan Jiron
Donald Hall
Elizabeth Norton
Gene Zimmerman
Jim Geiger
Kathy Hardy
Kristy Cottini

Laurie Fenwood
Nancy Gibson
Mark Nechodom
Randy Gould
Sharon Prell
Thomas Kuekes
Tim Stone

Facilitated by Bob Loudon
FS Grant Strategists Enterprise Unit
USDA Forest Service
Phone: (909) 382-2781
E-mail: bloudon@fs.fed.us

As the facilitator of this planning process, I would like to thank the participants who stretched their already very busy schedules to participate in the strategic planning meetings. It was these dedicated people who enthusiastically contributed their time, energy and ideas in the hope of building more effective partnerships for better stewardship of our public lands. Also thanks to Bernie Weingardt, Betsy Carroll, Marlene Finley, and Shelby Reeder for reviewing and editing this document and the Pacific Southwest Region Regional Forester Team for supporting the project. –Bob Loudon

Table of Contents

Executive Summary	vii
Introduction	1
Background and Purpose	3
Goals for the Planning Process	4
Process for Strategic Planning	5
Planning Group Participants	6
Scope/Definition of Partnerships	7
Mission, Vision & Issues	9
Mission.....	11
Vision.....	11
Issues or Challenges to Reaching the Vision.....	12
Strategies	13
Strategies Arranged by Issue	15
Strategies with Action Items.....	16
Appendices	21
Appendix A: Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis.....	23
Appendix B: Regional Partnership Program Summary	27
Appendix C: National Partnership Task Force Products	29

Executive Summary

Faced with shrinking resources and increasing demands, it is now more important than ever that the Forest Service develop partnerships for managing public lands. Recently, at the national level efforts have been made to improve the agency's effectiveness at developing partnerships. The Pacific Southwest Region has also been working to improve partnerships through an innovative approach of focusing on a larger issue of increasing advocacy for public lands. Partnerships are one aspect of this larger focus. The region sponsored the development of this strategic plan to establish a vision for increasing the effectiveness of its partnerships, and to determine strategies to reach that vision. The planning process included three one-day meetings. The participants in the process included employees of the region from various levels and staff areas of the organization. The report - *A Look at Partnerships in the Pacific Southwest Region* was used as a foundation for developing the plan.

Mission

The mission of the FS-Pacific Southwest Region is to use partnerships internally and externally to provide better services for the public and the best management of the forest ecosystems on public and private lands.

Vision

Five key vision statements emerged. In five years:

1. The Pacific Southwest (PSW) Region has effective cooperation between internal staff areas and across administrative boundaries.
2. The PSW Region has stakeholders who feel that the organization is relevant and helpful to them and that their participation in land stewardship is important.
3. The PSW Region has additional resources obtained from sources outside the agency to provide better services and land stewardship.
4. The PSW Region has integrated an emphasis on partnerships into the culture and function of the entire organization.
5. The PSW Region includes partners in the development of strategies for land stewardship.

Issues and Strategies

Five central issues were identified which would inhibit the Pacific Southwest Region from reaching its vision in five years. Strategies were developed for each of the issues.

Issues	Strategies
Understanding and Vision	<ol style="list-style-type: none"> 1. Develop a coaching/mentoring cadre. 2. Put a partnerships element into all meetings and trainings. 3. Develop an information program (workbook, video) for field units.
Leadership	<ol style="list-style-type: none"> 1. Make partnerships a priority of leadership. 2. Identify an organizational structure for partnerships. 3. Create a recognition system. 4. Establish a funding source for regional partnership enhancement.
Competencies	<ol style="list-style-type: none"> 1. Integrate partnership skills into recruitment, selection and development processes.
Policies	<ol style="list-style-type: none"> 1. Develop a "Dispelling the Myths" publication. 2. Develop more efficient processes for partnering with the state.
Priorities	<ol style="list-style-type: none"> 1. Establish a system to measure the success with partnerships. 2. Have each unit conduct a partnership assessment and develop an annual strategy.

Introduction

Background and Purpose for Region 5 Partnership Planning

As a land management organization, the Forest Service needs to optimize its use of partnerships to fulfill its mission of “Caring for the Land and Serving People.” The agency is continually faced with the challenge of providing more and more services across a complex landscape of diverse social settings and ecosystems with less and less resources. Therefore, improving the use of partnerships is an ongoing task. Even though the success of partnerships in the agency will ultimately depend upon relationships developed at the field level, the leadership, policy, and support provided from upper management levels are imperative for success.

Recently, many efforts have occurred at the national level to improve the effectiveness of partnerships both within the Forest Service and other land management agencies, such as the BLM and the NPS. In May 2001, Chief Bosworth responded to an offer from Congress to work with the Forest Service to improve the agency’s ability to work in partnership with the public by establishing the “Partnership Authorities Work Group.” The Group’s report, completed in April 2002, was the basis for the formation of the National Partnership Task Force. Subsequently, Chief Bosworth charged the Task Force with the following, in May of 2002: *“The Forest Service is increasingly dependent upon working in partnership and through collaborative approaches. Our relationships are becoming more complex and the monetary and resource values of partnerships are growing. However, our business processes and management guidelines reflect a different era and a different way of doing business. They sometimes hamper the best of efforts. I want that to change.... Your job is to re-engineer Forest Service partnership policies and practices to make them more partner ‘friendly.’”* The National Partnership Task Force concluded their work on December 1, 2002, with the development of many products to support partnerships.

The Pacific Southwest Region has a large potential for developing partnerships due to California’s huge economy and multifaceted diversity and leadership in technological, social, cultural, geographical, and biological arenas. In the region’s tradition of innovation, it has been working on improving partnerships as part of a larger approach toward improving advocacy.

In 2001, the Regional Leadership Forum (RLF) identified “advocacy” as an emphasis area for Region 5. The RLF has continued to support this emphasis area by creating an Advocacy Team and by maintaining the topic as a standing item on RLF meeting agendas. The units within the region have been conducting self-assessments and work plans to improve advocacy. The vision of the Region 5 Advocacy Team is to *“broaden the interest, understanding, and support for the management of national forests and all public lands in California by building on successful examples within the region.”* Advocacy, as a concept, represents an umbrella under which we might employ collaboration and a spirit of inclusion to accomplish our work. Partnerships are one component under this umbrella along with community outreach, collaborative decision-making and education.

Because partnerships represent such an important part of advocacy, the region has recognized the need to take the time to reflect and prepare strategically for how we can be more effective in the partnership arena in the next five years. This process began with an overview of Region 5 partnerships developed by the FS Grant Strategists (FSGS) Enterprise Unit. The resulting document, *An Overview of Partnerships in the Pacific Southwest Region*, was completed in March 2002. This assessment looked at the status of partnerships in Region 5 as compared to other regions, the status of partnerships within the region, and the partnership

status on individual forests. As a “snapshot” of Region 5 partnerships, the report provides an excellent springboard from which to develop strategies to move forward.

In the fall of 2002, FSGS began developing a Strategic Planning Process for the region. The timing was ripe for this effort due to declining budgets and the need to continue to engage our partners in the work of the Forest Service. The process also parallels the national efforts that are continuing to move forward as the National Partnership Task Force products are rolled out. In the end, the need to develop a plan at the regional level was validated by the dedication and enthusiasm of the members of the planning group.

The purpose of this planning process is to develop regional strategies for a coordinated approach to support partnerships in order to provide better public services, improve ecosystem management, and build advocacy. This document is essentially a proposal to the Regional Forester Team. The plan is meant to be a starting place that sets the direction for an effort to enhance partnerships in the region developed by a cross section of the staff who feel these actions will support their efforts.

Goals for the Planning Process

- Develop a region-wide, coordinated approach to enhance the effectiveness of partnerships.
- Develop creative strategies that meet the unique needs of the Pacific Southwest Region.
- Establish a well thought out starting point for a “program” that will evolve over time.
- Develop a written plan that will communicate the ideas to others.

Process for Strategic Planning

The Pacific Southwest Region Regional Forester Team contracted the services of FS Grant Strategists (FSGS) Enterprise Unit to facilitate the development of a plan for enhancing partnerships in the region. FSGS worked with the region to select participants for the planning. Participants for the process were chosen through informal networking and recommendations of “champions” of partnerships. Selections of participants were based on their availability to attend meetings and the need to have representatives from various levels of the organization.

The process was meant to be conducted during the summer of 2002 but was postponed due to travel restrictions. The planning meetings were held on October 24, 2002, November 22, 2002, and January 21 and 22, 2003. The Regional Forester’s Office in Sacramento was selected for the location of the meetings due to its central location. Bob Loudon of FSGS developed agendas and provided facilitation for the meetings.

A strategic planning process was employed due to the need to establish a coordinated effort within the region (as opposed to just refining the direction of an existing program). A key question was used to guide the planning:

"How do we envision that we will be using partnerships in our work in the Pacific Southwest Region in five years?"

During the first meeting we reviewed goals for the planning process and the process that we would follow to develop the plan; reviewed the current status of Forest Service partnerships; developed the scope/definition of partnerships that we would plan for; identified internal strengths, internal weaknesses, external opportunities, and external threats/barriers; reviewed the key question for the planning; and developed a list of vision statements.

On November 22, 2002, the group met for the second meeting. The meeting started with Brian O’Neill, Superintendent of Golden Gate National Parks, speaking to the group about his strategies for developing a culture of collaboration. Next the group prioritized the vision statements developed in the previous meeting and developed a list of issues or barriers to the vision and prioritized them.

On January 21 and 22 the group met for the last meeting and began by reviewing the products developed by the National Partnership Task Force. They then reviewed and refined the vision statements and issues. Next they developed strategies for each of the issues. After prioritizing them, they selected the key strategies. For each selected strategy, the group developed action items. Since the plan is just a proposal, the action items were not taken to an action plan.

In summary, the group completed the following steps:

- Mission – Define why partnerships are important to our work.
- SWOT Analysis – Identify internal strengths, internal weaknesses, external opportunities, external threats or limitations.
- Vision of Success– Identify a desired attainable future that has a specific timeframe and is designed to fulfill the mission.
- Issues – Identify the roadblocks that will inhibit the organization from reaching its vision.
- Strategies – Develop organizational goals to fulfill the vision and/or overcome the issues.
- Action Plan – Develop details for implementation of the strategies.

Planning Group Participants

The planning group consisted of employees of the region from various levels and staff areas of the organization. The group members were chosen based on their interest in partnerships, availability to participate in the meetings, and their role in the organization (ensuring the group represented a cross section of the organization). Additionally two staff from Region 4 participated in the meetings to learn about the planning process and ideas Region 5 is developing.

The participants included:

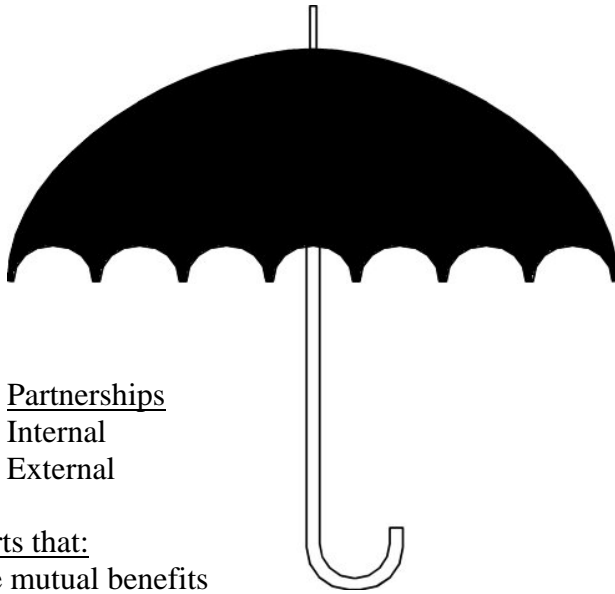
Adam Rich, District Wildlife Biologist, Stanislaus National Forest
Amy Gowan, Team Leader, Medicine Lake Highlands Cultural Resource Planning, Klamath, Modoc, and Shasta-Trinity National Forests
Betsy Carroll, Grant Development Specialist, FS Grant Strategists Enterprise Unit
Bernie Weingardt, Deputy Regional Forester, Pacific Southwest Region
Chris Nota, Regional Forester's Representative, Pacific Southwest Region
Danny Ebert, Partnership Coordinator, Intermountain Region
Dennis Orbus, Assistant Director, FAMSAC, Region 5
Dan Jiron, Director of Communication, Intermountain Region
Donald Hall, Rural Development Specialist, Klamath National Forest
Elizabeth Norton, Assistant Forest Supervisor for Public Services, Lassen National Forest
Gene Zimmerman, Forest Supervisor, San Bernardino National Forest
Jim Geiger, Director of Communications, Center for Urban Forest Research
Kathy Hardy, District Ranger, Eldorado National Forest
Kristy Cottini, District Ranger, Shasta-Trinity National Forest
Laurie Fenwood, Director of Reinvention Laboratory, Pacific Southwest Region
Nancy Gibson, Public Affairs Officer, Klamath National Forest
Mark Nechodom, Social Scientist, Sierra Nevada Research Center
Randy Gould, Hydrologist, Pacific Southwest Region
Sharon Prell, Recreation Extension Agent, Pacific Southwest Region
Thomas Kuekes, District Ranger, Los Padres National Forest
Tim Stone, Pacific Crest Scenic Trail Program Specialist, Pacific Southwest Region

Planning Facilitator – Bob Loudon, FS Grant Strategists Enterprise Unit

Scope/Definition of Partnerships

Since “partnerships” is a term that has many meanings, the group discussed and determined what areas they would consider as included in “partnerships” for the purposes of this planning process.

Advocacy for Public Lands



Partnerships

Internal
External

Efforts that:

Have mutual benefits
Build relationships
Bridge communities
Have net public benefit
Benefit to public’s resources
Engage people in our work in meaningful ways

Potential Partners

Non Profits
For Profits Orgs
Education
Grants
Other Federal Agencies
International
Other Agencies (state, county)
Volunteers
Tribes and Permittees
User/Interest Groups

Who can we join with to do the community’s work?

Our Definition of Partnerships Excludes:

Relationships with elected officials for policy development or issues
Outreach to general public – those not engaged

Mission, Vision & Issues

Mission

The mission statement describes the organization's purpose. In this case we are describing the mission for Region 5 in relation to partnerships.

The mission of the FS-Pacific Southwest Region is to use partnerships internally and externally to enhance public services/opportunities and ecosystem management on public and private lands.

Vision

The group developed statements of the vision for success and narrowed them down to the following statements. The vision statements represent overarching goals or the destination for the next five years. Energy, resources and action should be dedicated to attain the organization's vision statements

In five years:

1. **The Pacific Southwest Region has effective cooperation between internal staff areas and across administrative boundaries.** (Rather than compete, we collaborate to make the best use of existing resources and gain additional resources.)
2. **The Pacific Southwest Region has stakeholders who feel that the organization, which includes Administration, NFS, IF, S&PF, and Research, is relevant and helpful to them and that their participation in land stewardship is important.** (Partners seek us out because of the strength, value, and flexibility of our program.)
3. **The Pacific Southwest Region has additional resources (funding, personnel, equipment) obtained from sources outside the agency to provide better public service and land stewardship.** (Through building strong relationships and valued friendships, we can expand our resources and learning to increase accomplishments.)
4. **The Pacific Southwest Region has thoroughly integrated an emphasis on partnerships into the culture and function of the entire organization.** (We reach our goals through partnerships.)
5. **The Pacific Southwest Region includes partners in the development of strategies for land stewardship.** (We build the program of work collaboratively with our partners.)

Issues or Challenges to Reaching the Vision

After developing the vision of success that we want to reach, we must consider what may be a challenge to our success in arriving there. The group identified these key challenges to achieving the vision. These challenges were developed for a broad region-wide context even though we realize that there are individuals and programs excelling in these areas.

1. **Understanding and Vision** - Lack of understanding for how to implement partnerships and vision for what can be done through partnerships (internal and external).
2. **Leadership** - Limited focus on accomplishing work through partnerships.
3. **Competencies** - Competencies for selecting staff and leadership are not consistently focused on partnerships.
4. **Policies** - Lack of partnership friendly policies and administrative systems.
5. **Priorities** - Inconsistent priority for building long-term partnerships at all organizational levels.

Strategies

Strategies Arranged by Issue

The strategies were developed by asking the question, “What strategies can we implement to build pathways around or eliminate the challenges to reaching the vision?” After brainstorming a list of ideas, the strategies were selected and prioritized. The strategies were developed while keeping in mind the products of the National Partnership Task Force and how to utilize them. Here, the strategies are listed according to the issue. This is just to show how the group developed the strategies, recognizing a lot of the strategies deal with multiple issues.

Issue: Understanding and Vision

9. Develop a cadre of partnership champions to provide coaching, mentoring, and training (i.e. peer to peer communication about successes).
8. Put a partnership/advocacy element into every training workshop/meeting that occurs in the region.
12. Develop an information program (workbook, video) that is sent to field units so every employee can see and understand the expectations for partnerships (e.g. good host program).

Issue: Leadership

1. Make partnerships a priority of leadership that is clearly embraced and articulated. Have all leadership understand that increasing the use of partnerships starts at the top.
6. Identify an organizational structure for enhancing partnerships in Region 5.
11. Create a recognition system that recognizes achievements in partnerships for both internal/external groups and individuals and raises awareness of partnership opportunities for potential partnership champions.
10. Establish a funding source to pay for efforts to enhance partnerships in the region.

Issue: Competencies

5. Integrate partnership skills into personnel recruitment, selection and development processes.

Issue: Policies

4. Create a “Dispelling the Myths” publication including a section on “Little-known Strategies that are Legal,” information about the Wyden Agreement, information about new legislative authorities, and a list of perceived barriers to partnerships in Region 5.
7. Develop more efficient processes for partnering on projects with the state.

Issue: Priorities

2. Establish a system or tool to measure success with partnerships. (Integrate with existing systems as much as possible.)
3. Have each unit complete a partnership assessment as part of their advocacy assessment and develop an annual strategy for developing partnerships and advocacy.

Strategies with Action Items

The group developed action items for each strategy. They did not develop a complete action plan for each strategy since this plan is still a proposal. Here, the strategies are arranged according to the priority the group identified.

1. Make partnerships a priority of leadership that is clearly embraced and articulated. Have all leadership understand that increasing the use of partnerships starts at the top.

Action Items:

- Develop an overall communication plan for communicating the vision internally.
- Develop talking points and a presentation for stating the vision.
- Include a statement about partnerships/collaboration as a part of every directive/message from leadership.
- Hold a R5 Participants Meeting in conjunction with the National Partnership Conference in November, 2003.
- Hold a R5 Partnership symposium for Forest Supervisors, District Rangers, and Directors. The Regional Forester states the vision for using partnerships to accomplish our work.
- Include partnership policy and guidance in regional budget advice and the Regional Directives, supplementing the FS Manual and Handbook.
- Have partnerships as an emphasis item for leadership presentations.

2. Establish a system to measure success with partnerships (Integrate with existing measurement systems as much as possible.)

Action Items:

- Gather information on and evaluate current measurement mechanisms.
- Create a new measurement mechanism. Involve Grants and Agreements staff and others. Consider a variety of ideas for measurement including longevity of relationship; number of agreements; capacity in community; qualitative benefits; volunteer hours; value of resources acquired; feedback from partners; success in using partnerships to meet program goals; diversity with local community members, nonprofits, other government agencies; feedback from partners; success in implementing the “friend-raising” cycle*. Factor in the population surrounding the unit, economic value of area around the unit, and the size of the unit. Tie this into the advocacy assessment.
- Test and refine the system.

* The friend-raising cycle is a concept described by Brian O’Neill.

3. Each unit completes partnership assessment as part of their advocacy assessment and develops an annual strategy for developing partnerships and advocacy.

Action Items:

- Develop a worksheet for the partnership assessment and strategy.
- Develop an outline for leading the process.
- Provide an introduction to the tools developed by the Partnership Task Force and the region if needed.
- Establish a worksheet for planning and implementation of Brian O’Neill’s “friend-raising” process as a planning tool for developing a strategy.

4. Create a “Dispelling the Myths” publication including a section on “Little-known Strategies that are Legal,” information about the Wyden Agreement, information about new legislative authorities, and a list of perceived barriers to partnerships in Region 5.

Action Items:

- Review the materials created by the National Partnership Task Force to determine what information is covered.
- Identify myths and strategies through inquiry by e-mail.
- Outline the information that will be included.
- Collect information and produce a publication.
- Distribute the publication.

5. Integrate partnership skills into personnel recruitment, selection, and development processes.

Action Items

- Collect examples from around the region.
- Utilize the OPM training cadre.
- Include partnership skills in Position Descriptions and evaluation criteria.
- Ensure partnership skills are included for administrative positions (e.g. Grants & Agreements, Budget, Procurement).
- Provide templates for a standard paragraph in Position Descriptions, evaluation criteria, and quality indicators and explain why and how to use it.
- Ensure that employees understand that partnership skills are more than just Grants and Agreements.
- Top leadership communicates the importance and need to select people with partnership skills.

6. Identify an organizational structure for enhancing partnerships in Region 5.

Action Items:

- Look at other models for regional programs (i.e. FERC re-licensing, Recreation Special Uses).
- Develop a plan for organizational structure and responsibilities.

7. Develop more efficient processes for partnering on projects with the state.

Action Items:

- Develop a standard agreement to receive funds from other agencies to conduct NEPA and CEQA.
- Work with the state to eliminate the requirement for CEQA when NEPA is required. (This may require special state legislation.)

8. Put a partnership/advocacy element into every training workshop/meeting that occurs in the region.

Action Items:

- Develop detailed actions as part of the communication plan.
- Create a list of all of the meetings and conferences in the region.
- Develop an outline for a presentation.
- Identify a group of people who can attend meetings and present.

9. Develop a cadre of partnership champions to provide coaching, mentoring, and training (i.e. peer-to-peer communication about successes).

Action Items:

- Identify “champions” in the region.
- Determine the organizational structure, roles/responsibilities, and process for funding the work of the group.
- Link this cadre to the collaborative teams identified by the National Partnership Task Force.
- Develop training materials and lesson plans.
- Develop plans for promotion, recruitment, and training opportunities for cadre members.
- Identify and record regional success stories and utilize existing success stories linked through the Partnership Resource Library and as part of our reporting system.

10. Establish a funding source to pay for efforts to enhance partnerships in the region.

Action Items:

- Develop cost estimates for each strategy.
- Identify sources for funding.

11. Create a recognition system that recognizes achievements in partnerships for both internal/external groups and individuals and raises awareness of partnership opportunities for potential partnership champions.

Action Items:

- Develop an award system including the criteria for receiving awards, a nomination system, content of the award, and a timeline for awards. Consider for awards - reinvestment dollars, personal awards, and allocation of dollars.
- Identify funding strategies for the awards.
- Create events or utilize existing events to present recognition for partnerships and introduce the idea of partnerships to potential partners.
- Present awards at the National Partnership Conference in November, 2003.

12. Develop an information program (workbook, video) that is sent to field units so every employee can see and understand the expectations for partnerships (e.g. good host program).

Action Items:

- Identify goals for this information program.
- Script and storyboard the package. Consider including Brian O'Neill's story.
- Produce communication materials and design packaging.
- Develop a strategy for roll-out.
- Distribute materials.

Appendices

Appendix A.

Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

(This is a brainstormed list developed at the first partnership planning meeting. These ideas were used as background information for the development of the plan.)

Internal Strengths

- Talented people
- The land – multifaceted
- Diverse FS mission leads to diverse partnerships
- Multiple resources – people, equipment, locations
- Technical specialists
- Administrative and organizational structure established
- Management direction for where we are going
- Diverse workforce
- Long history of partnerships
- Public service ethics
- Kernel of leadership support
- More encouragement to be innovative
- More focus now on connection to communities (rural, local)
- Lots of good examples – models
- Good stories to tell – rich heritage
- 18 NF's in one state
- Strong tribal relations
- Decentralized organization
- Workforce contains many individuals with the personal initiative, interest, expertise and energy to create and maintain partnerships
- Myriad of opportunities perfect for partnerships (e.g., restoration, recreation uses, etc.)
- The Forest Service is an active member of some groups, which facilitate the development and implementation of multi-partner projects

Internal Weaknesses

- Rarely persistent about being bold
- No sense of permission to make mistakes
- Too often punish for innovation (even though we encourage it)
- “Policy Sheriffs”
- Ceiling at various levels – based on stated policy – not allowing innovation
- Decentralized organization
- Perceived erosion of autonomy of the RD's and NF's
- So much direction, hard to keep track of and understand it all
- “Not invented here” syndrome

- People add on to regulations
- Substitution of prescriptiveness in place of accountability
- Organization is slow to react
- People working with partners need more authority and work closer with line officers
- Perception that gains from partnerships will result in loss of appropriated dollars
- We don't want to give up control
- We want partners to be minor images of ourselves
- Enough money in past to not create incentive
- Trying to catch up to a changing demographics
- "Head down/butt up" workforce
- Lack of business management/planning skills
- "Can-do" culture
- Blindness to opportunities
- Spread thin
- FS culture shift from productivity to process
- Inflexible budgets
- Difficulty to match FS budget cycle to partner budget cycle
- Strong corporate immune system
- People not in place long enough to form relationships
- Lack of support from line officers
- Inconsistency from line officers
- Partnerships thought of as only a nice thing to do
- How we choose our leaders
- Strong dislike of change
- Trying to catch up with changing and conflicting societal values
- Caught in the middle of different and conflicting values
- Inconsistent support of creating and maintaining partnerships and inconsistent levels of understanding regarding what kind of constant effort and commitment it takes to create and maintain partnerships
- If we truly want to participate in partnerships, we must make constant commitment to regular coordination and participation: Partnerships are relationships, and, as such, they require constant feeding and care
- Multiple, and often changing, "number one priorities" makes it difficult to maintain the consistent personal time and effort needed to create and maintain partnerships
- Decentralized organization makes it difficult to form partnerships at larger scales (e.g. multi-district, multi-forest)
- Current budget structure makes it difficult to consistently fund partnerships at larger scales (multi-forest) and over multiple years
- Current budget structure makes it difficult (or at least is perceived as making it difficult) to fund partnership projects that have multiple "benefiting functions"
- Our current "burden rate" policy is incompatible with many of our non-profit potential partners - they have money for on-the-ground implementation of restoration projects, but cannot pay overhead costs

External Opportunities

- More T&E species than other regions
- 5th largest economy – highly diverse economies across state
- Large and strong higher education
- Diverse public
- Consumable water comes from NF's
- Hollywood
- Sophisticated NGO's throughout the state
- Very diverse landscape
- National public policy focus in CA
- 36 million people
- Thousand of corporations – social & civic entities
- More politicians than other states
- Liberal/pro-environment state government – connected to environmental community
- California is a trendsetter
- Good network of statewide extension specialists within universities
- Large number of potential partners
- Lots of media outlets
- Many external groups exist and are interested in partnering with us
- The FS does not currently actively participate in many "partnership" groups, which facilitate the development and implementation of multi-partner projects
- Participation by the Forest Service in multi-partner efforts, such as local watershed groups, can facilitate access to funding sources that are available for work on projects on National Forest land, but not available directly to the agency
- Icons people want to be associated with
- 18 National Forests in one state

External Threats/Barriers

- Interest groups are so polarized on issues
- Interest groups like one part of our mission but hate another part
- Interest groups very sophisticated and politically connected
- Interest groups and neighboring landowners don't trust us
- Population: higher urban, more diverse, less connection to the land
- Higher population is putting more pressure on NF
- Internet allows small groups to have large voices
- Lack of capacity for some tribes, tribal members and rural citizens to share and utilize their knowledge and skills as partners in implementing stewardship projects on the land
Federal granting, contracting and funding processes and authorities are often too complicated and inconsistent (across forests / regions / agencies)
- Most consumable water comes from NF. Volatile issue, due to lack of water
- Everyone is busy with their busy life. No time to participate
- Tend to think we have all the answers
- Wildland urban interface – people moving in are not connected to an organization

- Parcelization (subdivision) of property: Losing land base for forest products/disease threats
- Inability to communicate with large populations
- Large number of people not connected to groups/issues
- Many potential partners have limited staff/time/money
- Many partners are focused on large-scale projects, encompassing multiple Forests. The USFS' decentralized structure complicates organizing such projects because of planning, coordination, and budgeting, which must align across multiple forests.
- It is currently difficult to coordinate budgets across multiple forests, which is necessary to implement partnership projects across multiple forests
- Partners typically have neither the time nor staff to maintain coordination with Forest Service people on multiple ranger districts and forests
- Some current partnership funding sources are only available to non-federal agencies (e.g., National Fish and Wildlife Foundation, National Forest Foundation), even though the funds are available to accomplish work on NFS lands

Appendix B. Regional Partnership Program Summary

(Excerpted from *An Overview of Partnerships in the Pacific Southwest Region*, March 2002)

Region	Staff and Organization	Strategy	Training	Information Resources
One	Designated Regional Partnership Coordinator position located in the Public and Government Relations Unit of the RO. Part time position. Also regional partnership contacts in resource areas (recreation/wildlife).	The region administers a Partnership Fund. In 1999 provided \$450,000 for grants to units and \$50,000 for training for FS staff and community partners.	Provide training workshops annually and training for individual units. R1 helped host the 1999 conference in Salt Lake.	<i>Partnership Tool Kit – a 6 leaf folder with a funding guide and other forms (sample worksheets, partnerships guide, etc) for keeping track of information.</i>
Two	A partnership contact in recreation and wildlife. A few forests (rare) have partnership coordinators.	No explicit strategy for partnerships. It is emphasized in budget advice. In CIP, partnerships rewarded through priority.	Developing a training program for managing volunteers.	None. Contacts provide informal networking.
Three	Partnership with one staff that reports to Deputy Regional Forester for Operations. Currently ½ time. A partnership contact on every forest and 3 are full time coordinators.	Partnership Coordinator provides resources, tools, and information. Have annual meeting of forest contacts. Partnership Coordinator meets with units.	Informal coaching and encouragement.	Funding guide created. Information sent out to network of contacts. Resource center of information in the RO.
Four	Partnership Coordinator who works ½ time for region and ½ time for NF of Idaho. Trying to establish Partnership Coordinator on every forest.	Partnership Enhancement Project (PEP) began in 1998. Six member team (with R1 participation). Started with \$1M and reduced over time to \$200K next year.	Trained 270 R4 staff in grant writing over the past 4 years. Put on 2 partnership conferences	Information sent to field network. Put together 2 workbooks for grants for specific organizations. Develop draft partnership guide.
Five	A partnership contact in recreation and wildlife. A few forests (very rare) have partnership coordinators.	No explicit strategy for partnerships at the regional level. Partnerships encouraged.	No specific region-wide training.	Contacts provide informal networking.
Six	A partnership contact in recreation and wildlife. A few forests (rare) have partnership coordinators.	No explicit strategy for partnerships at the regional level. Partnerships encouraged.	Community Volunteering Workshops in two locations last year.	Don's Toolbox – cd with partnership info. Contacts provide informal networking.
Eight	Partnership Coordinator is detached RO employee. Reports to the Reg. Dir. of Fish and Wildlife. Spends ½ time on partnerships. Focused on wildlife.	The Partnership Coordinator works with forests to put together large projects that are funded by wildlife organizations.	Coordinator provides a presentation when invited by forests.	Coordinator distributes information.
Nine	Full time Partnership Coordinator position established. Position reported directly to the Regional Forester. Also wildlife and recreation partnership contact in the RO. A partnership contacts is identified for each forest. Currently position is filled by detailee.	The Partnership Coordinator helped the region compete for national opportunities. Visited forests often to learn and coach. Managed reg. submittals of grants. Built relationships with large organizations. Facilitated connections between functional areas and S&PF.	Annual training on general partnerships at Eastern/Southern FS University. Also sessions upon request for units- Partnership Proj. Planning and Volunteers.	Calendar of foundations/granting opportunities deadlines and contact people.
Ten	Recently restructured so no Regional Partnership Coordinator. Used to be a part time duty for the Assistant Director of Public Outreach. The region has a wildlife partnership coordinator..	The region did a partnership kickoff meeting and developed a Regional Partnership Strategy. The Region coordinates the submissions for some grant programs.	No specific region wide training.	Lotus Notes Team Room with many information sources.

Appendix C.

National Partnership Task Force Products

The National Partnership Task Force was in place from May to December 2002 to coordinate the re-engineering of Forest Service Partnership practices and policies. The following is a list of the products that were an outcome of their efforts.

Leadership Guide for Partnerships

The Leadership Guide is a tool available to all Forest Service employees and partners that conveys the agency's intention and key principles for working in partnerships and collaborative efforts. It establishes key roles and responsibilities and introduces readers to new tools available and in development that will assist agency efforts and will provide a quick reference for where these tools will be maintained and how to access them.

Resource Center

The Forest Service, in partnership with the National Forest Foundation, will implement an online resource center for partnerships and collaboration. The Resource Center will be a web-based point of entry to existing resources, organizations, tools, forms and other materials.

Assessment & Planning Tool

This tool will be a simple-to-use instrument for assessing current partnerships and collaborative efforts. It will allow the user to evaluate investments and actions to sustain relationships.

Policy and Manual Direction Handbooks

An updated manual and handbooks will provide agency direction for partnership program management and provide maximum flexibility for agency business practices.

Simplified Tools & Templates

This product includes tools for agreement administration and a simplified one-page template to use for Cost Share agreements, Participating agreements, Cost Reimbursable agreements and Wyden agreements. The template is web-based, optional use form. Partners will add a financial plan and describe mutual expectations.

Grants & Agreements Desk Guide

The desk guide will provide Grants & Agreements specialists and partnership practitioners with an overview of specific authorities, sample agreements, tools for agreement administration, and core competencies for administering agreements.

Partnership Guide

The Partnership Guide serves as an easy reference tool for practitioners and external partner organizations. Two unique features of the guide are guidelines for external organizations to help potential partners understand the Forest Service's mission, organizational structure and potential for working in partnership when there are mutual interests and benefits (Field Guide to the Forest Service). In addition, it includes guidelines to assist agency employees in understanding the role of nonprofit organizations, how to effectively work with the nonprofit sector and the potential for working in partnership with these organizations when there are mutual interests and benefits.

Partnership Development Program

The outcome of this product is a comprehensive program of skills development for partnership work.

Collaborative Resource Teams

The outcome will be recommendations on how to establish Collaborative Resource Teams in several geographic areas.

National Partnership Conference

The Task Force is part of the planning of a multi-agency National Partnership Conference to be held in November 2003.