



Forest Service  
U.S. DEPARTMENT OF AGRICULTURE

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# Partnership Basics

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# Session Agenda

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**Topic 1 – What are Partners and Partnerships?**



**Topic 2 – What are the Laws and Limitations that apply?**



**Topic 3 – How do Forest Service and Partners work together?**



**Topic 4 – How to be a Successful Partner**





## Topic 1: What are Partners and Partnerships?



partner

volunteer  
stakeholder  
advocate group  
agency  
member  
friend  
leader  
adviser  
visitor  
supporter  
collaborator club  
permitee  
community  
municipality

# What Are Partners?

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- An individual or entity that voluntarily desires to cooperate with the Forest Service on activities for which they share costs, mutual interest, and mutual benefit.



# What Are Partnerships?

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- A voluntary, mutually beneficial arrangement entered into for the purpose of accomplishing mutually agreed upon objectives.
- Partnerships can be
  - Informal relationships
  - Based on sharing skills and expertise
  - Developing a collective vision for the management of the forest.








## Topic 2: What are the Laws and Limitations that apply?



# Partnership Agreements

- Regulated by Forest Service Manual 1580
- Clarify how partners work together
- Clearly define
  - Project objectives
  - Decisions making
  - Funding allocation
  - Responsibilities
  - Who provides what resources
- Legally binding

1580  
Page 1 of 37



**FOREST SERVICE MANUAL**  
**NATIONAL HEADQUARTERS (WO)**  
**WASHINGTON, DC**

**FSM 1500 – EXTERNAL RELATIONS**  
**CHAPTER 1580 – GRANTS, COOPERATIVE AGREEMENTS, AND**  
**OTHER AGREEMENTS**

**Amendment No.:** 1500-2020-3  
**Effective Date:** 08/18/2020  
**Duration:** This amendment is effective until superseded or removed.  
**Approved:** TINA TERRELL  
Associate Deputy Chief, NFS  
**Date Approved:** 08/02/2020  
**Posting Instructions:** Amendments are numbered consecutively by title and calendar year. Post by document; remove the entire document and replace it with this amendment. Retain this transmittal as the first page(s) of this document. The last amendment to this title was ID 1580-2020-2 to FSM 1580.

|   |   |          |
|---|---|----------|
| <b>New Document</b>   | 1580  | 37 Pages |
| <b>Superseded Document(s) by Issuance Number and Effective Date</b> | 1580<br>(Amendment 1500-2009-1, 10/20/2009) | 39 Pages |

**Digest:**  
1580.41j – Establishes code, caption, and sets forth delegation of signing authority to the National Technology & Development Program Director (NTDP) and the Geospatial Technology & Applications Center (GTAC) Director. Sets forth delegation of authority to the National



# Types of Agreements

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- Participating Agreements
- Challenge Cost-Share Agreements
- Joint Venture
- Stewardship



# Legalities and Limitations

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- Congressional statutes or authorities
- Laws and Executive Orders
- Forest Service Manual
- Lassen National Forest Policies





# Grants and Agreements

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- Run through regional office
- Grants Management Specialists are Forest Service employees
- Evaluate agreement proposals
- Manage, award, and obligate agreement funds
- Administer close-out of awards



# Ethics & Conflicts of Interest

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- Need to be cognizant of real or apparent conflicts of interest:

*“Any situation in which an individual (either private or governmental) is in a position to exploit a professional or official capacity in some way for their personal or professional benefit”*

- Forest Service must maintain an "arms length" relationship
- No preferential treatment or endorsement of partners

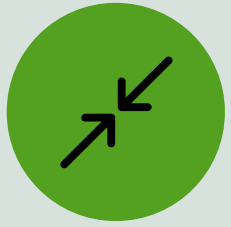
<https://www.fs.usda.gov/working-with-us/partnerships/servicefirst/rt/supervisorshb/ethics>



Topic 3:  
How Do the  
Forest Service  
and Partners  
Work Together?



# What kind of projects do partners support?



**Infrastructure:**  
Roads, Trails, Rec  
Sites, Facilities,  
bridges, toilets,  
etc.



**Improving Watersheds**  
for Fish, wildlife,  
Water, or other  
Resources



**Youth engagement,**  
Interpretive Programs,  
and Conservation  
education (Expanded  
Authority)



**NEPA, Reports, and**  
Surveys



**Hosting Volunteer and**  
Service Programs



**Forest Health, Fuels**  
Treatments, Timber  
Removal, and Other



**Multi-Jurisdictional**  
Projects (On/Off)  
NFS Lands



**Scoping meetings,**  
public outreach



**Other: Mine Rec,**  
Post-Fire, Mud,  
Floods, etc.



# When do we start to consider a partnership?

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**Always!**

- ▶ Is there an opportunity to collaborate?
- ▶ Is there an interested partner?
- ▶ Is there a legal authority and instrument?
- ▶ Is there funding?
- ▶ Are projects NEPA-Ready or NEPA-Doable?
- ▶ Are there shared realistic expectations?

**Is there a good relationship?**



## Topic 4: How To Be An Effective Partner



# Elements of Successful Partnerships

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Clear objectives

Agreed-upon  
scope

Mutual benefits  
and  
responsibility

Give and take

Good  
communication  
(listen!)

Planning for  
implementation  
and evaluation

# Developing a Partnership Mindset

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- Quality partnerships don't happen - they must be actively built
- 3 characteristics common to successful partnerships
  - Shared vision
  - Impact
  - Intimacy
- Bridging agency and other cultures is critical - need to understand other's context
  - Awareness of different organizational cultures
  - Each has its constraints, characteristics, opportunities



# Federal Agency Context

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- Passion for mission and pride in agency
- Bureaucratic processes – SLOW and COMPLEX
- Decision-making follows the law
- Opportunities to leverage labor, expertise, contracts, etc.
- Agencies don't want non-profits to interfere or compete, but to provide complementary services
- Risk-averse culture
- **Partners need to consider if they are willing to work within the constraints imposed by agency regulations**

# Getting to the Sweet Spot...

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It takes work and is a balance...



- Mutual Interest/Mutual Benefit
- Ability to Collaborate
- Shared Responsibility
- Proactive Cooperation
- Right Skill-level
- Follow-through and Communication
- And more



# Lifecycle of Partnerships

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*Forming, storming, norming...*

- Forming
- Frustration
- Functioning
- Flying
- Finished



# The Relationship is Most Important





# Relationships Take Time and Energy



# Capacity Limitation

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- Key challenge - staff turnover!
  - On both sides
  - Coming into a time with lack of history/experience
- Staffing Shortages
  - Lassen is limited on hydrologists and biologists
  - Only two NEPA planners
- Fit into Program of Work
- Grants and Agreements







*Celebrate the Power of Partnerships*



# USFS Program of Work:

## A Business model to track projects



# Rhythm of Business

Document what is needed for

## Plan Development

- Compliance
- Collaboration

## Human Resources

- Workforce capacity
- Hiring

## Finance

- Annual budget creation process
- Reporting
- Financial review

## Implementation





# Guide to execute projects

breakdown a complex process into simpler parts

Step 1 – what is the scope of the project – deliverables

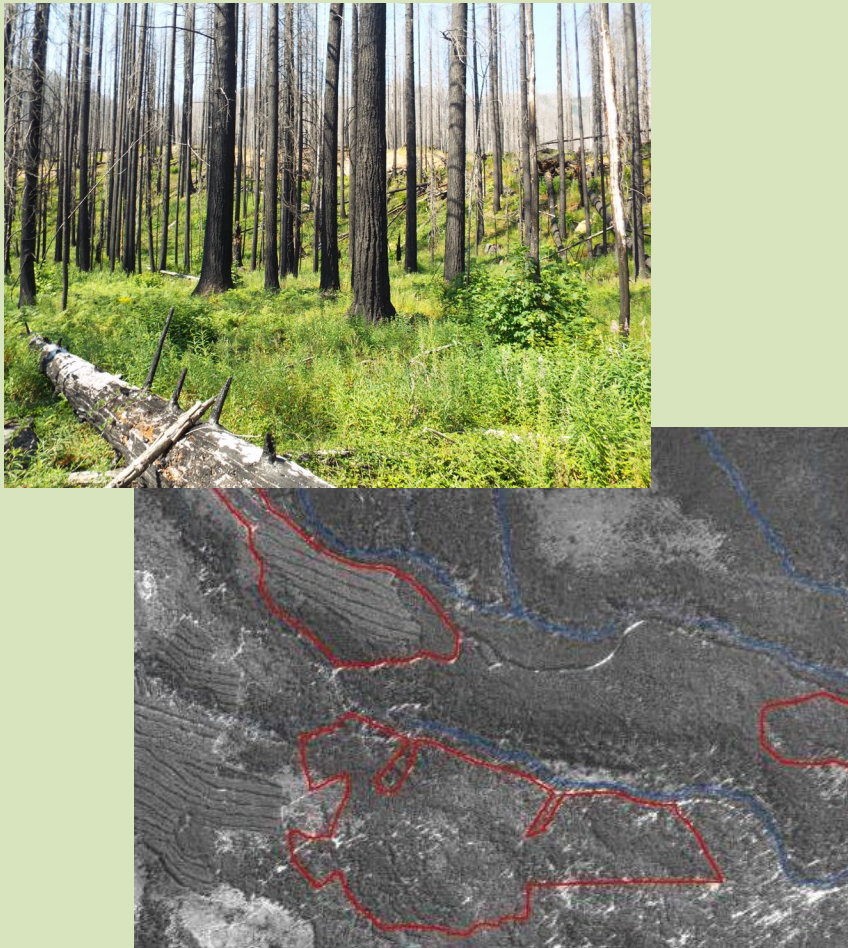
Step 2 – identify deliverables for the entirety of a project: project development, NEPA, and implementation





# Planning Stage

Step 2 –identify every work item and list the activities that should be performed



Deliverable

EA

Work  
Breakdown

Project  
Development

PAPN

EA

Decision

Activities

Collaborate  
Area  
Needs

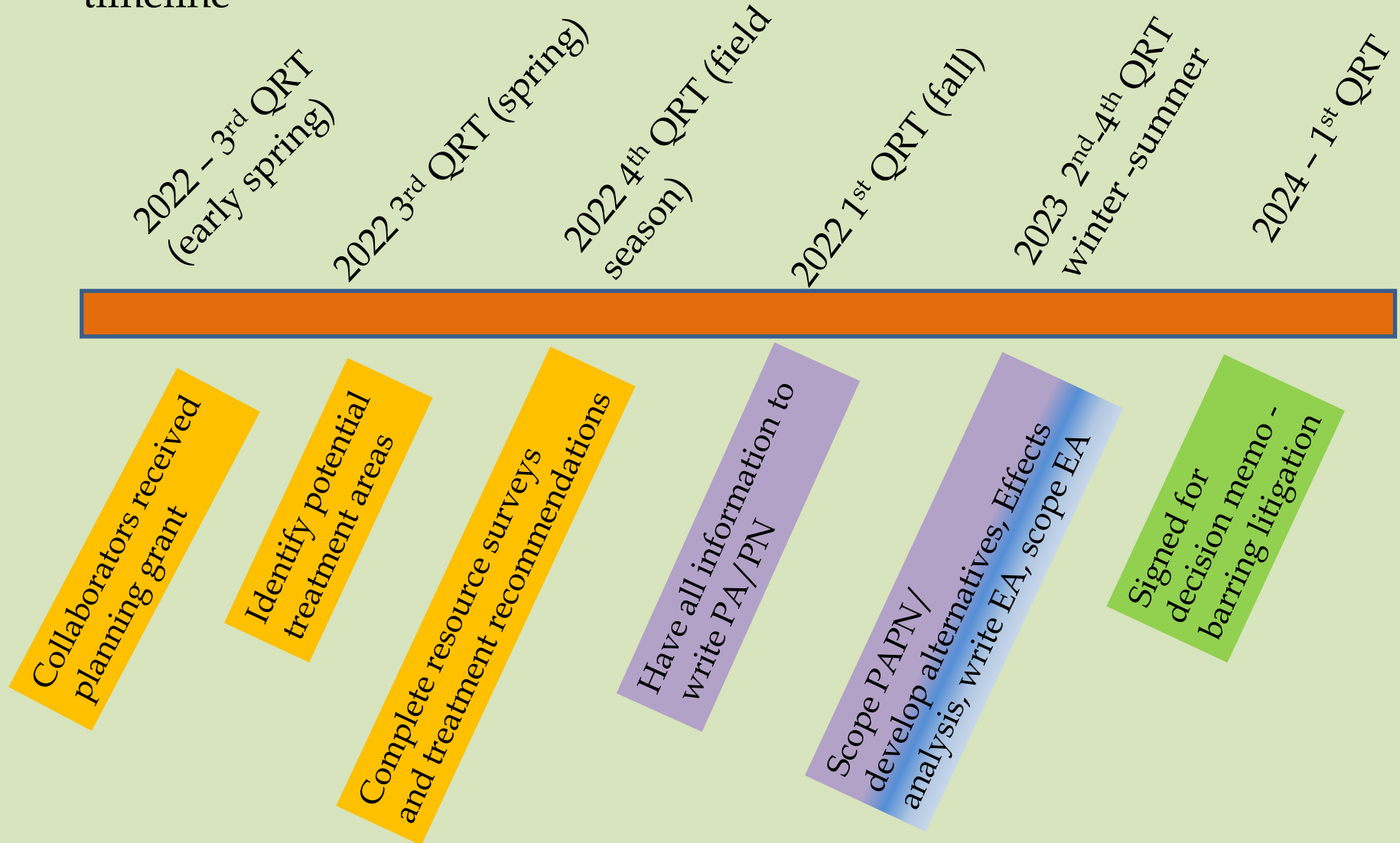
Surveys  
Refine  
Sopa  
Scoping  
Consult

RTC  
Alternative  
Reports  
Comment

Decision Memo  
Objection  
Review  
Litigation

# Timelines for defined tasks in sequence

Step 3 – Shows the sequence for needed activities and create a delivery timeline



# Program of Work (POW)

Visually depict what will happen each quarter(month) throughout the year and milestones or activities that need to occur.

Project Priority

| Lassen National Forest - NEPA Program of Work |                       |   |   |  |  |  |  |                                    |                                 |                                 |           |
|---|-----------------------|---|---|--|--|--|--|------------------------------------|---------------------------------|---------------------------------|-----------|
|   |                       |   | FY 2021   |  |  |  | FY 2022  |                                    |                                 |                                 |           |
| Forest Priority                               | District/ISD Priority | Project Name                                      | 4th Qtr   | 1st Qtr  | 2nd Qtr  | 3rd Qtr  | 4th Qtr  | 1st Qtr                            | 2nd Qtr                         | 3rd Qtr                         | 4th Qtr   |
|   |                       |   | July-Sept   | Oct-Dec  | Jan-Mar  | Apr-June   | July-Sept  | Oct-Dec                            | Jan-Mar                         | Apr-June                        | July-Sept |
|   | 3                     | AL Big Springs Project (Partners)                 | Project Development - developing Purpose & Need/Proposed Action (left side) | Scoping Period - both internal and external scoping and developing associated issues | Alternatives/Effects - drafting document and writing specialist sections | Finalize Document/Draft Decision   | Decision   |                                    |                                 |                                 |           |
|   |                       | AL Rocks Project (Partner/NFWF Project)           |   |  |  |  | Decision   |                                    |                                 |                                 |           |
|   |                       | AL Green Island Project                           |   |  |  |  | Decision   |                                    |                                 |                                 |           |
|   | 1                     | HC Badger - SNC Funding                           | Scoping   |  | Alternatives/Effects - drafting document and writing specialist sections |  | Decision   |                                    |                                 |                                 |           |
|   | 2                     | HC Backbone (partner)                             | PA/PN   | Scoping  | Alternatives/Effects - drafting document and writing specialist sections |  | Decision   |                                    |                                 |                                 |           |
|   |                       | AL Colby Collaborative (Partner)                  |   | Project Development - developing Purpose & Need/Proposed Action (left side)          |  |  | Decision   |                                    |                                 |                                 |           |
|   | 1                     | EL Harvey (MDF potential partner)                 |   | Project Development - developing Purpose & Need/Proposed Action (left side)          | PA/PN  | Alternatives/Effects - drafting document and writing specialist sections | Finalize Document/Draft Decision   | Decision                           |                                 |                                 |           |
|   | 2                     | EL The Shining (Partner/MDF and PC CRMP Partners) |   | PA/PN  |  |  | Alternatives/Effects - drafting document and writing specialist sections | Finalize Document/Draft Decision   | Decision                        |                                 |           |
|   | 3                     | EL Dark Side of the Moon - BMEF/PSW Research      |   |  |  |  | Alternatives/Effects - drafting document and writing specialist sections | Finalize Document/Draft Decision   | Decision                        |                                 |           |
|   |                       | EL Gooch Allotment Grazing EA                     |   |  | PA/PN  | Scoping  | Alternatives/Effects - drafting document and writing specialist sections | Finalize Document/Draft Decision   | Decision                        |                                 |           |
|   |                       | AL Snow Mountain Forest Restoration               | Project Development - developing Purpose & Need/Proposed Action (left side) |  |  |  |  |                                    |                                 |                                 | Decision  |
|   |                       | AL Isht Fire Restoration Project (Partners)       | Project Development - developing Purpose & Need/Proposed Action             | Project Development - developing Purpose & Need/Proposed Action                      | Project Development - developing Purpose & Need/Proposed Action          | Project Development - developing Purpose & Need/Proposed Action          | Scoping Period - both internal and                                       | Scoping Period - both internal and | Alternatives/Effects - drafting | Alternatives/Effects - drafting |           |

Time

Development Scoping PAPN/Alt/Effects Decision

\*Note multiple years and tabs that track iterative steps for each project stage with different people involved

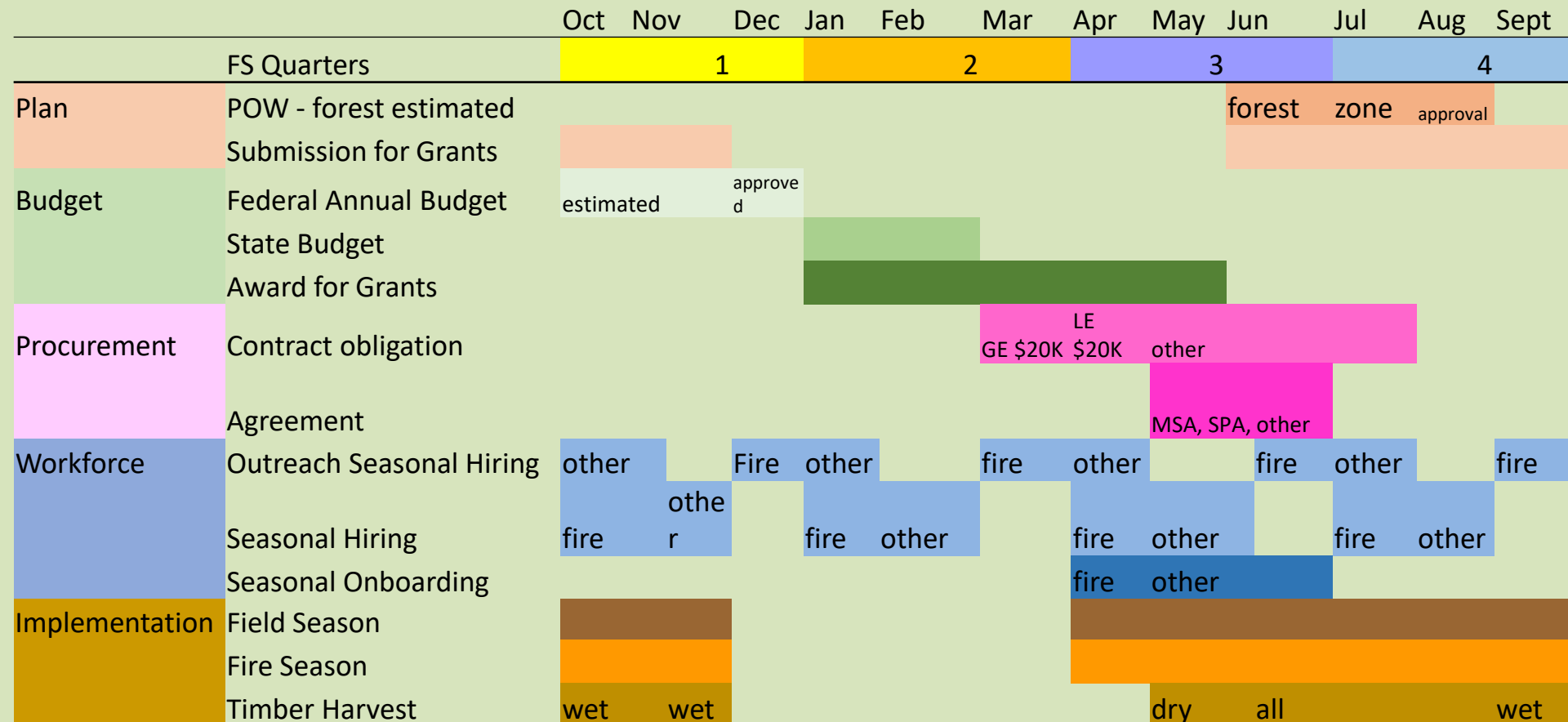


# POW is only one aspect within our “business model”

Step 4. Align your departments to achieve its goals, objectives, and timeframes.

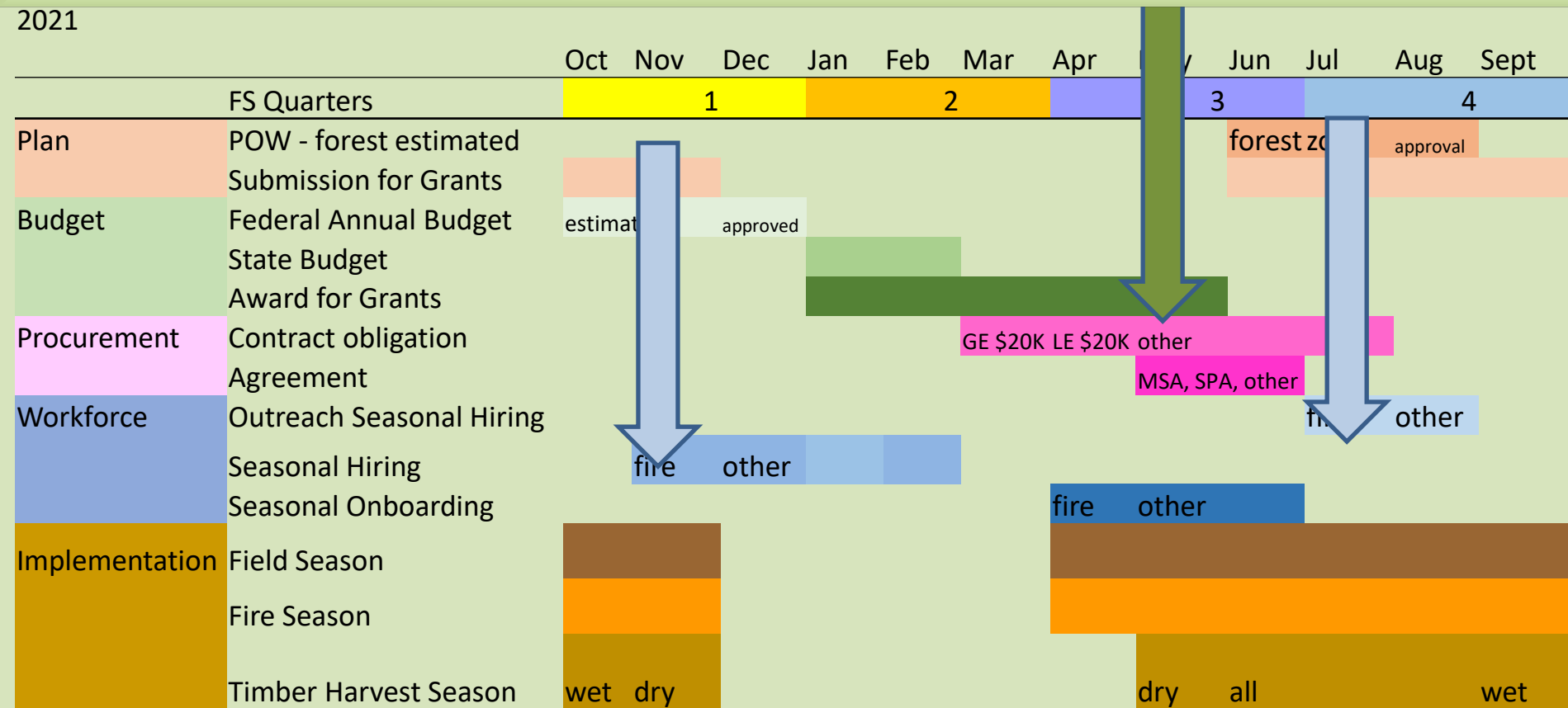
- HR and workforce
- Finance and budget;
- Strategic planning process POW
- Implementation windows FS & Partners

2021



Gantt diagram illustrating estimated resources and start and end dates for each task.

# Align business model = Realistic Timelines



Timeframes – process has mismatched times frames and cycles.

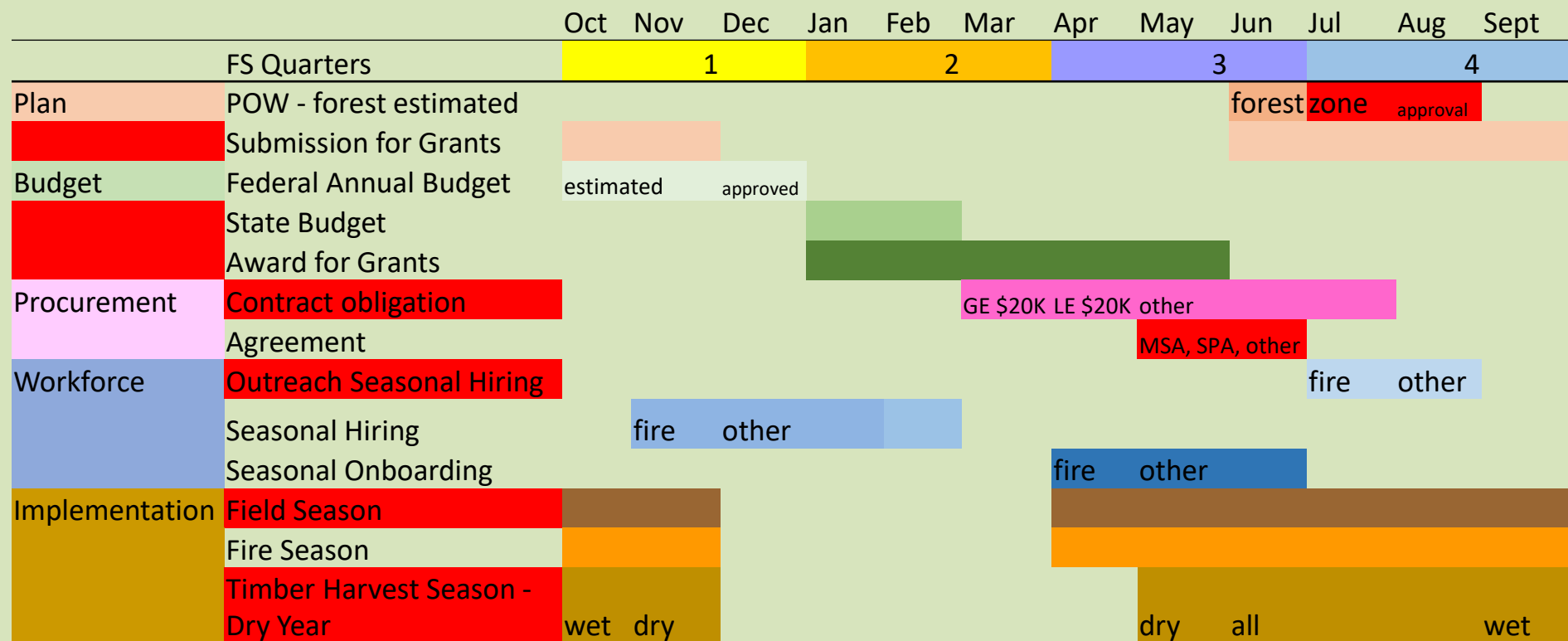
- Plan - concept to implementation ~ 5 yrs
- Budget – annual / Grants – 1-4 years
- Hiring - annual



## Align forest POW and Scale Up :

1. Priorities set at project, forest, zone, region, nation scale
2. Money enters the process from different sources at different times
3. Flexibility and adjustments for unpredictable changes

2021





# Good business plan anticipates possible events and pre-planned means of adjusting to them.

## Planning with uncertainty

### Tracking:

- Priorities
- Adjust to changes
  - Reaction to emergencies – fire, pandemic, flooding, stimulus or settlement spending
  - New decision – change in scope, new information = more time depending on stage of process

### Alignment:

- Capacity
- Finance

### Scheduling:

### Display for communication





# possible events and pre-planned

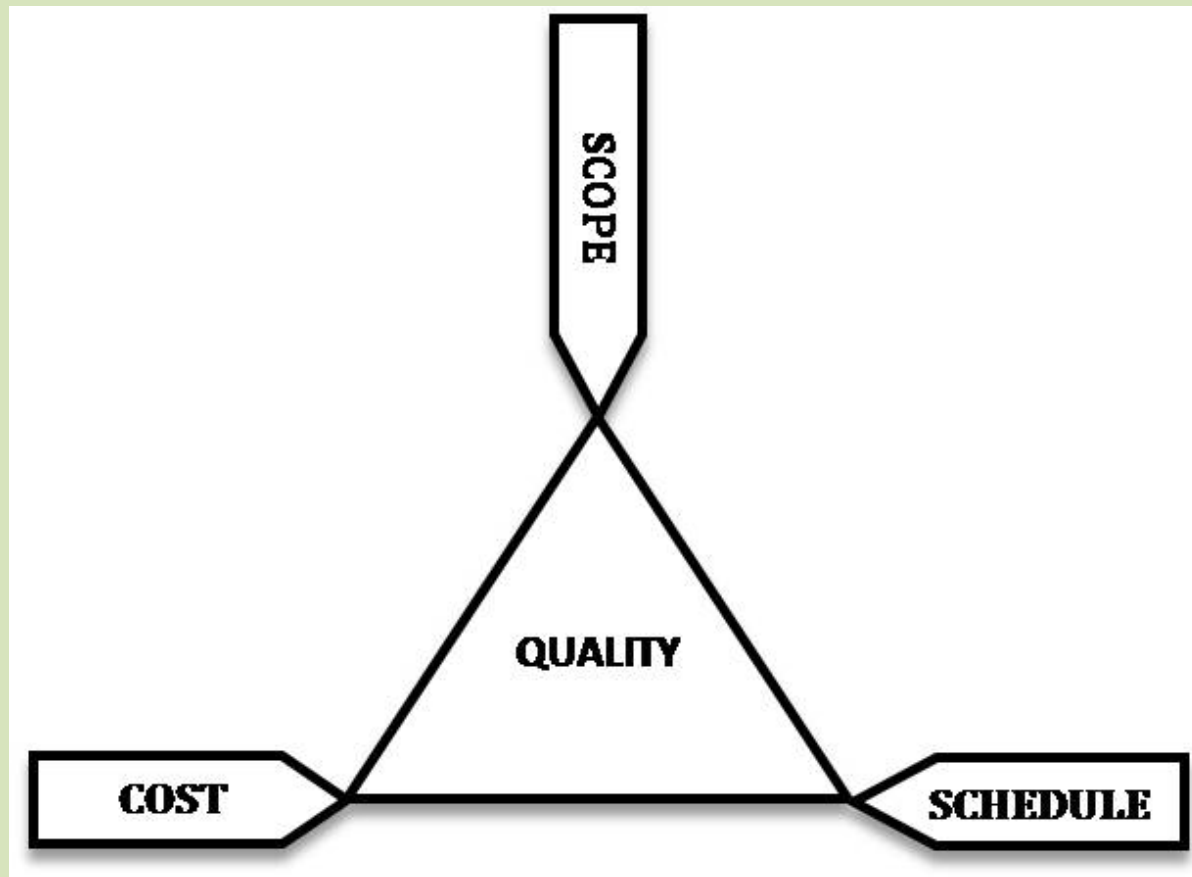
Out of California's 20 largest wildfires, 15 burned since 2000





# Key points

1. Helps those involved stay grounded in the same goal and makes sure everyone is taking the mapped path (expectations and accountability)
2. Displays timelines and timing
3. POW stewardship involves negotiating, flexibility, and coordination



# Example of timeframes

