

Some Basics

How is "need" defined? Public need is identified by the Forest Service with input from citizens and identifies the types of outfitted services needed to meet agency objectives. Market generated demand or applications for conducting outfitting do not constitute need.

Basis for doing "needs assessment".

Forest Service policy (FSM 2720) states that:

- a. As identified in forest land and resource management plans, provide for commercial outfitting and guiding services that address concerns of public health and safety and that foster small business.
- b. Encourage skilled and experienced individuals and entities to conduct outfitting and guiding activities in a manner that protects environmental resources and ensures that national forest visitors receive high quality services.

Outfitting and guiding permits may be issued when one or more of the following occurs:

- a. An increased allocation, capacity, or public need is identified through the forest planning process.

FSM policy (section 2340) regarding concession uses contains numerous references to "needs assessments", using the land and resource management planning process to identify the "public need" for private sector uses, and authorizing concession developments only where there is a "demonstrated public need".

The Wilderness Act states that "commercial services may be performed to the extent necessary for activities which are proper for realizing the recreational or other purposes of the Act".

FSM policy on wilderness management (section 2320) states: "Address the need for and role of outfitters and guides in the forest plan. The plan must address the type, number, and amount of recreational use that is to be allocated to outfitters and guides.

The National Environmental Policy Act requires disclosure of the "purpose and need" for any proposed action (e.g. issuing additional outfitted use).

Agency Objectives (public need is based on these types of wildland objectives)

1. Conservation/stewardship of natural and cultural resources - air, water, soil, vegetation, wildlife, cultural. Promote responsible use so that natural systems are sustained for future generations.

2. Public service - enable people to obtain benefits such as personal growth, family/friend bonding, spiritual re-connection, stress relief/personal reflection, physical exercise, challenge, learning/mental stimulation, etc.
3. Visitor safety - enable people to experience wildland settings in a manner that they perceive the risk is within their control.
4. Retain lands in the public domain so people of all races, gender, and economic categories have the opportunity to re-connect with nature and experience their common heritage.
5. Contribute to the people's quality of life and economic sustainability in communities - foster small business, provide clean water and air, add beauty to people's lives, etc.

Decisions made via Needs Assessments.

Needs assessments are the analysis that supports the following types of decisions. Both types of decisions require NEPA analysis and involve value-based judgments, thus public participation is essential.

Programmatic level (forest plan): Decision on role ("need") for outfitted services and the amount of use to be allocated to the outfitted public sector. (Basically, establish a framework that will help project managers evaluate proposals for new or additional outfitted use. In defining the amount of use to be allocated to outfitted publics, a specific amount or range of outfitted use may be set or, if more flexibility is desired, a clear set of criteria can be developed for evaluating additional use).

Project level: Decision on whether or not to issue a new permit or additional use to an existing outfitter and if so, what stipulations will be required in the permit.

There are three separate steps in developing a framework for assessing the "public need" and allocation for outfitted services (programmatic level) or evaluating an individual application for new or additional use (project level).

1. Public need for outfitted services - identification of the types of outfitted services that will help meet agency objectives.
2. Capacity - **estimate** of total number of people who can use an area during defined time period based on resource and setting capability (i.e. meeting management desired conditions and standards).
3. Allocation - division of total capacity estimate among difference sectors of the public (e.g., commercial outfitted, institutional outfitted, non-outfitted publics)

NEEDS ASSESSMENTS - A Checklist of Considerations

PUBLIC NEED (types of outfitted services needed to meet agency objectives)

(Note: Recognize that many people today are choosing to go on an outfitted trip to enrich their experience by going with someone who is very knowledgeable about the area, thus outfitters are not just serving people who can't access the area on their own). Helpful to get outfitter and other public input on ways outfitted services can help meet agency objectives.

Step 1: Determine what types of activities are appropriate and needed.

1. Provide opportunities to experience wildlands and learn skills - some people do not have the skills, equipment or knowledge to experience wildlands on their own or have special needs that require extra assistance (e.g. some disabled people).

Within your area, what activities require specialized skills, equipment, or knowledge to safely and responsibly visit the area? What activities occur or could occur that are difficult to learn in a responsible and safe manner without instruction? Are these activities appropriate given existing laws, regulations, and desired setting/ROS classification (from forest plan)?

Step 2: For the activities you identified, what role can outfitters play to further meet agency objectives (value-added aspect of outfitting)

1. Enrich appreciation of area - through interpretation of the area's natural and cultural history, guides can increase the appreciation of area for people they are serving.

Within your area, what do you want visitors to know about the area that outfitters might best be able to convey?

2. Promote development of conservation ethic - it is primarily through direct contact with wildland settings that people can re-connect with their roots in nature and begin to develop their own sense of the human role and responsibility within the larger community of life.

Within your area, what role can outfitters play in helping people develop their own conservation ethic?

3. Build constituency for public lands and their stewardship - it is said that "people will conserve only what they love, and love only what they understand". Our system of public wildlands exists because people love and support them but we cannot take this for granted. Public wildlands must continue to be viewed as relevant to people and our society, or we will lose them.

In your area/region, does a strong constituency exist for public lands and their stewardship - if not, what role can outfitters play in helping build this constituency?

4. Resource protection - outfitters can help with resource stewardship by clearing/maintaining trails, monitoring conditions, sponsoring educational clinics, reporting illegal activity, restoring campsites, assisting with search and rescue efforts, etc.

Within your area, what are key resource needs that outfitters could assist with?

5. Contribute to rural economies - the sustainability of rural communities is dependent on creating a diverse economic base. Small businesses such as outfitting can help in this endeavor.

Within your area, what role does outfitting play in the economy and how can this role be enhanced - i.e. keep more money circulating within local area?

PRODUCT: List of specific activities and ways outfitters can meet "public needs" within your area.

II. CAPACITY DETERMINATION (Estimates of capacity can be done for the entire area or for each separate management area. Capacity estimates should also be separated by season - e.g. winter vs. summer/fall)

1. Assessment of Demand/Supply/Opportunities

Step 1: Determine current services available

*What are the current services offered, # permits, amount of authorized use - summer, fall, winter? What is the current utilization of existing permits?

Current Outfitted Services

Outfitted Service Mode of travel

of permits

Amt of authorized use

% utilization

Areas of operation

Ex. treatment of at-risk youth

foot - backpacking

Moonshine Creek, Green Lakes

Ex. fishing, cultural history

horse - progressive camps

Happy Jack Creek.....

*For each of the current services offered, assess whether the service is consistent with identified "public needs" (from I).

Step 2: Determine desired future services to meet public need. (Note: it is helpful to get outfitter and other public input on desired future services)

*What types of activities or opportunities are being requested (either via special use applications or via phone calls from public)? Include requests for institutional outfitting.

*What is anticipated future mix of activities/opportunities given recreational trends (including institutional outfitting)? Does the area offer some unique opportunities that could be met by outfitted services?

PRODUCT: Table displaying current services offered. List of services to be phased out. List of desired future services to meet public need.

2. Identification of areas of concern - resource capability

Step 1: Identify objectives and standards that establish resource and "social" limits (from Forest Plan or other documents containing direction for geographic area).

Shade areas on map in red that meet these criteria (areas where all outfitted activity is discouraged)

*Are there areas where private land, parking space or other access problems warrant discouraging regular, additional use?

Winter Capacity:

*Are there areas of winter range where winter human presence would be detrimental?

Summer/Fall Capacity:

*Are there areas where wildlife, fish, or plant species concern or other critical resource concern warrants discouraging human activity?

Shade areas on map in yellow that meet these criteria (areas where certain types or amounts of outfitted activity should be restricted)

*Are there areas where recreational stock grazing isn't advised due to range conditions/forage utilizations standards?

*Are there areas where terrain or lack of suitable campsites make it inappropriate for overnight activities?

*Are there areas where encounter standards or other "experience" standards are not being met or are showing declining trend?

*Are there areas where the concentration of existing outfitters is causing problems between outfitters or between outfitted and non-outfitted publics?

*Are there areas where State big game population objectives are not being met suggesting need for less hunting pressure?

*Are there areas where soil types do not support trails that can be maintained to an acceptable standard?

Shade areas on map in green that meet the following criteria (areas where additional outfitted use would be beneficial)

- *Are there areas where State big game population objectives are being exceeded suggesting a need for greater harvest levels?
- *Are there areas where illegal activities are occurring that might be deterred with regular presence by outfitted publics?
- *Are there areas where potential resource or safety concerns suggest that visitation by outfitted publics (whose use can be managed fairly closely by the agency) would be better than visitation by non-outfitted, non-permitted publics?

PRODUCT: Map showing areas where outfitted use should not be allowed, areas where outfitted use should be restricted, and areas where outfitted use might be beneficial

3. Estimate total capacity using resource limiting factors

The goal here is to come up with a ballpark estimate of total capacity (expressed in terms of people at one time) for a defined season of use. This estimate should be based on the factor that ultimately limits people's use. Some possible limiting factors are:

Number of acceptable campsites

Number of boats that can launch or take-out at ramps

Parking lot size

Tolerance of sensitive wildlife species

Desired setting - Recreation Opportunity Class (ROS) coefficients

Acceptable number of encounters between groups along trail or at camps

Recommended ranges for capacity coefficients for ROS settings are:

Primitive setting --- .002 - .025 people at one time/acre

Semi-primitive, non-motorized setting --- .008 - .083 people at one time/acre

Semi-primitive, motorized setting --- .008 - .083 people at one time/acre

Roaded natural setting --- .083 - 2.50 people at one time/acre

Specific coefficients can be adjusted based on different ecological environments or other local conditions.

Coefficient x number of suitable(useable) acres x season of use = estimated capacity
(Note: A more realistic way to develop estimated capacity may be using acceptable number of encounters between groups along a trail or in a camp area and incorporate your knowledge on use patterns)

Warning - don't fall in love with the numbers you generate - they are only estimates. If your estimate seems ludicrous, it probably is - go back and try another approach.

Example using number of acceptable campsites as limiting factor:

1. Determine number of potential campsites by:

Taking management area acreage (minus acreage shaded in red or yellow from #2 if applicable) and determining acreage of suitable camping habitat (e.g. less than x% slope and within y feet of water source).

Then divide acreage of suitable camping habitat by acceptable density of sites (e.g. 1 site/x acres)

OR, assume that most of the campsites that really would be used have been used and just identify number of acceptable (based on standards) campsites within management area (minus area shaded in red or yellow from #2 if applicable).

2. Determine number of campsites that can be occupied in any one night without seeing or hearing other parties (or other occupancy standard you might have).

3. Multiply the number of campsites that can be occupied in any one night by the average party size = estimated people at one time (PAOT) capacity

4. PAOT capacity x Season of Use = Estimated season capacity

PRODUCT: Estimated total capacity for season in terms of number of people

III. ALLOCATION

Common Options

1. Split Allocation

* Based on historical use

* Even split (i.e 50-50)

* Even pool (if outfitted or non-outfitted did not use 50% on any one day, remainder would go to other sector)

* Fixed percentage based on trends and anticipated future need

2. Non-split Allocation

* Time/Location Zoning (i.e. "tee-off" times) Applicable to rivers

* Freedom of Choice

Unless you are in a situation where estimated capacity has been reached and equity issues regarding allocation of use are a major issue, it is recommended to start with this approach.

1. For existing outfitted services that meet public need and are consistently using close to 100% of capacity, consider allocating additional use.
2. For existing outfitted services that meet public need but are only being utilized 70-95%, continue current number of permits and priority days but don't allocate additional use.

3. For existing outfitted services that meet public need but are consistently using less than 70% of priority use, reduce number of priority days and re-allocate extra use to meet other public needs.
4. For existing outfitted services that don't meet public need, terminate permits as opportunities arise and re-allocate use to services that better meet public need.
5. Estimate of % of total use that has been historically outfitted. Multiply this percent by estimated capacity determined in section II(3) = estimated outfitted allocation. This is as far as you need to go if developing programmatic level decision.

If trying to make project-level decision about issuing new or additional outfitted use - continue the process by:

Subtract existing priority days to determine growth potential. Allocate this remaining capacity to services consistently using close to 100% of capacity (#1 above) or allocate to new services that are identified as needed to meet anticipated future public needs. Don't allocate all remaining capacity all at once, but phase in slowly so that adjustments can be made if monitoring reveals problems. Use the bid and prospectus process to obtain the most qualified permittees and allocate enough service days per business so that each is economically viable.

Permit stipulations: Identify permit stipulations based on resource capability items noted in section #2 and stipulations needed to ensure permittee meets identified public needs.

Administrative workload: Adjust the number of permits issued down if number can not be administered in a quality manner OR determine a way to more effectively/efficiency administer permits.