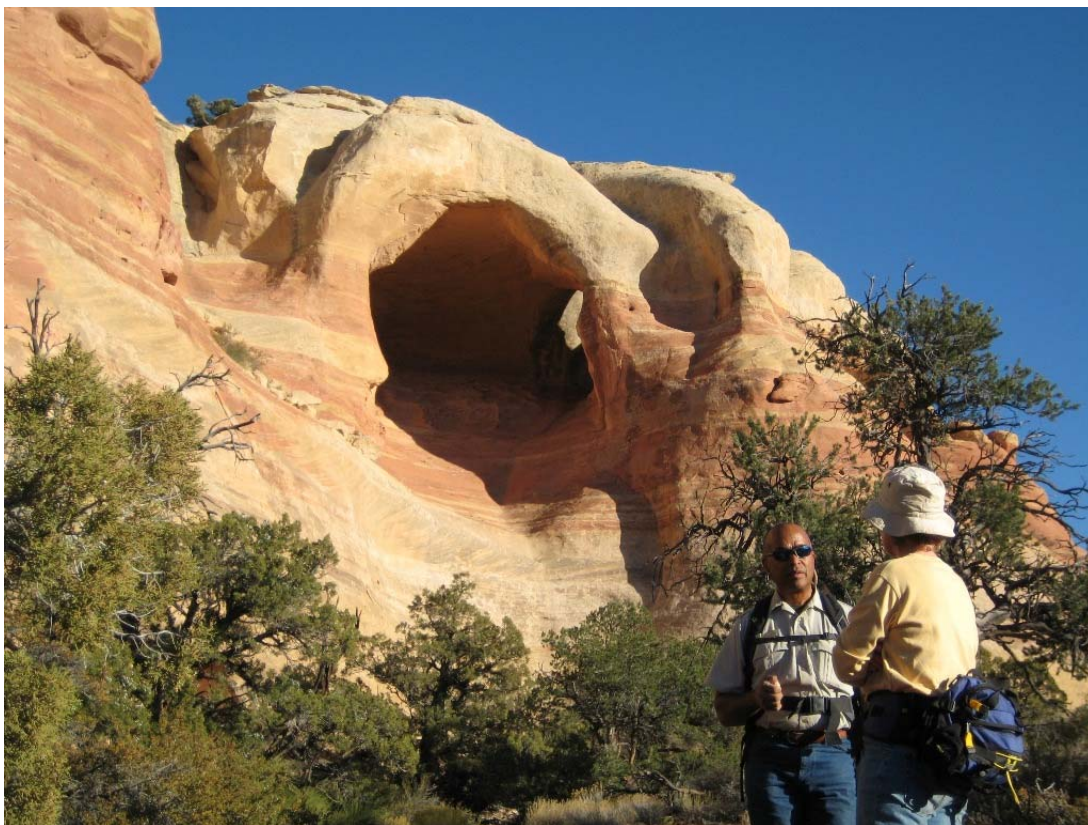




Case Study Evaluation of the Pilot-Test Application of Benefits Based Management on the McInnis Canyons National Conservation Area



Prepared by:

B.L. Driver,
Don Bruns,
Randy J. Virden

February 2008

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**Final Report
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Prepared by:

B.L. Driver
Don Bruns
Randy J. Virden

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College of Public Programs
Arizona State University
Phoenix, AZ 85004-0690
(602) 496-0550

Case Study Evaluation of the Pilot-Test Application of Benefits Based Management on the McInnis Canyons National Conservation Area

This report is an evaluation of the first pilot test of benefits-based management (BBM) on a public wildland area. That application started in 1991 to guide the planning and management of the recreation resources and services provided on the Ruby Canyon/Black Ridge Special Recreation Management Area. It continued through the designation of that area as the Colorado Canyons National Conservation Area in 2000 and through its later designation as the McInnis Canyons National Conservation Area (MCNCA) in 2004 until today as the resulting plan is being implemented. The MCNCA is located near Grand Junction, parts of which border the Colorado National Monument, and it is managed by the Grand Junction Field Office of the USDI Bureau of Land Management (BLM).

This report was commissioned in 2005 by the BLM's Division of Recreation and Visitor Services to help BLM administrators, managers, and planners better understand BBM and how to apply and implement it properly. As such, the report critiques what was done that should have been done and what was done that should not have been done under BBM guidelines. It also offers recommendations from the lessons learned and in extended appendices reviews what BBM is, why it was developed, and how to implement it fully.

The report was prepared by B. L. Driver, Don Bruns, and Randy Virden.

December 2007

Executive Summary

This case study report evaluation of the application and implementation of Benefits-Based Management (BBM) on the McInnis Canyons National Conservation Area (MCNCA) near Grand Junction, Colorado was commissioned by the USDI Bureau of Land Management (BLM) Division of Recreation and Visitor Services. The overall purpose of this report is to help BLM recreation administrators, planners, and managers understand BBM more clearly and thereby better equip them to apply and implement it. This will help assure that critical elements of the BBM planning and managerial processes will be continue to be carefully adhered to and built upon in future applications. BBM is a relatively new approach to planning and managing recreation and related amenity resources and services. It helps assure responsive, accountable, and efficient management and optimize realization of the personal, social, economic, and environmental benefits of recreation. Such optimization means that negative outcomes must also be considered under BBM. That approach was developed to provide a more cost-effective, responsive, efficient, and scientifically credible system for planning and managing recreation resources and services, and it has proven to be such.

This first pilot test of BBM on a public wildland area started in 1991 to guide planning the recreation components of the Integrated Resource Management Plan of the Ruby Canyons/Black Ridge (RC/BR) recreation area which was approved in 1998. BBM also helped guide planning of the recreation components of the Resource Management Plan for the Colorado Canyons National Conservation Area (CCNCA) after the RC/BR area was designated as such in 2000. That plan was approved on October 28, 2004, and has guided management of that NCA, re-designated the MCNCA in 2004.

The three specific purposes of the case study were to:

1. Describe and document both the positive and negative lessons learned from the application of BBM to guide the management of the recreation resources and services of the MCNCA.
2. Describe the actions that must be taken to properly apply and implement BBM and why each must be taken.
3. Review and summarize other applications of BBM by the BLM and other public park and recreation agencies.

After work began on this case study, it was realized that the first purpose could not be met until a comprehensive normative model was developed that described in detail how BBM should be the applied and implemented and why. It was not possible to describe that entire model in detail in this report. But, it is summarized in Part 2 of Appendix B of this report and described in detail in a companion text to this report which is described in Appendix A of this report. After the model was developed, it was used to evaluate the application and implementation of BBM on the NCA. That evaluation comprises the major part of this report.

The background information at the beginning of this report provides a brief description of the NCA and explains why and when BBM was applied on that area. More substantively, the report: provides a detailed evaluation of the extent to which each of the requirements of the normative model for applying and implementing BBM was or was not met; describes the many lessons learned; makes recommendations for future applications of BBM; and reviews other application of BBM.

When the application of BBM started on RC/BR area in 1991, the concepts, principles, and requirements of BBM were just being firmed up. Much progress has been made since then. In particular, the pilot-test application and implementation of BBM on the NCA contributed considerably to those refinements, which have improved subsequent applications of BBM. This report should help the reader understand the current concepts, principles, and requirements of BBM and how to apply and implement it properly.

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FOREWORD

by Catherine Robertson
Manager, BLM Grand Junction Field Office

Colorado's population has grown by more than a third in about the past decade. Therefore, the public lands have a growing clientele of new local residents, second home owners, relocated businesses, and retirees in dozens of communities and resorts that are gateways to the public lands. The effects of increased promotion of tourism are also being felt, with even more significant touring vacationers, resort getaways, special event participants, heritage visitors relishing the ambiances of small-town communities, the not inconsequential visiting of friends and relatives, and wanting to enjoy the distinctive benefits of public lands recreation. These changing demographics have made traditional notions of outdoor recreation obsolete. Increasingly, satisfying experiences and other beneficial outcomes matter to communities, to local economies, and to the environment. So does the character of the public lands recreation settings, not just for visitors but for people who live and work within our communities.

Being committed to recreation as that which, among other things, revitalizes our spirits, improves our physical and mental lives, strengthens our families, fosters greater community cohesion, stabilizes economies, and even improves the environment is a good thing. But oft times even our best intentions go awry. Unfortunately, examples of recreation resource management done wrong are not that uncommon. We hear about it from the news, see it in print, hear about it from our neighbors and friends, and even experience it first-hand as recreation participants. When that happens, those of us who have the privilege of serving the public hear about it from our customers, as we should.

When this pilot effort began, this Field Office was engaged in traditional activity-based, project-centered recreation management. As the recreation planners put it, they were trying to decide where the toilets should go, what kinds of roads were needed, and where the interpretive exhibits should go. Those who brought benefits-based management (BBM) to our office then began asking "Why?" Why did we want to build those things, what would it do to recreation setting character, and what difference would it make to the kinds of experiences and other benefits our customers most desire? At that time, we had no answers other than that people said they wanted those things. At least, so we thought. But beyond required environmental analyses, we had not yet begun to consider exactly what kinds of recreation outcomes would result and to which visitors, or to which affected local communities, residents of them, and the environment itself. In short, we were only managing some of the components of recreation opportunity production.

We have known for years that the goodness of recreation is not automatically achieved by protecting resources, developing support facilities, or even essential services. All of these things must be consciously structured if recreation is to actually re-create people's lives, protect the environment, and strengthen community life. The good news is that BBM has given us a framework for more effectively addressing these needs and desires of the increasingly diverse recreation-tourism clientele, and it is fundamentally changing the way we look at recreation and tourism use and enjoyment. Done right, we can now manage to produce the recreation opportunities that are most valued by our customers, as well as provide and maintain the character of recreation settings on which those opportunities depend. Put simply, BBM has changed the way we do business, and continues to do so. Most recently we have come to understand that it is not enough to manage just for beneficial outcomes. We need to focus our

efforts on all outcomes, which mean managing both negative outcomes as well as those beneficial.

I happened to be at the right place at the right time to be part of this change, to embrace BBM for the Grand Junction Field Office and to encourage its wider adoption within the Bureau of Land Management. I am delighted to see that our agency has now adopted BBM as the central unifying objective for its entire recreation program. With the help of Bev Driver and others from the scientific community who understood the scientific underpinnings of BBM *and* had an abiding commitment to see it applied, we discovered that the BLM's traditional activity-based paradigm had answers that went no further than accommodating the activity-based desires voiced by only the most well-organized and involved recreation users and interest groups. We knew how to reduce environmental impacts posed by increased recreation activity participation. But it was quite another thing to restructure the entire recreation program and all related services to ensure the production and realization of desired experiential and other beneficial outcomes and to avoid the negative outcomes customers sought to avoid. Managing to achieve beneficial outcomes requires a new level of awareness and understanding of leisure from recreation professionals and managers alike. It takes more than simply talking about managing for benefits, much more.

This case study documentation and its accompanying lessons learned can help recreation administrators, managers and planners improve their understanding of BBM. This report sets forth both positive and negative lessons, what to do, and what to avoid doing. It demonstrates that responsible application of BBM requires adherence to the underlying principles and requirements of BBM and their consistent application. But BBM does not immediately fall into anyone's lap. There is a learning curve that requires a managerial training investment in our recreation professionals. And it requires a corresponding degree of professionalism from our recreation planners and managers alike which transcends traditional activity-based recreation management practice.

As we move forward, we must not neglect the scientific underpinnings that make BBM work. That means making a sustainable commitment to help recreation professionals learn and consistently apply them. Managing for outcomes requires a greater level of understanding of those scientific principles and essential application processes if we are to succeed. In particular, BBM can not be applied properly unless one has a fairly good understanding of the scientifically-documented benefits of recreation on which BBM is based (which are listed in Appendix F of the case study report. From this BBM application, we have seen the negative consequences of taking short-cuts. Producing the specific outcome-opportunities most valued by customers that comprise key recreation-tourism markets and local resident customers doesn't just happen. It takes lots of work to get there. I appeal to my colleagues to maintain the professionalism required to ensure responsible follow through. We must not imagine we can succeed without an abiding commitment to all the requirements of BBM and all that entails.

Training is absolutely essential if we are to succeed in the sustained application of BBM, not only to write realistic and useable management plans, but to implement them on-the-ground. But the kind of training required to do BBM will require more than classroom sessions. When it comes to BBM, the old saying "Telling isn't teaching, and listening isn't learning: you learn to do by doing" certainly applies. The best training we had for this pilot application, in all of its stages without exception, was hands-on training. And at the time we did this, there were no formal training sessions, and no planning handbooks. But there were people who knew how who had both the initiative and the commitment to make numerous trips to the field, roll up there

sleeves, and get their hands dirty. Study results were splayed all over the conference room tables, maps were taped to the walls, and flip chart stands made negotiating through the beehive of recreation planner dialogue challenging, but exciting. BBM was caught, not taught.

Of course, everyone is not yet enthusiastic about managing for explicitly-defined beneficial and negative outcomes, and not everyone is yet convinced that this is a good thing. It was easier to simply manage programs and projects for increased recreation activities, but it certainly was not better. As a manager, I am happy to say that, without exception, when our customers understand that we are finally addressing the outcomes for which they most value recreation and that they must be engaged, they support BBM. Experiences and longer-term beneficial outcomes matter no less to affected communities and their residents than they do to outdoor recreation enthusiasts and leisure travelers. And BBM is helping us think more and more like our visitors and resident customers, to see public lands recreation through their eyes.

This effort represents another milestone in the productive working relationship Colorado BLM has enjoyed with Dr. B.L. Driver and the U.S. Forest Service's Rocky Mountain Research Station over the past 30 years. Among other things, Bev is internationally recognized for his leadership in helping develop the ROS and BBM recreation resource inventory and management systems, and he introduced us to managing for beneficial outcomes over a decade ago. Now in retirement, he still remains professionally active and was therefore a natural for this report's primary authorship. Having discovered that this report could not be written without first having an objective standard against which applying and implementing BBM on the McInnis Canyons NCA could be compared, Bev entered into an independent effort to write a separate "how to apply and implement BBM text" that will be published in early 2008 by Venture Publishing, Inc. It is most significant that while this case study report draws from that effort, it was also the catalyst for that forthcoming text.

It seems most appropriate to recognize here that Bev's new text changes terminology from "Benefits-Based Management" to "Outcomes-Focused Management," recognizing the profession's responsibility to manage both beneficial and negative outcomes. For us, what is significant is that this makes explicit our need to clearly target, as management objectives, both the desired beneficial outcomes and the negative outcomes to be avoided and to be reduced in magnitude. For now, the BLM still calls what we are doing BBM, but we support both the spirit and intent of the changing terminology.

Dr. Randy Virden at Arizona State University continues to help the BLM apply BBM here in Colorado, in other BLM states, and beyond. Cultivating this professional relationship with another leisure scientist and one who remains committed to on-the-ground application of BBM is good for the BLM and for the academic community. Randy's contributions to this report are therefore most appropriate.

But, there would have been no case study report to write without the enduring commitment of others who have worked with us to make it so. First and foremost, the contributions of Don Bruns as our BBM guru must be recognized. Don was with us at the beginning of our adventure, helping us to understand this new framework and adapt it to use on BLM lands. His commitment has never wavered and his contributions have helped BLM grow to meet the community expectations of BBM.

I also want to recognize the particularly significant contributions of Brian Hopkins, now with our Glenwood Springs Field Office. "Hoppy" was the first within our office to embrace BBM on this effort and has continued to support its application here in Colorado and in all of the BLM. Jane Peterson and Gene Arnesen were the ones who helped make the quick transition

from managing just for recreation activities to managing for beneficial outcomes as the NCA plan went from draft to final. And now, we are continuing to learn how to manage for outcomes as Matt McGrath and Paul Peck eagerly adjust and fine-tune the implementation plan for that NCA. Thanks to each of you for your contribution to public lands recreation and to the recreation profession!

I hope that this Case Study Report makes a positive contribution towards advancing the application of BBM on the public lands. It has been a challenging but most rewarding experience. And now, the journey continues as we continue to learn how to sustain the production and attainment of outcome opportunities!

The Current Status of Applying And Implementing BBM in the BLM

After the BLM's Executive Leadership Team endorsed BBM as an integral part of *The BLM's Priorities for Recreation and Visitor Services* "BLM Workplan for Fiscal Years 2003-2007, May 2003 (Information Bulletin No. 2004-072, February 27, 2004), BBM was adopted throughout the BLM on May 5, 2006 by Instruction Memorandum (IM) No. 2006-060 (reproduced as Appendix C of this report). Necessary ensuring revisions to BLM recreation planning processes were made in updates to the BLM's Land Use Planning (LUP) Handbook on March 11, 2005 (Release 1-1693). Those revisions shifted the BLM's Recreation and Visitor Services program beyond managing for recreation activities only. In addition, the BLM's *Unified Strategy* for this program now gives it even further direction (IM No. 2007-043, January 9, 2007), unifying the seven program objectives set forth in the above priorities document in a cause-and-effect hierarchy, with managing for recreation experiences and other quality of life outcomes now being the BLM's primary unifying program objective. Now, the BLM must also manage all Special Recreation Management Areas for experiential and other beneficial outcomes, avoidance of negative outcomes, maintenance of recreation setting characteristics upon which sustained production and attainment of those outcomes depend, and guiding and constraining all program actions to achieve those targeted ends. Recreation management objectives were once written to implement projects and programs. But under BBM, they must be written to overtly target explicitly desired outcome opportunities, and all managerial actions must be restructured to ensure their production and attainment and to maintain the character of settings on which that depends. In areas where significant market demand for such recreation opportunities cannot be identified (i.e., within Extensive Recreation Management Areas), recreation management objectives are limited to only custodial outcomes necessary to resolve identified custodial management issues (in the absence of significant identified demand for structured recreation opportunities), not to accommodate only activity-focused recreation demand. Increased recreation activity participation is therefore accommodated only where managers can associate that demand with identifiable markets and specific desired outcomes.

The initial recreation management decision of all BLM recreation planners and managers is therefore to determine, for each recreation management zone, whether structured recreation market demand is both identifiable and significant.¹ Where it is, the public lands may be managed as a Special Recreation Management Areas (SRMAs). For units where structured recreation demand has not been identified or is not identifiable, or where managers determine that it does not warrant intensive management, only custodial actions are authorized. Such areas are managed as Extensive Recreation Management Areas (ERMAs) to take care of identified recreation issues, but not to accommodate increased use. Within the BLM, application of BBM is therefore, of necessity, limited to SRMAs.

¹ "Structured recreation-tourism market demand" describes desires for specific experiences and other benefits and accompanying maintenance of recreation setting characteristics upon which attainment of those desired outcomes depends. For recreation participants, this includes recreation activities; but in the case of resident customers, it may only include preferences for setting characteristics upon which their desired recreation outcomes depend (re. BLM's Land Use Planning Handbook). Remember that recreation development and use affects on-site visitors as well as adjoining communities and their residents in many different ways. Therefore BBM requires managing for all of these effects to ensure they will be as positive as possible.

What this means for the development of Land Use Plans (i.e., Resource Management Plans) is that management objectives for both SRMAs and ERMAs are still outcome-focused. The difference is that the outcomes targeted for SRMAs consist of experiences, beneficial outcomes to be attained, and negative outcomes to be avoided; whereas in ERMAs, they consist only of custodial care-taking outcomes (e.g., improved visitor safety, reduced user conflict, and protection of natural and cultural recreation resource attractions).

| SRMAs | ERMAs |
|---|---|
| <p><u>Land Use Plan Decisions:</u> <i>Intent:</i> To respond to identified market Demand for structured recreation (i.e., experience and other benefit outcomes and the maintenance of recreation setting character) <i>Context:</i> Here the BLM has been able to identify specific recreation-tourism markets, their explicit but differing recreation experience and other benefit outcome desires, and the setting characteristics that must be maintained to sustain both production and attainment of those outcome opportunities. <i>Content:</i> 1. Identify markets/niches 2. Write management objectives for experiences & other benefit outcomes Prescribe essential recreation setting conditions Outline implementation framework</p> <p><u>Implementation Decisions:</u> a. Management actions b. Marketing actions c. Monitoring actions d. Administrative support actions</p> | <p><u>Land Use Plan Decisions:</u> <i>Intent:</i> To only take care of identified issues Resulting from recreation activity participation, but neither to accommodate nor facilitate increased recreation activity or activities. <i>Context:</i> Here the BLM has identified only custodial recreation management issues related to existing recreation activity participation (such as user conflicts, visitor safety, or resource protection). Specific recreation-tourism markets and their desires for structured outcomes are unknown. <i>Content:</i> 1. Write management objectives for custodial outcomes 2. Identify implementing actions a. Management b. Marketing c. Monitoring d. Administrative support</p> <p><u>Post-Land Use Plan Implementation Decisions:</u> <i>None—generally addressed in the Land Use Plan (see above)</i></p> |

The foregoing table summarizes BLM’s recreation planning and management intent, application context, and content for these two types of recreation management areas. The significance of these decisions is that the BLM now authorizes more than custodial recreation management only where managers are both able to identify structured recreation markets and their demands and are willing to proactively accommodate it for selected target market niches. This makes sense, because unless reasons for accommodating recreation have been carefully articulated in terms of desired/targeted experiences and other beneficial outcomes for selected recreation-tourism market niches, and the corresponding essential setting characteristics upon which those outcomes depend have been identified, there are no outcomes to guide recreation programs, projects, and field operations. Activities alone provide insufficient direction and rationale (i.e., they do not answer the basic question raised by BBM of “why?” “Why are any program and project actions necessary?”).

The practical outworking of recreation’s Land Use and Implementation Plan guidance has significant implications for on-the-ground field operations. Under the BLM’s previous activity-based management model, field operations were subject to only getting projects done to

accommodate recreation use. As a result of the Executive Leadership Team 's bureau-wide adoption of BBM, all recreation programs and projects are now both guided and constrained by outcome-based management objectives. In addition, for SRMAs only, all recreation programs and projects are also guided and constrained by accompanying setting character prescriptions for the provision and maintenance of setting conditions upon which outcome opportunity production and attainment is predicated. And, those management objectives and setting prescriptions must be written for discrete, logical management units called Recreation Management Zones (RMZs). Each RMZ has its own set of outcome-focused objectives, setting prescriptions, and implementing framework, and is planned and managed to accommodate the preferences of one (or more) relevant market segments or niches.

Case Study Evaluation of the Pilot-Test Application of Benefits-Based Management on the McInnis Canyons National Conservation Area

by B. L. Driver, Don Bruns, and Randy Virden²

This report is a case study of the first application of Benefits-Based Management (BBM) to guide the management of the recreation resources and services on a large wildland area. That area is the McInnis Canyons National Conservation Area (MCNCA), which is managed by the USDI Bureau of Land Management (BLM) near Grand Junction, Colorado. The authors of the report appreciate the help of the many people who offered us support and provided us useful information.³

This report is written for readers having at least a basic understanding of BBM, which is a scientifically credible and managerially approved approach for optimizing the benefits that can be realized from the management of park and recreation resources, programs and services. To enhance the readers' further understanding of BBM, a companion text to this report was developed concurrently with this report. The rationale for that text is described in Appendix A of this report. Key concepts, principles, and requirements of BBM that must be understood to fully apply and implement BBM are described in Chapters 1, 2 and 3 of that companion, and they are reviewed in Appendix B of this report to assist the reader of it.

Organization of This Report

This report has the following sections.

Why This Report?

Initiation of the Report

Purposes of this Report and How they Have Been Met

Background Information

Legislative History of the MCNCA

Brief Description of the MCNCA

Why Was BBM Applied?

² Driver is a retired leisure scientist and the author or co-author of over 200 scientific publications including six texts. For over 35 years, he studied the benefits of leisure and worked with practitioners in public park and recreation agencies in the United States and about 40 other countries to develop and/or apply five recreation resource management systems, including BBM. He has assisted with training workshops on BBM, and is the recipient of quite a few rather significant awards.

Bruns is the recreation program leader for the Bureau of Land Management's Colorado State Office in Lakewood, Colorado. He has been influential in helping develop and refine BBM and document its requirements. He has played a key role in training others how to apply BBM, and he has been actively involved in several application of BBM in the United States and several other countries. He was influential in getting BBM applied on the MCNCA.

Virden is a professor and past Director of the School of Community Resources and Development at Arizona State University. Over the past 20 years, he has conducted visitor and BBM studies for the BLM in Arizona, Colorado, Oregon, Idaho, Wyoming, and Utah. His research publications have appeared in several scientific journals. He has helped develop research tools to advance BBM and has served as an instructor for the recreation short course at the BLM's National Training Center since 1996.

³ In particular, we thank Scott Abdon, Catherine Robertson, Brian Hopkins, Paul Peck, Gene Arnesen, and Jane Ross.

When Was BBM Applied?
Scope of the Study
Sources of Information for the Study
Evaluation of Applying and Implementing BBM on the MCNCA
Requirements of BBM
To What Degree Were The Requirements Met?
Lessons Learned
Recommended Future Actions
Other Applications of BBM and of the Beneficial Outcomes Approach to Leisure
Appendices
Literature Cited (in the text and appendices)

Liberal use of appendices is made for two reasons, to make the body of the report more succinct and to provide supplemental information for interested readers.

Why This Report?

Initiation of this Report

On May 5, 2006, BBM was adopted throughout the BLM by Instruction Memorandum (IM) No. 2006-060, which among other things stated “This IM affirms BLM’s corporate commitment to change its framework and emphasis to **benefits-based recreation management**.... Field Managers will assess and evaluate effects of proposed projects in Special Recreation Management Areas on activities, experiences, beneficial outcomes and recreation setting character to ensure consistency with **benefits-based management** concepts”(emphasis added). That directive is reproduced as Appendix C of this report.

This endorsement of BBM in the BLM was stimulated by several forces. First, very soon after the application of BBM on the MCNCA started in 1991, a growing number of BLM planners applied BBM on other BLM areas, worked to improve it, and promoted its wider use in the BLM. Second, for several years before the IM was issued in 2006, key people in the BLM’s Division of Recreation and Visitor Services (RAVS) and the agency’s Executive Leadership Team and Directorate created the Recreation and Visitor Services Advisory Team (RVSAT). It took the lead on promoting BBM in the BLM and realized that successful adoption of BBM throughout the BLM would not happen until more guidance was provided on how to apply and implement it. Therefore, in the early 2000s, some members of RVSAT started in-house training on how to implement and apply BBM and disseminated instructions on such. They also recognized that useful lessons had been learned from applying and implementing BBM on the MCNCA and that those lessons could help guide other applications of BBM within the BLM and beyond. Therefore, to inform still others of those lessons, the RAVS Division commissioned this case study report, and in 2005 a contract was let between the BLM and the first author of this report to lead the study as the principal investigator.

Purposes of This Report and How They Have Been Met

The major purposes of this report were listed in the contracts between the BLM and the first and third authors of this report. They are to:

1. Describe and document both the positive and negative lessons learned from the application of BBM to guide the management of the recreation resources and services of the MCNCA.
2. Describe and document the ingredients and processes essential for responsible application of BBM’s expanded conceptual framework to planning and management.
3. Review and summarize other applications of BBM by other agencies or organizations as well as applications of the broader construct from which BBM emanates, the Beneficial Outcomes Approach to Leisure (BOAL).

The reader should notice that no requirements exist in said contract to describe *how* BBM was implemented on the MCNCA, only to describe the positive and negative lessons learned. Nevertheless, an attempt is made to do that, because such description will help facilitate a better understanding of how BBM should and should not be implemented.

After work started on this report, Driver realized that none of these three purposes could be met adequately without making this report excessively long. Specifically, the first purpose

could not be accomplished without first developing a normative model that described in detail how BBM *should* be implemented. The required evaluations of lessons learned could not be documented without such a model to test what was done and not done properly under BBM guidelines on the NCA. Once such a model was developed, it would meet the requirement of the second purpose of the study defined above. In addition, there were many more applications of BBM than could be usefully summarized in this report. Therefore, when combined, the normative model and summary of the applications of BBM were much too lengthy to include in this report. Nevertheless, it was realized that those space constraints would prevent important information about applying and implementing BBM from being available to BLM planners and managers who had been mandated by the January 5, 2006 directive from the BLM's Executive Leadership Team (see Appendix C) that BBM be implemented throughout the BLM. For that reason, Driver decided with the concurrence of Don Bruns and Randy Virden, the other two authors of the case study report, and the BLM's designated Contracting Officer's Representative (COR) for the contract that a companion text to this report needed to be developed and published. This would be a readily available source within which the model for applying and implementing BBM would be described in detail and other applications of BBM could be reviewed in depth. Work on that text has proceeded concurrently with work on this case study report. That text entitled *Optimizing the Beneficial Outcomes of Recreation*, is edited by Driver, and will be published by Venture Publishing, Inc. in early 2008.⁴ An expanded rationale for the companion text is given in Appendix A of this report. It is acknowledged up front in that text that it would not have been developed if the BLM had not wanted this case study to provide additional information on how to implement BBM on the MCNCA.

The three purposes of this case study report have been met in the following ways:

1. The first purpose is met by the main section of this report entitled "Evaluation of Applying and Implementing BBM on the MCNCA."
2. The second purpose is met by development of the model for applying and implementing BBM that is described in detail in the companion text. The outline of that text in Appendix B of this report shows that Chapters 1, 2, and 3 of it were written to explain why the normative model is needed and to describe it, especially in Chapter 3. An overview of those three chapters is provided in Appendix B of this report. Furthermore, that model is used in this report to accomplish the first purpose.
3. The third purpose has two parts, (a) review other applications of BBM and (b) review uses of the BOAL. The first part is met primarily by the 18 chapters in the companion text that describe different applications of BBM to guide policy development and management of recreation and related amenity resources and services in the United States, Canada, and New Zealand. Those chapters are written by invited authors and co-authors who were directly involved in those efforts. The outline of that text in Appendix A of this report gives the names of those authors and co-authors and the titles of their chapters. A short summary of those applications is given in a section near the end of this report, and a review of the uses of the BOAL is given in the section that follows it.

⁴ In that text, BBM is named Outcomes-Focused Management (OFM) to avoid future inaccurate published criticism that BBM does not require consideration of negative outcomes as well as positive ones. In addition, a rapidly growing number of public agencies that provide social services are using the word "outcomes" to describe their operations. Other than these differences, BBM and OFM are identical.

Background Information

Legislative History of the MCNCA

When the application and implementation of BBM was started in 1991, the MCNCA was called the Ruby Canyon /Black Ridge area (hereafter the RC/BR area). In 2000, PL 106-353 of the 106th Congress changed the name of that area to the Colorado Canyons National Conservation Area (CCNCA). Then, in the fall of 2004, the name was changed again (by PL 108-400), and an additional 5,200 acres were added in eastern Utah. That act stated “Effective Jan. 1, 2005, the Colorado Canyons National Conservation Area has been renamed McInnis Canyons National Conservation Area in honor of former U.S. Representative Scott McInnis.” To review, the RC/BR area and the CCNCA were identical in acreage and boundaries, and those two areas are identical to the MCNCA except for the 5,200 acres in Utah that was added to it.

Brief Description of the MCNCA

Figure 1 shows that the MCNCA is contiguous to the Colorado National Monument which is managed by the National Park Service. P.L.108-400 (that changed the name of the CCNCA to the MCNCA describes that NCA as follows.

“The McInnis Canyons NCA, located west of Grand Junction and, for the most part, south of I-70, includes 122,300 rugged acres of sandstone canyons, natural arches, spires, and alcoves carved into the Colorado Plateau along a 24-mile stretch of the Colorado River....Unique recreational opportunities abound in the area. Hiking among large concentrations of natural sandstone arches, float boating through spectacular red rock canyons on the Colorado River, exploring the world of dinosaur fossils, viewing centuries-old Native American rock art, off-highway vehicle touring to the rims of scenic plateaus and down through grand valleys, mountain bike riding on dramatic single-track trails such as the internationally renowned Kokopelli Trail, and finally, viewing diverse wildlife species that include desert bighorn sheep, bald eagles, and peregrine falcons.”

PL 106-353 (that designated the CCNCA and BRCW on October 24, 2000), provided additional descriptions as follows. "The areas making up the Black Ridge and Ruby Canyons of the Grand Valley and Rabbit Valley, which contain unique and valuable scenic, recreational, multiple-use opportunities (including grazing), paleontological, natural, and wildlife components enhanced by the rural western setting of the area, provide extensive opportunities for recreational activities, and are publicly used for hiking, camping, and grazing, and are worthy of additional protection as a national conservation area. The Black Ridge Canyons Wilderness Study Area has wilderness value and offers unique geological, paleontological, scientific, and recreational resources.”

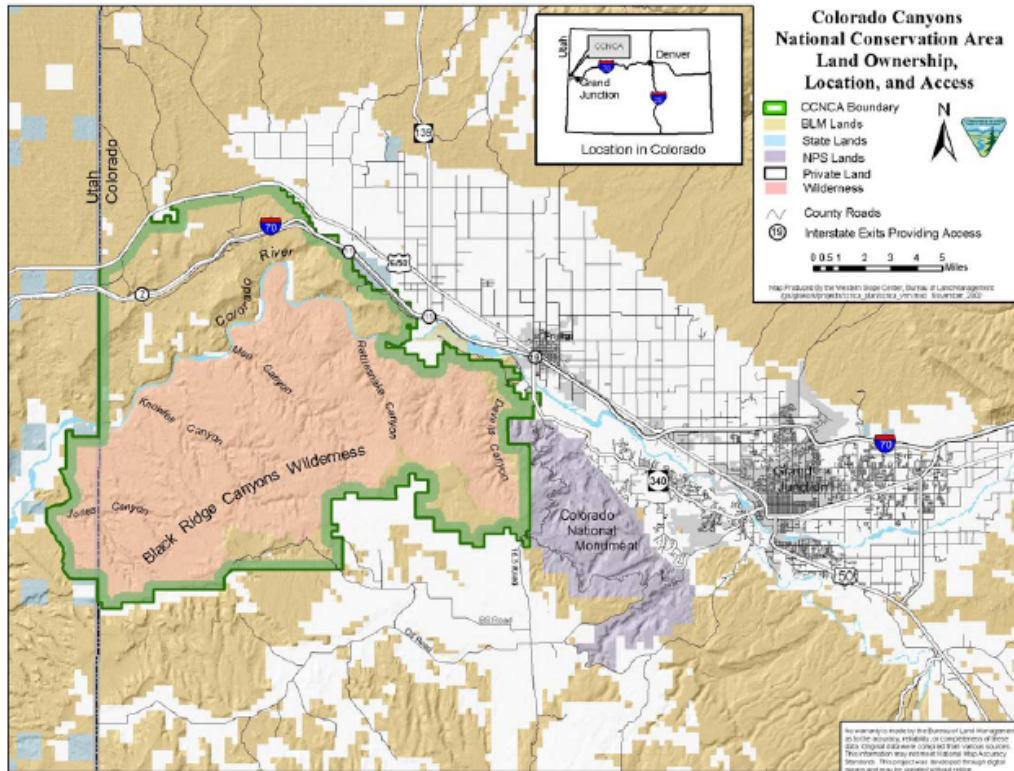


Figure 1. Location of the MCNCA

The following photographs portray the beauty and diversity of the NCA.⁵



Black Ridge Canyons Wilderness

⁵ The photos were taken from the MCNCA web page at <http://www.co.blm.gov/mcnca>



Colorado River



Rattlesnake Canyon Arches



Kokopelli Bicycle Trail





Devil's Canyon



Rabbit Valley Recreation Area



Visitor use records presented in the proposed NCA management plan show widely varying recreation use levels across the areas depicted by the above photos. Some of the most dramatic increases have occurred in mountain biking in the Mack Ridge area which is traversed by the internationally renowned Kokopelli's Trail that extends from Fruita, Colorado to Moab, Utah. Boating (i.e., rafting, canoeing, and kayaking) visitor use on the Colorado River has remained generally constant for the past eight years. Visitor use of the Black Ridge Canyons Wilderness has varied in different areas of it and on access routes to it. Use numbers in motorized portions of Rabbit Valley show sharp increases since 2001. Records of use of non-motorized, back country trails on the perimeter of the Rabbit Valley areas have varied widely over time.

Why Was BBM Applied?

The following events that converged early in the 1990s contributed to the BLM's decision to apply BBM on the RC/BR area.

Before the text, "Benefits of Leisure" (Driver, Brown & Peterson, 1991) was published, its editor (and lead author of this report) arranged and coordinated a meeting of the authors and co-authors of chapters of that text to review and critique their near-final chapters. They met in Snow Bird, Utah in the fall of 1989, and several of the authors and co-authors were park and recreation agency administrators and staff members. They expressed their strong felt need to consider more credibly the beneficial outcomes of their policy and managerial decisions but did not then know how to do so. This was also a concern of the first author of this report of this report and many of his associates. Therefore, he organized and coordinated a Benefits of Leisure

Applications Workshop, which was held in Estes Park, Colorado, in May 1991. That workshop was attended by 35 lead administrators, staff members, and managers of several federal, state, regional, and municipal park and recreation agencies as well as by another 35 leisure scientists and educators, who also wanted to see the results of leisure research applied more systematically in park and recreation policy development and management. The early concepts of BBM were discussed and firmed up at that workshop.⁶

- In the early 1990s, the BLM began developing a recreation management plan for the RC/BR area. The manager of the BLM's Recreation, Wilderness, and Cultural Resource Staff Group attended the above-mentioned 1991 Estes Park Workshop and was interested in pilot testing BBM in the BLM. Also in attendance was the second author of this report, Don Bruns, who was then and is now the Recreation Planner/Program Leader in BLM's Colorado State Office. At the workshop, these two attendees decided that the Ruby Canyon/Black Ridge (RC/BR) Recreation Area would be a good area on which to do a pilot application of BBM. Among primary reasons for selecting this area as a BBM pilot was its extraordinarily diverse recreation attractions. Shortly thereafter, \$40,000 dollars was transferred from the Washington Office of BLM to Colorado BLM to help start that application. That led to BBM guiding the recreation components of the "Ruby Canyon/Black Ridge Integrated Resource Management Plan," which was approved in 1998.
- The Acting Manager of the Grand Junction Resource Area (now called Field Office) and his recreation staff were interested in BBM and agreed to apply BBM as a pilot test on the RC/BR area. Shortly thereafter, the new manager of that resource area strongly supported the application of BBM and has continued to do so until the time this report was written.

When Was BBM Applied?

As indicated above, work on implementing BBM on the NCA started in the fall of 1991 to guide development of the recreation component of the resource management plan for the Ruby Canyon/Black Ridge (RC/BR) area. That plan was completed in 1998 and was written with a distinctive set of benefits-based management objectives and setting prescriptions for each of its eight different Recreation Management Zones (RMZs). It guided management of the area until PL 106-353 designated the RC/BR area as the CCNCA in 2000. That act included a statement that directed the Secretary of the Interior to develop a "comprehensive plan for the long-range protection and management of the Conservation Area" by October 24, 2003. For reasons explained in the "Evaluation" section of this report, initial efforts on developing the plan for the NCA fell far short of applying BBM properly. However, that problem was rectified during preparation of the final plan which was approved on October 28, 2004. That draft plan, was substantively modified, and it has guided management of the CCNCA since it was renamed the MCNCA.

⁶ The second investigator of this report helped draft one of the first papers on BBM that was critiqued at that workshop.

Scope of this Study

This report focuses only on the application of BBM to planning and management of the recreation resources, and the delivery of visitor services of the NCA. It is therefore not concerned with the other resources and uses that are addressed in the approved Resource Management Plan for the NCA except for the recreational use of the Black Ridge Canyons Wilderness.

Sources of Information for this Study

Given that the NCA is being managed under the plan approved for the CCNCA on October 28, 2004, that plan is the primary source of information used to write this report, supplemented by personal interviews with several key BLM employees who developed the plan for the CCNCA and/or are implementing it. The name of that plan is “Resources Management Plan and Record of Decision for the COLORADO CANYONS NATIONAL CONSERVATION AREA and BLACK RIGDE CANYONS WILDERNESS.” Some of the maps, charts, and tables referenced in this report were only available in the on-line “Proposed Plan” for the CCNCA on the BLM’s Grand Junction Field Office web-site. It was therefore more efficient to electronically transfer the relevant information than redrafting it for this report. But, not all on-line plan components yet reflect the NCA’s new name (i.e., they still read CCNCA, not MCNCA).

The reader’s understanding will be enhanced by accessing the approved plan via the internet (see Final Plan and Record of Decision at <http://www.co.blm.gov/gjra/planning.htm>.) For the Setting Character Prescription tables, see “Proposed Plan” at http://www.co.blm.gov/mcncaplan/cocanprmp/cocanprmp_index.htm. If this site cannot be directly accessed, go to www.blm.gov and click on “Colorado,” “Grand Junction Field Office,” and finally “Planning,” for the Resource Management Plan and Record of Decision. For the earlier “Proposed Plan” tables and graphics, instead of clicking on “Planning,” click on “McInnis Canyons National Conservation Area,” and finally “Management Plan.” Once there, the sections of the proposed plan that are most relevant to this report are those concerned with recreation resources and uses (including the recreational uses of the BRCW). Those sections are located at various locations within these websites, including relevant appendices.⁷

⁷ If you have located the web site for the “Colorado Canyons National Conservation Area (NCA) Resource Management Plan and Record of Decision (RMP/ROD)” and the “MCNCA Proposed RMP/EIS,” you have all final plan content. Because the Grand Junction Field Office has not completely updated its website since the management plan was completed, one has to look in several places on the Grand Junction BLM website to view all plan content: (1) Click on “Chapter 2: Resource Management Plan” and scroll down to the second page for a description of the planning area, planning issues, and planning criteria: General Recreation Management Guidelines for the CCNCA (MCNCA) are presented on pages 2-18 through 2-30. RMZ-specific benefits-based management objectives, setting prescriptions, and implementing actions are outlined on pages 2-30 through 2-61. Notice the accompanying RMZ and Setting Prescription maps. Management direction for recreation-related resources is shown on pages 2-17 (Cultural Resources) and 2-18 (Paleontological Resources). (2) Go to “MCNCA Proposed RMP/EIS” and click on “Appendix 4: Planning Tools for recreation,” which describes in detail how BBM was applied on the CCNCA (MCNA). This also attaches the recreation setting prescription tables for all 10 RMZs (beginning on page A-4-9). (3) Go back to the “Colorado Canyons National Conservation Area (NCA) Resource Management Plan and Record of Decision (RMP/ROD)” and go to Appendix 2 for the “Wilderness Management Plan,” that provides some additional content about recreation

Evaluation of Applying and Implementing BBM on the NCA

This rather large section is the evaluative "guts" of this report, because it attempts to fulfill the first purpose of this report, which was to describe and document both the positive and negative lessons learned from the application of BBM to guide recreation and visitor services program actions and investments within the NCA. In addition, this section will attempt to review *how* BBM was applied and is being implemented on the NCA and what was done that should not have been done and what was not done that should have been.

As mentioned earlier, accomplishment of the first purpose for this case study (i.e., review and document the lessons learned) depended on developing a normative model that described in detail what *should be done* to properly and fully apply and implement BBM. That model was needed to *evaluate what was done* and to determine the positive and negative lessons learned. Obviously, that model was also needed to meet the second purpose, which is to "describe the actions that need to be taken for effective, efficient, and responsive application of the conceptual framework of BBM to planning and management." Also as mentioned earlier, that model could not be presented in its entirety in this report, but appears in Chapter 3 of the companion text (see Appendix A of this report), and is reviewed in Part 2 of Appendix B. That normative model describes the planning steps which are grouped into eight sequential "phases." Those phases and steps (numbered numerically) will be listed first, and the application and implementation of BBM on the NCA will then be evaluated in terms of the degree to which the requirements of each step were met.

Requirements for Applying and Implementing BBM

The phases and steps of the just mentioned normative model are as follows:

Phase 1: Preparatory Actions

- Ensure that overseeing supervisors and managers approve and support adoption of BBM(1st)
- Organize the planning team (2nd)
- Ensure that all members of the planning team understand BBM (3rd)
- Understand responsibilities and Constraints (4th)
- Consider essential collaborative management and related public involvement needs (5th)
- Identify critical issues and concerns (6th)

Phase 2: Gather, Analyze, Interpret, and Integrate Supply and Demand Information.

- Assess recreation preferences of the most relevant recreation participant and affected community resident markets (7th)
- Inventory or update inventories of key recreation-tourism resource attractions and services (8th)
- Analyze recreation opportunity supply by possible recreation management zones and corresponding customer market demand (9th)

planning for the BRCW that is not considered in earlier sections referred just above. (4) Lastly, "surf" the relevant maps, because they provide quickly accessible and visual information about the area.

- Select primary recreation-tourism markets (10th)
- Identify the most logical recreation management zones and corresponding niches identified within the market(s) (11th)

Phase 3: Develop the Management Plan

- Determine which outcomes can feasibly, and should, be targeted within each recreation management zone. (12th)
- Develop management objectives (13th)
- Identify and prescribe the essential setting characteristics (14th)
- Define the essential recreation-tourism service environment (15th)
- Evaluate alternatives and select the preferred alternative (16th)

Phase 4: Develop an Implementation Plan

- Identify management actions to be implemented (17th)
- Identify marketing actions to be implemented (18th)
- Identify monitoring actions (19th)
- Identify supporting administrative actions (20th)
- Provide ample opportunities and time-frames for review of the proposed plan (21st)

Phase 5: Adjust Management/Implementation Plan as Needed and Approve Final Plan(22nd)

Phase 6: Implement the Plan and Adjust Field Operations Accordingly (23rd)

Phase 7: Revise the Plan as Needed or as Required by Agency Directives (24th)

Phase 8: Ensure that Performance Reports and Evaluations Document and Recognize the Production and Attainment of Targeted Outcomes as Feasible (25th)

Were the Requirements of BBM Met?

As just stated, in this, probably most important, section of this report, the application and implementation of BBM on the MCNCA will be evaluated in terms of the degree to which *each* of the above requirements of the normative model were met. The required planning and plan implementation actions required at each step are frequently apparent just from the above names of each step. If those required actions are not apparent, see Part 2 of Appendix B of this report where the requirements are summarized briefly.

While reading this section, it should be remembered that (1) this evaluation was the *first* application of BBM anywhere and especially on a large public wildland area and (2) that the requirements of BBM were evolving and being refined *during* that application. Therefore, although the following discussion “critically” evaluates that application, the authors of this report recognize that complete compliance with the now-known requirements of BBM was impossible. Our purpose then is to critique, inform and improve future applications of BBM, rather than to depreciate what was done, the results of which have significantly improved and refined BBM.

Phase 1: Preparatory Actions

Ensure that Overseeing Supervisors and Managers Approve and Support Adoption of BBM (1st)

After having obtained support in 1991 of the manager of the BLM's recreation group to initiate a BBM Pilot Test on the RC/BR area, the Recreation Program Lead in the BLM's Colorado State Office (who is also the second author of this report) met with the then acting manager of the BLM's Grand Junction Area and his staff to propose such a pilot test. Having been briefed about the emerging concept of BBM, they agreed to do the pilot test and remained supportive of BBM.

However, after the CCNCA was designated in 2000, its first manager did not adopt the BBM framework to guide the management planning of that area. Among other reasons, he thought that managing to produce opportunities for customers to achieve their most highly valued experiences and other beneficial outcome opportunities was too complex for public understanding. Therefore, development of the plan mandated for the CCNCA by its enabling legislation was not begun under BBM guidelines.

In 2004, the current manager of the BLM's Grand Junction Field Office got BBM planning back on track. She has remained very supportive of BBM since she became manager (as indicated by her "Foreword" to this report) and so has the current manager since he took over.

Organize the Planning Team (2nd)

Management plans for the RC/BR area and the CCNCA are both multiple-use (also called comprehensive or integrated) resource management plans. As such, those plans were done by planning teams that included representatives from relevant disciplines who could professionally represent different land uses and values, including recreation. Private-sector recreation service providers and public sector local government infrastructure providers were invited participants in plan scoping efforts and in plan review, but they were not engaged as planning team members.

Ensure that all Members of the Planning Team Understand BBM (3rd)

All members of the planning team must have or gain a reasonably good understanding of BBM. If not, the effort will be marginalized, other team members may be at cross purposes, team members will get "grumpy" with other members using a "secret language" beyond their comprehension, and BBM concepts are directly applicable to other "multiple" uses other than recreation. Fortunately, the recreation planner, who led the early planning efforts for the recreation components of the Ruby Canyon/Black Ridge (RC/BR) plan, picked up rapidly on the purposes, concepts and requirements of BBM, informed other members of that the planning team, and lead the effort to apply them as they were known then (i.e., in the early evolution of BBM). More importantly, the skills and knowledge he acquired on this ground breaking effort enabled him to contribute significantly to the refinement and improvement of BBM. As a result, he has become a leading trainer of BBM in the BLM. Unfortunately, for the BBM-guided planning effort on the RC/BR area, he transferred to another BLM Field Office in 1995. A

second recreation planner was hired who had not worked with the emerging concepts of BBM on this initial pilot application. Because no opportunity was provided for technological transfer from the first recreation planner to the second, the new planner, who was activity-focused, therefore did not fully understand BBM. Consequently, the completed plan was not implemented. About the time that the RC/BR area was designated as the CCNCA, the second Grand Junction Field Office recreation planner transferred to another area and a third took his place.

With designation of the CCNCA came funding for NCA staffing, and a fourth recreation planner was hired by the new NCA manager to work just on the NCA. By that time, a good deal more had been learned about how to apply BBM, and both the new NCA manager and recreation planner were provided in-depth training on how to apply BBM. That training was provided by the original recreation planner who developed the RC/BR management plan's recreation components and the second co-author to this report. Both the NCA's manager and recreation planner believed that the public would not be able to grasp the notion of managing to provide for specific experiences and other beneficial outcomes most important to the different kinds of visitors visiting the NCA's different RMZs. Consequently, development of the draft CCNCA management plan was based on users' recreation activity interests only, rather than on developing outcomes-focused management objectives to specify as management objectives the outcomes desired, both by participants and by those affected by that recreation participation. Neither were setting condition prescriptions written to identify the essential setting characteristic upon which the production and attainment of those desired outcome opportunities depends. Instead, recreation components of the draft management were comprised mostly of a list of recreation program actions and projects, primarily trail and other recreation activity-oriented facility construction, management controls, and a few interpretive exhibits. These actions were identified in response to the desires of users and other special interests, solely to accommodate increased recreation activity participation.

The above efforts continued until the draft plan for the draft was developed and submitted for public review. At that time, the manager of the BLM's Grand Field Office intervened, insisting that recreation components of that plan were to be developed utilizing BBM's expanded conceptual framework.

Understand Responsibilities and Constraints (4th)

Given that this pilot test of BBM was formally approved to guide the planning and management of the RC/BR area, it cannot be said that some failures to follow those guideline (described just above) reflected acceptable understanding of all "responsibilities." Other than that, the plans for the RC/BR area and the NCA did a good job of scoping and understanding the relevant responsibilities and constraints.

Consider Essential Collaborative Management and Related Public Involvement Needs (5th)

The approved plans for RC/BR area and the NCA documented in detail the efforts taken to involve relevant potential on-site customers and customers residing in contiguous or near-by communities. The collaborative involvement of relevant associated providers was documented to a lesser degree in those two plans. Specifically, pages ii-iv of the RC/BR plan describes the

membership of the Ad-hoc Committee that was assembled to help develop that plan and also describes the “special work group teams” assembled to work on issues relating to recreation, river management, and desired plant communities. The recreation work group team had 22 members that represented various recreation-related customers and associated provider stakeholders. The membership of the ad-hoc committee reflected similar customers and stakeholders. In addition, pages 3-2 to 3-5 of that plan identify relevant partners and their planned roles and responsibilities. Chapter 7 of that plan details specific relevant cooperative management agreements that were in place, and several concerned recreation interests.

The approved plan for the NCA provides even more detail about public involvement in the development of that plan. Page 1-10 reviews those efforts, including the establishment of a federally authorized Resource Advisory Council, project newsletters, numerous public presentations, issuing of news releases, holding public open houses, and “publishing” a project web site. Appendix 5 of the approved plan for the NCA provides a ten-page description of “Public Involvement” efforts and mentions that special “Working Groups” were set up for the four “Planning Area Zones” initially set up to consider interests in “Primary [recreation]Activities.”

Although many associated providers, or organizations which they represented, were named in both plans, those plans did not mention all relevant principal affecting recreation-tourism providers upon whom the BLM and its customers depend for services (e.g., tour operators, visitor information bureaus/centers, gear rental shops, retail services, etc.) and supporting infrastructure (e.g., local governments). This is probably attributable to the newness of BBM and lack of understanding of the critical role of associated providers in the provision of recreation opportunities as emphasized in the normative model. Nonetheless, all affecting recreation providers should have been identified and engaged as participants in the development of these management plans. To the degree this did not occur, the BLM failed to identify the essential contributions those providers must make to the produce the outcome opportunities targeted by these plans and also to help provide and maintain prescribed recreation setting characteristics.

Identify Critical Issues and Concerns (6th)

The considerable amount of scoping and public involvement described and documented in the two plans reveal that serious efforts were made to identify critical issues and constraints with one important exception (see section 5.2.4 of the approved plan). In the initial phases of planning for the NCA, little scoping was evident regarding concerns about beneficial and negative outcomes. The early issues focused on recreation activities, the facilities needed, and the areas in which opportunities to engage were most suited for particular groups. As elaborated in the following section, that focus fortunately changed to help guide the visitor surveys (as later described in this report) conducted and finalize the plan that was approved.

Phase 2: Gather, Analyze, Interpret, and Integrate Supply and Demand Information

Assess Recreation Preferences of the Most Relevant Participant and Affected Community Resident Markets (7th)

This requirement was met well for planning of the RC/BR Recreation Area but not as well for the planning that was done for the NCA. Again, each will be discussed in turn.

During the planning of the RC/BR recreation area, several relevant studies were conducted by the Northern Arizona University (NAU) School of Forestry. Beginning in early 1992, these included both visitor and community studies, focus-group interviews, and an evaluation of manager-defined benefits (Stein & Lee, 1995). An unforeseen problem with this survey was that it sampled recreation visitors by five zones instead of the eight RMZs that were eventually identified in the approved plan. There was a reasonable response rate (68 %) to the mailed questionnaire. Results of the survey provided only limited useful information for the planning effort. Consequently, the rationale for further dividing the five sampling zones to create eight final RMZs came from focus group output and further analysis by the BLM's recreation planners.

Another visitor study was conducted in 2001 and 2002 by NAU School of Forestry (Lee, Stephens & Fuller (2003), to provide information for the planning of the NCA. Again as in the previous survey, only five management zones guided that survey because of the foregoing described initial abandonment of BBM. On page 6 of their report (Visitor Survey 2003), the authors state that "At BLM's request, we combined several of the zones to create five management zones to analyze and present survey results." Visitor preferences were assessed for experiential and other beneficial outcomes and the perceived degree to which they were realized. The response rate to the mailed questionnaire (50 %) was low, but more importantly; results had only marginal utility for developing the management plan because the final management plan was written for ten RMZs, not the five sampling zones requested by the NCA manager.

At the NCA manager's discretion an additional study was conducted by the US Geological Survey in 2003 that dealt "...primary with recreation-based activities in four areas: Kokopelli Loops, Rabbit Valley, Loma Boat Launch, and Devil's Canyon" (Ponds, Gillette, Koonz (2004: 1). The survey profiled user demographics and recreation activities but focused on visitors' willingness to pay user fees. It did not consider beneficial or negative outcomes experienced.

In the end, it was the assessment results from concerted public involvement efforts (see Appendix A of the approved plan) and the old RC/BR recreation preference assessments that were all that was truly useful in developing the NCA management plan. The requirement of BBM being considered here was therefore only partially met. The necessity for assessing both on-site and off-site customer preferences is of paramount importance to arrive at explicitly-stated benefits-based management objectives.

Inventory or Update Inventories of Key Recreation-Tourism Resource Attractions and Services (8th)

Of the two parts to this step, the first is to inventory attractions, and the second is to inventory services. The RC/BR Integrated Resource Management Plan addressed this step under the heading "Area and Community Attractions and Services." Concerns related to outfitted and

guided services were addressed, but no actual inventories of related community attractions and essential recreation support services were completed. Instead, inventories focused on natural, cultural, and paleontological attractions.

The service inventories comprising the second part of this step include not only services provided by the managing agency, but also both competing and complimentary services provided by other agencies, local communities, and private sector businesses (e.g., equipment rentals, transportation, supporting retail, lodging services, restaurants). The draft NCA RMP neglected addressing related community attractions and services. Because use and enjoyment of the NCA depends greatly on both on-site and off-site services from private sector businesses (e.g., outfitters, tour operators, gear and equipment rental, etc.) and local government infrastructure support (e.g., road maintenance, emergency services, etc.). Several river boating and mountain biking outfitters are under permit from the BLM to provide on-site services to visitors who either cannot or choose not to outfit their own trips. Likewise, existing paleontology tours are authorized through the Museum of Western Colorado. Presence of the spectacular natural stone arches at Rattlesnake Canyon hint at possibilities for commercial tours, and there are other significant attractions where either tours or outfitted trips could afford greater access to those seeking to enrich their lives through recreation outings. In addition, these inventories should have also addressed (1) other campgrounds, interpretive exhibits, and visitor centers within the service area that could meet the needs of NCA visitors; (2) nearby outdoor recreation facilities such as youth camps, campgrounds, guest ranches, and cabins; and (3) nearby summer and winter resorts.

The promotional outreach efforts of tourism organizations (e.g., the Grand Junction Visitors and Convention Bureau, the Fruita Welcome Center, etc.) relevant to the NCA were not addressed. Destination recreation-tourism markets targeted in the approved plan will need adequate information about the NCA's rich diversity of outcome opportunities, but planners needed to know what was presently happening in order to assess the need for additional informational outreach. Relevant communities that should be included are the cities of Grand Junction and Fruita as well as more distant recreation and tourism hubs such as Moab, Utah and Montrose, Colorado. Each has significant visitor outreach campaigns which could reach important customers to provide more definitive content about the NCA.

The same holds true for inventories of supporting infrastructure. Few access roads to the NCA are official BLM public roads but are instead local county roads and state highways. The role which Mesa County and the State of Colorado play in maintaining and/or developing these routes needed to be considered in assessing what kinds of implementing actions were necessary to achieve the management objectives and setting prescriptions outlined in the final plan. The specific outcome opportunities targeted in the approved management plan suggest that the BLM will have to proactively engage its local government partners to ensure that some key access routes left as they are and that others are appropriately improved, both according to setting prescriptions outlined in the approved management plan. Unaddressed, those changes may well occur without due consideration being given to the constraints imposed by the approved management plan.

In summary, the environment affected by the plan should therefore have identified the role which both private-sector service providers and local governments have in sustaining the qualities for which the NCA was designated by Congress, the productive capacity and distinctive character of its recreation settings, and the ability of targeted market niches to achieve outcome opportunities targeted by management objectives.

Analyze Recreation Opportunity Supply by Possible Recreation Management Zones and Corresponding Customer Market Demand (9th)

In the plan for the RC/BR area, supply and demand were addressed as prerequisites for deciding which recreation to target in each of the area's eight RMZs defined for that area. At that time, eight sets of recreation opportunities targeted for these RMZs were compared with other recreation opportunities available elsewhere in the relevant market areas. Analyses involved recreation areas managed by the Grand Junction Field Office, by other BLM Field Offices, and by other natural resource recreation-tourism providers. They considered outcome opportunities each RMZ could reasonably provide, to which of the different kinds of customers desiring them, both actual and potential nearby alternative venues that could satisfy this demand, and the varying size and extent of most relevant customer clienteles (for example, the market for mountain biking on Kokopelli's Trail on Mack Ridge is substantially larger than that for dispersed camping near vehicles in Rabbit Valley). At the time this was done, these analyses were neither as structured nor definitive as recreation planners now know how to make them, but they were nonetheless essential for deciding which recreation opportunities to target within each RMZ. For the RC/BR plan, considerations of supply and demand are what convinced planners that the NCA actually had eight RMZs instead of the five that were used to assess recreation customer preferences.

These same kinds of considerations were made in preparation of the NCA management plan, and they convinced planners that public recreation demand had grown sufficiently diverse to warrant breaking out yet two more RMZs for a total of ten. In the process, they concluded that the original plan did not sufficiently limit the set of targeted activities, experiences and other beneficial outcomes, both across RMZs and within each. For example, the original plan targeted mountain biking in more RMZs than was either necessary or appropriate because there were significant other mountain biking opportunities provided by the BLM and by other recreation providers as well.

In addition, the list of outcome opportunities identified in the draft RC/BR plan was simply carried forward from Benefits Chain of Causality worksheet drafts to the final plan, because new recreation planners did not understand BBM well-enough to do otherwise. For most RMZs, that list of outcome opportunities included too many items either to enable managers to effectively differentiate between RMZs, or to enable visitors to differentiate between RMZs on the basis of how information and promotional outreach materials are structured. The fact that the most distinctive of all outcome opportunities were not identified for each RMZ was another complicating factor. A more thorough job of analyzing supply and demand would have resolved this problem.

Select Primary Recreation-Tourism Markets *and* Identify Logical Recreation Management Zones and Corresponding Niches within the Primary Market(s) (10th and 11th)

These two requirements are considered together in this section, because they are related and reflect the nonlinear and iterative nature of the required actions and the need for simultaneous attention to several required actions. Regarding primary markets, the model for applying and implementing BBM in Chapter 3 of the companion text states "To make OFM work, it is necessary to select the *primary recreation market segments* from the many relevant

markets that desire benefits from the recreation area from which the plan is being made. This must happen, because no one management area can simultaneously be managed to be all things to all people.” However, the management plan for the NCA was written before current BLM LUP Handbook guidance (see Appendix D of this report) was updated to incorporate BBM. Therefore, the plan did not specifically select primary recreation-tourism markets and corresponding niches for each of its ten RMZs as now directed by the BLM’s LUP Handbook.

Regarding identifying logical recreation management zones (RMZs), the model for applying BBM states “Unless the area being planned and managed is quite small, it will be necessary to define and delineate physically, on maps, the boundaries of logical recreation management zones (RMZs) in which recreation opportunities will be provided for the primary market segment to be served, and the distinctive recreation niche (and sometimes niches) within each RMZ must be identified.” Instructions for defining RMZs and niches are provided in the BLM’s guideline for Managing Visitor Services, which is Appendix D of this report. It is recognized that these delineations of RMZs and their niches might need to be adjusted after the results of the demand analyses are analyzed and interpreted.

Page “i” of the plan for the RC/BR area mentions that area was first separated into three broadly defined “Planning Zones (north of the Colorado river, the Colorado River, and south of the river). Those three zones were further divided into a total of eight logical management zones (shown on the map on page “ix” of that plan) to guide applying BBM to guide the planning and management of the recreation components of that plan. Subsequently, a reasonably good job was done of defining the primary recreation markets, management zones and special recreation niches in that plan as a result of the scoping, focus group activities, a visitor survey (described in a later section), and public involvement activities pursued.

Those achievements on the RC/BR SMRA contrast sharply with the way in which these two requirements were not met in the *initial* NCA planning efforts. That is because the newly arrived manager of the NCA chose not to use the eight RMZs outlined in the RC/BR plan or to use the BBM framework on which it was built. Having returned to activity-based planning (see Part 1 of Appendix B in which activity-based, experience-based, and benefits-based planning and management are contrasted), only four geographically-defined planning zones were established for the entire NCA. Reading from the planning process description in the final plan, “...to facilitate the planning process, working groups were formed based on four geographical areas in the CCNCA” (page 1-2), and “...each working group identified specific planning issues for each of the four planning zones within the CCNCA” (page 1-10). These zones are shown in Figure 2 (electronically reproduced from Figure 2-1 on page 2-2 of the plan). The plan states, “To further facilitate the planning process, Working Groups were formed based on four major geographic areas in the CCNCA...Each planning zone offers unique settings for recreation opportunities” (see Figure 2). This statement reveals that those who prepared the draft plan believed that setting characteristics were distinctive for these four zones (actual setting character is distinctive for each of the ten RMZs appearing in the final plan, and the erroneous observation regarding settings quoted above was obviously never corrected). The activity-based planning framework under which these four planning zones were envisioned is further revealed by the presentation of different activities as the distinguishing features of these four planning zones (see Figure 2).

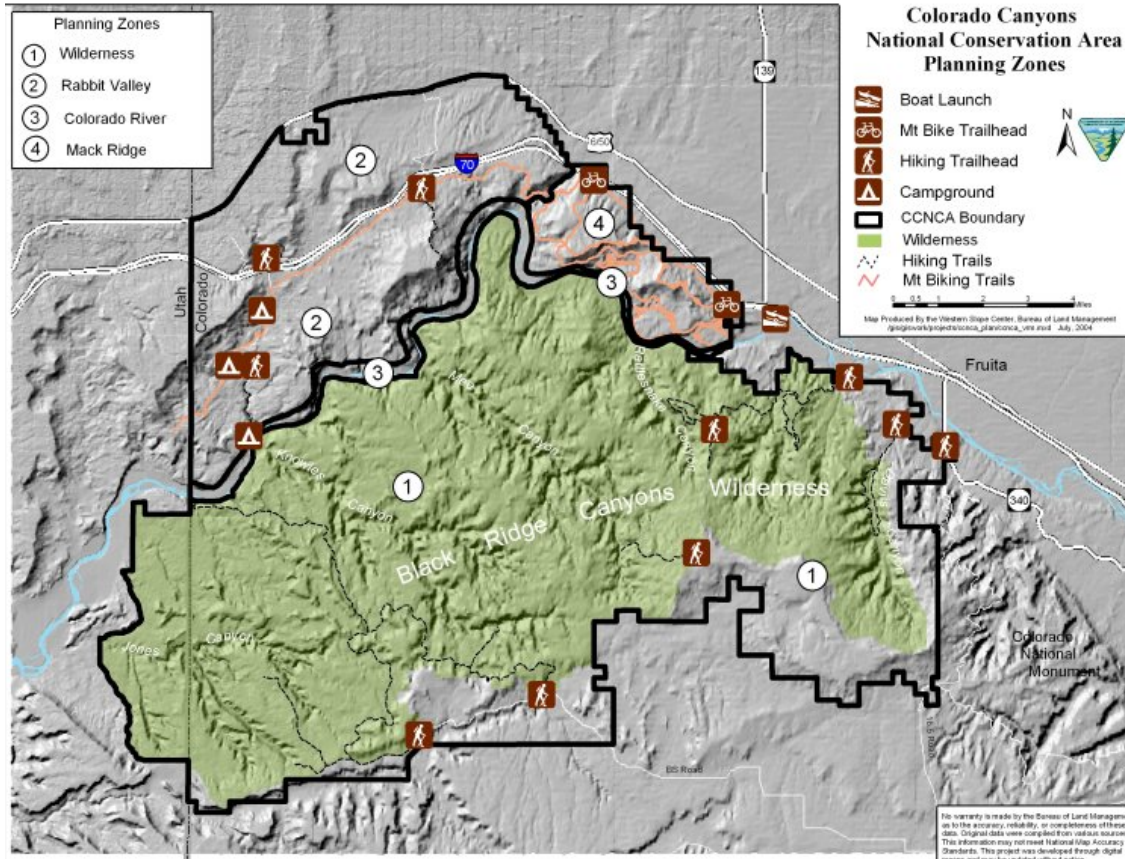


Figure 2. Planning Zones of the CCNCA

| | |
|---------------------|---|
| Mack Ridge Zone | Mountain bike riding and horseback riding |
| Rabbit Valley Zone | Off-highway vehicle (OHV) riding, hiking, Native American rock art viewing, camping, wildlife watching, mountain bike riding, horseback riding, and grazing |
| Wilderness Zone | Hiking, backpacking, horseback riding, grazing, and hunting |
| River Corridor Zone | Boating, hiking, and camping |

Figure 3. CCNCA Planning Zones and Primary Activities

While the BLM was responding to comments on the draft plan, the Grand Junction Field Manager intervened, reinstating BBM as the conceptual framework under which recreation sections of the final plan were to be developed. Within an outcomes-focused recreation management context, it soon became apparent that the four planning zones provided an insufficient basis for responsively differentiating between the diverse kinds of recreation opportunities the area could provide or for responding to identified market demands for those opportunities. Therefore, those four planning areas were, in the aggregate, further subdivided into ten distinct RMZs, (see page 2-35 of the plan) and called “recreation sub-zones in the CCNCA.” Those RMZs are shown in Figure 4 (Figure 2-10 on page 2-36 of the plan). They were defined using the eight RMZs outlined in the plan for the RC/BR area (page ix of that plan). Two of those eight original zones were further subdivided, creating the total of ten zones. This was done, because two additional special recreation market niches were defined based on new

information about customer demands. This case study therefore needed to focus on the final ten BBM-directed RMZs, which were considered late in the planning process for the NCA.

In preparation of the final NCA plan, planners therefore faced an unusual challenge. They needed to address recreation allocation decisions within a benefits-based context (i.e., targeting experiences and other beneficial outcomes as management objectives, prescribing essential recreation setting characteristics, and following through with implementing actions guided and constrained by those objectives and prescriptions). These were presented by each of the ten RMZs appearing in the final plan (these appear on pp. 2-30 to 2-61 of the final plan—see also Figures 5-9 later in this report). At the same time, however, they needed to enable publics who had helped develop the activity-based recreation management actions proposed in the draft determine which actions were included in the final plan. These were presented by each of the four original planning zones (these appear on pp. 2-18 to 2-30 of the final plan). Thus the recreation section of the final plan starts on page 2-18 with the words “Recreation in the CCNCA will be managed for beneficial outcomes.” In sum, the four planning zones were developed both to “facilitate the planning process” and to identify “specific planning issues for each of the four planning zones” as stated on page 1-2 of the approved NCA plan. This was needed to Retention of the original four planning zone format for implementation actions enabled the original four working groups on the draft plan to track their work.

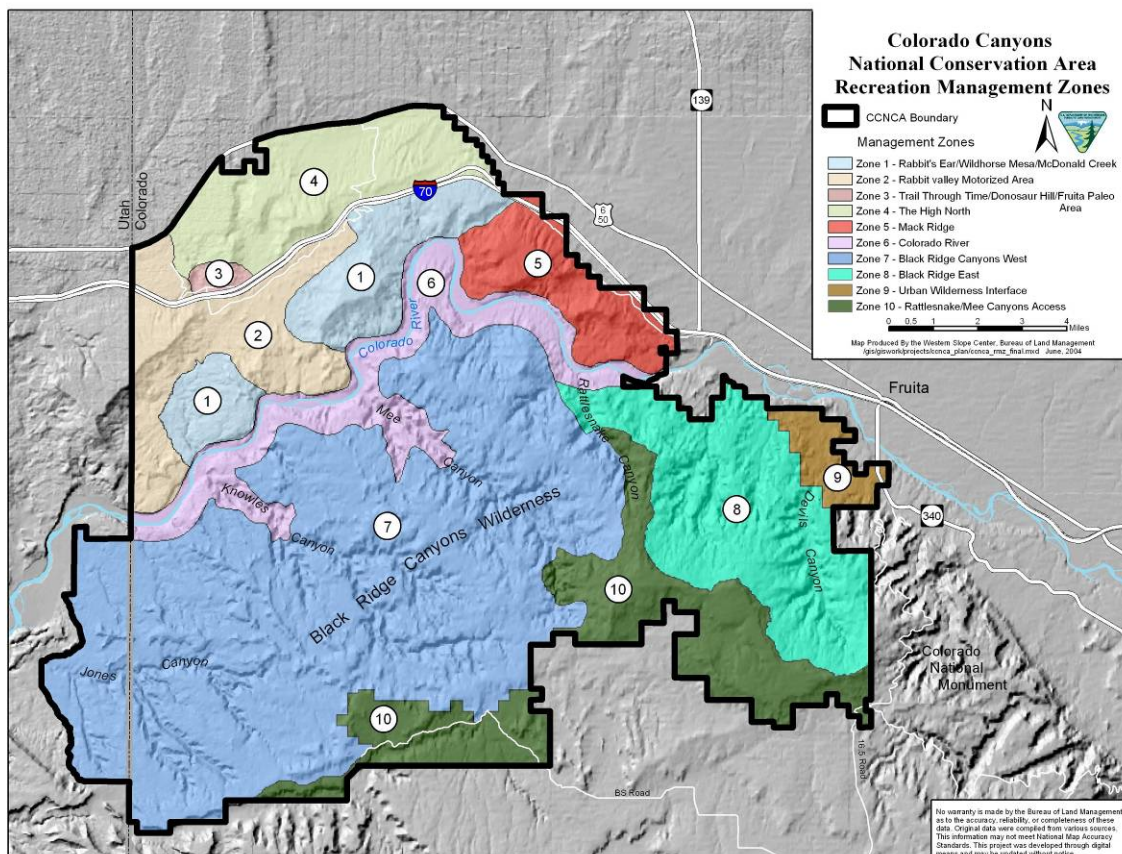


Figure 4. Recreation Management Zones of the MCNCA

In sum, the eight RMZs established for the RC/BR plan and the ten established for the NCA plan meet most of the BBM requirements for defining RMZs. Specifically, the management plan for the NCA was written before current BLM LUP Handbook guidance (see Appendix D of this report) was updated to incorporate BBM. Both the RC/BR and NCA plans therefore identified “niche” as a recreation opportunity instead of a market segment, which it actually is. It was insufficient to identify the targeted recreation opportunities but omit identification of the specific market segments (i.e., niches) for which they are being produced.

It should be emphasized that the BLM Land Use Planning Handbook requires identifying both the “who” and “where” of each primary market. Identification of primary recreation market segments in terms of who they are and where they are from also greatly assists in mapping each corresponding RMZs and identifying the corresponding niche segment of that market which is vital to completing all remaining steps of BBM. The identification of target market niches with that level of specificity is therefore essential to ensure both that management and marketing actions are directed to the right customers and also to ensure that the right customers are monitored to determine if they are achieving targeted outcomes to the degree specified by management objectives

Phase 3: Develop the Management Plan

Determine which Outcomes Can Feasibly, and Should be, Targeted within Each Management Zone (12th)

This requirement is a difficult one to meet, because what “should be” is not always “feasible” due to many constraints on management. In addition, some outcomes are of much greater importance to some customers than they are to others. Therefore, it is important that visitor surveys identify such differential preferences and confirm them. For example, the surveys done for the NCA should have attempted to confirm the preferences revealed in studies for the RC/BR area, which they did not do adequately. In addition, under BBM planning, it is easy to try to target all the outcomes revealed by preference studies and other sources of information about customer demands. However, much discretion must be exercised under BMM planning not to leave the impression that “all things must be done for everyone” and particularly not to leave the impression in the plan that a “laundry list” of beneficial outcomes are being targeted.

Given that the two plans being evaluated in this report were pilot-tests of BBM, the authors of this report believe that a credible job was done of meeting the requirements of this step. Nevertheless, several people who have reviewed the plans for the RC/BR area and the NCA have questioned whether a “laundry list” of beneficial outcomes had been targeted. The reason why is that neither plan clarifies why so many outcomes were targeted. In addition, benefits accrue to on-site visitors, to residents of local communities and to local and regional economies. These outcomes from RMZ to RMZ and must be tailored accordingly.

Develop Management Objectives *and* Identify and Prescribe the Essential Setting Characteristics (13th and 14th)

These two requirements are considered together, because they are related. The approved plans for the RC/BR area and the NCA met these two requirements well. Specifically pages 2-36 to 2-61 of the approved NCA plan provide graphic figures for each of the ten RMZs, and they

concisely summarize how the two requirements being considered here and others considered later were met. For each of the NCA's ten RMZs, those figures depict planned management objectives, setting prescriptions, and implementing actions. Figure 5, management objectives and setting prescriptions for the Rabbit Valley Recreation Management Zone (RMZ No. 2), is reproduced electronically from the final plan to illustrate. The location of this RMZ can be identified on Figure 4 above. These management objectives and setting prescriptions for RMZ 2 are found on page 2-40 of the approved plan.

Selection of a limited number of outcome opportunities most highly-valued by the target market niche for each RMZ, in the form of explicitly-stated management objectives, is one of the most important steps in the entire process of managing for beneficial outcomes. The development of S.M.A.R.T (i.e., specific, measurable, actionable, realistic, and time-bound) outcome-focused management objectives is one of the most critical components of a good management plan. That is because objectives are what determines what eventually happens, including setting characteristics to be provided and maintained and all service provider actions (incl. management, marketing, and supporting administrative actions). Management plans must adequately address these components of recreation production to provide a sufficient basis for future monitoring and evaluation of plan implementation. Adapted from Schomaker (1984) those five essentials for all good management objectives are as follows. They are:

1. Specific: selecting the specific outcomes opportunities to be provided so that the provider knows what is to be achieved.
2. Measurable: quantifiable outcomes that establish objective monitoring indicators and standards.
3. Attainable: the recreation area and the providers have the capacity to deliver
4. Realistic: focused on realistic outcomes that are actually achievable
5. Time-bound: committing providers to deliver by calendar benchmarks.

Although useful for comparing *general* differences among setting characteristics prescribed among the 10 RMZs, Figure 5 provides insufficient content about specific setting conditions to guide and constrain implementing actions. That necessary content is shown in Figures 6, 7, 8 and 9, both narrative and graphic. The narrative portion, Figure 6 consists of a tabular matrix of prescribed setting characteristics for each of 12 different setting attributes that comprise the three basic setting components: physical, social, and administrative. Prescribed conditions are those needed to produce and facilitate achievement of the outcome opportunities explicitly stated in management objectives. In this way, setting characteristics for each attribute are "customized" to facilitate production and attainment of the outcome opportunities targeted for each RMZ. Accompanying maps in Figure 7, 8 and 9 graphically depict the geographic extent of the prescribed settings for each of these three setting components. Both narrative and graphic representations of setting prescriptions are necessary if implementing actions are to be guided and constrained according to

| RABBIT VALLEY MOTORIZED AREA (Zone 2) | | |
|--|--|---|
| Management Objectives | By the year 2010, manage this zone to provide opportunities for visitors to engage in <u>Sustainable scenic, diverse motorized and mechanized play area for the Grand Valley</u> , providing no less than 75% of responding visitors and affected community residents at least a “moderate” realization of these benefits (i.e., 3.0 on a probability scale where 1=not at all, 2=somewhat, 3=moderate, 4=total realization) | |
| Outcomes | | |
| <u>Primary Activities</u> Motorcycle ATV Mountain bike riding Camping | <u>Experiences</u> Enjoying frequent exercise Access to a range of physical challenge Escaping everyday responsibilities for a while Savoring canyon-country aesthetics Enjoying easy access to diverse recreation opportunities. Developing skills, abilities and self-confidence | <u>Benefits</u> <u>Personal:</u> Improved physical fitness Better health maintenance Restored mind from unwanted stress Greater cultivation of outdoor-oriented lifestyle Improved outdoor knowledge, skills, and self-confidence Greater environmental awareness and sensitivity More well-informed and responsible visitors <u>Household & Community:</u> Improved cultivation of aesthetic appreciation for the area and an outdoor-oriented lifestyle <u>Economic:</u> Positive contributions to local-regional economic stability <u>Environmental:</u> Increased resource stewardship and protection by communities |
| Setting Prescriptions | | |
| <u>Physical</u> <i>Middle and front country with rural character along the north portion of this zone, due the proximity of the I-70 corridor. Mostly natural in appearance, with a number of rustic facilities including trails, restrooms, dispersed campsites and signage.</i> | <u>Social</u> Group size up to 45 Could have 30-35 encounters per day beyond encounters in staging or camping areas | <u>Administrative</u> Brochures are available for information and opportunities Agency personnel are periodically available Rules are clearly posted and use may be temporarily restricted due to permitted events or resource concerns due to weather Area accommodates multiple-use including OHV |

Figure 5. Management Objectives and Setting Prescriptions for RMZ No. 2

the requirements of BBM. In addition, outdoor recreation planners and managers should be aware of the need to prescribe setting characteristics for each attribute upon which the production and attainment of the outcomes targeted within each RMZ are dependent. For these reasons, the approved plan includes a tabular setting prescription matrix for each of the ten RMZs. These tabular setting prescriptions for the Rabbit Valley RMZ are portrayed in two parts in Figure 6,

because the print is not very legible if that figure was not split into those two parts. The complete set of tabular setting prescriptions for all 10 RMZs may be found on pages A-4-9 through A-4-18, Appendix 4 of the Proposed Colorado Canyons Proposed RMP/EIS. The final plan also includes an accompanying set of three setting prescription maps that differentiate, in color, the geographic extent of each of these three recreation setting components: physical, social, and administrative. These maps are reproduced as Figures 7-9. These same three setting prescription maps may also be found on pages 2-31 to 2-33 in the approved plan. The BLM's adaptation of the Recreation Opportunity Spectrum (ROS)(USDA, Forest Service, 1982) to write setting prescriptions recognizes some additional setting attributes (not included in the original ROS) that influence outcome opportunity production and attainment and therefore must be addressed. It also changes the title of "managerial" settings to "administrative" settings, because some BLM planners favored that change in terminology.⁸

⁸ Note from the first author of this report: Because he has authored published papers (e.g., Chapter 11 of Moore & Driver, 2005) that distinguish between the words "administration" and "management," he must (to avoid confusion) state that he disagrees with the BLM's use of the words "administrative settings" as used in Figure 6, other figures in this report, and in Appendix C of the BLM's Land Use Planning Handbook (which is reproduced as Appendix D of this report). His position is that "administrative settings" were more appropriately called "managerial settings" in the *ROS User Guide*, because they do not have anything to with administration as that term is commonly used in academic studies of public administration. To wit, notice that each of the "administrative" actions called for in Figure 6 denote actions to be taken by managers, not administrators. And, in retrospect, the physical settings should have been called bio-physical settings in the *ROS User Guide*.

Criteria for Descriptions and Prescriptions

Physical Setting Components: character of the natural landscape and built environment

| Setting Attributes | Primitive | | Back Country | Middle Country |
|------------------------|--|---|--|---|
| | Pristine | Transition | | |
| a. Remoteness: | G <i>More than 10 mi. from any road</i> ___ | G <i>More than 3 mi. from any road</i> ___ | G <i>More than ½ mile from any kind of road, but not as distant as 3 miles, and no road is in sight</i> ___ | G <i>On or near four-wheel drive roads, but at least ½ mile from all improved roads, though they may be in sight</i> ___ |
| b. Naturalness: | G <i>Undisturbed natural landscape</i> ___ | | G <i>Naturally-appearing landscape having modifications not readily noticeable</i> ___ | G <i>Naturally-appearing landscape except for obvious primitive roads</i> ___ |
| c. Facilities: | G <i>None</i> ___ | | G <i>Some primitive trails made of native materials such as log bridges and carved wooden signs</i> ___ | G <i>Maintained and marked trails, simple trailhead developments, improved signs and very basic toilets</i> ___ |

Social Setting Components: character of recreation & tourism use

| | Primitive | | Back Country | Middle Country |
|---|--|---|---|--|
| | Pristine | Transition | | |
| d. Group Size (other than your own): | G <i>Fewer than or equal to 3 people per group</i> ___ | | Q <i>4-6 people per group</i> ___ | Q <i>7-12 people per group</i> ___ |
| e. Contacts (with other groups): | G <i>Fewer than 3 encounters/day at camp-sites and fewer than 6 encounters/day on travel routes</i> ___ | | G <i>3-6 encounters/day off travel routes (e.g., campsites) and 7-15 encounters/day on travel routes</i> ___ | G <i>7-14 encounters/day off travel routes (e.g., staging areas) and 15-29 encounters/day en route</i> ___ |
| f. Types of Encounters: | G <i>Users plan trips to avoid others altogether</i> ___ | G <i>Take evasive actions for face-to-face avoidance</i> ___ | G <i>Users step aside to avoid unsafe conditions or user conflicts, sometimes grudgingly</i> ___ | G <i>Users may be unnerved but may not necessarily move off routes, areas, or sites to accommodate others</i> ___ |
| g. Personal Gear & Equipment: | G <i>Very basic gear, cell phones usually don't work here</i> ___ | G <i>Some convenience gear like cell phones but not radios</i> ___ | G <i>Expect hiking, climbing, & mountain bike gear (e.g., sportswear, bicycle helmets, etc.). Radios may also be playing</i> ___ | G <i>Expect to see gear associated with vehicle or off-highway vehicle use (e.g., body armor, etc.) Radios & music also</i> ___ |
| h. Evidence of Use: | G <i>Only footprints may be observed</i> ___ | | G <i>Footprints plus slight vegetation trampling at campsites & travel routes; litter only infrequent.</i> ___ | G <i>Vehicle tracks and occasional litter and soil erosion; vegetation becoming worn</i> ___ |

Administrative Setting Components: character of agency, local government, and private sector services and controls

| | Primitive | | Back Country | Middle Country |
|--------------------------------|--|---|--|--|
| | Pristine | Transition | | |
| i. Visitor Services: | G <i>None is available on-site</i> ___ | | G <i>Basic maps, but area personnel seldom available to provide on-site assistance</i> ___ | G <i>Area brochures and maps, plus area personnel occasional present to provide on-site assistance</i> ___ |
| j. Management Controls: | G <i>No visitor controls apparent. No use limits. Enforcement presence very rare.</i> ___ | | G <i>Signs at key access points on basic user ethics. May have back country use restrictions. Enforcement presence rare</i> ___ | G <i>Occasional regulatory signing. Motorized and mechanized use restrictions. Random enforcement presence</i> ___ |
| k. Domestic Animals: | G <i>No domestic animals allowed here</i> ___ | G <i>Dogs & pack livestock on designated routes and areas only</i> ___ | G <i>Dogs under control and pack livestock (horses & llamas) allowed, but only on designated travel routes</i> ___ | G <i>No controls on dogs and pack livestock other than standard regulations prohibiting wildlife harassment, etc.</i> ___ |
| m. Mechanized Use: | G <i>None whatsoever.</i> ___ | | G <i>Mountain bikes and perhaps other mechanized use, but all is nonmotorized</i> ___ | G <i>Four-wheel drives, all-terrain vehicles, dirt bikes, or snowmobiles in addition to non-motorized, mechanized use</i> ___ |

Figure 6a—Part 1 (Left Side): Targeted Setting Prescriptions and Existing Setting Descriptions for RMZ No. 2

Criteria for Descriptions and Prescriptions



= Existing Setting Descriptions



= Targeted Setting Prescriptions

| <i>Front Country</i> | <i>Rural</i> | <i>Urban</i> |
|---|---|--|
| G On or near improved country roads, but at least ½ mile from all highways | G On or near primary highways, but still within a rural area | G On or near primary highways, municipal streets, and roads within towns or cities |
| G Landscape partially modified by roads, utility lines, etc., but none overpower natural landscape features | G Natural landscape substantially modified by agriculture or industrial development | G Urbanized developments dominate this landscape |
| G Improved yet modest, rustic facilities such as campsites, restrooms, trails, and interpretive signs | G Modern facilities such as campgrounds, group shelters, boat launches, and occasional exhibits | G Elaborate full-service facilities such as laundry, groceries, and book sales |

Social Setting Components: character of recreation & tourism use

| <i>Front Country</i> | <i>Rural</i> | <i>Urban</i> |
|--|---|--|
| Q 13-25 people per group | Q 26-50 people per group | Q Greater than 50 people per group |
| G 15-29 encounters/day off travel routes (e.g., campgrounds) and 30 or more encounters/day en route | G People seem to be everywhere, but human contact is still intermittent | G Other people constantly in view |
| G Users here routinely expect, welcome, and accommodate other visitors | G Because crowd tolerance is a necessary condition for being here, encounters tend to be impersonal | G Here people accept but routinely ignore multiple crowd interactions |
| G Variety of traditional camper trailers, pop-up tents, & conventional tents. Radios, and music common | G Upscale motor homes common, dependent on utility hookups or generators to support home conveniences and gadgets | G Very specialized gear dependent on service provider assistance (e.g., boat slips, grounds keepers, caretakers) |
| G Well-worn soils and vegetation, but often gravel surfaced for erosion control. Litter may be frequent. | G Paved routes protect soils and vegetation but the presence of noise, litter, and facilities is pervasive | G A busy place with what seems like constant noise. Unavoidable litter seems to be a lifestyle choice |

Administrative Setting Components: character of agency, local government, and private sector services and controls

| <i>Front Country</i> | <i>Rural</i> | <i>Urban</i> |
|---|--|---|
| G Information materials describe recreation areas and activities. Area personnel are periodically available | G Information described to the left, plus experience and benefit descriptions. Area personnel do on-site education | G Information described to the left, plus regularly scheduled on-site outdoor skills, demonstrations, and clinics |
| G Rules clearly posted with some seasonal or day-of-week use restrictions. Periodic enforcement presence | G Regulations prominent. Total use limited by permit, reservation, etc. Routine enforcement presence. | G Continuous enforcement to redistribute use and reduce user conflicts, hazards, and resource damage |
| G Dogs on leash and pack livestock only in designated areas within recreation sites. Both under control elsewhere | G Dogs on leash everywhere and pack livestock allowed only in designated areas | G Dogs on leash everywhere and pack livestock allowed only under specific use authorizations and stipulations |
| G Two-wheel drive vehicles predominant, but also four wheel drives and non-motorized, mechanized use | G Ordinary highway auto and truck traffic is characteristic | G Wide variety of street vehicles and highway traffic is ever-present |

Figure 6b—Part 2 (Right Side): Targeted Setting Prescriptions and Existing Setting Descriptions for RMZ No. 2

Blocks of Figure 6 above that have heavy borders describe setting conditions as they existed at the time the final plan was written, whereas the shaded blocks denote prescribed setting conditions to be used to guide plan implementation. Unfortunately, to make Figure 6 legible/readable, it had to be presented in two parts. Part 1 shows the right side of that figure, and Part 2 shows the left side. Set side-by-side, one may read across the page, beginning with the 12 setting components listed on the left margin.

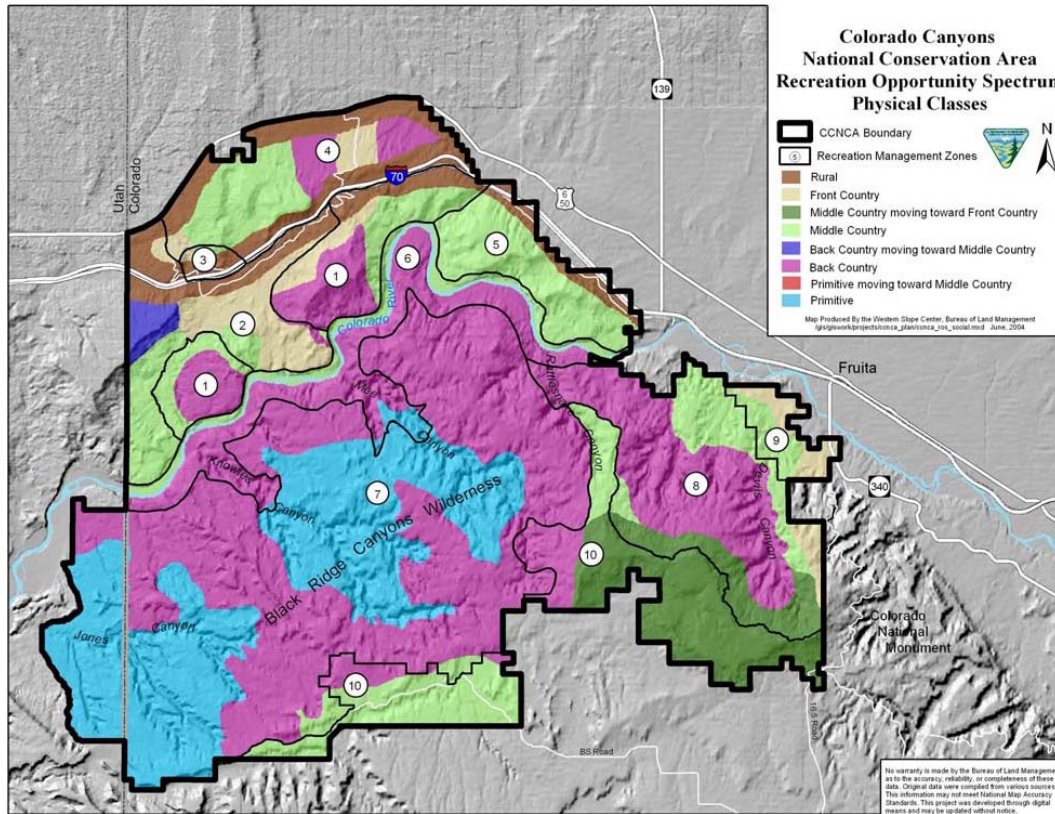


Figure 7. ROS Physical Settings Map

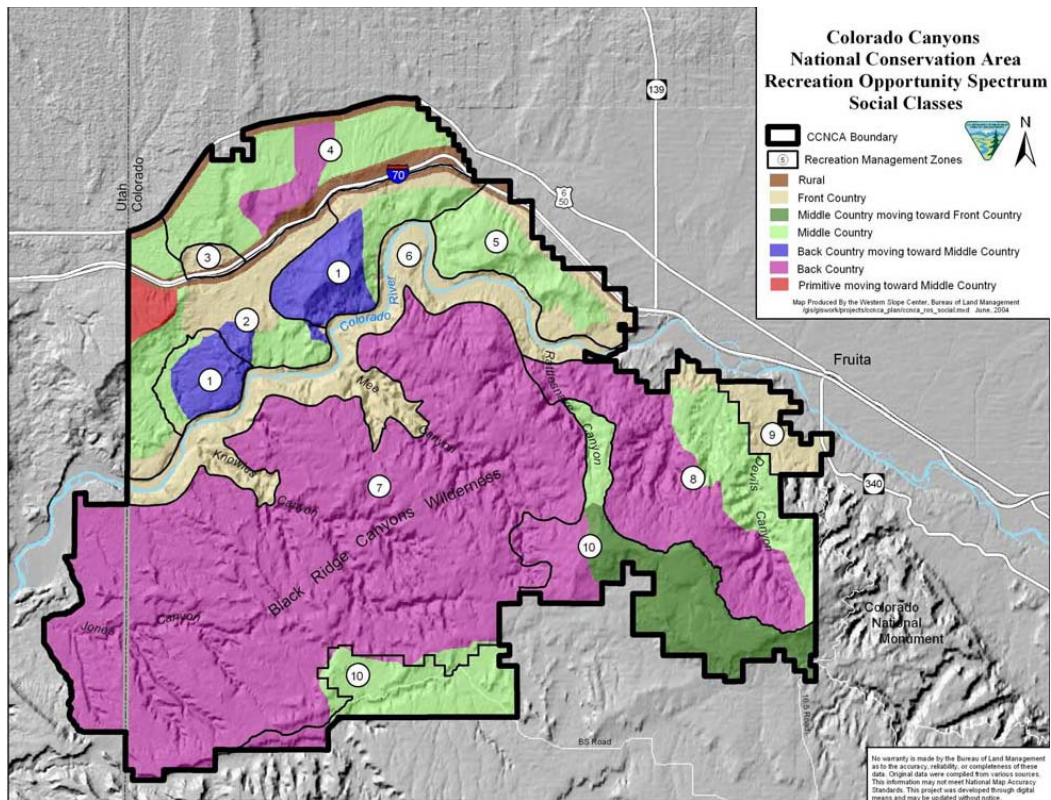


Figure 8. ROS Social Setting Map

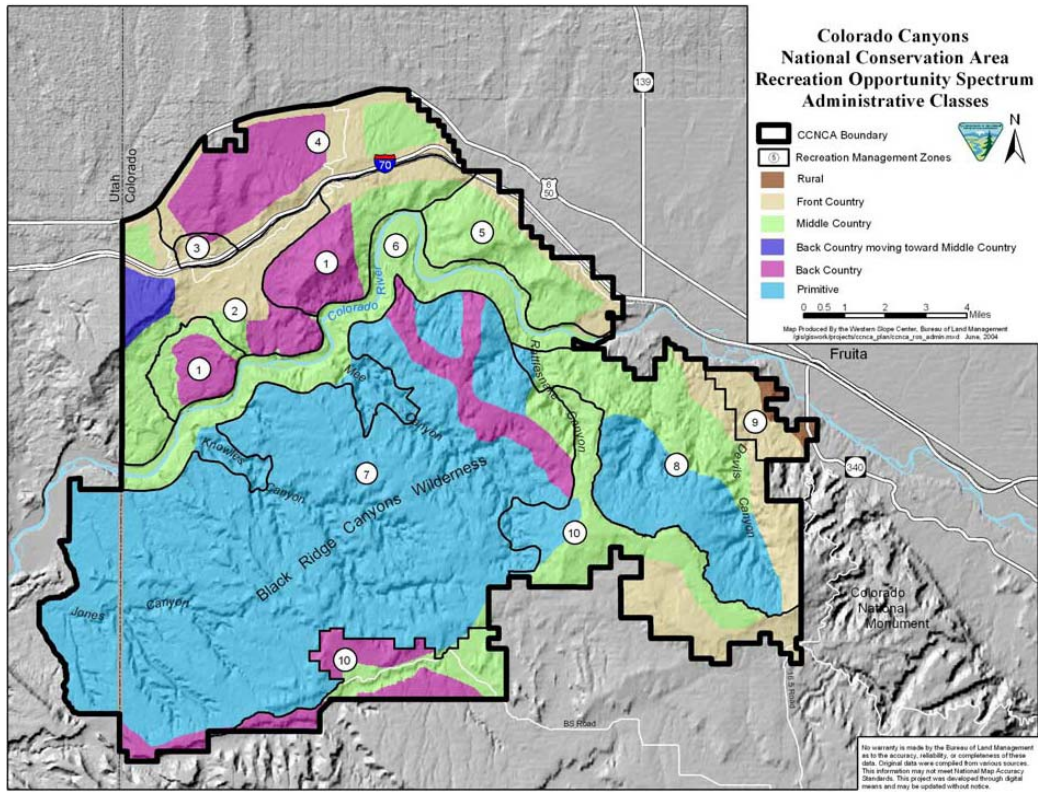


Figure 9. ROS Administrative (Managerial) Setting Map

In summary, a good job was done of not only meetings the two requirements of BBM considered here, and it has helped guide other applications of BBM

Define the Essential Recreation-Tourism Service Environment (15th)

Because the NCA plan was written before current BLM LUP Handbook guidance (see Appendix D of this report) was updated to incorporate BBM. Therefore, the approved plan did not specifically attempt to meet this requirement. However, the public involvement efforts and the scoping of issues and concerns did consider many elements of the recreation-tourism-related service environment during development of that plan. For example explicit attention is given in the plan to guides and outfitters and other associated providers. Had the current guidance of the LUP Handbook been in place, other key players in the local recreation-tourism service environment would have been identified.

Absent the identification of all affecting and affected providers for each RMZ, it is difficult to identify the potential effects each will have on outcome production and attainment or the role each needs to play in changing or maintaining desired recreation setting characteristics, the consequent kinds of outcome opportunities being produced, or which outcomes are being realized and to what extent. This makes the completed plan less than useful for managers as they seek to successfully engage key affecting providers as managing partners.

Evaluate Alternatives and Select the Preferred Alternative (16th)

Remember that the plans for the RC/BR area and the NCA were both comprehensive (integrated) multiple-use resource management plans, and not plans solely oriented to recreation. Section 1-3 of the approved NCA plan discusses the four alternatives considered and explains why “Adaptive Management” instead of one of the other three alternatives, including the “Recreation Emphasis” was selected as the preferred alternative. To be sure, there was not a ranking of alternatives on the basis of recreation alone, but it is highly unlikely that the planned action for that BBM-guided component in the approved plan would have been significantly, if at all different, if any of the other three alternatives had been chosen. Because the draft NCA plan was written within an activity-based framework, the various alternatives were comprised only of different kinds of actions to be implemented, and those only by the BLM (e.g., “Trail Proposals,” “Dirt Road Proposals,” “Camping,” “Target Shooting,” “Facilities,” “Interpretation/Education,” “Permits”). A reasonable range of outcome opportunities was therefore not addressed, and outcomes consequently did not figure into the evaluation of alternatives. While all of this happened prior to the BLM’s formal adoption of BBM as its planning and management framework for Special Recreation Management Areas, the omission is nonetheless noted here to clarify what was and was not done.

Phase 4: Develop an Implementation Plan

The five requirements of the normative model of Phase 4 all relate to development of a multi-part implementation plan that is not only required by BBM but also by the BLM's current Land Use Planning Handbook (see Appendix D of this report). Phase 4 requires that such an implementation plan: (1) *identify* management actions to be implemented; (2) *identify* marketing actions to be implemented; (3) *identify* monitoring actions; (4) *identify* supporting administrative actions; and (5) *provide* ample opportunities and time-frames for review of the proposed plan. In the forgoing critique, each requirement (i.e., step) of the normative model for applying and implementing BBM has been evaluated separately (except for the related requirements to develop management objectives and setting prescriptions). In this section, all five of the just-listed requirements of Phase 4 of that model are also considered separately as before but all under the above Phase 4 heading. That is done, because the "Implementation Framework" section of the BLM's current LUP Handbook (Appendix D of this report) had not been written when the NCA plan was being developed, and a separate implementation plan was not required then. Nevertheless, these implementation actions are an important part of applying and implementing BBM as reviewed in Appendix B of this report and described in detail in Chapter 3 of the companion text. And, while planned implementation actions are no longer the only component of effective recreation plans, they can be the most important part, because if planned actions are not implemented, the plan is essentially for naught. Furthermore, if implementing actions are not directed by benefits-based management objectives and setting prescriptions, they will be inadequate to achieve those approved outcomes and conditions. Implementation actions addressed in the final plan were limited to only those to be done by the BLM. Neither the actions of key private-sector service providers nor of local governmental providers necessary to achieve recreation management objectives were addressed. The significance of these omissions varies in direct proportion to the degree in which the sustainable production of targeted outcome opportunities and their attainment depends on the actions of others outside of the BLM (i.e., by associated providers as explained in Part 1 of Appendix B of this report)

Identify Management Actions to be Implemented (17th)

As indicated in an above section, management objectives and setting prescriptions were specified for each of the ten RMZs of the NCA. The same holds true for management actions, and they are shown on pages 2-37 to 2-61 of the approved NCA plan. Figure 10 below shows those for RMZ-2. Other management direction for recreation is given on pages 2-17 to 2-34 of the approved plan. But, it should be pointed out that most of those other managerial directives are not related to the requirements of BBM. That deficiency caused this BBM requirement to only be partially met. Using 20-20 retrospective hindsight, several things would have helped overcome this deficiency: (1) had the planners and managers had access to current BLM LUP Handbook guidance, the plan could have been improved and (2) the planners did not have access to what has been learned recently about other implementation requirements that are needed to guide, constrain, and balance all management actions to achieve approved management objectives and setting prescriptions. One reviewer of this report wisely observed that it would further the intent of managing for outcomes if a requirement were added to couple each action with a rationale statement specifying why that action is needed at all. If the plan is truly

benefits-based, then that rational would be written in terms of the outcome opportunities to be produced or the essential setting characteristics to be provided and maintained.

Identify Marketing Actions to be Implemented (18th)

The marketing actions included in the approved plan are deficient. Only the first pertains to marketing in its broadest sense, and the other two address partnership actions that are actually supporting administrative actions, the topic considered in a later section. Even though current BLM guidelines for making marketing plans were not available when the plan was developed, it is a little surprising that more marketing planning was not included, because relevant information was available to do so. For example, both local and statewide tourism marketing efforts feature the NCA's superlative scenery and outdoor recreation attractions. In particular, the Rabbit Valley motorized area (RMZ-2) is the "busiest" of the entire NCA; it adjoins I-70 and has access ramps to the area that invite thousands of people to that area. Therefore, this section of the plan could have specified visitor informational, promotional, educational, and interpretive actions designed to adequately inform customers about the types of recreation activities and associated outcome opportunities, recreation settings, and services provided and available. Since the BLM is not the only purveyor of this information, the marketing plan also needs to further identify the BLM's marketing role and active partnerships relative to the tourism industry that includes both on- and off-site service providing businesses and local governments.

There are other reasons why a more detailed marketing plan is needed. Although the boundaries of RMZ-2 are appropriately drawn in the final plan, it is important to recognize that visitors must pass through this area on their way to at least three other distinct but contiguous RMZs. Unless those visitors' knowledge of the distinctly different recreation opportunities provided in those RMZs is to be assumed, that information must be provided at key staging areas within RMZ-2 and include information about targeted recreation activity and outcome opportunities, prescribed setting conditions, available services, travel routes and appropriate modes of travel, and so on that is relevant to those four related RMZs.

| RABBIT VALLEY MOTORIZED AREA (Zone 2) | |
|--|--|
| Management and Marketing Actions | |
| <p>Management Actions:</p> <p><u>Roads and Trails</u></p> <p>Restore closed roads that have no administrative benefit & are not included in range allotment agreements</p> <p>Modify roads and trail as needed to mitigate impacts</p> <p>Rehab non-designated trails and trails that are closed unless there is a potential future use</p> <p>Develop multiple-use single-track trails on Harley Dome (#9 on Map)</p> <p>Relocate Trail #2 off the valley floor to the escarpment west of the main entrance (#11 on map)</p> <p>Connect Trail #4 to Trail #3 along the upper escarpment (#12 on map)</p> <p>Relocate Trail #3 to the opposite side of the drainage and connect to Trail #4 (#13 on map)</p> <p>Relocate Trail #4 and Trail #5 to on the valley floor to the dry wash that runs east-west in the same area (#15 on map)</p> <p>Designate multiple-use single track trail from stock pond west of Trail through Time, head west to State line and south to dirt road (#16 on map).</p> <p>Close dead end spurs that lateral south from the frontage road if no purpose is identified (#14 on map)</p> <p>Close and rehab route north of I-70 near Utah border (#21 on map)</p> <p>Contain parking facilities to prevent encroachment</p> | <p>Harden surfaces at parking areas, trailheads, & campsites only when needed to prevent resource impacts.</p> <p><u>Camping</u></p> <p>Construct formal campground if BLM successfully acquires the Joufflas in-holding</p> <p><u>Other</u></p> <p>Develop a large area for recreational parking & events (#5 on map)</p> <p>Consider developing & designating a 2nd group-use site at the disturbed alcove location</p> <p>Develop and implement a site plan for the Rabbit Valley entrance vicinity south of I-70</p> <p>Marketing Actions:</p> <p>Develop comprehensive interpretive plan which includes all aspects of interpretation, education, and public outreach</p> <p>Strive to involve user groups, volunteers, and other interested public to help maintain resources through partnerships, adoption programs, special events and/or a “friends group”.</p> <p>Identify partners and develop “Friends” group to assist BLM in outreach and education</p> |

Figure 10. Management and Marketing Actions for RMZ No. 2.

The foregoing critique was intended to describe what should have been done and not to discredit the authors of the NCA plan. It is explicitly acknowledged here that this portion of the plan was written when current BLM guidelines were not yet available and also when the draft plan was being revised into the approved plan with tight time-frames to get BBM back on track while attempting to meet the planning deadline. On a positive note, it is also acknowledged that since marketing actions include outreach, education, and interpretation, the planners and managers of the NCA are to be complimented on the useful educational brochures that have been made available. They: provide maps of the NCA and its different RMZs such as Rabbit Valley, the Trail Through Time, Devil’s Canyon, etc.; describe the natural, geographical, and cultural features of the areas; explain what types of recreation opportunities are available; define the rules and regulations that exist for the area and subparts of it; and encourage visitors to use the areas to protect and maintain the conditions of the settings on which satisfying recreation experiences and other benefits depend. In particular, the “Visitor Guide” developed for the NCA and the contiguous Colorado National Monument is an excellent guide that among other things briefly

explains and promotes BBM. For example, on page 6, this statement is made "...from the visitor's perspective...benefits based management helps people make better recreation choices when visiting the NCA. Recreation experiences will likely be improved because visitors are matched with the appropriate zone offering their desired recreation activities, experiences and [other]-benefits."⁹ Earlier on that page, the guide states "... the NCA is divided into ten different recreation, management emphasis zones. *BLM wants to help you find the zone that offers you the recreation activities, experiences and [other] benefits that you want.*" The boundaries and characteristics of each zone are described in the guide.

Identify Monitoring Actions (19th)

Monitoring Actions along with Administrative Actions for each of the NCA's ten RMZs are outlined on pages 2-37 to 2-61 of the approved plan. Figure 11 below shows those actions for RMZ-2. Page 1-8 of the approved plan for the NCA states "The BLM planning regulations (43CFR 1610.4-9) call for the monitoring of resource management plans on a continued basis with a formal evaluation done at periodic intervals. Implementation of the CCNCA plan will be monitored over time. Management actions arising from activity plan decisions will be evaluated to ensure consistency with RMP objectives. A monitoring and implementation plan will be developed for the CCNCA through a similar public collaboration process as was done for the RMP planning process."

This quoted text reveals that NCA planners hesitated to make the monitoring commitments required by BBM. Social and environmental indicators and standards had been clearly outlined in the RC/BR plan, so it is difficult to surmise that planners did not know what to monitor or how to do it. It is more probable that they deferred addressing monitoring actions to a follow-up monitoring and implementation plan because compressed time-frames (having decided to re-institute an outcomes-focused planning framework after publication of the draft plan) left inadequate time to outline monitoring methods and schedules for each of the various indicators to be addressed under BBM. BBM requires the on-going collection of multiple types of data gathered through several different methods, each corresponding to the different components of recreation production. Monitoring indicators and standards for the social settings are derived from management objectives; environmental indicators and standards are derived directly from setting prescriptions; and administrative indicators and standards may be derived directly from implementing actions. Most of those administrative indicators and standards (i.e., what the BLM and its collaborating business and local government providers should do as the plan commits them to) is missing, because they are only implied and not specified in the approved plan, as discussed in the next section. Absent these monitoring components, implementation of approved plan allocation decisions for the NCA continues to be hampered. However, to their credit, the manager and recreation planner of that NCA are currently in the process of revising implementation sections of the approved plan.

One reviewer perceived that the absence of any action calling for a re-assessment of customer preferences was a significant omission from the NCA plan. However, done right, the monitoring of social indicators for the standards outlined by outcome-focused management objectives will address not only the attainment of targeted outcome opportunities but also the

⁹ The word "other" was inserted in brackets to emphasize, that BBM identifies satisfying experiences as one type of benefit of leisure, as explained in Part 1 of Appendix B of this report. Therefore, the words "experiences **and** benefits" erroneously imply that satisfying experiences are not benefits.

degree to which each is yet preferred or highly-valued. That observation was also coupled with another suggesting that one possible solution to having inadequate funding to do step-down implementation plans would be to address Implementation Decisions concurrently with Land Use Plan decisions in the Resource Management Plan. This was done in the NCA plan, but several factors have proven those actions to be inadequate in guiding proactive implementation of the final NCA plan. Many actions were simply carry-overs from actions identified in the activity-based draft. Actions included in that plan further suggest that the newness of BBM to planners was constraining as were compressed time-frames, thus precluding the more thorough identification of the most necessary functional inputs. These observations seem to be borne out by the follow-up implementation planning efforts now underway by NCA managers and staff. It is now known that follow-up implementation planning, within an outcomes-focused context, no longer needs to be viewed as something either inordinately time-consuming or costly. Because BBM requires continuous monitoring to ensure that actions keep plan implementation on, planners have begun to appreciate that implementation plans continue to be adjusted in response to monitoring feedback and, of necessity, remain fluid.

| VALLEY MOTORIZED AREA (Zone 2) | |
|--|--|
| Administrative and Monitoring Actions | |
| <p>Administrative Actions:</p> <p><u>Roads and Trails</u> All motorized/mechanized use is limited to existing trails & roads. Designate trail south of and running parallel to I-70 as non-motorized (#22 on map) Avoid locating trails near known paleo/cultural sites except where specifically intended for interpretation Travel management signage must adhere to BLM Colorado Uniform Sign Standards Designate & maintain all dirt roads for public access & close non-designated roads. Equestrian use limited to designated trails only</p> <p><u>Other</u> All dogs need to be on leash in high-use areas Dogs under voice control elsewhere Coordinate with Moab BLM for continuity</p> <p><u>Permits</u> See <u>Special Recreation Permit Program</u> in Chapter 2</p> | <p><u>Camping</u> Limited to no more than 7 consecutive nights Portable toilets are mandatory for overnight dispersed use All open fires must be contained in fire pan (no fires rings) No wood cutting Dispersed camping sites not designated unless monitoring shows unacceptable impacts.</p> <p><u>Shooting</u> No discharge of any projectile (i.e. target shooting)</p> <p><u>Hunting</u> Hunting allowed in conformance with DOW regulations</p> <p><u>Visual Resources Management</u> Class III - northern portion near I-70 corridor Not Rated - most of southern portion</p> <p>Monitoring Actions: Assure objectives are being met and prescribed settings are being maintained Monitor implemented actions and evaluate A mandatory, no-fee, self-registration system would be implemented for the entire CCNCA by January 1, 2010 to contribute data on visitor use, group size, and other trends to support adaptive management of the CCNCA.</p> |

Figure 11. Administrative and Monitoring Actions for RMX N0. 2

Identify Supporting Administrative Actions (20th)

A wide range of administrative actions are required to support virtually all recreation field operations. They include visitor services, controls and restrictions, permits and fees, sustainable funding, and both collaborative (with other affecting providers) as well as implementing partnerships with volunteers and organized users and interest groups. Those actions shown in Figure 11 for RMZ-2 are limited mostly to controls and restrictions. Here again the planning effort's tight time-frames and 11th hour shift from activity-based management to the expanded benefits-based management approach again clearly hampered efforts to comprehensively address all needed supporting administrative actions. For example, the NCA's close proximity to the urban Grand Junction and Fruita communities and both BLM and its customers' dependence on both private sector business services and local government infrastructure underscore the importance of having a viable administrative actions plan. That need is further revealed by unmet needs for funding to sustain the delivery of essential services, public and private, and fair value-fair return policies of the BLM further require addressing user fees beyond existing commercial Special Recreation Permit requirements.

Provide Ample Opportunities and Time-Frames for Review of the Proposed Plan (21st)

Section 5.4 of the approved NCA plan documents that this requirement was met well.

Phase 5: Adjust Management/Implementation Plan as Needed and Approve Final Plan

Good reviews of the draft RC/BR plan enabled planners be more objective about it content and assemble a better approved plan. This happened in stages. The first and most helpful was that provided by other agencies and their academic partners who provided a benchmark review of initial plan development on a 1994 field trip. Orchestrated by the first author of this report, that field trip facilitated useful dialogue about how to assess visitor preferences, structure management objectives, relate them to the character of recreation settings, and ensure the provision of services essential to the production of targeted outcome opportunities. It was at that meeting that participants from the US Forest Service, social scientists experienced in working with BBM, and others agreed on the need to line up both the functional recreation provider inputs (i.e., management, marketing, monitoring, and administrative support) and the recreation setting character attributes which determine outcome opportunity production *before* deciding which outcome opportunities should be targeted as management objectives. Additional useful reviews at the draft stage of RC/BR plan development were also useful in restructuring the final plan.

For the draft NCA management plan, review comments for recreation only addressed management actions, because the activity-based planning framework under which it was developed addressed no other recreation plan components. The BLM's managers and planners therefore did not have the benefit of seeing comments offered from diverse perspectives normally afforded by a public review. Nevertheless, the Grand Junction Field Office land-use planner, the NCA recreation planner, and the acting NCA manager expeditiously moved recreation sections of the NCA plan from draft to approved, transforming it into a benefits-based plan. Having decided to re-adopt BBM as the conceptual framework for the NCA, all activity-

focused draft plan content had to be restructured within the more all-encompassing outcomes-focused framework (i.e., beyond managing resources, facilities, and visitor controls). Most notably, that included identifying the setting characteristics essential to the production of desired outcomes and targeting a select set of those as explicitly-stated management objectives. For input, planners went back to the draft RC/BR plan as a starting point, reviewed results of the studies by Northern Arizona University, and combed through the output of numerous meetings to update the RC/BR management objectives and setting prescriptions. The draft management plan was further revised in response to other public review comments.

The content of functional inputs (i.e., management, marketing, monitoring, and administrative support) that were included within the draft plan were also changed. Because that draft plan consisted only of implementation actions, necessary revisions to the draft plan were limited, but the amount of work to be done had increased. Had the draft plan addressed all components of recreation production (as required by BBM), planners would have had a head start on the final plan. Two significant challenges were involved in rewriting the plan from draft to final. First, assembling the final plan therefore required carefully adding outcomes-focused components missing from the draft plan; and secondly, every effort was made to remove unnecessary activity-focused elements included in the draft plan (i.e., actions which may have looked appropriate absent outcome-based rationale for their inclusion). The BLM had to ensure that all implementation actions required to achieve the plan design had been adequately addressed. At the same time, planners also had to ensure that only the minimum implementation actions required to achieve prescribed setting character and produce targeted outcome opportunities were included in the final plan.

Phase 6: Implement Plan and Adjust Field Operations Accordingly

The foregoing section discussed deficiencies in developing planned implementing actions required by Phase Four of the model being used to guide this critique. That discussion also considered the reasons for those deficiencies, especially the planners' not having later-developed BLM land use planning guidelines for developing those planned implementation actions (see Appendix D of this report) and their facing severe time constraints to getting the plan finished, reviewed, and approved by the required deadlines after BBM planning got back on track. Despite these problems, the conclusion of the authors of this report is that the current manager and recreation planner of the NCA and the manager of the BLM's Grand Junction Field Office are doing a good job of implementing that plan, especially given the constraints under which they must operate.

Phase 7: Revise the Plan as Needed or Required by Agency Directives

An on-going revision of planned implementation actions is a necessary condition of adaptive management under BBM. It requires identifying which components of the plan need to be adjusted over time and to what degree through the continuous gathering and evaluation of monitoring feedback. Sensing the need for more definitive plan implementation guidance, the new NCA manager and recreation planner have begun to revise implementation actions outlined in the final plan. Hopefully, they will include monitoring methods and schedules so that the continuous evaluation of monitoring feedback can promptly get underway. None of these kinds of adjustments to or revisions of implementation decisions constitute revisions of the approved

plan for the NCA. They are not allocation decisions, and the BLM therefore does not require the revision of the plan. Determinations of any need to do that will come from monitoring that discloses that management objectives or setting prescriptions need to be changed.

Phase 8: Ensure that Performance Reports and Evaluations Document and Recognize the Production and Attainment of Targeted Outcomes as Feasible

Especially since passage of the 1993 Government Performance and Results Act (GPRA) and the proliferation of articles in professional journals (notably “Public Administration Review”) on performance reporting and evaluations, ever increasing attention has been and is being devoted by public agencies at all levels of government to improving the periodic reporting and evaluations of their the performance and that of their employees. Problematic from the perspective of BBM is the fact that practically all reports and evaluations of public park and recreation agencies have focused on reporting the production of facilitating outputs, numbers and types of recreation activity opportunities provided and uses, and resource protection and improvement, with little reporting done of the degree to which targeted outcomes were attained and sustained.

It is emphasized that attainment of targeted outcomes needs to be better incorporated within performance evaluations of all public park and recreation agencies, and their administrative subunits, and also into the periodic evaluations of recreation managers and planners. Those employees will then respond to what is expected of them professionally and especially with the formal recognition they receive for meeting the requirements of the agencies for which they work. Individuals must be rewarded and formally recognized for the attainment of targeted outcomes, because this goes hand in hand with the spirit and the proper application of BBM.¹⁰

Lessons Learned

The BBM model that is reviewed in Part 2 of Appendix B and was used in this report to evaluate the application and implementation of BBM on the NCA has evolved over at least four decades of published writings about: why people engage in leisure activities and what they obtain from such engagements; what do park and recreation administrators, planners, and managers need to understand about the production of recreation opportunities and the associated positive and negative outcomes; and what actions must those practitioners take to efficiently, effectively, and responsibly optimize the benefits of recreation to their customers and society.

Although improved considerably since it was first proposed in General Systems Theory terms (Driver & Rosenthal, 1982: 7-10), the BBM model is still evolving. Many of the lessons learned since 1991 from applying and implementing BBM on the RC/BR area and the NCA have contributed significantly to refinements in BBM. Important contributions to that evolving refinement of BMM have also been made from the lessons learned from other applications of BBM in municipal areas and on wildlands that were started and completed before the plans for

¹⁰ A rather large section at the end of Chapter 3 of the companion text was devoted to explaining why more attention needs to be given to outcomes in performance reporting and evaluations of public park and recreation agencies and of recreation managers and planners.

the RC/BR area and the NCA were approved. For example Chapters 7-24 of the companion text (described in Appendix A of this report) describe applications of BBM in different areas in the U. S. (including three BLM areas) and three other countries. For that reason, it is impossible to accredit specific refinements of BBM to specific lessons learned from this application of BBM. Nevertheless, specific lessons learned from applying and implementing BBM on this area are described below:

- It is absolutely necessary that supervisors and managers responsible for applying and implementing BBM understand and support it.
- All recreation planners involved must also understand and support BBM. This requires a willingness to restructure traditional activity-based recreation programs and projects, funding and partnerships, and staffing.
- Logical RMZs must be delineated in terms of the types of recreation opportunities and outcome goals that can be attained in each. When dissimilar RMZs are combined, as they were early in the planning for the NCA, the requirements and logic of BBM are not being applied. From both assessment and management perspectives, this leaves different markets and niches within the same RMZ, which provide wildly different recreation opportunities and outcome desires and preferences. Planners and managers need to agree on logically manageable units as RMZs, each having its own distinctive recreation outcome opportunities.
- All customer assessments (i.e., informal interviews, focus groups, and visitor surveys) must be oriented to logical RMZs. Residents of local communities should be considered as customers as much as the on-site visitors, because they are also recipients of the improved, maintained, and worsened conditions that result from public lands recreation use and management, whether they are participants or affected residents. Key local governmental officials, relevant owners of local businesses and other associated providers should also be actively involved as integral partners in the collaborative planning and management of public wildland recreation resources and services.
- All customer assessments must establish and maintain a useable response context that relates individuals' recreation preferences for experiences and other benefit outcomes to most satisfying RMZs and most satisfying activities. That response context must further ensure that setting preference assessments not simply identify what people desire but the setting conditions they believe must be provided and maintained in order for them to achieve their most highly valued outcomes.
- Response formats used in customer assessments should disclose enough variance in responses to enable managers to exercise at least as much discretion in managing public lands recreation attractions as do visitors in deciding where to go and what to do. For example a seven-point Likert (bipolar) response format (e.g., -3 through +3 with a neutral middle point of 0) provides managers much greater ability to differentiate between "neutral, somewhat, moderate, and very" expressed strengths of attitudes, preference, or opinions than does a bipolar response format that permits the respondents a more limited range of options, such as on of a five-point response format (which is too frequently used or even a binary "Yes" or "No" one). But, it should be mentioned that a unipolar scale (i.e., one measuring opinions or preferences toward only one polar position, such a No to Very Strong Preference or opinion in contrast to registering preference or opinions **both** for and against on a

bipolar response format) also has its place in customer assessments. The major recommendation is that these technical decisions should be left to truly professional people who have proper training and experience in making surveys and related assessments and in analyzing and interpreting the results. Too frequently, recreation planners and managers hire people to do those tasks who do not have the requisite skills and/or attempt to design the assessment instruments themselves lacking adequate skills to do so.

- All recreation planners and managers involved must also understand and support BBM. They must understand BBM's planning processes and application requirements and be committed to shifting field operations beyond activity-based program and project management, before they begin any attempt to plan or manage under BBM guidelines.
- Specific outcomes-based management objectives and setting condition prescriptions (i.e., that address all components of the relevant physical, social, and administrative setting attributes) must be developed for each RMZ.
- Under BBM, implementation decisions may no longer promote just the traditional activity-based programs and projects but instead facilitate the production and attainment of desired experiences and other beneficial outcomes and reduction of negative outcomes.
- An implementation plan must be developed that identifies all essential management, monitoring, marking, and administrative actions required (i.e., of the BLM and other necessary recreation-tourism service and infrastructure providers) to achieve approved management objectives, setting prescriptions for targeted markets and niches.
- All implementation plan decisions must be both directed and constrained by the benefits-based management objectives and setting prescriptions targeted for each RMZ and corresponding market niche.
- Managers and planners need to understand that responsive application of BBM is a very dynamics process that requires adaptive flexibility to achieve desired results.

Recommendations

The recommendations gleaned from this case study report are outlined below:

- An attempt should be made to meet all the requirements of the normative model for applying and implementing BBM described in the companion text and reviewed in Part 2 of Appendix B.
- Train all recreation staff as an essential step in shifting from activity-based project and program management to managing for outcomes.
- Insure that BBM training for all managers is provided and structured to ensure that key recreation staff is present.
- Develop a one-day field managers' course that addresses both preparation and implementation of land use plans within a BBM Framework
- Complete the above training and follow up with a reality check that necessary understanding of BBM is reflected by on-going field operations before beginning any BBM planning effort. Motivate or empower someone with a position of

authority or influence over the above players to make this happen, because it is not automatic.

- Create, empower, and make ready a strike team of recreation professionals who are experienced in both doing and teaching the above to help the recreation managers and planners.
- Because the BLM's Executive Leadership Team has directed use of BBM in all of the BLM's SRMAs (see Appendix C of this report), that team needs to also ensure that recreation program funding is redirected away from the advancement of activity-based programs and projects and towards adequate hands-on training, field assistance, and implementation of BBM plans. Doing so would provide incentive for managers and planners to embrace and adopt the BBM framework.
- More attention needs to be given to targeted outcomes in agency and personnel periodic attainment reports and evaluations. Some of that can be done in an objective and quantifiable manner, and some must be done in a more qualitative/narrative manner.
- Managers in charge of the relevant organizational units should understand and embrace:
 1. The need for restructuring (i.e., directing and constraining) all recreation programs, initiatives, projects, and field operations (i.e., management, marketing, monitoring, and administrative) to facilitate the production and attainment of targeted experiences and other beneficial outcomes by targeted market niches through maintenance of prescribed setting characteristics.
 2. The concept that managing under BBM requires that they understand and embrace the necessity of guiding and restricting all program actions to fit within approved recreation setting prescriptions and not use BBM as a cover to continue advancing program initiatives and activity-based projects.
- Recreation planners should understand and embrace:
 1. The need for expanding the working definition of "customer" to include both as do on-site recreation participants.
 2. Recreation management best practices that encompass new (i.e., to much of the BLM) recreation-tourism markets that have become important visitors to the public lands to tour, visit resorts, ski, enjoying villages and special events, and visit friends and relatives.
 3. The need to dispense with all projects and programs which are not related to approved management objectives and setting prescriptions.
 4. The need to integrate recreation program actions, initiatives, and projects across all traditional activity-based programs within recreations most basic functional inputs: management, marketing, monitoring, and administrative support.

- Park rangers and recreation technicians should understand and embrace:
 1. A commitment to stop advancing project and facility development merely to advance additional recreation activity or the desires of activity-based programs and interests.
 2. The need to shift field operations away from project and facility development to manage and market dispersed recreation-tourism for the expressed purpose of providing sustainable outcome opportunity production and attainment.
 3. The need to restrict facility development (e.g., trails and sites) and provide both sustainable on-site management presence and visitor information geared to maintain the dispersed character of recreation settings and facilitate the attainment of resource dependent, dispersed recreation outcomes for markets for undeveloped recreation opportunities.
 4. The need for continuous monitoring to ensure that the above conditions are met, that management and marketing actions are continuously adjusted, fully integrated and supported but not driven by supporting administrative actions.
- There is a need for more careful attention to the design of user preference studies and other assessments. The list of possible outcomes studied must be at least as diverse and inclusive as are the outcomes feasibly attainable in the RMZs for which customer preferences are being assessed. For the NCA in particular, its ten RMZs are very diverse, as are its customers. Both factors suggest that a truly usable assessment would have to include questions about all of the most relevant experiential and other beneficial outcomes and negative outcomes to be avoided for each of these RMZs. Put simply, there is a need that assessment methods and instruments be designed to obtain needed information that is managerially useful. It is not enough to simply determine what customers want; planners and managers need to understand how customer desires vary within and among RMZ. Furthermore, customer preferences within each RMZ must be related to most satisfying activities, and then to their desires to realize satisfying experiences and other benefits and to avoid negative outcomes. Likewise, the context for assessing setting preferences must be articulated in terms of those that need to be provided and maintained to sustain opportunities for customers to achieve their most highly valued outcomes. Preferences for recreation and visitor services must likewise be related to preference necessary to achieve desired outcomes and maintain essential setting characteristics.
- Devote resources to *learn how* to more effectively engage key private-sector service providing business sectors (e.g., tour operators, outfitters and guides, downtown retail, etc.) upon whom the BLM and its recreation-tourism markets depend for essential services. As one reviewer of this report stated “Until we collectively figure out a better way for the BLM staff to engage these partners, it simply won’t happen.” Among other things, it is important not to allow traditional activity-based users and special interest partnerships (Goal 3, Objective 2 of the BLM’s Priorities for Recreation and Visitor Services) as a substitute for sustainable gateway community tourism partnerships.

- Also, engage key local governments and leaders upon whom the BLM and its recreation-tourism markets depend for infrastructure support precisely as outlined immediately above, and as integral partners in these collaborative planning and management partnerships.
- Incorporate BBM into the Partnership Series workshops that every office must undertake with the community prior to initiation of an RMP. This would provide orientation to both the community as well as key managers to BBM on a conceptual level and lay a great foundation for focus groups and survey instruments.
- The unfamiliarity of most resource recreation planners and managers with marketing heightens the need for the BLM to provide adequate guidance and training to get beyond the limited scope of interpretation and education program actions.
- Each BBM project should have a BBM mentor to insure that the process works smoothly, to engage periodically in monitoring of the process, to provide a staff sounding board to further improve success options. It is extremely difficult for a staff within a FO to try to apply and implement BBM for the first time without that mentorship.

Other Applications of BBM and Uses of the BOAL

The contract for this report required reviewing and summarizing other applications of BBM, and the broader Beneficial Outcomes Approach of Leisure (BOAL) paradigm as well. As mentioned earlier, meeting that requirement constituted the third purpose of this report. That requirement is met in two major subsections of this section, the first dealing with BBM and the second with the BOAL. The first major subsection on BBM has two parts, one entitled “Applications of BBM Other Than by the BLM” and the other entitled “Other Applications of BBM by the BLM.”

Applications of BBM Other Than by the BLM

It was explained in the "Purposes" section of this report that there were many more applications of BBM than could meaningfully be reviewed in this report. That was one reason for development of the companion text within which many of those other applications are described. From the Table of Contents of that text in Appendix A, it can be observed that 18 chapters (Nos. 7-24) in that text (by at least 35 authors and co-authors) describe in detail their experiences in applying BBM in different locations for different agencies in the U.S. Australia, Canada, New Zealand. The reader is referred to that text for information about those applications. In addition, the lead author of this report spent considerable time trying to identify what other applications of BBM had been made. He did this by communicating with scores of recreation professionals including the authors invited to write chapters of the companion text and surfing relevant web sites. From those efforts, he learned that many federal/national, regional, state/provincial, county, and municipal park and recreation agencies are in various stages of thinking about or trying to implement BBM. Few of them have actually attempted to fully implement BBM, but interest in it is growing in several countries.

A considerable amount of the growing interest in BBM was spawned by the rather rapid increase in the number of park and recreation agencies that have attempted to use better measures of performance since the passage of the Government Performance and Results Act of 1993. In addition, interest in BBM was spawned by the National Recreation and Park Association promoting the benefits approach in the late 1990s and early 2000s under the slogan "The Benefits Are Endless." The large amount of interest it promoted can be gleaned if one enters "The Benefits Are Endless" into Google and surfs the many "hits" that can be observed. Last, but not at all least, the benefits movement lead to and has been stimulated greatly by the "The Benefits Catalogue" produced by the Canadian Parks and Recreation Association. (1997). That influential publication comprehensively lists and describes the nature and social implications of the many benefits of leisure that have been supported by scientific research, and it provided references to each of those studies. The Canadian Parks and Recreation Association is currently updating is Benefits Catalogue.

Beyond the internal world of park and recreation agency work, considerable and growing interest is being expressed among private sector tourism organizations and businesses about the importance of satisfying experiences and other life-enriching beneficial outcomes. This increased awareness of the importance of outcomes is also re-focusing tourism marketing efforts.

More applications of BBM will occur as more practitioners learn about it and especially as lead administrators of park and recreation agencies formally promote and support its implementation, both within their agencies and sub-units and among key private sector business and local government service and infrastructure providers. The Executive Leadership Team of the BLM did that on January 5, 2006 when they issued their directive endorsing BBM that is shown in Appendix C of this report.

Other BLM Applications of BBM

The following summarizes the status of other BLM applications of BBM by each of the BLM states.

ALASKA

Central Yukon Field Office: Working under an Assistance Agreement with Dr. Peter Fix, University of Alaska at Fairbanks, a benefits-based visitor survey to assess recreation preferences of visitors within the Dalton Highway Special Recreation Management Area (SRMA) was completed in the summer of '07. This work is being done in preparation for scheduled start-up of the Central Yukon RMP. The Dalton SRMA encompasses 40 different recreation sites, including the Arctic Circle Visitor Center, Yukon Crossing Contact Station, Marion Creek Campground, and the famous Arctic Circle Wayside.

Eastern Interior Field Office: A benefit-based visitor survey was completed in '06 for the Steese Highway SRMA which involves the White Mountains NRA and the Steese NCA. The SRMA encompasses the Beaver Creek and Birch Creek Wild and Scenic Rivers, the Pinnell Mountain National Recreation Trail, three hot springs, and several campgrounds. Also, a benefits-based visitor survey was completed in '07 for the Taylor Highway SRMA. This SRMA encompasses nearly 400 miles of the Forty Mile Wild and Scenic River, Fort Egbert National Historic Site, twenty some different trailheads and wayside exhibits, and three campgrounds. The pre-plan has been completed for the upcoming Eastern Interior RMP to begin application of outcomes-focused planning. The importance of these assessments is underscored by the fact that these highway corridors are essentially SRMAs themselves, and each encompasses several other significant attractions.

Glennallen Field Office: Yet another benefits-based visitor survey is being done by the University of Alaska during the summer of '07 on the Denali Highway and adjoining recreation attractions. These include the Delta Wild and Scenic River, Tangle Lakes Canoe System, Tangle Lakes Archaeological District, several wayside exhibits, numerous OHV trails, and three campgrounds.

Scheduled Future Applications: This coming winter, the University of Alaska will continue its work assessing recreation visitor preferences through a cabin survey within the White Mountains National Recreation Area. Plans are also underway for completing visitor recreation preference studies for the highly-valued Campbell Tract SRMA within the city limits of the City of Anchorage and the Richardson Highway and Gulkana SRMA in 2008.

Statewide: On a statewide basis, the BLM is cooperating with the University of Alaska and other natural resource agencies on a new Alaska Resident Statistic program. This focuses on residents and their in-state travel patterns and preferences. Working on a statewide scale, this collaborative effort is measuring, among other things, resident's place-based outcome preferences. Studies are contextual and tie expressed preferences to specific geographic places to provide the necessary context for the application of results to management. This effort is

ongoing and has been underway for the past couple of years. An upcoming statewide workshop will disseminate results to affected communities.

Benefit-Based International Project: This project was initiated as part of the World Wilderness Congress. Funding for the project has come from the United Nations Development Programme. The objectives of this cooperative roundtable are to further cooperative international relations to advance recreation management within protected areas in the circumpolar north. This has direct benefits to the BLM because, incorporating outcomes-focused management principles, it is helping advance wider understanding of BBM's expanded conceptual framework and its application to protected areas. Implications for wider application of BBM to all NLCS units within the BLM are suggested, and benefits to be realized by both the environment and public lands customers are readily apparent. This project also interfaces nicely with the Alaska Resident Statistic Program, enabling the BLM to begin in-house storing of study results for future application to public lands in Alaska.

Complexity Model Development: The BLM in cooperation with the University of Alaska at Anchorage's Resilience and Adaptive Management Group is developing an agent-based complexity model that highlights the Recreation System components of Green Spaces, Recreation Services and Communities and its role and relationship in Building Community Resilience and Adaptive Capacity. After an exhaustive literature review and academic and professional search to eliminate activity-based studies, this is presumed to be the first effort of its kind that relates the benefit-based model of recreation outcomes to community health and resilience theory. The results hope to show science-based evidence that recreation benefit-based outcomes correlate directly with the ability of a community to respond and adapt to political, social, economic and/or environmental crisis and maintain itself in a desired state of livability. The model will utilize quantifiable data to show that the Recreation System helps build that capacity.

ARIZONA

Five Resource Management Plans (RMPs) were on-going in Arizona when the BBM guidance in BLM's LUP Handbook came out. Two were restructured to reflect the new planning guidance, but a third was too far along to change its recreation planning framework from activity-focused to benefits-based management. To attempt achieving compliance with the Handbook on this third effort, planners created a separate recreation appendix that reinterprets the plan's recreation decisions in terms of beneficial outcomes. This was the Bradshaw Mountain/Agua Fria National Monument. The remaining two RMPs have incorporated BBM from the start. These are the Arizona Strip RMP (including the Vermillion Cliffs and Grand Canyon/Parashant National Monuments) and the Lake Havasu RMP. The recreation sections of two new additional RMP start up efforts, the Yuma and the Ironwood Forest National Monument RMPs, will have management objectives that target benefits-based outcome opportunities according to LUP Handbook guidance. All of these RMPs are in various stages of completion. Only one, the Havasu RMP, has been finalized through the Record of Decision. Arizona BLM has just begun developing its statewide recreation strategy. Following the national Unified Strategy for recreation, the beneficial outcomes approach will influence how its objectives are developed.

CALIFORNIA

A number of California RMPs were written just prior to adoption of BBM as the framework for managing all Special Recreation Management Areas in the BLM's Land Use Planning Handbook. However, the Hollister Field Office is currently engaged in scoping the Clear Creek Management Area plan. In addition, both the Folsom and Bakersfield Field Offices are drafting their RMPs in conformance with the new Handbook guidance.

COLORADO

Besides the McInnis Canyons NCA BBM application which is the focus of this Case Study report, BLM in Colorado has several other BBM applications.

Gunnison Gorge National Conservation Area: In 2004 the Gunnison Gorge National Conservation Area (NCA) RMP was approved, incorporating BBM. Managers decided to adopt the expanded BBM conceptual framework to address all components of recreation production (i.e., recreation opportunities and outcomes, setting character, and provider actions and services). That happened prior to revision of the BLM's LUP Handbook incorporating BBM. Under an Assistance Agreement with Arizona State University, Drs. Rick Knopf and Randy Virden conducted several recreation customer preference assessments consisting of on-site and mail-back visitor studies and focus groups. The final plan recognizes six Recreation Management Areas (RMAs), three of which are overtly managed as Special RMAs (the others are managed for custodial outcomes), comprised of ten Recreation Management Zones (RMZs). The plan includes recreation management objectives targeting experiential and other beneficial outcomes; setting prescriptions specifying physical, social, and managerial setting components; and a variety of implementing actions. As is appropriate for benefits-oriented implementation plans, revisions are underway in response to monitoring feedback.

Red Hill Special Recreation Management Area: Interested in the BLM's future management of the 3,093-acre Red Hill recreation area lying immediately adjacent to Carbondale, Colorado, a group of citizens formed the Colorado formed the Red Hill Council (RHC). Consisting of recreation users, neighboring landowners, local businesses, and the Town of Carbondale, the Committee funded a 1998 survey of Red Hill visitor experience, other benefit, and setting desires, independent of the BLM. All partners agreed that management of the area should shift from its former "custodial" management strategy to manage for "structured" recreation opportunities desired by the primary customer market. Acknowledging that the RHC's efforts had fulfilled public scoping comments required by the National Environmental Policy Act, the BLM worked with RHC to develop a benefits-based management plan for the area. The plan was approved in 2000, and in 2002 the Red Hill Council received the BLM's "Making a Difference Award" for its significant collaborative efforts.

Emerald Mountain Special Recreation Management Area: Public access to the 4,139-acre Emerald Mountain Recreation Area adjoining Steamboat Springs, Colorado was obtained in February 2007, following a dozen years of negotiations on a three-way land exchange the transferred the land from the Colorado State Land Board to the Bureau of Land Management. The proposal was advanced by the Emerald Mountain Partnership to prevent the area's proposed

sale from transforming its landscape from rural to urban and avoid associated negative effects to the community. An approved RMP amendment for the Emerald Mountain SRMA outlines primary markets and niches for two Recreation Management Zones, each with its own set of benefits-based management objectives, setting prescriptions, and implementation framework. One zone emphasizes strenuous recreation including mountain biking and cross-country skiing; while the other emphasizes wildlife viewing, hiking, horseback riding, and hunting. Implementation decisions were included in the RMP amendment, but second-generation implementation planning continues. The BLM announced opening Phase 1 of the Ridge Trail for recreation use in September 2007.

Canyons of the Ancients National Monument:

The draft Resource Management Plan for the National Monument, with alternatives, will be published in the Fall 2008. Recreation sections of this plan incorporate elements of benefits-based management as outlined in the Land Use Planning Handbook. The Monument Manager has outlined ten different SRMAs within the draft plan.

Alpine Triangle/Silverton Special Recreation Management Areas: The Gunnison FO and San Juan Public Lands Center are updating a recreation Implementation Plan for these two SRMAs that share a common boundary. Management objectives for the revised plan are targeting desired beneficial outcome opportunities for each RMZ, with accompanied by setting prescriptions specifying the essential setting conditions required to sustainably produce them. Implementing actions will consolidate and integrate program actions under the four field implementation categories outlined in the LUP Handbook including management, marketing, monitoring, and administrative supports. The plan is scheduled to be done by summer '08.

Glenwood Springs/Kremmling FOs: For this combined Resource Management Plan, Drs. Randy Virden and Megha Budruk with Arizona State University have been doing benefits-based recreation assessments in '06 and '07, consisting of both focus group community assessments and visitor surveys. Survey work is focused on nine study zones in the Glenwood Springs Field Office and on four in the Kremmling Field Office; these are either existing or probably SRMAs and RMZs for the new plan. Alternatives are presently being developed for the combined RMP and a draft is scheduled for release later in FY 2008.

Gateway Special Recreation Management Area: Under the same Assistance Agreement with Arizona State University, Drs. Virden and Budruk have also been conducting other benefits-based focus group community recreation assessments supplemented by a detailed user study for a Gateway SRMA recreation plan scheduled to begin later in FY '08. This outcome-focused management planning effort is being done in collaboration with Gateway Canyons Resort which has several venues adjoining the 10 RMZs that have tentatively been identified for the recreation area. Anticipated target outcome opportunities will focus on beneficial outcomes related to the area's diverse natural and heritage attractions and to the resort's Palisade Academy presently under development.

Statewide: Managing for beneficial outcomes also plays prominently in Colorado BLM's new recreation strategy. Following the hierarchy of national program objectives outlined in the BLM's national Unified Strategy, managing public lands for recreation experiences and quality

of life outcomes is also this strategy's primary unifying program objective. This strategy commits Colorado BLM to work with communities, service providers, interest groups and individuals to produce recreation opportunities and maintain setting character for visitors and local residents to achieve health, fitness, and other quality of life benefits from public lands recreation.

IDAHO

Shoshone FO: Blaine County Commissioners in southern Idaho signed an assistance agreement with the BLM to develop a cooperative conservation Recreation and travel plan implementing a Benefits-Based framework involving public lands in a portion of the Shoshone Field Office, Wood River Valley. Under auspices of Dr. Megha Budruk, Arizona State University (ASU) the partners completed several community resident focus-group assessments involving community residents, principally from Belleview and Hailey, and others from Ketchum and Sun Valley as well. Three SRMAs were identified (two with markets being primary and a third targeting destination markets), encompassing 13 different RMZs, both winter and summer. A draft recreation management plan has been developed which will ultimately amend the RMP. This application of BBM has enabled using recreation management objectives to drive criteria for the travel management plan component, thereby ensuring that travel route designations support rather than drive recreation. The plan will be presented before the Blaine board of County Commissioners in the fall of 2007.

Pocatello FO: The Pocatello FO is incorporating BBM into the Field Office RMP. The effort was begun prior to adoption of BBM, but planners and field managers decided to structure the final plan to incorporate BBM to address all components of recreation production as outlined in the LUP Handbook.

Statewide: Idaho BLM is also using the beneficial-outcomes approach to structure development of its statewide recreation strategy. Plans are underway on convening a strategic planning session to address community growth and related increases in recreation demand, incorporating *The BLM's Priorities for Recreation and Visitor Services* and the Unified Strategy that functionally integrates the priorities. The session is being facilitated by the Dr. Megha Budruk from Arizona State University's School of Community Resources and Development. The strategy is also being organized around recreation's four most basic functional inputs: management, marketing, monitoring, and administrative support.

As part of Idaho BLM's annual recreation workshop, participants have scheduled a field trip meeting with stakeholders in two Recreation Management Zones within two RMZs in the Pocatello Recreation Area. Organizers have planned informal discussions involving various recreation constituents from the mountain biking community, greenway foundation, Blue Ribbon Coalition, and Idaho State University Outdoor Program Manager, a private landowner having a lot of recreation occurring on their land and controlling key public lands access points, and representatives of the City of Pocatello. The idea is to get recreation planners to begin thinking about benefits and explore ways of having this kind of dialogue occur with other constituents on a daily basis. Follow-up discussions will have workshop participants consider, using the Outcomes Checklist and the Settings Classification Matrix, opportunities and challenges for responding to the kinds of customer/constituent needs they heard expressed.

MONTANA

The BBM framework for managing recreation is being applied to both the North and South Dakota RMPs and on the Miles City RMP as well. All three efforts are currently in the draft plan development stage. Draft RMPs have been completed for both the Butte Field Office and for the Upper Missouri Breaks National Monument, and public reviews of both efforts are underway. Montana is working to incorporate benefits-based management principles into the final versions of both plans, targeting desired outcomes by select market niches and prescribing essential setting conditions required to produce the targeted outcome opportunities. Start-up efforts are underway to write recreation management sections of the Billings RMP to incorporate the beneficial outcomes approach in all of its Special Recreation Management Areas scheduled to begin in '08.

NEVADA

The Black Rock Desert-High Rock Canyon Immigrant Trails National Conservation Area RMP was completed in 2004, too soon to incorporate benefits. The Winnemucca RMP is now in its draft stages and is following the beneficial outcomes guidelines outlined in BLM's LUP Handbook. Three SRMAs have been identified for the Winnemucca Field Office, and a final management plan is scheduled for completion in '09. The Ely RMP was started in 2003, has been in the review process for a long time, and should be finalized soon. While the Ely RMP does not incorporate BBM, it does require all Implementation Plans to follow the BLM Land Use Planning Handbook and incorporate benefits-based management.

NEW MEXICO

Two on-going Field Office-wide RMPs, Socorro and Las Cruces, are close to being done; but both of these efforts were too far along to expand their recreation sections to address beneficial outcomes. The Taos Field Office's RMP is therefore likely to be the first in New Mexico to target beneficial outcomes for selected recreation-tourism markets and niches as management objectives. A draft RMP is expected to be out for public review sometime in 2008. In addition, the Albuquerque Field Office RMP is scheduled to start up in 2008, also following benefits-based LUP Handbook guidance.

OREGON

Because Oregon's recreation program is well-established, most recreation management plans are already completed, particularly on the west side. There, many of the splendid recreation facilities that have been funded through the O&C program (i.e., Oregon and Coos Bay funding), and although BBM was not explicitly addressed, these recreation sites are generating multiple visitor benefits. Several of the RMPs on the east side have also been completed, but preparation of a draft plan and alternatives for the John Day RMP is presently underway. This effort is using the BBM framework to target desired experience and other beneficial outcome opportunities, essential setting characteristics for markets and niches. The draft plan is scheduled to be out for public review later in 2008. A statewide RMP is scheduled for all public lands in the State of

Washington to also address beneficial outcomes for affected SRMAs. This effort is gearing up with staffing for anticipated 2009 start-up.

UTAH

Utah BLM has four ongoing RMP's which are utilizing the BBM framework, Price, Moab, Monticello, and Kanab. Three other plans were already underway prior to the adoption of the framework in the LUP handbook. At public meetings held for the Moab plan, the framework and approach was well received and immediately understood. Comments from the public were that the focus zones and setting and experience goals helped them decide about the alternative that best met their expectations and desires. Every Field Office with the exception of one (the Salt Lake FO is prohibited from planning by a rider attached to an appropriation bill and their F.O. Manager will not approve their attending the training), has sent at least one recreation planner to the BBM recreation planning course. Additionally, we two managers and several planning leads and contractors have attended. Utah will host the upcoming training session and two more environmental planner contractors from SWCA (Stephen W Caruthers and Associates) have committed to attend. The BBM framework will also be a prominent component of Utah BLM's upcoming statewide recreation strategy.

WYOMING

Wyoming BLM has four RMP efforts nearing completion, Kemmerer, Pinedale, Rawlins and Casper. Each of these RMPs have met the requirements in Appendix C of the new LUP Handbook and are looking forward to implementation once the RODs have been issued. The Lander RMP has been launched and the FO held several scoping meetings earlier this summer. The Field Office is planning on conducting focus group meetings with recreation interests of the area in support of the plan revision. The Cody and Worland RMP efforts will begin in FY08. Most Wyoming Outdoor Recreation Planners have completed the NTC's Recreation Planning course. Holding the course in Casper, WY in 2007 allowed additional WY recreation planners and an Associate FM to attend.

Uses of the More Encompassing Beneficial Outcomes Approach to Leisure Paradigm

To begin, it must be recognized that the BOAL emerged in the early 1990s to serve as a broad paradigm within which *all* thought and action about leisure, and not just management, could be framed, whether leisure teaching/training, research, policy development, management, marketing, or repositioning the image of leisure. Within the BOAL, BBM was developed to guide management of recreation resources, programs, and services. Both concepts have gained rather wide recognition (Driver & Bruns, 1999; Driver, Bruns & Booth, 2001; Moore & Driver, 2005: Chapters 12 & especially 13 which describes the BOAL in detail); O'Sullivan, 1999; and Driver In Press (i.e., the companion text).

Because of the now rather wide recognition of the BOAL (in several countries) as an umbrella paradigm to guide all thought and actions about leisure, it is impossible to review all of the applications of the BOAL in serving the above-purposes and uses of the BOAL listed in the previous paragraph. It is being taught in many courses in many colleges and universities in

several different countries. It has helped promote and guide research on the benefits of leisure. It has been and is being used to serve as a conceptual model for "repositioning the image" of leisure away from the common erroneous perception that leisure is not all that important socially in comparison to other social services and towards the correct perception that leisure contributes tremendously to the welfare of the citizens of all societies, especially the so-called "advanced" ones. Last, but certainly not least, BBM, one of the uses of the BOAL, is increasingly being used by many public agencies to guide the planning and management of park and recreation, resources, programs, and services in many different countries.

Appendix A

Why the Companion Text Was Needed

As mentioned at the beginning of this report, its three major purposes described in the contract between the BLM and the first author of this case study report, the first author of this case study were to:

1. Describe and document both the positive and negative lessons learned from the application of BBM to guide the management of the recreation resources and services of the NCA.
2. Describe the actions that need to be taken for effective, efficient, responsive, and responsive application of the conceptual framework of BBM to planning and management.
3. Document and review other applications of BBM by other agencies or organizations.

After work began on this report, the first author of this report realized that a companion text to this report was needed for the following reasons:

- a. **None** of the above three purposes of this report could be met without making this report excessively long. The first two will be discussed first, starting with the second one. The “actions” needed to properly implement could not be described before a comprehensive, normative, theoretically sound, scientifically credible, and managerially relevant model was developed that described in detail each and every requirement that had to be met before BBM could be applied and implemented fully. Although parts of that model existed, some parts were missing and those present had never been integrated fully, meaningfully, and useful. Put simply the normative model needed to be developed to meet the second purpose. Not only did the fulfillment of the second purpose of this study require such an extensive model, the first purpose could not be met without it; the positive and negative lessons learned could not be identified, defined, described, and *documented* without having a normative model to evaluate the degree to which each of its requirements were or were not met. Any other approach would have been highly subjective and judgmental.
- b. Although this BBM application, as well as many others, have proceeded with guidance developed by various BBM pioneers, that guidance has been shared among recreation professionals, incorporated within training materials, and written within BLM’s Land Use Planning Handbook, but not yet published. A comprehensive model meeting the above requirements therefore had not yet been developed, and developing it was a sizable, time-consuming task. Initial efforts soon revealed that such a model could not be readily understood unless it was preceded by detailed explanations of why BBM is needed, what it is, what are its fundamental concepts, purposes, and requirements, its theoretical and scientific credibility, and how it improve on existing approaches. It took four chapters in the companion text to meet these needs. Since those chapters comprise over 100 single-spaced pages that were submitted for publication, only an abbreviated version of that detail can be accommodated within this report.
- c. The same situation holds for the third purpose. After work started on this report, the first author learned that there have been many more applications of BBM than could be reviewed meaningfully in this report. Seventeen, but not all of them, are described in the companion text by invited authors who were directly involved in those applications.

- Those descriptions are richer and provide more information than could be provided in this report by us three investigators, who were not as close to those applications.
- d. The major purpose of this case study is that the BLM wanted a document that would provide information on how to implement BBM throughout that agency as directed by a January 5, 2006 Instruction Memorandum (see Appendix C of this report). That directive made official agency policy the existing agency program guidance referred to above. The companion text will provide additional more detailed information about implementing BBM that could not be provided in this report. It therefore will help the BLM meet its major purpose for commissioning this report.
 - e. Systematically integrated, detailed, scientifically credible, and conceptually sound instructions about how to implement BBM are not readily available to interested people beyond agencies such as the BLM which have made formal policy commitments to implement BBM. In addition, that guidance exists only as bits and pieces in the “fugitive” literature, such as BBM training handbooks and specific park and recreation agency planning and management guidelines. As such, those guidelines are written using each agency’s institutional terminology. That terminology varies from agency to agency and tends to be loaded with agency-specific jargon not well-understood outside the agency in which it was developed. More fundamentally problematic is the fact the fugitive literature is so named because it is not identified in printed biographical sources or by electronic search engines. Even if it is, it is generally not readily available to interested parties. It is highly probable that this report as well will become a part of that literature because the BLM has no established process for formally publishing and distributing such reports (as, for example, is routinely done by US Forest Service Experiment Stations). Therefore, the companion text was developed to assure that needed information about BBM would be published in a readily available source for BLM recreation professionals as well as other people.

The companion text is entitled “Managing to Optimize the Beneficial Outcomes of Recreation. Edited by B. L. Driver (the first author of this report) it will be published by Venture Publishing, Inc. in early 2008. The list of the authors and co-authors of chapters of the text and the titles of their chapters are given below, but *that is subject to change*, because not all the invited chapters were completed when this case study report was finalized. It can be noted that Bruns and Virden (co-authors of this report) are lead authors of three chapters, Bruns is also a co-author of two additional chapters, and a total of seven BLM managers and planners, are authors and co-authors of chapters.

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edited by B. L. Driver

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2. What is Outcomes-Focused Management?--**B.L. Driver**
3. Implementing Outcomes-Focused Management on Nature-Based Recreation and Related Amenity Resources--**B. L. Driver & Don Bruns**
4. Implementing Outcomes-Focused Management in Municipal Park and Recreation Agencies--**Teresa W. Tucker & Larry Allen**
5. OFM and Needs for Many Segments of a Society to Understand Better the Benefits of Leisure--**B. L. Driver**
6. Axioms and Strategies for Repositioning Park and Recreation Agencies Based on OFM--**J. L. Crompton**

Part 2: Applications of OFM to Help Guide Policy Development

7. Use of the Outcomes Approach by the U. S. Army Corps of Engineers--**Darrell Lewis**
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13. Revitalizing an Inner-City Park in Detroit: A Retrospective on the Outcomes Approach to Planning--**Robert W. Marans**
14. Application of OFM on the McInnis Canyons National Conservation Area-- **Don Bruns, B. L. Driver, Brian Hopkins, & Paul Peck**
15. Application of OFM on the Red Rock Ranger District of the Coconino National Forest--**Marty Lee & Bill Stafford**
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17. Applying and Implementing OFM on the Gunnison Gorge National Conservation Area near Montrose, Colorado-- **Don Bruns, Karen Tucker, & John Arkins**

18. Outcomes-Focused Management of the BLM's Red Hill Special Recreation Management Area--**Brian Hopkins**
19. Assessing the Benefits of the Alpine Loop Backcountry Byway in Southwestern Colorado --**Randy Virden, Christine Vogt, & Richard C. Knopf**

Part 4. Other Applications to Achieve Specific Outcomes

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24. Application of Experienced-Focused and Outcomes-Focused Management to Fisheries and Wildlife Management-- **David C. Fulton, Michael J. Manfredo, and Dorothy H. Anderson**
25. Summary and Conclusions.--**Perry Brown**

Appendix B

Review of Benefits-Based Management (BBM) and of How to Apply and Implement It

This appendix is provided to enhance understanding of BBM. It has two parts with Part 1 being a review of the basic principles and concepts of BBM, and Part 2 presents the normative model that shows in detail the requirements that need to be understood and met before BBM can be fully applied and implemented. Both parts of this review draw heavily from highly condensed parts of Chapters 1, 2 and 3 of the companion text described in Appendix A. Venture Publishing, Inc. has copywrote those chapters, and se graciously provided the first author of this report written permission to reproduce parts of those sources. They have been footnoted appropriately, but page numbers were not available at the time this report was written.

Part 1 of Appendix B: Review of Characteristics, Purposes, and Concepts of BBM

Scientific Credibility of BBM

Any method that is developed to inventory and/or manage recreation resources and service must meet several criteria before it will be accepted by careful and thoughtful practitioners and other interested parties. It must be efficient or not overly costly to apply, responsive to the clientele served, and understandable. When applied in different locations, it must provide consistent results and serve its intended purposes. A further extremely important criterion is that it must be conceptually and scientifically sound; it must be based on established theories and concepts of relevant disciplines and it must be supported by the results of credible scientific research. BBM meets each of these criteria.

The Central Question Raised by BBM is “Why?”

The basic question raised by BBM is: *Why* should any recreation and related amenity opportunities and services be provided? The answer to that question includes consideration of what has been done in the past, but BBM does not accept past actions, in and of themselves, as sufficient basis for continuing those actions. Instead, BBM answers the “why” question **only** in terms of **beneficial outcomes to be realized and negative outcomes to be avoided or reduced**. It requires that policy makers and managers of park and recreation agencies understand what benefits should be provided and what unwanted likely negative effects can be avoided or reduced in magnitude. To do that, they must understand the following definitions of outcomes adopted by BBM.

Definitions Adopted by OFM¹¹

Outcomes

The word "outcomes" is used by BBM in a *highly specialized way* to refer **only** to the beneficial (desirable) and non-beneficial (undesirable) consequences (i.e., outcomes) of the management and use of recreation and related amenity resources and programs. As such, outcomes do not refer to "*outputs*" such as picnic tables, ice rinks, play grounds, swimming pools, tennis courts, ball parks, dance or yoga programs, hiking trails, camp grounds, interpretive talks, acres of designated wilderness protected, numbers and types of large wildlife and fish available for preservation of gene pools, numbers of cultural/historic site preserved, etc. Such facilitators of recreation opportunities are important, because they are needed for beneficial outcomes to be realized and undesired outcomes to be avoided or reduced, but they are not outcomes the way that word is used by BBM. Early applications of BBM disclosed that there was considerable confusion about the word "benefit," so the following three types of benefits of recreation were defined to clarify that confusion and to help ensure that all relevant benefits would be considered in subsequent applications of BBM.

1. **An improved change in a condition:** The first type of benefit draws on the definition of a benefit found in most dictionaries. It is a state that is viewed as more desirable than a previously existing condition or state; an improved condition. That beneficial change can be to individuals, groups of individuals, or to biophysical and cultural/heritage resources. The benefits can be psychological, physiological, social, economic, and environmental in nature.
2. **Maintenance of a desired condition, prevention of an unwanted condition, or reduction of an unwanted condition:** It is important to recognize that practitioners do more than just offer opportunities for improved conditions. Much of what they do is to *maintain* desired conditions, *reduce* the magnitudes of undesired conditions, and *prevent* undesired conditions from becoming worse.
3. **Realization of a satisfying recreation experience:** A special type of benefit is covered by this third definition that a person benefits when she or he realizes a satisfying experience, whether or not an actual improved condition or maintained desired condition is readily apparent.

No definitions seem necessary about the types and nature of undesirable outcomes, because practitioners generally understand them better than they do the benefits. They do, because, at least since passage of the Environmental Protection Act of 1969, practitioners have attended rather carefully to many negative impacts in the large number of environmental and social impacts assessments they have made.

Collaboration with Customer and Associated Provider Stakeholders¹²

BBM requires building and maintaining collaborative partnerships with all managerially-relevant stakeholders. BBM adopts a much broader than normal definition of the word *stakeholder* to include any person or group that affects, is affected by, or is just seriously interested to *a managerially relevant degree*, and it believes that such relevance must be

¹¹ Condensed from Chapter 1 of the companion text.

¹² This major section and the following three were condensed from Chapter 2 of the companion text.

determined by the practitioners concerned. Under BBM, there are two important types of stakeholders, the customers and the associated providers.

Customer Stakeholders

BBM recognizes two types of customers/users--the on-site visitors and the off-site users. The *on-site* customers are those who visit and use the recreation areas and sites being managed. There are *two types of off-site users*, local and remote ones. The local customers are those people who live *contiguous to or near* the recreation/amenity resources being managed, such as in local host/gateway communities or just down the street from a park or open space in a city but do not use the area or site for recreational purposes. The *remote* off-site customers live farther away from the recreation areas or sites being managed but still realize stewardship and other appreciative (vicarious) benefits from learning about the protection and management of those resources from television, movies, books, and other publications and media.

Associated Providers

BBM not only requires a broader than normal definition of “stakeholder” to include the off-site users but also expands the traditional concepts of *service provider* beyond that of the providing agency/organization responsible for managing the resources on which recreation and related amenity opportunities are provided. It does this because of the very significant influences that *associated providers* have on the types, amounts, and quality of the total package of opportunities made available. They provide necessary services both on- and off-site that are supplemental or auxiliary to the services provided by the managing agency. Such associated providers include but certainly are not limited to the following: businesses that provide medical, laundry, and dry-cleaning services, sell groceries, hunting and fishing licenses, outdoor retail shops, etc.; hospitality industries that provide lodging, places to eat, transportation (rental cars, bicycle and motorcycle shops), owners and managers of local automotive service stations; services offered by outfitters and guides, concessionaires, and tour operators; local governmental entities such as chambers of commerce and local law enforcement departments; and other service-providing agencies in near-by communities.

Distinguishing between Activity-Based Management, Experienced-Based Management, and Benefits-Based Management

To better understand BBM, it is useful to understand that it evolved to supplement but not replace activity-based management and experience-based management. That is made clear in the following descriptions of each of the three approaches to the management of recreation resources and services that will contrast them and to show the advantages of BBM. This section draws heavily from Moore & Driver (2005: 162-164).

Activity-Based Management (ABM)

- ABM is required in all recreation resource management to meet customers' demand for activities in which they can participate.
- While necessary, ABM is much less complex than EBM and BBM, because it defines recreation only as the human behavior of participating in a recreation activity, just as eating and sleeping are human behaviors.
- ABM is supply oriented and focuses on the facilities or resources. It gives little attention to the demand side of management other than the demands for specific activity opportunities.
- By just describing and documenting different types of activities provided and counts of people using different types of recreation and related amenity opportunities, ABM says nothing about how those customers are affected or impacted by the provision of those opportunities.
- ABM defines the user inputs to the recreation and related amenity opportunity production process in the same terms as it does the outputs of that process. Specifically, user inputs (other than their demands for activity opportunities and for facilitating attributes of the managed settings) are defined as users coming, and user outputs are defined as users going. Therefore, the inputs are the same as the outputs, and we do not know what the positive and negative impacts of participation are. By analogy, hospitals need better measures of their social contributions than just counts of the patients coming and leaving, because they also need to know what happened to the patients while they were in and before they left the hospital.
- Given its focus on the biophysical and cultural/heritage resources, ABM provides too little opportunity to consider the quality of the recreation and related amenity activity opportunities provided or used. It does require consideration of the specific attributes of the recreation settings that are necessary for activity opportunities to be created. But it does not explicitly require professional understanding of why those attributes are needed and desired.
- Under ABM, management objectives, prescriptions, guidelines and actions are oriented only to the provision of recreation and related amenity activity opportunities.

Experienced-Based Management (EBM)

EBM builds on, supplements, *but does not replace ABM*, so ABM is necessary but not sufficient. The essential characteristics of EBM follow:

- It is more complex than ABM, because it defines recreation as a psychological state in experiential terms and not just the behavior of participating in a recreation activity. See Moore & Driver (2005: Chapter 1) for an elaboration of this concept and definitions of leisure and recreation).
- It requires understanding of both supply and demand factors, including information from the customers about the types of experience opportunities they desire to be provided.
- It focuses on the types of psychological experiences that the customers desire to realize, so it is customer driven. This contrasts with ABM, which provides little

- focus on the customers' demand and expectations other than for activity opportunities and the attributes of the recreation settings necessary for them to be created.
- EBM provides a better basis for understanding and improving the quality of recreation and related amenity opportunities provided and the experiences actually realized from using those opportunities. It does because it requires analyses and evaluations of user satisfactions in experiential terms. It also requires relating preferences for experiences both to activity opportunities and the attributes/features of the recreation settings necessary for those activities and experiences to take place.
 - Under EBM, management objectives explicitly state the types of experience opportunities that will be provided when, where, for whom and in what amount. Then management prescriptions, guidelines, and standards are written to help assure that those targeted experience opportunities will be delivered within the time frame proposed by the plan for which the experience opportunity management objectives have been written.
 - Until recently, applications of EBM focused on the on-site visitors/customers, but now EBM refers to all customers, including off-site customers who realize satisfying psychological experiences from just the existence of recreation and related amenity resources EBM is an important but limited type of BBM outlined below because Chapter 1 defined the third type of benefit of recreation as the realization of satisfying recreation experiences. Thus, since EBM addresses satisfying experiences, EBM is a limited type of BBM; limited because BBM covers all types of benefits and not just the experiential benefit.

A good example of EBM is use of the Recreation Opportunity Spectrum (ROS) system as elaborated in Moore & Driver (2005:168-175).

Benefits-Based Management (BBM)

BBM supplements *but does not replace ABM and EBM*. The characteristics of BBM are outlined below and contrast it with ABM and EBM.

- BBM goes beyond EBM and considers not only psychological experiences but also psycho-physiological, physiological outcomes, and all other types of benefits of the management and use of recreation and related amenity resources, including benefits to individuals, groups of individuals (extending from the family and other smaller groups, thorough communities to the nation at large), and to the biophysical and cultural/heritage resources.
- It considers not only immediate benefits but also long term benefits.
- It requires consideration of negative as well as positive outcomes.
- It requires that planners and managers collaborate with all affecting and affected stakeholders about the types of benefit opportunities that should be provided and negative outcomes that should be reduced or avoided.
- It requires that planners and managers work collaboratively with relevant associated providers who provide needed supplemental and/or auxiliary services. It requires that management plans overtly target well defined positive and negative outcomes

and that the means for attaining those outcome goals defined by time-bound, realistic/achievable, and cost-effective management objectives.

- It could not be developed and implemented fully until sufficient research had been done on the other than experiential benefits of leisure were available, which demonstrates its greater complexity than ABM and EBM.

BBM Views the Delivery of Recreation and Related Amenity Opportunities as a Recreation Opportunity Production System

Under BBM, the provision of recreation opportunities is viewed as “a recreation *opportunity* production system.” Unless one understands how and why BBM is based on the concept of a recreation opportunity production system (or process), she or he cannot appreciate what BBM is about, because that concept integrates the cause and effect relationships and systems perspectives necessary for proper and successful implementation of BBM. The word production is emphasized, simply because the concept of provision does not explicitly denote the need to understand *all the cause-and-effect relationships* that go into providing those opportunities. As elaborated in detail in Chapter 2 of the companion text to this report, the recreation opportunity process can be summarized diagrammatically as in Figure 1 below.

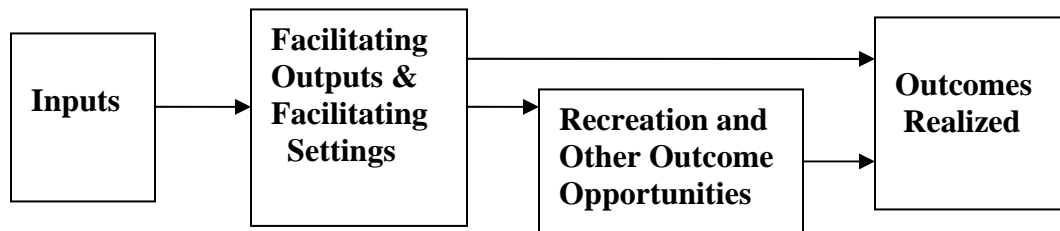


Figure 1. Expanded BBM model of the recreation opportunity production process.

Inputs

Inputs are things put into recreation and related amenity systems that are defined by their physical, biological, administrative, and social/cultural components. They include time/labor/effort, professional knowledge and skills, on-site presence of agency personnel, recreation capital investments, information on customer and other stakeholder preferences, social norms and mores, regulations, fees or lack of fees, administrative vehicles, materials for informational brochures and maps, reductions of hazards, on-site interpretive programs and guided tours, stocking of fish, materials to construct infrastructure (e.g., roads, trails, parking lots, picnic tables, exhibits), sanitation and potable water systems, and so on. The customers and other stakeholders input their expectations, preferences, knowledge, past experiences, numbers of users (who contribute to on-site density), and the pets and other trappings the customers bring, including vehicles, equipment, radios, musical instruments, dance costumes, and electrical generators. The associated providers also input their services, prices, and regulations (e.g., use of easements across private lands). Inputs from the natural environment include climatic influences, floods, infestations of unwanted plants, etc.

Facilitating Outputs and Facilitating Settings

Facilitating Outputs: Under BBM, facilitating outputs are human-contributed components of the recreation opportunity production system that help produce opportunities for benefits to be realized and negative outcomes to be avoided/reduced. They are called facilitating outputs to emphasize that provisions of these outputs is not the *ends* of recreation and related amenity resource management but that these facilitating outputs are produced only to *facilitate* the realization of positive outcomes and prevention of unwanted outcomes, which are the actual objectives of management.

Facilitating Settings: All recreation takes place within settings that facilitate the realization of different types of outcomes, such as satisfying experiences. For example, remote settings facilitate enjoyment of solitude and testing of outdoor skills, interpreted nature trails facilitate learning about nature, group-camping areas facilitate camaraderie and social bonding, and so on. As emphasized in the normative model used to evaluate application of BBM to the NCA in body of this report, managing required and prescribed setting conditions is an extremely important requirement of BBM.

Recreation and Other Outcome Opportunities

Recreation Opportunities: These refer to opportunities to engage in particular recreation activities within particular settings to realize satisfying experience, additional personal benefits, and avoid undesired ones. Under BBM, most provider actions are oriented toward producing opportunities for beneficial outcomes to be realized and preventing or reducing negative outcomes. Those opportunities are produced by the facilitating outputs interacting with features of the facilitating physical, social, and managerial/administrative settings.

Other Outcome Opportunities: Included are the opportunities made available to realize economic, social, and environmental benefits. Most of these outcome opportunities are closely linked to use of the recreation opportunities produced while others are produced directly by the actions of the providers' actions of recreation opportunities and services, as explained in the following paragraph. Under BBM, the nature and magnitudes of feasible beneficial and negative outcomes must be understood clearly before they can be targeted managerially and overtly managed for.

Outcomes Realized: BBM defines outcomes as beneficial (desirable) and non-beneficial (undesirable) consequences of the management and use of recreation and related amenity resources and programs. Those outcomes are produced in three ways: directly by managerial actions; chained/subsequent benefits, and by the actions of on- and off-site customers. Some outcomes however result *directly* from managerial actions whether or not the recreation opportunities produced are ever used by recreation participants or enjoyed by off-site customers. They are indicated by the arrow in Figure 2 that goes directly from "Facilitating Outputs and Facilitating Settings" directly to "Outcomes." Examples include the local economic impacts of salaries of local park and recreation agency employees, revenues gained by contractors with

agencies, the local economic multiplier effects of provider and tourist expenditures, resource protection activities, etc.

In review, the recreation opportunity production system inherent to BBM requires clear distinctions between inputs, facilitating outputs and facilitating settings, recreation and outcome outcomes, and actual outcomes realized.

Planning from Right to Left and Implementing from Left to Right

The recreation opportunity production model is central to BBM, because: it requires that policy makers and managers (1) be able to answer not only the question *why* but also what, how, for whom, in what amount, and when the opportunities will be delivered and (2) understand the cause-and-effect relationships that exist within the Figure1 model.

In flow diagram terms, it is easier to understand the cause and effect relationships if one views *planning* of a recreation service delivery system as going from the right to the left side of the opportunity production process shown in Figure 1. That planning process *starts* with decisions about what beneficial *outcomes* will be targeted and which negative *outcomes* will be avoided or reduced in impact; those outcomes determine what will be done and why. Once the outcomes to target have been determined, they directly determine what facilitating outputs and facilitating settings need to be provided and created and/or maintained.

In contrast, from a plan *implementation* perspective, one moves from the left of Figure 1 to the right--from provider inputs needed to attain targeted outcomes to attainment of those outcomes.

Advantages of BBM

Moore & Driver (2005: 204 & 205) listed the following advantages of the Beneficial Outcomes Approach to Leisure or BOAL, which was considered briefly in the last section of the body of this report. BBM is an important, but not the only use of the BOA, but the advantages listed below apply to it, because it too:

- **Promotes greater public understanding and appreciation of the social significance of recreation and related amenities.**
- **Justifies allocations of public funds to recreation and related amenities in the policy arena.** Policy makers need to compare the benefits and costs of alternative uses of public resources. BBM helps make the nature, scope and magnitudes of the benefits of public expenditures on recreation more explicit and objective.
- **Helps planners and managers to develop clearer management objectives.** Once public policy decisions have allocated public resources to a particular type of recreation or related amenities, information on beneficial and negative outcomes improves the ability of recreation and related amenity planners and managers to define clear management objectives and prescriptions and then to establish more explicit standards and guidelines for meeting those objectives.
- **Facilitates social interventions.** Frequently, park and recreation agencies are given social mandates to promote particular benefits such as environmental learning, increased physical fitness, and help prevent specific social problems such as juvenile delinquency. While the BBM itself is silent with regard to such social engineering, it provides guidance on how to meet social agendas.

- **Facilitates more meaningful recreation/amenity demand analyses.** By focusing on ends rather than means (i.e., outcomes instead of just inputs and outputs), BBM makes explicit the different types of recreation demands (i.e., demands for activity, experience, and other benefit opportunities). This facilitates more accurate and meaningful analyses of demand.
- **Facilitates a collaborative style of management.** BBM rejects the common idea that a recreation or related amenity agency is a sole provider, and it requires a collaborative style of decision making that necessitates forming partnerships with other providers who affect provision of recreation opportunities and with all other affecting or affected, or just interested, stakeholders.
- **Provides flexibility to managers.** Practitioners appreciate the flexibility that BBM afford them. It can be implemented incrementally, and it can be practiced at different degrees of comprehensiveness.
- **Better identifies conflict.** Different customers desiring different types of benefits cause most conflicts among customers. BBM makes conflicting demands more explicit, which facilitates reducing or avoiding such conflicts.
- **Enhances the customers' choice processes and consumer sovereignty.** BBM presume that the individual generally knows best what does and does not improve his or her personal welfare and knowledge about desired and unwanted consequences of personal action enhances those personal decisions.
- **Facilities marketing.** Because BBM makes the outcomes of recreation resource management explicit, the managing agencies can use this information to develop more explicit informational packages and recreation/amenity opportunity guides orientated to the specified types of activity, experience, and other benefit opportunities being made available where, when, in what amount, and of what relative quality.
- **Enhances the rationality of recreation and related amenity fee programs.** Some people argue that the users should pay their fair share of these costs, while other people expand this reasoning and say the beneficiaries and not just the users should pay. BBM helps to implement this beneficiaries-should-pay rationale because it requires identification and, to the extent possible, quantification of all benefits to all beneficiaries.
- **Advances knowledge.** BBM has helped motivate scientists and educators to promote and attain greater understanding of the benefits of recreation resources.
- **Increases pride in the professions.** Lastly, and of subtle but vital importance, the above advantages of BBM serve to increase the pride of recreation and related amenity professionals.

Part 2 of Appendix B: The Comprehensive Normative Model for Applying and Implementing BBM

• This Part 2 of Appendix B reviews the specific required actions that must be taken to fully and properly apply and implement BBM. They are included here, because those requirements were used in the body of this report to evaluate the degree to which BBM was and was not applied fully and properly on the NCA. Those requirements are described in detail in Chapter 3 of the companion text as a “comprehensive normative model for applying and

implementing BBM fully.” Only a highly condensed and slightly revised version of that model is presented here, with little mention of how to meet the requirements, which is provided in the companion text.

The reader familiar with land use planning will notice from the following review that much of planning for BBM follows the conventional land use planning process. But, it also has additional requirements that are identified as steps which define the specific required actions that must be taken to fully and properly apply and implement BBM. Those steps are organized into seven logically sequential phases. The requirements of each step will now be reviewed.

Phase 1: Preparatory Actions.

- **Ensure that overseeing supervisors and managers approve and support adoption of OFM.** Experience has demonstrated that it is virtually impossible to implement BBM if the supervisor(s) of the affected planners and managers do not endorse BBM or do so only weakly.
- **Organize the Planning Team.** The planning team is the individual or group of individuals who will develop a recommended management plan for a particular outdoor recreation facility, site, or area. Planning teams for land-use planning vary considerably by types of plan and the scope and complexity of the planning efforts. BBM requires that relevant on-and off-site customer and associated provider stakeholders *are involved in all phases* of the management planning and plan implementation processes—either as members of the planning team or at least *regularly* consult with it.
- **Ensure that all members of the planning team understand BBM.** It is vitally important that each member of the planning team and stakeholders collaborating with the planning team have a reasonably good understanding of what BBM is, why it is being applied, and what it requires.
- **Understand Responsibilities and Constraints.** All members of the planning team must understand the agency's relevant mission, goals, and current policy and managerial directives as well as those of all collaborating providers to help ensure efficient, effective, and responsible management planning. Existing and probable constraints must be recognized and contingency measures developed to address them. Such deliberations and actions are necessary for the planning team to succeed.
- **Consider essential collaborative management and related public involvement needs.** Decide at least on a preliminary basis, whether the land managing agency is a sole-source provider of all essential services or if collaborative management partnerships are needed. Decide what associated providers need to be engaged as managing partners and, in addition, what related public involvement efforts are needed to involve local communities, public land visitors and other relevant stakeholders.
- **Identify critical issues and concerns.** The planning team should review past planning and managerial efforts for the planning unit to familiarize themselves with issues and concerns that have previously surfaced to determine if they are relevant. Equally important, current pressing issues and concerns that beg to be addresses in the plan must be considered.

Phase 2: Gather, analyze, interpret, and integrate supply and demand information.

Under activity-focused planning frameworks, supply and demand analyses were simply a matter of considering which recreation activities to accommodate. But, that activity-focused approach left important recreation components unaddressed. In contrast, BBM requires analyzing supply and demand not only for opportunities to engage in specific activities, but also to realize desired satisfying experiences and other benefits avoid unwanted outcomes, as well as the characteristics of settings within which they occur and upon which their sustained attainment depends.

- **Assess recreation preferences of the most relevant recreation participant and affected community resident markets.** Demand studies must be conducted to determine which types of recreation activity, experiences and other beneficial opportunities are most desired and which types of negative outcomes should be avoided or reduced in impact by both probable on- and off-site customers. Preferences for recreation activities and management actions have guided most past recreation demand assessments. In sharp contrast, BBM planning demands restructuring of the entire process for assessing preferences of on- and off-site customers for satisfying experiences and other benefits, undesirable outcomes they seek to avoid. Assessments must address both recreation participants as well as non-participants (both affected citizens and affecting recreation service and infrastructure providers, such as businesses and local governments). Especially needed is information about their preferences for specific characteristics of recreation settings that are essential to facilitate the production and realization of their desired outcome opportunities and for associated recreation activities. The checklists of different positive and negative outcomes, given in Appendix E of this report can be used to serve as a reminder of particular outcomes to consider in this step and thereby help prevent the omission of possibly relevant outcomes in demand studies.
- **Inventory or update inventories of key recreation-tourism resource attractions and services.** Inventory the attractions and services separately.
- **Analyze recreation opportunity supply by possible recreation management zones and corresponding customer market demand.** This step is preliminary to the ones that follow to discern general relationships between supply and demand for the planning area by considering what recreation opportunities can likely be produced, what opportunities have been and probably will be demanded, and who and where are alternative providers of those opportunities.
- **Select primary recreation-tourism markets.** To make BBM work, it is necessary to decide what will be the primary *recreation-tourism market* among the many relevant markets that desire benefits from the recreation area. This must happen, because no one management area can simultaneously be managed to be all things to all people.
- **Identify most logical recreation management zones and corresponding niches identified within the market(s).** Unless the area being planned and managed is quite small, it will be necessary to define and delineate physically on maps the boundaries of logical recreation management zones (RMZs) and to identify the distinctive recreation niches associated with each. It is important to understand that when planning recreation and related amenity resources and services under the OFM, each

RMZ and its associated niche(s) is (are) essentially defined by related/synergistic market/demand parameters. The RMZs:

1. Facilitate analyses of recreation demand. Facilitate supply analyses.
2. Help determine what types of recreation activity and outcome opportunities can be provided and where.
3. Facilitate the identification and protection of recreation settings that must be maintained to accommodate the customer demands identified for each zone.
4. Enable the development of clear and specific management objectives, implementing actions, and monitoring actions within those specific zones.
5. Make possible marketing of the types, amounts, and locations of the recreation outcome opportunities provided.
6. Are necessary for assigning and scheduling plan implementation field operations to fulfill all affecting provider responsibilities.

After completing the following two steps, it is probable that the boundaries of the RMZs and niches might have to be refined somewhat.

Phase 3: Develop the Management Plan

This phase describes the steps required to develop the plan that will be proposed and offered for public review. Phase 4 discusses implementation planning.

- **Determine which outcomes can feasibly, and should, be targeted within each RMZ.** For public land management agencies having multiple-use mandates, recreation will not always be the dominant use, whereas for dedicated park and recreation areas this is not an issue. If multiple-use planning is done, several feasible alternatives must be considered for each of the principal land uses considered. Under OFM, development of feasible recreation alternatives depends on determining what combinations of outcomes can feasibly be targeted in each of the RMZs. Thus, this step essentially defines and describes both the specific purposes (i.e., outcomes) and customers for which each RMZ *could be* managed. The feasible positive outcomes (i.e., conditions improved, maintained, and satisfying experiences) to be realized and negative outcomes (i.e., worsened conditions) to be avoided must be explicitly stated. Decisions about which outcomes can be feasibly targeted should not be subjective.
- **Develop management objectives.** *Outcome-focused management objectives* must specify the character of recreation settings and which actions are planned to be implemented in day-to-day field operations. Put differently, BBM subjects all provider actions and all required recreation setting characteristics to explicitly stated outcomes-focused management objectives. To develop those objectives, you must determine which recreation opportunities are to be provided and facilitated and what associated outcomes will be targeted for each RMZs. If the supply and demand analyses described in previous steps have been thorough, you will already know who your primary recreation markets are and you will have a good idea of how the products of each particular RMZ compare with the available recreation opportunities provided elsewhere, both within the planning area and in the larger market area. This step requires trying to find the best match between the capabilities of each RMZ to provide desired benefit outcomes with that of one of more primary recreation markets having the greatest desire or need for those outcomes.

- **Identify and prescribe the essential setting characteristics.** After the outcomes have been targeted for the identified primary markets in each RMZ and for relevant off-site customers, the next task is to prescribe the essential setting conditions that *must* be present, created, and maintained to produce targeted recreation opportunities and facilitate realization of targeted benefit outcomes. This step is vitally important to ensure that the setting-dependent recreation opportunities are in fact produced and that the associated outcomes are realized. To accomplish this objective, it is important to understand that most if not all recreation settings have three components that affect the types and nature of recreation activities that can be provided and experiences and other outcomes that can be realized. They are the physical, social and managerial/administrative components of recreation settings. BBM recognizes that the attributes of those three setting components determine whether many setting-dependent recreation and outcome opportunities can be produced.
- **Define the essential recreation-tourism service environment.** This step outlines both the composition and breadth of the necessary recreation-tourism service delivery system upon which your agency customers depend for achievement and realization of outcomes targeted for your particular area. Simply stated, the purpose of this step is to identify all of the key providers who materially affect the character of recreation settings within which this occurs, the kinds of recreation being produced, and what outcomes are realized and to what extent. Secondly, it outlines the framework required for the successful and sustained collaborative engagement of these providers as managing partners with the principle managing agency, unit of government, or other organization.
- **Evaluate alternatives and select the preferred alternative.** In this step, feasible alternatives are evaluated, and a preferred alternative will be selected that will become the recommended plan. This means that the planning team must develop some kind of selection criteria for ranking the alternatives to select the most suitable

Phase 4: Develop an Implementation Plan.

The following five steps comprise this phase on developing an implementation plan. They are listed in the cause-and-effect order in which they must be addressed to help assure that actions identified under each ensuing step are fully complementary of the ones previous. All of these actions must be included in the implementation plan, which is a most important part of the overall plan.

- **Identify management actions to be implemented.** In the simplest of terms, this step outlines *all* recreation management actions required to create and/or maintain prescribed setting conditions, and to realize the targeted recreation opportunities, and targeted outcomes. One of the most noticeable departures from activity-focused management shows up in this step. Recreation management is no longer a matter of just building more facilities and implementing more programs to accommodate more use, because BBM requires that implementing actions must be taken to assure those desired outcomes can be realized.
- **Identify marketing actions to be implemented.** The term “marketing” is used here as an umbrella concept that covers all information, outreach, education, interpretation, and promotional (especially descriptive marketing) activities required to maintain

prescribed setting characteristics and to facilitate the attainment of targeted outcomes by identified primary visitors and resident customers. Marketing means providing the right kinds of information by whatever means is appropriate to achieve setting prescriptions, produce targeted opportunities, and facilitate targeted outcome attainment.

- **Identify monitoring actions.** Done right, the preceding planning steps already outline the appropriate monitoring indicators and standards. All that remains is to identify appropriate monitoring methods, actions, and schedules. For example, the standards used to monitor the desired social settings are defined by the social setting prescriptions.
- **Identify supporting administrative actions.** This is the caboose to all planned recreation actions. Include in this step whatever administrative actions are required to support the management, marketing, and monitoring actions identified above. Address the following kinds of actions: funding, collaborative management agreements, assistance agreements, user fees and fund raising, external funding grants, and development of outcomes-directed criteria for making performance evaluations of those responsible for implementing BBM (a critical requirement discussed in the last section of this chapter).
- **Provide ample opportunities and time-frames for review of the proposed plan.** While plan reviews are customary, it is doubly important that all collaborating providers identified in the above steps are not only given the opportunity to review the draft plan but are engaged as partners in responding to review comments. This will require providing adequate time frames for review of the proposed plan.

Phase 5: Adjust Management/Implementation Plan as Needed and Approve the Final Plan.

Phase 6: Implement the Plan and Adjust Field Operations Accordingly.

Incorporate implementing actions into all field operations. In a sense, the most difficult part of adopting BBM is plan implementation. Restructuring traditional field operations, making the shift from activity-based, program and project-centered management to BBM is no easy task. Actually managing recreation setting character for the production and attainment of targeted recreation opportunities and outcomes targeted for selected market niches in every RMZ requires a good deal of introspective and innovative work. Before implementation is commenced, it is necessary to assure that needed administrative and managerial support is or will be available for efficient and successful plan implementation. Another operational necessity should be the incorporation of all actions into annual operating plans. It is imperative that traditional activity-based program and project-centered actions be restructured by integrating them within the four most basic fundamental and related elements of the management of recreation resources and services-- management, marketing, monitoring, and administrative support. Unless this happens, field operations will continue to be a collage of overlapping, sometimes conflicting, and therefore inefficient and ineffective activity-based projects and program initiatives.

Phase 7: Revise the Plan as Needed or as Required by Agency Directives.

Normally, under BBM, adaptive changes to the plan will be made during monitoring. Those changes typically do not require plan revisions and are part of agile and adaptive plan implementation. Changes in primary recreation markets, management objectives, and/or setting prescriptions, however, normally require a plan revision. In addition, some public wild land management agencies require periodic revisions, which generally involve starting a new planning process for the area.

Phase 8: Ensure that performance reports and evaluations document and recognize the production and attainment of targeted outcomes as feasible.

Appendix C BLM Adopts BBM

UNITED STATES DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
WASHINGTON, D.C. 20240

January 5, 2006

In Reply Refer To:
8300 (250) P
Ref. IB No. 2004-072
Ref. H-1601-1

EMS TRANSMISSION 01/10/2006
Instruction Memorandum No. 2006-060
Expires: 09/30/2007

To: All Washington Office and Field Office Officials

From: Assistant Director, Renewable Resources and Planning

Subject: Incorporating Benefits-Based Management within Recreation and Visitor Services Program Policy Changes

Program Areas: Recreation and Visitor Services

Purpose: This IM affirms the Bureau of Land Management's (BLM) program direction approved by the Executive Leadership Team (ELT) to adopt an expanded conceptual framework for planning and managing recreation on public lands. Strategies and policy for planning and managing recreation-tourism use is described in two key documents: "*The BLM's Priorities for Recreation and Visitor Services*" (see WO IB No. 2004-072) and in Sections II.C and II.D of Appendix C to the Land Use Planning (LUP) Handbook (H-1601-1, Release 1-1693, dated March 11, 2005). The BLM's recreation constituents and gateway communities have affirmed these changes are appropriate direction for the future management of recreation and visitor services at both the 2004 BLM National Recreation and 2005 Western States Tourism Policy Council forums.

Action/Policy: This IM affirms BLM's corporate commitment to change its framework and emphasis to benefits-based recreation management. All new and on-going LUPs shall incorporate and implement policy contained in Appendices C and D of the LUP Handbook. Until LUPs incorporating Appendices C and D policies have been approved -- and for completed LUPs which do not incorporate Appendices C and D policies, Field Managers will assess and evaluate effects of proposed projects in Special Recreation Management Areas on activities,

experiences, beneficial outcomes and recreation setting character to ensure consistency with benefits-based management concepts.

Program planning and management direction are outlined in “*The BLM’s Priorities for Recreation and Visitor Services*”. The policy for management planning and plan implementation is contained in Appendices C and D of the LUP Manual Handbook. Subsequent to LUP Appendices C and D, specific policy guidance integrating the BLM’s Priorities for Recreation and Visitor Services will be forthcoming. This IM is critical to the future of maintaining quality recreation opportunities, providing appropriate public access and meeting growing recreation demand.

Timeframe: This policy is effective with the date of this IM. Further direction will be provided through subsequent information, Manual Section, Handbook, Unified Strategy for Recreation and Visitor Services and appropriate training.

Coordination: Assistant Director, Renewable Resources and Planning (WO-200), Director, National Landscape Conservation System (WO-170), and Group Manager, Public Affairs (WO-610).

Manual/Handbooks Section Affected: 8300

Contact: Gary G. Marsh, Acting Deputy Chief, Division of Recreation and Visitor Services (WO-250) at (202) 452-7795 or Bob Ratcliffe, Chief, Division of Recreation and Visitor Services (WO-250) at (202) 452-5040.

Signed by:
Carolyn J. McClellan
Acting, Assistant Director
Renewable Resources and Planning

Authenticated by:
Robert M. Williams
Policy and Records Group, WO-560

Appendix D

BLM Guidelines for Managing Recreation and Visitor Services and for Comprehensive Trails and Travel Management

Source: H-1601-1 – LAND USE PLANNING HANDBOOK
Appendix C (pp. 15-17)
BLM Manual Release 1-1693, 03/11/05

C. Recreation and Visitor Services

Land Use Plan Decisions. Identify special recreation management areas (SRMAs).

Each SRMA has a distinct, primary recreation-tourism market as well as a corresponding and distinguishing recreation management strategy. For each SRMA selected, determine whether that primary market-based strategy will be to manage for a *destination* recreation-tourism market, a *community* recreation-tourism market, or an *undeveloped* recreation-tourism market, and state that determination in the land use plan. Then describe the market that corresponds to that specific recreation management strategy (who they are and where they are located). Divide recreation areas that have more than one distinct, primary recreation market into separate SRMAs.

For each SRMA identified, delineate discrete recreation management zone (RMZ) boundaries. Each RMZ has four defining characteristics - it: (1) serves a different recreation niche within the primary recreation market; (2) produces a different set of recreation opportunities and facilitates the attainment of different experience and [other] benefit outcomes (to individuals, households and communities, economies, and the environment); (3) has distinctive recreation setting character; and (4) requires a different set of recreation provider actions to meet the strategically-targeted primary recreation market demand. To address these four variables within each RMZ, make the following land-use allocation decisions:

1. Identify the corresponding recreation niche to be served;
2. write explicit recreation management objectives for the specific recreation opportunities to be produced and the outcomes to be attained (activities, experiences, and benefits);
3. prescribe recreation setting character conditions required to produce recreation opportunities and facilitate the attainment of both recreation experiences and beneficial outcomes, as targeted above (the recreation opportunity spectrum is one of the existing tools for both describing existing setting character and prescribing desired setting character); and
4. briefly describe an activity planning framework that addresses recreation management, marketing, monitoring, and administrative support actions (e.g., visitor services, permits and fees, recreation concessions, and appropriate use restrictions) necessary to achieve explicitly-stated recreation management objectives and setting prescriptions (see Implementation Decisions subsection below).

Visual resource management classes need to be correlated with the recreation management objectives and setting prescriptions that have been set for each RMZ delineated.

Anything not delineated as an SRMA remains an extensive recreation management area (ERMA). Management within all ERMAs is restricted to custodial actions only. Therefore, actions within ERMAs are generally implemented directly from land use plan decisions and do not require activity-level planning. Land use plan decisions must, therefore, include recreation management objectives for all ERMAs. Consider addressing visitor health and safety, user conflict and resource protection issues in particular through these recreation management objectives. However, land use plan decisions for ERMAs need to also identify implementing recreation management, marketing, monitoring, and administrative support actions of the kinds listed for SRMAs under Implementation Decisions below (because no follow-up implementation decisions at the activity plan level are required for ERMAs) *Note: If recreation demand (i.e., from an undeveloped recreation-tourism market) requires maintenance of setting character and/or production of associated activity, experience, and benefit opportunities/outcomes, the area should, nonetheless, still be identified and managed as an SRMA, rather than being custodially managed as an ERMA.*

Recognition of singularly dominant activity-based recreation demand of and by itself (e.g., heavy off-highway vehicle use, river rafting, etc.), however great, generally constitutes insufficient rationale for the identification of an SRMA and the subsequent expenditure of major recreation program investments in facilities and/or visitor assistance. This does not mean that the expenditure of substantial custodial funding is unwarranted when circumstances require it, but such expenditures should be geared to take care of the land and its associated recreation-tourism use and not to provide structured recreation opportunities which characterize SRMAs.

Identification, but not formal designation, of both SRMAs and ERMAs is required (see Manual Section 8300).

Implementation Decisions. For all SRMAs, address four basic but broad types of recreation actions:

1. Recreation management (of resources, visitors, and facilities [i.e., developed recreation sites, roads and trails, recreation concessions, etc.]);
2. recreation marketing (including outreach, information and education, promotion, interpretation, environmental education; and other visitor services);
3. recreation monitoring (including social, environmental, and administrative indicators and standards); and
4. recreation administration (regulatory; permits and fees, including use restrictions where necessary and appropriate; recreation concessions; fiscal; data management; and customer liaison).

All BLM implementing actions for SRMAs must be conditioned by both the identified primary recreation market strategy and the specific RMZ land use allocation objectives and accompanying setting prescriptions incorporated within land use plan decisions. Since the BLM is not the sole-source provider of public lands recreation, be sure to address any actions of other key recreation-tourism providers within local service communities (i.e., local governments and private recreation-tourism businesses). The BLM cannot dictate to its local government and private business providers. Yet, without their collaborative engagement as managing partners in plan design and implementation, recreation opportunities targeted by land use plan management objectives cannot be produced over the long run, nor can prescribed recreation settings be sustained.

To the greatest extent possible, and appropriate to the setting prescriptions for the area involved, all new construction and modifications to recreation facilities, outdoor developed areas, and any related programs and activities will be accessible to people with disabilities in accordance with the Architectural Barriers Act of 1968 and Section 504 of the Rehabilitation Act of 1973, as amended, and in conformance with relevant building standards, accessible outdoor program guidance, and program regulations.

Notices, Consultations, and Hearings. No additional specific requirements exist.

D. Comprehensive Trails and Travel Management

Land Use Plan Decisions. Delineate travel management areas and designate off-highway vehicle management areas.

1. *Delineating Travel Management Areas.* Comprehensive travel management planning should address all resource use aspects (such as recreational, traditional, casual, agricultural, commercial, and educational) and accompanying modes and conditions of travel on the public lands, not just motorized or off-highway vehicle activities. In the RMP, travel management areas (polygons) should be delineated. Identify acceptable modes of access and travel for each travel management area (including over-land, over-water, over-snow and fly-in access [remote airstrips and float planes]). In developing these areas, consider the following:

- a. Consistency with all resource program goals and objectives;
- b. primary travelers;
- c. objectives for allowing travel in the area;
- d. setting characteristics that are to be maintained (including recreation opportunity system and VRM settings); and
- e. primary means of travel allowed to accomplish the objectives and to maintain the setting characteristics.

2. *Designation of Off-Highway Vehicle Management Areas.* All public lands are required to have off-highway vehicle area designations (see 43 CFR 8342.1). Areas must be classified as *open*, *limited*, or *closed* to motorized travel activities. Criteria for open, limited, and closed area designations are established in 43 CFR 8340.0-5(f), (g) and (h),

respectively.

For areas classified as limited consider a full range of possibilities, including travel that will be limited to types or modes of travel, such as foot, equestrian, bicycle, motorized, etc.; limited to existing roads and trails; limited to time or season of use; limited to certain types of vehicles (Ohms, motorcycles, all-terrain vehicles, high clearance, etc.); limited to licensed or permitted vehicles or users; limited to BLM administrative use only; or other types of limitations. In addition, provide specific guidance about the process for managing motorized vehicle access for authorized, permitted, or otherwise approved vehicles for those specific categories of motorized vehicle uses that are exempt from a limited designation (see 43 CFR 8340.0-5(a)(1-5).

At a minimum, the travel management area designation for wilderness study areas (WSAs) must be limited to ways and trails existing at the time the area became a WSA. *Open* areas within WSAs are appropriate only for sand dune or snow areas designated as such prior to October 21, 1976. Existing roads, ways and trails must be fully documented and mapped. This applies to both motorized and mechanized transport (see Interim Management Policy and Guidelines for Lands Under Wilderness Review H-8550-1(I.)B.) (11) for mechanized transport). In addition, future designations may be made for a WSA if it is released from study.

Except as otherwise provided by law (e.g., the Alaska National Interest Lands Conservation Act), congressionally designated wilderness areas are statutorily closed to motorized and mechanized use. These areas should be shown in the land use plans along with the acreage affected.

Existing laws, proclamations, regulations or Executive orders may limit the use of the open area designation or impose additional requirements relating to travel management in specific circumstances.

For RMP provisions related to national scenic, historic and national recreation trails, national back country byways, or other byway designations (see Appendix C, III. Special Designations).

Implementation Decisions. Complete a defined travel management network (system of areas, roads and/or trails) during the development of the land use plan, to the extent practical. If it is not practical to define or delineate the travel management network during the land use planning process, a preliminary network must be identified and a process established to select a final travel management network. Possible reasons for not completing the final network might be size or complexity of the area, controversy, incomplete data, or other constraints.

If the final travel management network is to be deferred in the RMP, then the RMP should document the decision-making process used to develop the initial network, provide the basis for future management decisions, and help set guidelines for making road and trail network adjustments throughout the life of the plan. The identification of the uncompleted travel management networks should be delineated in the land use plan and the following tasks

completed for each area:

- 1) Produce a map of a preliminary road and trail network;
- 2) define short-term management guidance for road and trail access and activities in areas or sub-areas not completed;
- 3) outline additional data needs, and a strategy to collect needed information;
- 4) provide a clear planning sequence, including public collaboration, criteria and constraints for subsequent road and trail selection and identification;
- 5) provide a schedule to complete the area or sub-area road and trail selection process; and
- 6) identify any easements and rights-of-ways (to be issued to the BLM or others) needed to maintain the preliminary or existing road and trail network.

If the decision on delineating travel management networks is deferred in the land use plan to the implementation phase, the work normally should be completed within 5 years of the signing of the ROD for the RMP.

At the implementation phase of the plan, establish a process to identify specific areas, roads and/or trails that will be available for public use, and specify limitations placed on use. Products from this process will include:

- 1) A map of roads and trails for all travel modes.
- 2) Definitions and additional limitations for specific roads and trails (defined in 43 CFR 8340.0-5(g)).
- 3) Criteria to select or reject specific roads and trails in the final travel management network, add new roads or trails and to specify limitations.
- 4) Guidelines for management, monitoring, and maintenance of the system.
- 5) Indicators to guide future plan maintenance, amendments, or revisions related to travel management network.
- 6) Needed easements and rights-of-ways (to be issued to the BLM or others) to maintain the existing road and trail network providing public land access.

In addition, travel management networks should be reviewed periodically to ensure that current resource and travel management objectives are being met (see 43 CFR 8342.3).

Notices, Consultations, and Hearings. No additional specific requirements exist.

Glossary of Terms and Acronyms (Excerpts Only)

Source: BLM Manual Release 1-1693, 03/11/05

Following are the acronyms and definitions for terms used in this Handbook. Also see definitions for terms used in Section 103 of FLPMA and the planning regulations at 43 CFR 1601.0-5. This glossary does not supersede these definitions or those in other laws or regulations.

Activity plan ~ a type of implementation plan (see *Implementation plan*); an activity plan usually describes multiple projects and applies best management practices to meet land use plan

objectives. Examples of activity plans include interdisciplinary management plans, habitat management plans, recreation area management plans, and allotment management plans.

Beneficial outcomes ~ also referenced as “Recreation Benefits”; improved conditions, maintenance of desired conditions, prevention of worse conditions, and the realization of desired experiences.

Closed ~ generally denotes that an area is not available for a particular use or uses; refer to specific definitions found in law, regulations, or policy guidance for application to individual programs. For example, 43 CFR 8340.0-5 sets forth the specific meaning of “closed” as it relates to off-highway vehicle use, and 43 CFR 8364 defines “closed” as it relates to closure and restriction orders.

Community recreation-tourism market ~ a community or communities dependent on public lands recreation and/or related tourism use, growth, and/or development. Major investments in facilities and visitor assistance are authorized within SRMAs where BLM’s strategy is to target demonstrated community recreation-tourism market demand. Here, recreation management actions are geared toward meeting primary recreation-tourism market demand for specific activity, experience, and benefit opportunities. These opportunities are produced through maintenance of prescribed natural resource and/or community setting character and by structuring and implementing management, marketing, monitoring, and administrative actions accordingly.

Designated roads and trails ~ specific roads and trails identified by the BLM (or other agencies) where some type of motorized vehicle use is appropriate and allowed either seasonally or year-long.

Destination recreation-tourism market ~ national or regional recreation-tourism visitors and other constituents who value public lands as recreation-tourism destinations. Major investments in facilities and visitor assistance are authorized within SRMAs where BLM’s strategy is to target demonstrated destination recreation-tourism market demand.

Here, recreation management actions are geared toward meeting primary recreation-tourism market demand for specific activity, experience, and benefit opportunities. These opportunities are produced through maintenance of prescribed natural resource setting character and by structuring and implementing management, marketing, monitoring, and administrative actions accordingly.

Explicit recreation management objective ~ specifically targeted recreation activity, experience, and benefit opportunities (i.e., recreation opportunity outputs) and their attainment (i.e., recreation outcomes).

Extensive recreation management area (ERMA) ~ a public lands unit identified in land use plans containing all acreage not identified as a SRMA. Recreation management actions within an ERMA are limited to only those of a custodial nature.

Limited ~ generally denotes that an area or roads and trails are available for a particular use or uses. Refer to specific program definitions found in law, regulations, or policy guidance for application to individual programs. For example, 43 CFR 8340.0-5 defines the specific meaning of “limited” as it relates to off-highway vehicle use.

Monitoring (plan monitoring) ~ the process of tracking the implementation of land use plan decisions and collecting and assessing data/information necessary to evaluate the effectiveness of land use planning decisions.

Objective ~ a description of a desired outcome for a resource. Objectives can be quantified and measured and, where possible, have established timeframes for achievement.

Off-highway vehicle (off-road vehicle) ~ any motorized vehicle capable of, or designed for, travel on or immediately over land, water, or other natural terrain, excluding: (1) any nonamphibious registered motorboat; (2) any military, fire, emergency, or law enforcement vehicle while being used for emergency purposes; (3) any vehicle whose use is expressly authorized by the authorized officer, or otherwise officially approved; (4) vehicles in official use; and (5) any combat or combat support vehicle when used for national defense.

Open ~ generally denotes that an area is available for a particular use or uses. Refer to specific program definitions found in law, regulations, or policy guidance for application to individual programs. For example, 43 CFR 8340.0-5 defines the specific meaning of “open” as it relates to off-highway vehicle use.

Recreation experiences ~ psychological outcomes realized either by recreation-tourism participants as a direct result of their onsite leisure engagements and recreation-tourism activity participation or by non-participating community residents as a result of their interaction with visitors and guests within their community and/or interaction with the BLM and other public and private recreation-tourism providers and their actions.

Recreation management zones (RMZ) ~ subunits within a SRMA managed for distinctly different recreation products. Recreation products are comprised of recreation opportunities, the natural resource and community settings within which they occur, and the administrative and service environment created by all affecting recreation-tourism providers, within which recreation participation occurs.

Recreation niche ~ the place or position within the strategically targeted recreation-tourism market for each SRMA that is most suitable (i.e., capable of producing certain specific kinds of recreation opportunities) and appropriate (i.e., most responsive to identified visitor or resident customers), given available supply and current demand, for the production of specific recreation opportunities and the sustainable maintenance of accompanying natural resource and/or community setting character.

Recreation opportunities ~ favorable circumstances enabling visitors’ engagement in a leisure activity to realize immediate psychological experiences and attain more lasting, value-added beneficial outcomes.

Recreation opportunity spectrum (ROS) ~ one of the existing tools for classifying recreation environments (existing and desired) along a continuum ranging from primitive, low-use, and inconspicuous administration to urban, high-use, and a highly visible administrative presence. This continuum recognizes variation among various components of any landscape's physical, social and administrative attributes; and resulting descriptions (of existing conditions) and prescriptions (of desired future conditions) define recreation setting character.

Recreation setting character conditions ~ the distinguishing recreational qualities of any landscape, objectively defined along a continuum ranging from primitive to urban landscapes, expressed in terms of the nature of the component parts of its physical, social and administrative attributes. These recreational qualities can be both classified and mapped. This classification and mapping process should be based on variation that either exists (i.e., setting descriptions) or is desired (i.e., setting prescriptions) among component parts of the various physical, social, and administrative attributes of any landscape. The recreation opportunity spectrum is one of the existing tools for doing this.

Recreation settings ~ the collective, distinguishing attributes of landscapes that influence, and sometimes actually determine, what kinds of recreation opportunities are produced.

Recreation-tourism market ~ recreation-tourism visitors, affected community residents, affecting local governments and private sector businesses, or other constituents and the communities or other places where these customers originate (local, regional, national, or

Setting character ~ the condition of any recreation system, objectively defined along a continuum ranging from primitive to urban in terms of variation of its component physical, social, and administrative attributes.

Special recreation management area (SRMA) ~ a public lands unit identified in land use plans to direct recreation funding and personnel to fulfill commitments made to provide specific, structured recreation opportunities (i.e., activity, experience, and benefit opportunities). Both land use plan decisions and subsequent implementing actions for recreation in each SRMA are geared to a strategically identified primary market—destination, community, or undeveloped.

Travel management areas ~ polygons or delineated areas where a rational approach has been taken to classify areas open, closed, or limited, and have identified and/or designated network of roads, trails, ways, and other routes that provide for public access and travel across the planning area. All designated travel routes within travel management areas should have a clearly identified need and purpose as well as clearly defined activity types, modes of travel, and seasons or timeframes for allowable access or other limitations.

Undeveloped recreation-tourism market ~ national, regional, and/or local recreation-tourism visitors, communities, or other constituents who value public lands for the distinctive kinds of dispersed recreation produced by the vast size and largely open, undeveloped character of their recreation settings. Major investments in facilities are excluded within SRMAs where BLM's strategy is to target demonstrated undeveloped recreation-tourism market demand. Here, recreation management actions are geared toward meeting primary recreation-tourism market

demand to sustain distinctive recreation setting characteristics; however, major investments in visitor services are authorized both to sustain those distinctive setting characteristics and to maintain visitor freedom to choose where to go and what to do—all in response to demonstrated demand for undeveloped recreation.

Visual resource management classes ~ categories assigned to public lands based on scenic quality, sensitivity level, and distance zones. There are four classes. Each class has an objective which prescribes the amount of change allowed in the characteristic landscape.

Appendix E

Positive and Negative Outcomes Checklists

The following checklists have been used to help analyze past demands; guide studies of present and future demands; define recreation niches and their corresponding Recreation Management Zones (RMZs); develop outcomes-focused management objectives; and finally, to formulate management and marketing actions, monitoring actions and corresponding standards and guidelines; and supporting administrative actions. The checklists have also proven helpful in enabling recreation planners and managers to better understand and appreciate the breadth and magnitudes of the many significant benefits of recreation and related amenities. There are two major components of the list, or actually two checklists. The first lists examples of **beneficial outcomes**, and the second lists examples of **undesirable or negative outcomes**. Beneficial and unwanted outcomes are shown for on-site recreating customers and as well as for residents of near-by communities and their households.

When using these checklists, remember that BBM adopts and incorporates definitions of three related but different types of benefits that can be realized from the management and use of recreation and related amenity resources. The definitions of these three types of benefits (and the reasons for each) are given in Part 1 of Appendix B of this text and are summarized as follows: (1) creation of an improved condition, (2) maintenance of a desired condition, prevention of an unwanted condition, or reduction of an unwanted condition, (3) and realization of a satisfying experience. For this reason, and to help assure comprehensiveness of the checklists of beneficial outcomes, two broad types of beneficial outcomes are shown. One is identified as “experiential benefits” and all others are “other benefits.”

For some of the experiential benefits, the accompanying improved conditions are obvious, but for others it is less discrete and is realized later in the “Benefit Chain of Causality” described in Part 1 of Appendix B of this report. Too frequently, practitioners forget about these “chained benefits” and inappropriately concentrate only on those satisfying experiences for which the improved conditions are readily apparent. In addition to the “chained benefits,” it is important to remember that not all positive and negative outcomes are created directly by the on- and off-site customers using the recreation opportunities and services provided, but instead accrue directly from provider actions. Examples include improvement and protection of the basis natural and heritage resources and economic benefits resulting from salaries paid to local agency employees and funds allocated to local contractors and cooperators.

The checklists were developed by expanding two published lists of the benefits of leisure. One was of items for the Recreation Experience Preference (REP) scales (Driver, Tinsley & Manfredo, 1991: 272-284 and Moore & Driver (2005:315-320). The REP scales were developed to “tap” many different types of recreation experiences, and they are shown in this Appendix to denote that variety. The other published list (Moore & Driver, 2005:29) built on and expanded the experiential benefits in the REP list to show all known benefits of leisure for which at least one (and generally more than one) scientific study supported the existence of each one listed. The first version of that list (Driver, 1990) was used to help develop “The Benefits Catalogue” (Canadian Parks/Recreation Association. (1997). It expanded that 1990 list of benefits and referenced the research publications that documented their existence and magnitudes. Later still, the second author of this case study report and his colleagues in the BLM expanded the Moore and Driver list of benefits, adapted the list of Benefits to Community Residents from work done

for the BLM by Marty Lee of Northern Arizona University, and created the Negative Outcomes Checklist.

Because many of the experiential benefits identified by the REP scales are repeated in the Moore & Driver (2005) list and also in the list of “Benefits to Community Residents, there is considerable redundancy among the lists. No attempt was made to reduce that redundancy in order to show the content of the two original lists.

Beneficial Outcomes Checklist
From which to Select or Craft Items for Visitor/Resident Customer Preference Studies and for Benefits-Based Recreation Management Objectives

Condensed list of Experiential Benefits to Recreation Participants

Defined by the Recreation Experience Preference Scales

- | | |
|---|--|
| A: Achievement/Stimulation | I: Enjoy nature |
| ! Developing your skills and abilities | ! Savoring the total sensory--sight, sound, and smell--experience of a natural landscape |
| ! Having others think highly of you for doing this | ! Enjoying having easy access to natural landscapes |
| ! Testing your endurance | |
| ! Gaining a greater sense of self-confidence | J: Introspection |
| ! Being able to tell others about the trip | |
| B: Autonomy/Leadership | ! Enjoying being more contemplative |
| ! Experiencing a greater sense of independence | ! Reflecting on my own character and personal values |
| ! Enjoying going exploring on my/our own | ! Thinking about and shaping my own spiritual values |
| ! Being in control of things that happen | ! Contemplating man=s relationship with the land |
| C: Risk-Taking | |
| ! Enjoying risk-taking adventure | |
| D: Equipment | |
| ! Talking to others about your equipment | |
| E/F/G: Family Togetherness/Similar People/New People | |
| ! Enjoying the closeness of friends and family | |
| ! Relishing group affiliation and togetherness | |
| ! Enjoying meeting new people with similar interests | |
| ! Enjoying participating in group outdoor events | |
| H: Learning | |
| ! Learning more about things here | |
| ! Enjoying having access to hands-on environmental learning | |
| ! Enjoying learning outdoor social skills | |

- K: Creativity
 - ! Doing something creative
 - ! Enjoying artistic expression of nature
- L: Nostalgia
 - ! Bringing back pleasant memories
- M: Exercise-Physical Fitness
 - ! Enjoying getting some needed physical exercise
 - ! Enjoying strenuous physical exercise
 - ! Enjoying having a wide variety of environments within a single park or recreation area
 - ! Enjoying having access to close-to-home outdoor amenities
 - ! Enjoying being able to frequently participate in desired activities in the settings I like
- N: Physical Rest
 - ! Enjoying getting some needed physical rest
- O: Escape Personal-Social Pressures
 - ! Releasing or reducing some built-up mental tensions
- ! Escaping everyday responsibilities for awhile
- P: Escape Physical Pressure
 - ! Feeling good about solitude, isolation, and being independent
 - ! Enjoying an escape from crowds of people
- Q: Social Security
 - ! Being near more considerate people
- R: Escape Family
 - ! Getting away from family for awhile
- S: Teaching-Leading Others
 - ! Enjoying teaching others about the outdoors
- T: Risk Reduction
 - ! Having others nearby who could help you if needed
 - ! Having a greater understanding about what will happen while I am here

Benefits to Community Residents

(Adapted by Bruns and colleagues from work done for the BLM by Marty Lee, Northern Arizona University)

- A: Lifestyle
 - ! Enjoying the hustle and bustle of having new people in town
 - ! Enjoying the peace and quiet of this small-town community
 - ! Enjoying maintaining out-of-town country solitude
 - ! Living a slower pace of life
 - ! Avoiding compromising the quality of life here
- B: Sense of Place
 - ! Feeling like I belong to this community and liking it
 - ! Avoiding having outsiders make me feel alienated from my own community
 - ! Observing visitors treat our community with respect
 - ! Feeling that this community is a special place to live
 - ! Just knowing this attraction is here, in or near my community
- C: Personal/Character
 - ! Nurturing my own spiritual values and growth
 - ! Developing a greater understanding of outsiders

D: Interacting with People

- ! Appreciating personal interaction with visitors
- ! Enjoying telling visitors what makes this community a special place to live and work
- ! Encouraging visitors to help safeguard our lifestyle and quality of life
- ! Sharing our cultural heritage with new people
- ! Seeing visitors get excited about this area
- ! Communicating our cultural heritage with those already living here

E: Change

- ! Liking change and new growth here
- ! Knowing that things are not going to change too much

F: Stewardship and Hospitality

- ! Feeling good about the way our cultural heritage is being protected
- ! Feeling good about how visitors are being managed
- ! Feeling good about how natural resources and facilities are being managed
- ! Feeling good about how this attraction is being used and enjoyed

Other and Related Benefits (From Moore & Driver, 2005)

I. To Individuals

A. Psychological

1. Better mental health and health maintenance

- ! A more holistic sense of wellness
- ! Restored mind from unwanted stress
- ! Diminished mental anxiety
- ! Improved mental well-being
- ! More committed to close-to-home recreation or consistent health improvement
- ! Greater commitment to pay more to re-create now to avoid paying more for health care later

2. Personal development and growth

- ! Greater self-reliance
- ! Confirmation/development of my own values
- ! Improved academic and cognitive performance
- ! Improved sense of control over one's life
- ! Improved skills for outdoor enjoyment
- ! Improved skills for enjoying the outdoors alone
- ! Improved skills for outdoor enjoyment with others
- ! Improved leadership abilities
- ! Improved teamwork and cooperation

- ! Improved outdoor knowledge and self-confidence
- ! Improved outdoor recreation skills
- ! Deeper sense of personal humility
- ! More balanced competitive spirit
- ! Improved competence from being challenged
- ! Greater sensitivity to/awareness of outdoor aesthetics, nature's art and its elegance
- ! Enlarged sense of wonder
- ! Greater spiritual growth
- ! Greater cognitive efficiency
- ! Increased capacity for artistic expression
- ! Improved ability to think things through and solve problems
- ! Increased adaptability
- ! Stronger ties with my family and friends
- ! Greater sensitivity to/respect for other visitors
- ! Increased understanding and tolerance of others
- ! Greater respect for my cultural heritage
- ! Enhanced awareness and understanding of nature
- ! Improved sensitivity and know-how to use and enjoy without adverse impact
- ! Greater understanding of the importance of recreation and tourism to our community
- ! Better sense of my place within my community
- ! Improved ability to relate to local cultures

- ! More well-informed and responsible visitor
- ! Greater sense of responsibility for my own quality of life
- ! Improved balance of work and play in my life
- ! Greater personal accountability and know-how in avoiding or causing conflict with others
- ! Enlarged understanding of my responsibility to help care for community and keep it clean
- ! Improved sense of personal accountability for control of domestic pets and livestock

3. Personal appreciation and satisfaction

- ! Closer relationship with the natural world
- ! A more outdoor-oriented lifestyle
- ! Improved reconnection to my rural roots
- ! Enhanced sense of personal freedom
- ! Greater sense of personal security
- ! Greater sense of adventure
- ! Improved appreciation of nature's splendor
- ! Improved opportunity to view wildlife close-up
- ! Greater appreciation of the arts
- ! Better understanding of wildlife's contribution to my own quality of life
- ! Greater freedom from urban living
- ! Greater appreciation for my wildland and park heritage and how managers care for it
- ! Greater personal enrichment through involvement with other people
- ! Improved personal awareness, learning and appreciation of others' cultural values

- ! Increased acceptance of others who are different
- ! Greater cultivation of natural resource stewardship ethic
- ! Increased appreciation of area's cultural history
- ! Greater awareness that this community is a special place
- ! Better understanding of my community's cultural identity
- ! Greater respect for private property and local lifestyles
- ! An improved stewardship ethic towards adjoining/host communities
- ! Improved understanding of how this community's rural-urban interface impacts its quality of life
- ! Improved understanding of this/our community's dependence and impact on public lands

B. Psycho-physiological

- ! Improved physical fitness and health maintenance
- ! Restored body from fatigue
- ! Improved cardiovascular health
- ! Reduced hypertension
- ! Improved capacity for outdoor physical activity
- ! Improved physical capacity to do my favorite recreation activities
- ! Greater opportunity for people with different skills to exercise in the same place
- ! Decreased body fat and obesity
- ! Improved muscle strength and connective tissue
- ! Increased lung capacity
- ! Reduced incidence of disease

II. To Households and Communities

- ! Heightened sense of community satisfaction
- ! Increased community sense of place
- ! Greater household awareness of and appreciation for our cultural heritage
- ! More informed citizenry about where to go for different kinds of recreation experiences and benefits
- ! Reduced social isolation
- ! Improved community integration
- ! Improved functioning of individuals in family and community
- ! Greater family bonding
- ! Improved parenting skills
- ! More well-rounded childhood development
- ! Improved group cooperation
- ! Greater community involvement in recreation and other land use decisions
- ! Increased community involvement reducing erosion of our community's small town, rural character
- ! Reduced numbers of at-risk youth
- ! Less juvenile delinquency
- ! Higher school class attendance
- ! Lower school drop-out rates
- ! More highly motivated students/improved scholarship
- ! Reduced social alienation
- ! Increased compassion for others
- ! Lifestyle improvement or maintenance
- ! Enhanced lifestyle
- ! Enlarged sense of community dependency on public lands
- ! Increased nurturance/tolerance of others
- ! Increased independence/autonomy among seniors
- ! Increased community interdependence and friendliness
- ! Greater interaction with visitors from different cultures
- ! Greater community valuation of its ethnic diversity

III. To Economies

- ! Reduced health maintenance costs
- ! Increased work productivity
- ! Reduced absenteeism from work
- ! Decreased job turnover
- ! Improved local economic stability
- ! More positive contributions to local-regional economy
- ! Increased local tax revenue from visitors
- ! Increased local job opportunities
- ! Greater value-added local services/industry
- ! Increased desirability as a place to live or retire
- ! Enhanced ability for visitors to find areas providing wanted recreation experiences and benefits
- ! Maintenance of community's distinctive recreation-tourism market niche or character
- ! Increased local tourism revenue
- ! Greater diversification of local job offerings
- ! Increased property values
- ! Greater fiscal capacity to maintain essential infrastructure and services

IV. To the Environment

- ! Greater retention of community's distinctive architecture and structures
- ! Maintenance of distinctive small-town atmosphere
- ! Maintenance of distinctive recreation setting character
- ! Improved maintenance of physical facilities
- ! Reduced looting and vandalism of historic/prehistoric sites
- ! Greater community ownership and stewardship of park, recreation, and natural resources
- ! Greater retention of distinctive natural landscape features
- ! Reduced wildlife harassment by recreation users
- ! Reduced wildlife disturbance from recreation facility development
- ! Reduced wildlife predation by domestic pets
- ! Greater protection of area historic structures and archaeological sites
- ! Sustainability of community's cultural heritage
- ! Improved respect for privately-owned lands
- ! Improved care for community aesthetics
- ! Improved soil, water, and air quality
- ! Greater protection of fish, wildlife, and plant habitat from growth, development, and public use impacts
- ! Increased awareness and protection of natural landscapes
- ! Reduced negative human impacts such as litter, vegetative trampling, and unplanned trails
- ! Increased ecologically friendly tourism operations
- ! Reduced spread of invasive species such as plants, insects, and aquatic organisms
- ! Greater recycling
- ! Conservation of entire sustainable ecosystems
- ! Improved maintenance of distinctive community character and identity

Negative Outcomes Checklist

From which to Select or Craft Additional Items for Resident Customer Preference Studies

(Adapted by Bruns and colleagues)

I. Personal Negative Outcomes:

A. Psychological

- ! Increased personal stress
- ! Loss of an important sense of place
- ! Loss of control over one's desired future
- ! Loss of control over my way of life

B. Personal development and growth

- ! Reduced ability to cultivate outdoor-oriented lifestyle
- ! Greater sense of residents being alienated from one's own community

II. Social and Cultural Negative Outcomes:

- ! Decreased family solidarity
- ! Reduced ability to cultivate outdoor-oriented lifestyle
- ! Increased exposure of at-risk youth to delinquency
- ! Increased erosion of community's small-town atmosphere
- ! Increased erosion of our sense of community
- ! Diminished sense of community cohesion/ friendliness
- ! Increased crime
- ! Greater conflict with outsider attitudes towards community
- ! Greater sense of resignation among local residents towards continued growth and development
- ! Increased personal disregard for local residents
- ! Increased personal disregard for other visitors
- ! Increased conflict with a new residents whose culture conflicts with our lifestyles

III. Economic Negative Outcomes:

- ! Higher cost of living
- ! Increased property taxes

- ! Loss of economic productivity
- ! Loss of family legacy (e.g., family ranch or other business)
- ! Loss of recreation-tourism product character and our community's market share
- ! Decreased tourism revenue
- ! Inability to cover costs of basic household necessities

IV. Environmental Negative Outcomes:

- ! More rapid loss of distinctive community architecture
- ! Loss of environmental quality within the recreation area
- ! Increased disregard for natural resources
- ! Increased visitor disregard for stewardship of community infrastructure
- ! Increased urbanization of the natural landscape
- ! Loss of community's defining, distinctive character
- ! Increased pollution, litter, and traffic noise
- ! Transformation of community by growth, develop

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