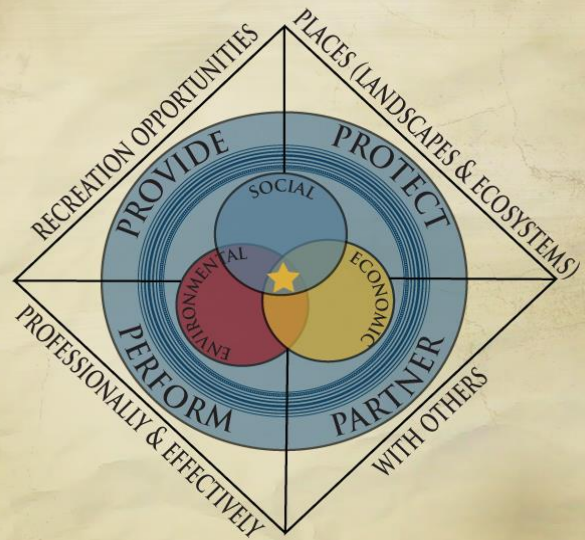


Southwestern Region Sustainable Recreation Strategy



*“Renewing body and spirit,
inspiring passion for the land.”*

<http://www.reclink.us>

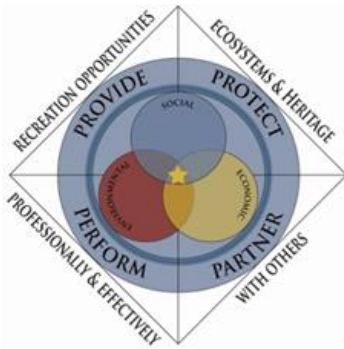


Southwestern Region of the Forest Service
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Introduction



It is not because things are difficult that we do not dare. It is because we do not dare that they are difficult.

Lucius Annaeus Seneca, ca. 4 BC – AD 65

The Southwestern Sustainable Recreation Strategy will guide the region toward a recreation program that is vital to the well-being of our visitors and communities and is essential to the future of the Forest Service and the National Forest and Grasslands. This innovative strategy sustains America’s great outdoors and builds greater capacity to serve the citizens of the southwest by focusing the recreation program on building strong relationships with our diverse publics who enjoy and actively care for the National Forests and Grasslands of the Southwest while improving our effectiveness and program resiliency.

Outdoor recreation is an important part of people’s quality of life and identity in the Southwest. The 11 national forests and grasslands are critical recreation resources for our citizens and part of what makes living in the Southwestern Region special. The Southwestern Region serves a diverse population of over 8.7 million citizens, with large communities of Hispanics and Native Americans. Public demand for recreation continues to increase rapidly, creating greater challenges in a time of increasingly limited resources.

The Performance Gap

Use of the forests has declined while population has increased. From 2000 to 2010, the region’s population has grown by over 24%, while recreational use of the forests and grasslands has fallen by about 11%. This means the recreation program is about 30% less relevant, as measured in terms of how well the agency served the population within the region. Additionally, about 2 million visitors a year or more than 10% are dissatisfied with their visit to a Southwestern Region national forest and grassland.

Recreation sites will close as they fall out of compliance with health and safety standards. Recreation infrastructure (i.e., the developed recreation sites, the utilities that support them, the roads to these sites and the trail systems that lead visitors safely into the forests) are rapidly falling into disrepair. By 2013, the Region’s ability to maintain this infrastructure base had plummeted by 60% (since 2010). Another major concern is the ecological impact caused by unmanaged recreation. This issue is particularly challenging as increasing motorized recreation is impacting the sensitive desert ecosystems.

Workforce morale has fallen. Morale was cited as a concern by forest recreation staff at the 2013 Regional RHWR meeting. One often-cited recommendation was to reassess workloads and set clear priorities. Recreation managers also talked about: confusion about recreation priorities, lack of accountability and lack of clear, concise leadership intent.

The greatest gap is the gap of lost potential. Basically, the recreation program is almost completely preoccupied with survival—it is an underfunded and over-worked program which rarely has time to consider the great potential contribution the recreation program can make toward solving the pressing issues of our time, or of contributing to people’s lives and the well-being of communities. This lack of greater vision and purpose, and maybe even the lack of hope or faith that the future can get better, is causing a loss of relevancy both internally and externally. The recreation program has tremendous potential to provide vital benefits for the economy, health, family and community building, problem solving, promoting democracy, restoring spirit and changing lives for the better. This Strategy takes step towards closing the widening relevancy gap to assure the sustainability of the recreation program and the National Forests and Grasslands.

Process Used to Develop the Strategy

To close the performance gap the regional leadership team (RLT) tasked a team led by the Director of Recreation, Heritage and Wilderness Resources (RHWR) to develop goals and objectives for the recreation program, and create a strategy to achieve them. The process began with a meeting of all the forests in the region (represented by their forest recreation staff) at the January 2013 Regional RHWR meeting. The results of that meeting were shared at the spring RLT meeting, and comments from the RLT were solicited at that time.

The team met regularly following the RLT meeting. The team reviewed the findings of the regional recreation meeting, the RLT comments and the National Sustainable Recreation Framework. Based on these documents and after extensive dialogue, the team developed an Intermediate Objective Map (IOM) that includes an overarching goal stated as a condition (i.e., the desired outcome of a set of activities). The IOM also defines “Critical Success Factors”, which are high-level outcomes, and the “Necessary Conditions” that represent the significant activities required to achieve the desired condition.

The team then examined the current reality of the recreation program within the region. They identified four areas that significantly contribute to the lack of desired performance and must be addressed in order to achieve the goal. These four areas are:

- 1) lack of clear strategic intent, and focused leadership and needed discipline;
- 2) inability to evaluate the long-term consequences of capital investment and other recreation policy decisions;
- 3) lack of new and greatly needed skills and training; and
- 4) inability to clearly communicate and engage both internally and externally with employees and partners in ways that would facilitate the changes needed to improve the performance of the recreation program.

The solution the team arrived at was to develop a set of interrelated strategic actions to address each of these areas that inhibited performance. These actions include: clearly lay out the strategic intent of sustainable recreation, and align performance and accomplishment measures and allocation methods with the strategic intent. This will create an environment that promotes behavior that will lead the region to achieve the desired level of performance. This Strategy views the recreation program as a large complex whole, instead of a set of competing program areas.

This Strategy is built on a hundred years of good work and also a total rethinking of the recreation program. It does this by setting it on new and solid scientific foundations, creating inspiring goals, opening up the program for new possibilities, working in close collaboration with our stakeholders and partners, and most importantly repositioning and integrating the program as core to the achievement of the Forest Service mission and the well-being of our citizens. In the past the relationship between the visitor and our communities has been transactional, or a social contract between the visitor and the agency. Part of the shift in paradigm is to make the relationship with our visitors transformational, or to transform the relationship of the recreation program and its constituents to that of one of exchange of fees or taxes for services to that of partner and citizen steward.

The Southwestern Sustainable Recreation Strategy

Goal

To achieve a sustainable recreation program, essential to advancing the mission of the Forest Service, with a diverse and engaged public that enjoys and actively cares for the National Forests and Grasslands of the Southwest.

The Sustainable Recreation Strategy will change the course of the recreation program, aligning the program tightly to the core mission of the Forest Service.

“To sustain the health diversity and productivity of the nation’s forests and grasslands to meet the needs of current and future generations.”

We achieve a sustainable recreation program by building resiliency in our ecological world, our social network of relationships and in our economy. Ecological recreation managers deal with modifying human behavior or designing sites to withstand ecological impacts and reduce energy use by creating sustainable sites and operations. In the social sphere we build mutually supportive relationships, trust and emotional connection and the ability to problem solve and cooperate together. In the economic world we create economic benefits to local communities and reciprocal economic support for government programs.

‘Sustainable Recreation’ is built on the concept of ‘sustainable development,’ which requires that the productive base needed to support well-being is maintained or increased over time. Furthermore, program development provides for the current generation without compromising the ability of future generations to meet their needs and aspirations. This productive base includes the ecological, social, economic and administrative dimensions of sustainability. The strategic intent of sustainable development is to expand the capability of the Region in order to provide the important benefits the visitors and communities are seeking to improve their quality of life, while increasing the sustainability of the national forests and grasslands.

So given that this is new, what do we do? We knowingly agree to consciously and fully change direction together. We build social capital first, increasing the resiliency of trust and

understanding. We build and operate recreation sites to reduce our ecological foot print. We do not trade off nature in ways that are irreversible when we have options. We enlarge the pie or total resources available by having our communities, the private sector and public engaged in our efforts. We co-create and co-operate. We live within our fiscal means in both our capital investment and our operations. We instill in our recreation workforce a clear sense of meaningful, vital purpose and optimism.

The Southwestern Region’s recreation program will transition toward sustainability beginning in FY 2014, and start a journey that will be filled with challenges and great rewards. The Southwestern Sustainable Recreation Strategy tiers to and adopts the vision statement of the National Framework for Sustainable Recreation:

“Renewing Body and Spirit, Inspiring Passion for the Land”

The Forest Service provides recreation on treasured lands that brings health and vitality to individuals and communities, and showcases our country’s natural abundance. Recreation on the national forests and grasslands invokes feelings of connection to the natural world and inspires responsibility to care for it. This strategy adopts the four “P’s” of the recreation management model: **Provide, Protect, Partner and Perform.**

Critical Success Factors

To achieve the goal the following three critical success factors were identified:

- 1. Leadership that is committed, focused, disciplined and shared, with an allocation and performance model and workforce that are aligned with our goal.**
- 2. Our agency and the diverse communities and partners we serve are engaged and able, together, to make better decisions and successfully implement programs.**
- 3. Action Plans, developed and implemented with our diverse communities and partners, which deliver a sustainable recreation program.**

Necessary Conditions

For each of these critical success factors to be attained necessary conditions were identified. The following section will elaborate on the needed necessary condition and the actions that are designed to meet them. This section is followed by an implementation timeline.

1) Leadership that is committed, focused, disciplined and shared, with an allocation and performance model and workforce that are aligned with our goal.

The following necessary conditions were identified:

- a) Focus and discipline, by helping and holding each other accountable, monitoring progress, meeting established milestones, and rewarding performance.
- b) Shared leadership at all levels within both line and staff.
- c) Enhanced and well-trained workforce (both line and staff). When hiring search out needed skills that are in alignment with the sustainable recreation framework.
- d) Aligned allocation and performance model and reward system.
- e) A clear description of the goal of sustainable recreation

Units will tightly define their strategic focus, deciding what the most important benefits they should be providing, and what important projects or program will be most effective in achieving these benefits. Units will evaluate their situation and then identify and take significant actions to achieve the transition toward sustainability and improved performance.

It is the responsibility of every recreation manager, line officers and those out in the field to share in the leadership and execution of this strategy. Units will have to work as a team, not only at the forest level but also at the regional level, to make this strategy a success and get the recreation program in the Southwestern Region performing at an optimal level.

This process can only be successful if all employees share in the goals and intent of the strategy. It will fall to line officers to assure that the strategy is followed. This will require

candid discussions and facing the reality of each unit's situation. This strategy is an opportunity to have alignment across the region and use our scarce resources to best meet the needs of the public for the long run.

To successfully execute this strategy, it is the RLT's responsibility to hold each forest and grassland accountable and consistently monitor progress toward the goal. Forest performance will be measured against the sustainability indicators and the new performance measures (see table). Forest Supervisor's performance appraisal will reflect the unit's progress toward sustainability. The allocation and performance targets will be aligned to further reinforce the Region's commitment to the goal of sustainable recreation.

All employees that play a role in the delivery of these systems need the exposure and training to this new paradigm and its goals and objectives. This shared understanding is critical to the success of shared leadership. The training will cover the spectrum of the knowledge and skills needed for successful sustainable recreation implementation and include the fundamental data analysis tools of the recreation program. The following is the initial priority training list:

- Partnership development, including communications, collaboration, strategic operations, fundraising, conduct and ethics, cradle to grave grants and agreements, and leadership training.
- Data analysis tools for: NVUM, INFRA, Recreation Facility Master Planning, US Census data, Forest Service social research management recommendations.
- Sustainable recreation planning processes at the site, watershed and forest planning scale.

To achieve these necessary conditions the following important actions were selected:

- 1.1 Forest Leadership Teams will establish goals for each performance measure and the RLT align the allocation model to reinforce the strategic intent and more equitable allocation.
- 1.2 The forest supervisors will ensure accountability and execution of action plans through yearly monitoring. The RHWR Director will hold a quarterly check-in during the first year and report to the regional forester and the RLT.
- 1.3 The RHWR Director will participate in workforce planning and assure that critical technical skills are available at the regional level. The RHWR Director will work with HR to align job descriptions and selection qualifications for recruitment of employees with the skills, knowledge and abilities needed for sustainable recreation.
- 1.4 The RHWR Director will identify the knowledge and skills required for the successful management of a sustainable recreation program, and will provide or identify training opportunities (e.g., collaboration, partnerships, business, sustainability and other tactical tools).
- 1.5 The regional forester will communicate the expectations for a skilled workforce and the use of employee Individual Development Plans to provide needed accountability.

2) Our agency and the diverse communities and partners we serve are engaged and able, together, to make better decisions and successfully implement programs.

The following necessary conditions were identified:

- a) Interested diverse communities and partners are engaged with us.
- b) Mutual commitment to building and maintaining long-term relationships.
- c) Shared leadership and responsibilities with our diverse communities and partners.
- d) Employees have the training, tools and skills to convene and engage the diversity of communities and partners.
- e) We make decisions and build only after fully evaluating the consequences.

The recreation program will give priority to the building of strong connections with communities and visitors. The goal is to transform the relationships and self-interests into one of connectedness and caring for the whole. The key is to place importance on building social capital as the most important part of sustainable recreation leadership.

The program will move beyond the past measures of success. For example, program resiliency and benefits measures will be applied, instead of measures related to the amount of infrastructure built and recreation opportunities provided. Rethinking these values, perceptions and practices requires addressing change at a fundamental level.

All significant recreation program capital decisions are to be made after fully evaluating the consequences with our stakeholders. As we become more aware of the consequences of our actions, we should also become better able to understand and manage the multiple demands of our publics. Units are to avoid the repercussions of unmanageable infrastructure by using the measures that target and promote sustainability.

A sustainability perspective is to be adopted. The sustainability indicators will monitor the state of ecological, social, economic and administrative foundation of productivity as assets or capital not to be consumed, but preserved and increased by using only the surplus 'interest'.

Managers are to apply adaptive management and steer the program by reflecting on consequences as a result of monitoring. Measures provide indicators of resiliency and effectiveness. By monitoring these measures, improvements are to be made in the more efficient use of resources and program delivery, thereby reducing per capita infrastructure and energy use per unit of benefit.

To achieve these necessary conditions the following important actions were selected:

- 2.1 Forests will work with local stakeholders to help them understand the importance of creating the most beneficial sustainable recreation program. This will include creating a more diverse inclusive program and the discussion of equity between forests, communities and user groups.

- 2.2 The Region will adopt the benefits based management approach to focus projects and actions on benefits achievement and not on infrastructure additions.
- 2.3 Forests will fully explore other opportunities to provide recreation through other governmental partners, non-profits or the private sector, before providing those opportunities ourselves.
- 2.4 Individuals will be rewarded and forests recognized for performance related to sustainability, and for developing innovative approaches to delivering recreation programs, information, interpretation, etc.
- 2.5 A Sustainability Assessment Tool will be developed in 2014 and applied to all new developments and reinvestments of over \$100,000 regardless of funding source. Developments actions should contribute to the unit's economic, environmental and social sustainability

3) Action planning, engagement, collaboration and communication action plans, developed and implemented with our diverse communities and partners, which deliver a sustainable recreation program.

The following necessary conditions were identified:

- a) A Forest and Grassland specific sustainable recreation action plan.
- b) A support team and a tool box for developing an adaptable sustainable recreation action plan.
- c) Funds set aside to help forests and the RO complete their plans.
- d) A regional and forest public engagement approach and communication plan.
- e) Regional Leadership Team review of action plans and active support for their implementation, including considering special sustainability funding initiatives.

In 2014 employees will participate in workshops providing them with an opportunity to understand the principles of sustainable recreation and be introduced to the tools, training, and skills required for collaboration with communities and stakeholders. Units will maintain ongoing collaboration with communities and stakeholder groups to deliver a sustainable recreation program on the ground. In addition, the region will develop a framework for collaboration in 2015 which includes the sideboards and principles for what sustainable recreation means and a menu of collaboration techniques and ideas that can be tailored to the specific circumstances found on a particular forest and community.

To facilitate employee engagement in 2014, the RHWR Director will develop a series of workshops, similar to the "Desired Conditions" workshops given for the regional restoration strategic plan. These interactive sessions will be a chance for employees to translate the concepts of sustainable recreation into concrete activities and ways to implement the strategy on the ground. In addition, the RO will facilitate convening regional networks and forums for employees to interact with peers and share ideas, successful techniques, and lessons learned.

To achieve these necessary conditions the following important actions were selected:

- 3.1 Each national forest and grassland will begin to develop a forest specific action plan in CY 2014. This plan, utilizing a framework created by the RO, will establish action priorities for a 5 year period that will transition the forest towards sustainability.
- 3.2 The regional public affairs staff will work with the regional recreation staff to produce a regional engagement and communications plan for both internal and external audiences to communicate the purposes and methods of this Sustainable Recreation strategy.
- 3.3 There will be common extensive training, dialogue and shared leadership around the Southwestern Sustainable Recreation Strategy itself.
- 3.4 There will be regional and state level networks for employees and stakeholders to share lessons learned and coordinate efforts will be developed.
- 3.5 There will be designed face-to-face dialogue for line and staff at all levels of the Agency.

Action Items and Timeline

To recap and place in context the implementation of the above action items, the following key actions and timeline are highlighted.

- The implementation of the Strategy will begin upon its approval by the Regional Forester. The life of the Strategy is five years, from FY 2014 through FY 2019. The Strategy will be the guiding document for the Southwestern Region Recreation program efforts.
- In the first year, all forests will begin to develop forest specific action plans that will lead to full implementation of the Strategy. The RO, in partnership with forests, will develop all the needed tools, such as planning processes and outlines for forest action plans. The RO will also develop a regional engagement and communication plan. The RHWR Director will develop a sustainable recreation workshop for the Supervisor's Office and Ranger District recreation and staff. Forest supervisors will initiate the development of their action planning by June 1, 2014. While developing their action plans, forests should categorize action items into phases, to ensure the action items are implemented by FY 2019.
- The key milestones will be the completion by all forests of the Southwestern Region Sustainability Strategy workshop by October 1, 2014, followed by approved action plans by June 31, 2015. These forest-based action plans will be used to develop project proposals for capital investment funding for FY 2015-2019 of the Strategy. Also for FY 2015, recommended modifications to the allocation in NFRW will take place to better reflect the goals of the Strategy. Starting in FY 2015, the RO will monitor implementation of forest-based action plans and the new sustainable recreation metrics.
- The RHWR Director will prepare summaries related to progress toward implementation, address any barriers that the forest need assistance in overcoming, and make annual presentations to the Regional Leadership Team until FY 2019. Success stories will be shared internally within the Region and with the Washington Office.

Performance and Accomplishment Measures

To improve performance and support accountability, new reporting measures have been developed. These measures remove the counter-productive incentives that contribute to unsustainability, and monitor a new set of measures that better represent both the performance of a forest program as measured in benefits, and its transition toward sustainability. All measures except for the “Recreation Visits” are not linked to the allocation model and all data is already being collected. The intention of the allocation model is to fairly fund various outcomes while the intention of these measures is performance improvement.

| # | CODE | NAME | UNIT OF MEASURE |
|----|-------------------------|---|-----------------|
| 1 | Recreation Visits | Total recreation visits to a NFS unit | Total Visits |
| 2 | Rec-Sat-Visits | Percent satisfied visitors to forest a unit | Percent |
| 3 | Rec-Equity | Percent gap between Community Diversity and visitors served | Percent |
| 4 | Rec-Eco | Average Total Trip Spending per Party | Dollars |
| 5 | HRTG-MGD-STD | Heritage program managed to standard, | Number |
| 6 | WLD-MGD-STD | Wilderness Areas managed to minimum stewardship level, | Number |
| 7 | WLD-SCE-RVR-MGD-STD | Wild and Scenic Rivers meeting statutory requirements | Number |
| 8 | REC-PAOT-DAYS-ADM-STD-% | Percent of Recreation site capacity operated to standard (Health and Safety) | Percent |
| 9 | REC-SUP-ADM | Percent of Recreation special use authorizations administered to standard | Percent |
| 10 | %-NFS-land-MVUM | Percentage of NFS lands covered by current motor vehicle use maps | Percent |
| 11 | REC-CPCTY-ACC-% | Percent of developed sites that meet accessibility standards | Percent |
| 12 | REC-SIT-STD-AVG | Forest Average Recreation Sites Facility Condition Index | FCI |
| 13 | REC-BLDG-ACC-STD-% | Percent Number of Forest Service owned buildings in recreation sites meeting accessibility guidelines | Percent |
| 14 | REC-SITE-INFRA | Sustainable Recreation CRV, the gap between an assigned CRV amount and the existing situation | INFRA-CRV |
| 15 | TL-SYS_MGD-STD-% | Percent of National Forest System trail miles managed to standard | Percent |
| 16 | Vol-Partnership-Dollars | Value of Hours and Dollars Contributed by Volunteers and Partners | Dollars |
| 17 | TC-Sat-Visitor | Cost per Satisfied Visitor Served | Dollars |
| 18 | UFS | Unit Fiscal Sensitivity (UFS) | Percent |