

OUTFITTER GUIDE CHECKLIST

This following list includes the requirements that are necessary to evaluate and approve your proposal. All new application proposals will be evaluated during the Forest's annual Open Season from September 1 to November 1 of each year.

1. Completed Outfitter/Guide Operation Plan Proposal (forms enclosed)
 - a. Explanation of services to be provided.
 - b. When you will offer services (beginning and ending dates).
 - c. A map(s) that shows where you propose to offer services.
 - d. Average and maximum size of groups you will be taking onto the National Forest for each type of activity planned
 - e. Qualifications roster of individuals or employees actually doing the outfitting/guiding.
 - f. Information and education to be given to your clients.
 - g. Safety and/or sanitation precautions/procedures that apply to your service.
 - h. Resource Protection measures

If your application is approved you will need to submit the following documents in order to receive an outfitter/guide special use permit.

1. Estimated Fee Option Worksheet (Instructions provided)
2. Proof of Oregon State Outfitter Guide registration or a copy of correspondence from the State of Oregon exempting you or your organization from the state law. (Non profit organizations are exempt, unless operating a commercial service) Information on state registration can be obtained from the Marine Board in Salem at 1-503-378-8587. Until your permit is approved, only submit documentation that you have contacted the Oregon State Marine Board, regarding registration. Once your application has been approved, you will need to submit a copy of your registration prior to receiving your permit.
3. A Certificate of Insurance showing coverage as described on page 2.
4. A copy of your participant agreement.
5. Documents reflecting your customer rate schedule. This should include advertising material, brochures, or a signed letter to the Forest Service indicating your customer rates.

OUTFITTER/GUIDE OPERATION PLAN/PROPOSAL

Complete all pertinent sections in as much detail as necessary for the Forest Officer to understand your annual operation. If additional space is needed, attach supplemental pages. If a section does not relate to you, indicate with a N/A. Please type or print legibly.

YEAR OF OPERATING PLAN: _____

NAME OF OUTFITTER AND/OR BUSINESS _____
ADDRESS: _____

PHONE NUMBER(S): _____

TYPE(S) OF ACTIVITIES (ski tours, horse packing, backpacking, climbing, etc.).
Group by National Forest and district. Attach map depicting travel routes and
overnight locations. _____

STANDARD OPERATING PROCEDURES (how you and your employees will run your
programs). Include how you will cover environmental education, minimum impact
practices, etc.. _____

RISK MANAGEMENT: Procedures you have in place to reduced the risk of injury or accidents to your clients. (i.e. for backcountry, climbing, or winter operations, explain in detail, the procedures used for avalanche hazard prediction, avalanche rescue, route selection, go or no-go decisions, travel precautions use of transceivers, etc.). Attach a copy of your operations or safety manual, if your organization has one.

LIST THE NUMBER OF CLIENTS/GUESTS THAT WILL BE INVOLVED IN EACH ACTIVITY

WHAT WILL BE THE AVERAGE RATIO OF GUIDES TO GUESTS?

LIST YOURSELF AND ALL EMPLOYEES, INDICATE THE LEVEL OF FIRST AID TRAINING, THE EXPIRATION DATE, AND PROFESSIONAL QUALIFICATIONS OR MEMBERSHIP.

Employee	First Aid and Expiration Date	Professional Qualifications
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EXPLAIN THE PROCEDURES TO BE TAKEN IN CASE OF ACCIDENTS OR OTHER EMERGENCIES.

The holder is must notify and submit to the Forest Service within 5 days of any accident that results in or may result in an insurance claim. The holder must contact the Forest Service within 24 hours of any accident resulting in a death or serious injury.

DESCRIBE THE FIRST AID EQUIPMENT TO BE USED DURING OPERATIONS:

WILL YOU USE ANY TYPE OF RADIO COMMUNICATION SYSTEM FOR GENERAL OPERATIONS OR FOR EMERGENCIES: _____ IF YES, DESCRIBE SYSTEM: _____

RESOURCE PROTECTION:

EXPLAIN METHODS FOR DISPOSING OF TRASH AND WASTE (TOILETS, LITTER, ETC.).

DESCRIBE ANY TEMPORARY STRUCTURES TO BE USED _____

WILL YOU REQUIRE AN ASSIGNED CAMP SITE? _____ WHERE? _____

ESTIMATED USE AND FEE CALCULATION FORM

Name of individual or organization: _____

Planned Date(s) of Use (Be Specific)	Activity	Proposed area of Use	Estimated No. of Participants	Estimated Revenue
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Totals

Gross Revenue X Option A or B (3%) = Fee

FEE OPTIONS and Fee Estimate Worksheet

The holder must select, at the time of the initial permit application, one of the following options (A orB), to be used in calculating the estimated fee.

Final Fee: After the operating season, at a date to be established by the authorized officer in the permit, the holder shall submit financial and actual use records for final fee calculations. This calculation is a reconciliation between the previously paid estimated fee and a final amount due based on actual use and revenue.

The two fee options are as follows: (both of which employ a pre-season estimate, payment in advance, and a year end reconciliation.)

1. Option A - Based on average service day client charge using the schedule of rates.
2. Option B - Based on 3 percent of annual gross revenue.

Under either option, the fee payable in advance is based on an estimate of the amount of total outfitter customer revenue expected during the full permit year.

OPTION A Schedule of Rates

Outfitter's Average Adjusted Service Day Client Charge	Service Day Fee Due Forest Service
less than \$8.00	\$.25
8.01 - 20.00	.40
20.01 - 35.00	.80
35.01 - 50.00	1.30
50.01 - 75.00	1.90
75.01 - 100.00	2.60
100.01 - 125.00	3.40
125.01 - 150.00	4.10
150.01 - 175.00	4.90
175.01 - 200.00	5.60
200.01 - 250.00	6.75
250.01 - 300.00	8.25
300.01 - 400.00	10.00
over 400.00	3% of the average adjusted service day client charge

DEFINITIONS

Gross Revenue is the total amount received by the holder from the clients or customers as payment for goods or services provided by the holder in connection with the outfitted and/or guided National Forest trip. Includes all revenue from clients or customers from the sale of goods or services provided by the holder, without regard to whether these goods or services are provided while on National Forest System lands or waters or on non-National Forest system lands or waters and without regard to whether provided during or prior to arrival or after departure from the holders headquarters or local community.

Adjusted Gross Revenue: is the gross revenue reduced by either the amount of the holders costs paid to others for pre and post trip transportation and pre and post subsistence (prior to arrival or after departure from the holders headquarters or local community) or the reasonable value of such services when provided by the holder. Transportation, subsistence or any other payments made by the holder to others for services, goods, or accommodations provided during the outfitted or guided trip are not deducted.

Service Day: is a day or any part of a day for each individual or client accompanied or provided services, including transportation services by an outfitter or guide.

Average Adjusted Service Day Client Charge: is the adjusted gross revenue divided by the number of service days actually used.

Discount for off-forest Use. Can be only used with option B. In calculating either the estimated or final fee, reduce the amount based on the percentage of time the customers occupy National Forest System lands and waters in relation to the total duration of the outfitted trip.

Percent of Total Time on National Forest Lands and Waters	Fee Reduction
Less than 5 percent.....	80 percent
5-60 percent.....	40 percent
over 60 percent.....	None

The holder must provide trip duration, itinerary, or such other information as may be specified by the authorized officer to support a request for fee reductions based on off-forest use. In unusual circumstances, Regional Foresters may provide for additional discounts when in the public interest, due to minimal use of NFS lands when the primary purpose of the trip is not directly for the use of NFS lands and waters.

INSURANCE REQUIREMENTS

The following insurance guidelines are provided to show why insurance requirements are necessary and how the Certificate of Insurance needs to be prepared to meet Forest Service requirements.

The Special Use Permit requires the holder to indemnify the United States against any liability for damage to life or property arising from the occupancy or use of National Forest System Lands. The Permit requires the Permittee to have the insurance company name the **United States Government** as an additionally insured party. Also, the Certificate of Insurance and the insurance policy shall contain a specific provision to the effect that the policy shall not be cancelled or the provisions changed or deleted before thirty (30) days written notification by the insurance company to the Forest Service.

A Certificate of Insurance must be presented to the Forest Service before a Special Use Permit will be issued. For new permits or if there is a change in insurance companies, especially for long-term or high risk projects the Authorized Officer will require that a copy of the actual insurance policy be furnished before the permit is issued.

The following acceptable additional insured clause shall be shown in verbatim on the face of the Certificate of Insurance and, as a clause or an endorsement in the insurance policy:

"It is understood and agreed that the United States Government is additionally insured solely as respects liability arising from operations of the named insured."

In addition, the following 30 day clause is also mandatory and shall be shown in verbatim on the Certificate of Insurance as well as in the insurance policy.

"It is understood and agreed that the coverage provided under this policy will not be changed or its provisions changed or deleted before thirty (30) days written notice to the United States Government, U.S. Department of Agriculture, Forest Supervisor, Mt. Hood National Forest, 2400 Champion Way, Sandy OR 97055.

The certificate holder should read: "United States Government, c/o USDA Forest Service, Mt. Hood National Forest".

If these clauses are not on the Certificate of Insurance in verbatim, and are not in the insurance policy or on an endorsement as stated above, a Special Use Permit will not be issued.

The amount of insurance required will depend on the degree of risk involved. The Forest Service representative administering the special use permit will inform the (prospective) permittee of the required liability coverage necessary.

ACTUAL USE REPORT AND FINANCIAL FORM

to be completed at end of operating season by date shown in clause _____ of your permit.

Name of individual or organization _____

Key contact person _____

Actual Date(s) of Use	Area of Use (Be Specific)	No. of Participants	Total Revenue from Fees Collected	Nature of Use or Program Name
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Totals

(add additional sheets if required)

Fee Calculation

When calculating the final fee, the holder must use the same option selected when the holder calculated the estimated fee. The final fee will be the total fee calculated minus the estimated fee previously paid.

The minimum fee due the Forest Service is \$80.00.

Forest Service Fee \$ _____
(please do not send in any payment until you are billed)