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Issues and Concerns Related to the USDA Forest Service's Recreational Fee Demonstration Program

*A Synthesis of Published Literature,
Critical Reports, Media Reports, Public
Comments, and Likely Knowledge Gaps*

April 29, 2002

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Recreation, Heritage, and Wilderness Program
USDA Forest Service, Washington Office





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Issues and Concerns Related to the USDA Forest Service's Recreational Fee Demonstration Program

*A Summary of Published Literature, Critical Reports, Media
Reports, and Public Comments*

Executive Summary

Since 1897, when Congress established the forerunner of the USDA Forest Service, the agency's work of providing recreation opportunities has largely been funded with public tax dollars allocated by Congress. Today, current backlogs of recreation-related maintenance are substantial and the popularity of recreating on all federal lands continues to increase even as fluctuating budgets are increasingly inadequate to fund related work. Federal land management agencies are expected to accomplish more with less. Previously secured non-tax dollars, such as timber sale revenue, have become generally less acceptable to the American public. During the 1990's, recreation fees were seen by many inside and outside the agency as a means to fund needed work, stabilize fluctuating budgets, and allow the agency to continue providing diverse, high-quality recreation while distributing more of the costs to those who most directly benefit.

The Forest Service is currently preparing to revise its Recreational Fee Demonstration program¹ in response to an opportunity presented by Congress. The program began after Congress, in 1996, directed the Forest Service, through the Secretary of Agriculture, to implement a Recreational Fee Demonstration program (P.L. 104-134, §315). In the same Act, Congress also directed the Secretary of Interior to implement separate, agency-specific versions of the program for agencies within the DOI. The authority to collect fees has been extended to September 30, 2004.

The current opportunity provided by Congress is for the Forest Service to revise its current program based upon lessons learned since its inception and test the revised program's feasibility over the two years of remaining authorization. This document contributes to the revision effort by summarizing known issues and concerns related to the Forest Service's program as reported in published literature, critical reports, media reports, and public comments. This document contributes to the discussion a summary of existing research and known opinions related to recreation fees.

Primary sources for this document include published literature from research studies, critical reports from internal and external sources, media reports and surveys, and public comments submitted to the agency.

¹ Congress authorized four federal agencies—the Bureau of Land Management, the National Park Service, the US Fish and Wildlife Service and the USDA Forest Service—to each establish a “Recreational Fee Demonstration program”. To remain consistent with authorizing language, this document applies that name to the program instead of other variations, such as Recreation Fee Demonstration program or Fee Demo. In places, the term “program” substitutes for the formal program title when the meaning is clear.



The Forest Service's program shows examples of the agency's efforts to adapt to new information and respond to issues and concerns while remaining focused on the task Congress assigned. Where possible and needed, the agency has made the current program less confusing than it was when it began. Such changes are efforts to address frustrations expressed by visitors. The agency has conducted numerous research studies, detailed in separate documents, to better understand visitor concerns and seek other ideas for improving the program. It is aggressively developing more convenient payment options and local programs that would extend to visitors a variety of substitutes for fees, including increased volunteer programs and clear communication of non-fee site availability. And it continues to invite suggestions for additional alternatives to recreation fees, alternatives that can help meet the very real need, clearly identified by Congress, to operate and maintain recreation areas or sites and enhance habitat affected by recreation.

This document concludes with a complete list of the central lessons learned and identifiable knowledge gaps related to the issues and concerns. It includes description of innovative Forest Service efforts to adapt the program to changing understandings and evolving circumstances.

Issues and Concerns

The following are summary statements of the central issues and concerns to which the Forest Service's Recreation Fee Demonstration program and any future recreation fee program must attend. An issue or concern exists when an individual or group believes that a Forest Service action related to the Recreational Fee Demonstration program has caused or will cause a problem. For those who support the program, an issue or concern often reflects possible problems that might follow from changing or discontinuing the program.

To emphasize the point that various individuals and groups tend to see issues and concerns differently, this document states them in the form of an implicit question rather than a statement of fact. This format is intended to encourage discussion, rather than argument, and highlight simultaneous ways of seeing each issue or concern.

Overarching Issue and Concern: Role of Recreation Fees in Agency Funding

- Whether and to what degree recreation fees can or should recover all or a portion of the cost of operating and maintaining recreation areas or sites and enhancing habitat affected by recreation.

Issues and Concerns About Accountability

- Whether the program, including the financial component, is adequately accountable to Congress and the public based upon understandable criteria.
- Whether the agency currently has adequate criteria to evaluate the program in a managerially relevant and publicly responsive manner.



Issues and Concerns About Public Involvement

- Whether the agency could more clearly improve and define opportunities for public involvement, better incorporate the public input, do a better job communicating with the public at various levels, and establish greater opportunities for stakeholder participation at regional and national levels.

Issues and Concerns About Inequitable Effects

- Whether the Fee Demonstration Program limits access based on economic ability to pay and causes an inequitable effect on those who have less income.
- Whether the Forest Service adequately addresses the possible effects of fees on visitors who have low levels of disposable income.
- Whether the population most affected by the program is defined by low-income or by low disposable or discretionary income.
- Whether recreation fees present an inequitable or unfair burden on local residents.
- Whether the program unfairly burdens recreation-related businesses, such as outfitter guides, whitewater boaters, or concessionaires, who already must obtain fee permits to operate.
- Whether the Forest Service has sufficient flexibility to distribute recreation fee revenue fairly and equitably to address high priority organizational needs.

Issues and Concerns About Acceptability of Fees

- Whether recreation fees are appropriate.
- Whether recreation fees are appropriate for dispersed recreation, such as trail access or backcountry camping, or for general access.

Issues and Concerns About Pricing of Fees

- Whether visitors are being charged numerous or layered fees by the same agency or by multiple public land management agencies;
- Whether the price of each recreation fee is appropriate for the level of service provided;
- Whether recreation fees could lead to greater levels of service that require more funding and higher or more common recreation fees.

Issues and Concerns About Displacement

- Whether visitors are being displaced by recreation fees or visiting less frequently and whether any displacement that might occur is by definition problematic.

Issues and Concerns About Volunteerism

- Whether payment of recreation fees reduces the ability of volunteer groups to attract willing participants to accomplish needed work on public lands.



Issues and Concerns Beyond Agency Control

- Whether Congress should have established a recreation fee program or increased agencies' budgets to provide the same benefits and whether Congress should fund the administration of the program.
- Whether Congress was correct in establishing a recreation fee program through an Appropriations Bill rider rather than with a distinct legislative act.
- Whether the fee program legislation is sufficiently clear about agency discretion to apply fee revenue to pay for recreation fee program related costs.
- Whether recreation fees are appropriate in light of current grazing fees and timber contract requirements, as well as any other Forest Service program established by legislation.
- Whether Congress should allow recreation fee revenue to replace appropriated funds to maintain recreation opportunities and habitat enhancements.
- Whether public land recreation should be free for all and paid for by the tax dollars of current and future generations.

Analysis Framework and Document Structure

This document contributes to revising the Forest Service's Recreational Fee Demonstration program. It summarizes published literature and research as well as additional source materials including reports from the General Accounting Office and Congressional Research Service, media reports, unpublished internal observations, available public comments, and other more anecdotal material.

The framework for this document is drawn from the following basic set of questions that can promote strategic thinking and help distinguish between accepted knowledge, disputed knowledge, and gaps in knowledge.

- What problems and benefits have been, are, or might be associated with the Forest Service's Recreational Fee Demonstration program, regardless of who raises them?
- What goals or objectives have been suggested that might guide the program so as to address those problems while realizing the benefits?
- What obstacles, whether internal or external to the agency, might get in the way of meeting those goals?
- What actions might take us where we want?
- What information might tell us if we are moving in the desired direction?



Congressional Goals for the Recreational Fee Demonstration Program

In 1996, Congress directed the USDA Forest Service, through the Secretary of Agriculture, to implement a Recreational Fee Demonstration program. In the same Act, Congress also directed the Bureau of Land Management, National Park Service, and US Fish and Wildlife Service, through the Secretary of Interior, to implement agency-specific examples of the program. Initial authority to collect fees ended on September 30, 1998. Congress has extended that authority several times and the current sunset date is September 30, 2004. Congress has also set September 30, 2007, as the current sunset date for agencies to expend collected funds.

The program's original and continuing purpose is stated in the General Provisions section for Department of Interior and related agencies, Section 315(a) of the Omnibus Consolidated Rescissions and Appropriation Act of 1996 (P.L. 104-134). With passage of the Act, Congress directed the relevant agencies to implement a Recreational Fee Demonstration program with the following purpose:

To demonstrate the feasibility of user-generated cost recovery for the operation and maintenance of recreation areas or sites and habitat enhancement projects on federal land (P.L. 104-134).

Congress directed the relevant agencies to test the feasibility of a variety of cost recovery and fair market valuation methods for setting fees and for evaluating the program, to test a variety of fee collection methods, and to test a variety of partnerships for accomplishing program goals. Congress also directed agencies to try innovative implementation activities, with specific reference to collection, information, and reservations through concession operations, volunteers, partnerships, and private investment. Program goals include raising revenue to fund the operation and maintenance of recreation sites and to fund work necessary to enhance habitat affected by recreation at those sites.

Revenue collected through this fee program is to remain with the agency administering the site. Agencies must apply most (80%) of the collected revenue to the area, site, or project that collected the revenue. Agencies must retain the remaining revenue (20%) for agency-wide needs determined at the agency's discretion as long as funded projects increase the quality of visitor experience or enhance resource protection. Congress directed agencies to apply Recreational Fee Demonstration program revenue in the following manner:

Amounts available for expenditure ... may only be used for ... backlogged repair and maintenance projects (including projects relating to health and safety) and for interpretation, signage, habitat or facility enhancement, resource preservation, annual operation (including fee collection), maintenance, and law enforcement relating to public use (P.L. 104-134, §315(c)3).

Current legislation removed an earlier limit on the number of sites that each agency can establish. Relevant agencies remain authorized to assess fines for refusal to pay fees at designated recreation fee collection areas. And they can provide discounted or free admission as they so choose. Agencies may not apply revenue from the program to plan, design, or construct structures costing over \$500,000 without Congressional approval.



A November 2001 General Accounting Office report to Congress describes aspects of the program in all four agencies (Table 1). Electronic copies of the report are available publicly at [The United States General Accounting Office \(http://www.gao.gov/\)](http://www.gao.gov/). Search for the report by number (GAO-02-10) or keyword (“recreation”). Primary concerns raised in the report are that the four agencies need more innovation and better coordination of fee programs, additional management improvements to increase the program’s effectiveness, and the latitude to apply revenues to address each agency’s highest-priority needs related to the legislated program purpose.

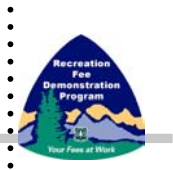
Table 1 General Accounting Office comparison of Recreational Fee Demonstration program applied by four federal agencies (Report #GAO-02-10).

Federal land management agency	Total Sites As of Sept. 2000	Revenue (millions) Fiscal Year 2000	Innovative Pricing Percentage of total sites	Sites Coordinating Fees Percentage of total sites
Forest Service (USDA)	81	\$31.9	41%	48%
Bureau of Land Management (USDI)	98	\$7.0	23%	24%
Fish and Wildlife Service (USDI)	86	\$3.4	11%	21%
National Park Service (USDI)	100	\$143.7	27%	28%
Average	91	\$46.5	25%	30%

The GAO’s report recommends additional mechanisms for holding all four federal land management agencies more accountable to program goals. It concludes that current programs lack a clearly understandable and applicable mechanism to pursue innovation and increase coordination. To meet the goal of greater accountability, GAO recommends agencies establish explicit performance expectations and measures that are consistent with legislated program goals.

Making expectations and measures explicit, according to the GAO, would provide needed direction to site managers and program managers, assuming program evaluation occurs and also focuses upon those expectations and measures. Evaluation results based upon explicit expectations and measures would provide managers with better information upon which to judge performance and identify opportunities to improve the program or to improve specific fee sites. With such information, managers also would have more substantive basis for deciding which program elements are working as intended and which program elements respond to broader agency goals, and, in each case, which are not.

The GAO’s report provides Congress with an overview of the Recreational Fee Demonstration program as it relates to possible management improvements that might enhance visitor services. Congress, as they consider revising the legislated program directions given the agencies, will consider the GAO’s recommendations. This document provides an additional link between existing knowledge about the program and the GAO’s recommendations for improving it. Key criteria considered in this document and drawn specifically from the GAO report include (1) innovation, (2) evaluation, (3) coordination, (4) performance measures, (5) program goals, and (6) agency priorities.



Forest Service Goals for Revising the Program

Congress’s recent extension of the Recreational Fee Demonstration program provides the USDA Forest Service with an opportunity to revise its program based upon lessons learned since the program’s inception. The agency is moving to embrace that opportunity by pursuing a coordinated effort to review and revise its Recreational Fee Demonstration program. That effort responds to Congress’s goals for the program and adds additional, agency-specific details needed make the program work.

Framing the revision process requires attention to organizing questions, overarching issues related to natural resources management and recreation management, Forest Service goals from its most current strategic plan, and agency goals for recreation management. This section provides a summary of that material.

Organizing Question for Revision:

In five years, what role will the Forest Service recreation fee program play in meeting the agency’s public service goals?

The question currently organizing the revision effort is, “in five years, what role will the Forest Service recreation fee program play in meeting the agency’s public service goals?” Related questions that follow from the broad organizing question include the following: where will the Forest Service charge fees? Who will the Forest

Service charge? How will the agency expend fee revenues? What pricing and recreation fee passes will the agency make available? What monitoring criteria will the agency apply to evaluate the program? And what interagency coordination will occur? Many other questions will continue to emerge from current and future discussions related to the revision effort.

Overarching Topics Related to Natural Resource Management

Contemporary management of natural resources and public lands is largely focused on six overarching topics. These topics are recognizable throughout the materials related to recreation fees and the Recreational Fee Demonstration Program, many General Accounting Office reports, and Forest Service management direction established in legislation, agency regulations, and agency-wide planning direction. Revision of the Recreational Fee Demonstration program will occur in a context defined by these topics.

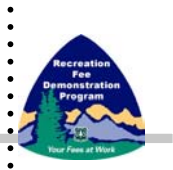
The six overarching topics are the following: long-term management direction for publicly owned lands (Sustainability); localized management direction to provide

Six Overarching Topics:

- **Sustainability**
- **Ecosystem Management**
- **Organizational Accountability**
- **Decision Making**
- **Cost Allocation**
- **Federalism**

sustainable social, economic, and environmental conditions (Ecosystem Management); government accountability for financial management and evaluation of outcomes (Organizational Accountability); decision processes that are participatory, based upon an understanding of previous decision outcomes, and oriented towards establishing explicitly stated desired outcomes for future decisions (Decision Making); allocation of costs between those who benefit most directly and

those who pay federal taxes generally (Cost Allocation); and the relationship between federal, state, tribal, and local governments and citizens (Federalism).



Forest Service Specific Goals

Many agency-specific goals of the Forest Service relate to the Recreational Fee Demonstration program. The goals are stated in the agency’s Strategic Plan, its established Recreation Agenda, and Recreational Fee Demonstration program documents.

Strategic Plan

The Forest Service’s Strategic Plan (2000 version) establishes four integrated agency-wide goals towards which all organizational activities should move: (1) ecosystem health, (2) multiple benefits to people, (3) scientific and technical assistance, and (4) effective public service. Under each goal is a series of goal-specific objectives and several are most clearly related to the fee program (see Table 2). The Forest Service’s Strategic Plan is available electronically at [USDA Forest Service Strategic Plan](http://www2.srs.fs.fed.us/strategicplan/index.htm) or directly at the website (<http://www2.srs.fs.fed.us/strategicplan/index.htm>).

Table 2 Forest Service Strategic Plan Goals and Objectives relevant to Recreational Fee Demonstration program

Ecosystem Health	Multiple Benefits to People	Scientific and Technical Expertise	Effective Public Service
Improve and protect watershed conditions (1.a)	Provide diverse, high-quality recreation opportunities (2.a.)	Build community capacity to adapt to economic and social change (3.a)	Improve financial accountability (4.a)
Provide conditions to sustain viable animal populations (1.b)	Provide opportunities for Wilderness experiences (2.b)	Increase the effectiveness of scientific information through public feedback (3.b)	Improve safety while reducing management costs of roads, trails, facilities (4.b)
Provide healthy habitat conditions and reduced risk from high-intensity fire (1.c)	Improve cost-recovery of special use programs (2.c)	Improve the knowledge base provided through scientific study so as to improve decisions and management (3.c)	Provide appropriate access (4.f)
	Increase accessibility for underserved and low-income citizens (2.d)		
	Improve delivery service to urban communities (2.e)		

Under the goal of ecosystem health, the related objectives are improving and protecting watershed conditions (1.a), providing conditions to sustain viable animal populations (1.b), and providing healthy habitat conditions and reduced risk from high-intensity fire (1.c), each related to the habitat enhancement goal of the program’s legislation.

Under the goal of multiple benefits to people, the objectives of providing diverse, high-quality recreation opportunities (2.a.), including opportunities for Wilderness experiences (2.b), relate to the program’s overall recreation orientation. Also under the goal of multiple benefits to people are the objectives of improving cost-recovery of special use programs (2.c), increasing accessibility for underserved and low-income citizens (2.d), and improving service delivery to urban communities (2.e), which relate to the program’s simultaneous need for financial accountability and social responsibility.

Under the goal of scientific and technical assistance are the objectives of building capacity of communities to adapt to economic and social change (3.a), increasing the effectiveness of scientific information through public feedback (3.b), and improving the knowledge base provided through scientific study so as to improve decisions and management (3.c). These objectives establish the program goal’s of funding work that is responsive to local communities and public feedback and grounded upon scientific study of outcomes.



Under the goal of effective public service are the objectives of improving financial accountability (4.a), improving safety while reducing management costs of roads, trails, and facilities (4.b), and providing appropriate access (4.f). These objectives establish that measurements of the program’s effectiveness must include financial accountability, general safety improvements, reduced overall management costs, and provision for appropriate access.

Recreation Agenda

The Forest Service’s Recreation Agenda focuses on five topics (see Table 3). An electronic copy of the Recreation Agenda is available at [National Recreation Agenda \(http://www.fs.fed.us/recreation/recstrategy/index_agenda.shtml\)](http://www.fs.fed.us/recreation/recstrategy/index_agenda.shtml). It follows from the agency’s Strategic Plan and provides guidance to those throughout the agency who work on recreation-related projects.

The first topic on the Forest Service’s Recreation Agenda is sound stewardship of forest resources while providing opportunities for compatible recreation (Settings). The second is provision of safe, well-designed, accessible recreation opportunities (Service). Third, the agency seeks to offer educational opportunities oriented towards conserving and interpreting natural, historic, and cultural resources (Conservation Education and Interpretation). The agency seeks, fourth, to strengthen community connections through expanded participation of public and private organizations, volunteers, and non-profit organizations (Community Connections and Relationships). And, fifth, the agency’s recreation program seeks expanded partnerships that are professionally managed and include greater inter-organizational cooperation with public and private parties (Partnerships).

Table 3 Forest Service Recreation Agenda topics with examples

Agenda Topic	Example
Settings	Integrated stewardship of resources and compatible recreation
Service	Providing safe and accessible recreation opportunities
Conservation Education and Interpretation	Cultural, natural, and historical learning opportunities
Community Connections and Relationships	Expanded opportunities for local organizations and individuals to participate in forest recreation and its management
Partnerships	Professionalism that attracts and expands agency partnerships with non-Forest Service parties

Recreational Fee Demonstration program direction

The Forest Service’s Recreational Fee Demonstration program is guided by a specific set of principles that have been articulated by agency leadership over the recent past. Although articulated, the principles are not yet packaged in a form that would address the accountability concerns raised by the General Accounting Office. Nevertheless, the principles informed this summary of issues and concerns by helping bring focus to the evaluation effort.



The agency's principles for the program follow from the program's legislation. They include the principles that:

- Fees should be fair and considerate (Equity);
- Fee program should increase efficiency of public service (Efficiency);
- Fees should not discourage recreation use because of inconvenience (Consistency and Coordination);
- Fee program should produce revenue for unmet needs (Revenue Production);
- Fees should stay largely at site collected (Local Application);
- Fees also should allow appropriate distribution of revenue to address related, unmet agency needs (Revenue Redistribution).

The Forest Service's articulated reasons for supporting the continuation of a Recreational Fee Demonstration program include the following:

- Taxpayers generally benefit when the cost of public services are at least partially borne by those who most directly benefit from those services;
- The Forest Service needs the funding to address otherwise unmet needs;
- Revenue has provided many areas with additional funding and meaningful improvements for visitors;
- The program has been adjusted and improved based on public comment.

Summary of Congressional and Forest Service Goals for the Program

Successfully revising the Forest Service's Recreational Fee Demonstration program requires clearly responding to goals stated by Congress and by the agency itself. Summarizing those goals for the program, a successful program would:

- Address clearly stated goals and seek understandable outcomes;
- Recognize and adapt to local situations, emerging lessons, and changing circumstances;
- Produce revenue that complements other funding sources without replacing them;
- Distribute fee revenue locally first and within the local agency second;
- Allocate costs between visitors and other funding sources, based upon a consistent process with clear criteria, so as to provide recreation opportunities appropriate for the setting, maintain those recreation opportunities, and offset recreation effects;
- Operate in a manner that is fair, equitable, science-informed, and citizen-oriented;
- Demonstrate financial accountability and efficiency;
- Simultaneously address the need for consistency and coordination and the need for innovation and flexibility;
- Clearly contribute to the agency's public service function;
- Integrate with the agency's other management responsibilities.



General Discussion of Program Stakeholders and Effects

Issues and concerns related to the Forest Service's Recreational Fee Demonstration program reflect who is affected and how they are affected. Some individuals and groups are directly affected by fees and others are concerned about fees for other reasons. Because agencies use fee revenues to pay for improved services, site maintenance, and habitat enhancement, those who visit the sites are affected.

Those who are affected by the Recreational Fee Demonstration program include individuals and groups who visit fee sites and taxpayers who fund federal budgets.

Business groups are also affected by recreation fees, including outfitters and guides who

charge clients and worry that additional fees may affect business negatively, concession operators who have existing contracts to operate Forest Service facilities, and recreation equipment manufacturers and retailers who feel any market effects related to a fee program.

Support for the program in its current form depends largely upon what the fee is charged for and how the fee revenue is spent. Any single measure of support or opposition to recreation fees glosses over real challenges that face land managers every day. Single measures risk trivializing

concerns raised by either those who criticize the program or those who support it. While research studies and newspaper polls show a significant majority of Americans support a greater role for recreation fees to fund maintenance and management activities, provide visitor services, and enhance habitat, those who most criticize the program also have some very helpful ideas for making it better.

Some individuals support the fee program as an appropriate funding source for accomplishing much needed work. Other individuals and groups are strongly opposed to the Recreation Fee Demonstration program entirely. A few groups support fees at National Parks and developed sites, while opposing the Forest Service's program, and often other programs, because of concerns about its popularity and authorization history.

More individuals tend to support the existence of some form of a recreation fee program beyond those that have traditionally existed at National Parks and developed sites, although results from surveys that have addressed this question differ. Surveys of a nationwide audience show a near balance between opposition and support for the program; surveys of visitors to fee sites show much more support; surveys of visitors to non-fee sites show more opposition. These results may not be in conflict if the national result is fairly correct and the other two results suggest that visitors are freely choosing where to spend their recreation time.

Some of these individuals and groups are opposed to the program in its current form while supporting the concept of recreation fees. General concerns include those about the program's organization, potential for undue reliance upon fees as a primary revenue source, and potential for unrestrained program growth. Related concerns include the

- Affected Parties and Stakeholders**
- **Visitors to fee sites**
 - **Taxpayers**
 - **Outfitters and guides**
 - **Concessionaires**
 - **Recreation equipment manufacturers**
 - **Recreation equipment retailers**
 - **Land management agencies**
 - **Agency employees**
 - **Congress**
 - **General Accounting Office**
 - **Public land recreation researchers**



perceived absence of clear program parameters and the lack of sufficient input and involvement of program stakeholders.

Some individuals and groups are opposed to continuation of the program under its current demonstration status and support a permanent status program. They would like to see a permanent program based generally on the existing one and incorporating lessons learned to date by citizens, organizations, researchers, and managing agencies. These individuals and groups support the program for a variety of reasons and many have also recommended ways to improve it.

Congress and congressional staffers have devoted much attention to the program and related issues, partly reflecting the amount of interest and concern that the program has generated among citizens and interested groups. The General Accounting Office and numerous research scientists from academia and agencies have studied the program over recent years. Documents and findings from these groups provide insights about opportunities for improving the program while retaining existing strengths.

The Forest Service and its employees, along with other agencies and their employees, continue to be affected by the program, especially employees in the field who implement program elements. Often, Forest Service personnel on the ground and elsewhere in the agency raise concerns that are also raised by those outside the agency. In addition, Forest Service personnel raise administrative and organizational questions from an operational perspective that continues to identify opportunities for improving the program. Several issues and concerns raised by agency personnel also relate to the opportunity provided by recreation fee revenue to accomplish much needed work that would otherwise remain unfunded. Lastly, agency personnel are clearly concerned that some of their most innovative responses to public concerns and criticism are too often ignored or misrepresented by those who oppose fees out of principle.

General Types of Effects

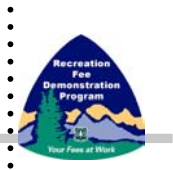
The Recreational Fee Demonstration program, and any recreation fee generally, leads to particular types of effects, including direct effects, indirect or secondary effects, and cumulative effects, and people disagree about the significance, relevance, and value of those effects. Effects are neither bad nor good except from distinct human perspectives.

Direct effects are those immediately related to paying or collecting the fee, accounting for and dispersing collected fee revenue, and conducting the work of improving recreation opportunities or affected habitat. Indirect or secondary effects are any relevant consequence of those direct effects, such as possible displacement of visitors, redirection of funds to cover program costs related to program administration, or changes in attitude or behavior attributable to a fee site. Cumulative effects are combinations of direct and indirect effects of a fee site and those of other agency activities or visitor decisions.

The Recreation Fee Demonstration program affects individuals and groups, as well as the habitat and environment in which they recreate. In addition to individuals and groups, a fee program affects organizations, such as the Forest Service and other agencies, who manage the program, as well as the social relationships between individuals, groups, communities, and agencies to whom the program is relevant.

General Types of Effects

- **Direct**
- **Indirect**
- **Cumulative**
- **Individual**
- **Social Group**
- **Community**
- **Organizational**
- **Environmental**



Revenue from the program funds work that affects the environment and habitat within which the work occurs. Recreation also directly affects habitat. Habitat changes can indirectly affect wildlife and fish to varying degrees. Such changes can also lead indirectly to changes in the variety of plants in the area and upon scenic quality. Cumulative effects of changes in habitat, wildlife, fish, and scenic quality can include changes in recreation opportunities, such as different hunting or fishing opportunities, different opportunities to see certain wildlife, or different likelihood of seeing other persons.

Distribution of Effects

Recreation fees affect people and their behavior, which can lead to changes in social or environmental conditions, including changes in the patterns and distribution of human behavior and in the patterns and distribution of environmental conditions resulting from that human behavior. The same change in social or environmental condition may be considered either positive, negative, or both, depending upon one's concern. Any change in social or environmental condition due to recreation fees is an effect of those fees.

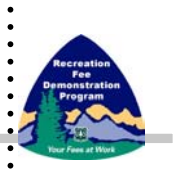
The distribution of effects is a central aspect of questions about fairness and equity. The effects of fees are distributed differently among individuals, communities, and distinct groups. Some of those effects are considered beneficial and others are considered detrimental depending upon perspective. This presents a significant challenge to managers because the easy answers are gone and especially difficult decisions remain.

Similarly, a primary concern is about the effect of fees on broad patterns of visitor behavior and expectations. Changes in relevant broad patterns of human behavior can lead to changes at the immediate fee site and at comparable and commensurable sites where fees are not charged. A commensurable site is one that is largely accepted as an interchangeable substitute for the fee site because it offers opportunities for similar recreation experiences.

Mitigating and Offsetting the Effects of Fees

Since the program's inception, as seen throughout this document, the Forest Service has sought to respond to issues and concerns related to the effects of fees. Where possible and needed, the agency has acted to reduce direct effects of recreation fees on individuals or the indirect effects that can occur on commensurable or substitutable recreation sites. The agency continues to revise the program, capture lessons learned, and look for knowledge gaps, as this document demonstrates.

The Forest Service's program shows examples of the agency's efforts to adapt to new information and respond to issues and concerns while remaining focused on the task Congress assigned. Where possible and needed, the agency has made the current program less confusing than it was when it began. Such changes are efforts to address frustrations expressed by visitors. The agency has conducted numerous research studies, detailed in separate documents, to better understand visitor concerns and seek other ideas for improving the program. It is aggressively developing more convenient payment options and local programs that would extend to visitors a variety of substitutes for fees, including increased volunteer programs and clear communication of non-fee site availability. And it continues to invite suggestions for additional alternatives to recreation fees, alternatives that can help meet the very real need, clearly identified by Congress, to operate and maintain recreation areas or sites and enhance habitat affected by recreation.



Primary Issues and Concerns

For the purposes of this document, an issue or concern exists when an individual or group believes, regardless of proof, that a Forest Service action related to the Recreational Fee Demonstration program—including a possible future action—has caused or will cause a problem or is otherwise inappropriate. Issues and concerns may suggest strengths or weaknesses in the current program. An issue or concern, therefore, is about whether a Forest Service action has led to or will lead to an outcome undesired from the perspective of some individual or group, including employees of the Forest Service. Issues and concerns may suggest strengths or weaknesses in the current program. They reflect history and context, opinion and perspective. Some have or will change; others are longstanding and likely to remain so.

The following issues and concerns are primarily about the trustworthiness of the Forest Service, the equitability and fairness of fees, the relationship between fees and taxes, the efficiency of the program at collecting fees and applying the revenue to improve visitor experience and affected habitat, the consistency of the program among different fee units and between different federal agencies, the coordination of the program with other agency goals from national to local levels, and the agency's capacity to address real needs in meaningful ways.

Several relevant issues and concerns reflect needs to which the Recreational Fee Demonstration program is responding. Those include the need for a stable, fair source of funding to maintain and manage recreation opportunities, the need to fund staff presence that decreases or prevents illegal activities, the need to reduce crowding at some locations, and the need to fund publicly desired land stewardship efforts. Several pragmatic concerns addressed by fees are that real budget declines are occurring at the federal level while visitation and maintenance backlogs increase.

Key Categories of Issues and Concerns

- **Trustworthiness of the Forest Service to adequately and understandably account for program activities and finances.**
- **Fairness and equitability of recreation fees, especially for those who have less disposable income, live nearest fee sites, visit sites more often, or volunteer with agencies**
- **Appropriateness of the relationship between recreation fees and taxes, permits, and payments to states in lieu of taxes.**
- **Efficiency of program at collecting fees with the least imposition or inconvenience to visitors and at the lowest cost**
- **Efficiency of program at applying the revenue to improve visitor experience opportunities and affected habitat**
- **Consistency of program among different fee units and between different agencies**
- **Coordination of program with other local, regional, and national agency goals**
- **Capacity of program to produce revenue to address real budget and maintenance needs in meaningful ways**



Overarching Issue and Concern: Role of Recreation Fees in Agency Funding

Congress directed the Forest Service's Recreational Fee Demonstration program, and those of the other three relevant federal land management agencies, to address the following, overarching issue and concern:

- Whether and to what degree recreation fees can or should recover all or a portion of the cost of operating and maintaining recreation areas or sites and enhancing habitat affected by recreation.

All other issues and concerns related to the Forest Service's program stem from this overarching one. The Forest Service's program has been controversial. The controversy, for some individuals and groups, reflects disagreement with how Congress chose to address this overarching issue and concern. For others, the controversy reflects disagreement with the Forest Service's program or its operation. Nevertheless, there is general agreement that current maintenance backlogs are growing and the funding allocated by Congress is insufficient to pay for recreation-related programs, infrastructure, and administration or for the work needed to restore and care for habitat affected by recreation.

Lesson Learned Regarding Role of Recreation Fees in Agency Funding

- Recreation fees have become increasingly important as a way to allow those who most directly benefit from recreation opportunities to most directly support the costs of providing those opportunities.
- Recreation fees are an important addition to other means already employed to meet needs of operating and maintaining recreation areas and sites and enhancing habitat affected by recreation; they are not the only answer.

Knowledge Gaps Regarding Role of Recreation Fees in Agency Funding

- Whether and how the program affects other Forest Service programs.
- Whether and how alternatives to recreation fees, when evaluated against criteria such as feasibility, efficiency, equity, acceptability, and practicality, can help meet the need of maintaining and operating recreation sites and improving habitat affected by recreation.
- How to address broad social questions, such as whether certain basic conveniences, like restrooms, are most appropriately funded by appropriated tax dollars and base funding rather than by recreation fees revenue.

Agency Trustworthiness

Many of the following issues and concerns affect and are driven by perceptions about whether the Forest Service and its Recreation Fee Demonstration program are trustworthy. Those who raise this concern point to recent audits by the General Accounting Office, unrelated to the Recreational Fee Demonstration program, which confirmed financial accounting problems in the agency in the past decade. They also point to general public concerns that agency accounting for economic and environmental costs related to timber sales was historically done poorly. As revenue from timber harvesting has declined during the 1990's, and the popularity of recreation on public lands continues to increase, previous agency history of poor financial accounting and public questions regarding accounting practices extend, for some individuals and groups, to the expanding role of



recreation fees as a funding mechanism. Agency credibility overall is reflected in attitudes towards any recreation fee program.

Program Accountability

Perceptions of agency trustworthiness are often related to beliefs about whether the Forest Service's recreation fee program is accountable in an understandable way. The relevant concern is the following:

- Whether the program is adequately accountable to Congress and the public based upon understandable criteria.

Although several Forest Service Regions have their own program standards, the Forest Service has not yet established national criteria of accountability for the fee program. Criteria upon which the Forest Service might evaluate the program and establish its accountability are reflected in the issues and concerns described in this document. Criteria that would respond to public concerns regarding agency accountability remain largely unexplored because a public effort to develop those criteria has not occurred. Such a process would allow the agency and others to better understand what the public means when insisting on obvious results from expenditures of recreation fee revenue. At the present time, Congress does require participating agencies to report annually on such things as revenue, expenditures, and visitation, collaboration efforts, and program highlights. The Forest Service also requires each region to report in a similar fashion.

Financial Accountability

Perceptions of agency trustworthiness are also often related to issues and concerns about financial accountability. Financial accounting is a specific and frequently mentioned concern related to the broader concern of program accountability. The concern is about the following:

- Whether the fee program's financial accounting is adequate.

The Forest Service has identified two organizational concerns related to financial accountability, both of which are outside the agency's ability to address:

- Whether the fee program legislation is sufficiently clear about agency application of fee revenue to pay for accounting required by the program.
- Whether Congress should provide the Forest Service with funding to establish a system of financial accountability for the program or have existing agency programs bear the cost of establishing it.

The General Accounting Office has recommended several ways to address concerns related to financial accountability, including the suggestion that an authorizing committee within the agency might disperse fee revenue. In 1998, the GAO recommended that the participating agencies establish an accounting system and clarify expenditure approval procedures. In 2001, GAO recommended that the Forest Service and other agencies with recreation fee programs maintain a central list of priority needs and direct revenue towards those needs accordingly.



Lessons Learned Regarding Agency Trustworthiness

- Negative public responses to the recreation fee program often reflect perceptions of how federal land management has addressed other responsibilities.
- The program is controversial in some areas and not others and for some individuals and not others, so program accountability and related evaluations require diverse criteria to adequately reflect related issues and concerns.
- Accounting for program expenditures in an understandable and professionally valid way that is also clearly associated with accomplishing recognizable outcomes is a significant challenge that the program must meet to establish, retain, or increase credibility.
- A fee program with adequate accountability, as described by sources reviewed for this report, would include three essential characteristics:
 - Clear sideboards and limitations on such things as where fees are collected and how fee revenue is spent;
 - Program sideboards would have national consistency as well as sufficient flexibility to adapt to local situations;
 - A clearly understandable evaluation system based upon established sideboards and other relevant criteria.
- Partnerships between the Forest Service and non-governmental organizations are a valuable program component and are also a focus of criticism from those who fear over-commercialization or undue influence on agency decisions;
- Security and safety of fee collection staff is a critical aspect of any recreation fee program;
- Organizational challenges of managing a demonstration program, such as attracting and retaining qualified staff to perform a temporary job, affect the program and its outcomes;
- Management challenges include inadequate sharing of specific lessons learned which reduces consistency and efficiency as lessons and tools are recreated;
- Extensive existing research is available and additional questions continue to emerge; yet, few program managers rely on research to evaluate the program;
- Program related evaluations are most often either focused on a narrow range of research criteria (with less broad program relevance) or, if more broad in scope, heavily-reliant upon less corroborated anecdotal evidence (with less scientific credibility).

Knowledge Gaps Regarding Agency Trustworthiness

- What potential Forest Service actions might increase levels of social trust regarding recreation fee program management and public land management;
- What visitors mean when they say they want to see obvious results from spending recreation fee revenue;
- What managers mean by adequate and relevant research and what researchers can do to provide it as part of program evaluation efforts.



Agency Adaptations and Innovations Regarding Agency Trustworthiness

- Project coordinators review and update business plans, communication plans, and the civil rights impact analysis yearly.
- Forest Service has set initial criteria for measuring program success based on equity, efficiency, consistency, revenue production, and revenue distribution.
- Recreation fee collection costs have continued to decline as projects with high collection costs have been modified or dropped.
- Project managers are given wide discretion and flexibility on how to spend fee revenues to address local needs.
- Regional boards have been set up to monitor and evaluate the local programs, provide oversight and fiscal accounting, and coordinate fee projects in each Region.
- The Forest Service's Washington Office reviews one Region or more each year to address the need for appropriate National consistency by sharing guidance with all Regions following review.
- Regions are updating their business plans more regularly and more actively highlighting their demonstrable accomplishments.
- Regions increasingly conduct research to gather feedback from visitors and residents and to monitor various aspects of the program such as public support and collection operations.
- Forests have worked with their civil rights coordinators to plan and implement fees in locally fitting ways and coordinated with their Forest accounting staff to support management decisions through more transparent fiscal accountability.
- There has been an increased use of existing and emerging technology to manage fee projects within the program.

Public involvement

Concerns regarding trustworthiness and accountability are often related to concerns about social responsibility, specifically those about whether sufficient opportunities exist for members of the public to learn and understand about the program and contribute meaningfully to its design and operation. Those who express concern about current and future opportunities for public involvement also tend to reflect concern about past public involvement. Expressions of concerns about a poor previous history of public involvement tend to include complaints about either the program's Congressional origin as an appropriation bill rider or about the design and implementation of specific Forest Service fee programs.

Public and agency concerns about public involvement include whether sufficient communication and dialogue occurs between the agency and the public to secure program support necessary for long-term success. Concerns related to public involvement include:

- Whether the agency could more clearly establish opportunities for public involvement before making a decision to establish a fee site, during design and implementation of the site, and throughout a project's lifespan;



- Whether the agency could better seek and incorporate public input when making decisions to allocate fee revenue;
- Whether the agency could do a better job communicating with the public at local, regional, and national levels regarding its previous and existing use of public input and about opportunities for ongoing or future involvement;
- Whether the agency might, for each local fee program and for regional and national programs, establish an advisory council composed of stakeholders, including Forest Service and other relevant State, Federal, and Tribal agencies;
- Whether revenue from recreation fees might fund related public involvement efforts.

Concerns about public involvement include whether program evaluation relies too heavily on public compliance and revenue, as measured through law enforcement records and financial accounting, rather than relying more on public review and non-economic measures. This point is discussed later in this document under the topic of evaluation.

Lessons Learned Regarding Public Involvement

- Public comments have helped the Forest Service learn of opportunities for improving the program;
- Public interest in participating in revising the program and in ongoing program management is strong and apparent.

Knowledge Gaps Regarding Public Involvement

- Whether public involvement might serve as a way to ensure that the fee program evaluation focuses on public purposes in addition to financial analysis.
- Whether users are concerned about public involvement.

Agency Adaptations and Innovations Regarding Public Involvement

- The Forest Service has actively sought public comments on a local and national level.
- A survey of visitors was taken at several sites in Mono Basin Recreation Area, with questions asked relating to customer service. In this case, respondents preferred that the visitor center function as a free site since it is often used by first time visitors and visitors seeking information. As a result of the information the study provided and program adaptation, the visitor center is now free.
- The Forest Service has funded social science research dealing with many aspects of recreation fees. The research findings often help the agency and others better understand insights contributed through less structured public comments.
- The Adventure Pass project in Southern California was modified in response to visitor input. Changes include free passes for volunteers and educational groups and free days.
- As a result of research and public comments, the Forest Service has emphasized fee programs that are convenient and that produce revenue which stays at local collection sites.
- After finding a lack of visitor support for access fees, the Forest Service has dropped several access fee programs and replaces them with fees for more developed recreation.



- The Forest Service has used local community concerns, visitor comments, and maintenance backlog information when making decisions about spending recreation fee revenue.

Concerns about Inequitable Effects

Concerns related to the Forest Service's social responsibility also include those about the program's effects. Recreation fees affect individuals and groups differently and those differences are typically evaluated based upon economic, social, or psychological criterion. Differences in effects are often considered matters of fairness, which is another word for equity. Issues and concerns about equity are typically about whether those who shoulder particular costs or burdens also share adequately in benefits.

Addressing questions of equity are especially challenging because any possible management decision regarding equity and fairness must consider an extremely wide range of criteria that are often in tension. A decision is often simultaneously equitable and inequitable, fair and unfair, when seen from distinct perspectives or evaluated by different criteria.

Effects on Low-Income Visitors

The possibility of recreation fees disproportionately affecting low-income visitors has received significant attention. There are two main stakeholder concerns regarding the impact to low-income visitors: the possible effects themselves and the Forest Service's efforts to address those effects. Long-term consequences of how this issue is addressed likely will affect where visitors go who have different ethnicities and economic wherewithal, as well as different expectations and recreation interests. The indirect and cumulative effects likely will have relevance to managers, visitors, the affected habitat, and society, at least to some degree.

Principle concerns related to effects on low-income visitors are the following:

- Whether the Fee Demonstration Program limits access based on economic ability to pay and causes an inequitable effect on those who have less income.
- Whether the population most affected by the program is defined by low-income or by low disposable or discretionary income.
- Whether and how the Forest Service might even more responsibly focus on those who have low incomes, low disposable incomes, or both.

Issues and concerns regarding the program's equitability to visitors who have low incomes or low disposable incomes are complex for several reasons. One reason for the complexity is that many low-income citizens do not recreate on public lands even when no fee is charged and, therefore, are not displaced or otherwise affected by fees. Yet, many National Forests are increasingly serving an urban population where many potential new visitors also have low incomes. For those individuals, a recreation fee might discourage or prevent them from realizing those recreational opportunities. On the other hand, urban dwellers are more accustomed to paying fees and thus might not be as concerned with an additional fee. Similarly, many other National Forests continue to serve a more rural population that has a historical tradition of recreating on public lands and a sub-population of individuals and families with little disposable income.

The principle concern related to Forest Service efforts to address the program's effects on visitors who have low incomes or low disposable incomes is the following:



- Whether the Forest Service adequately addresses the impact of fees on low-income visitors and on visitors who have low levels of disposable income.

The GAO describes the Forest Service's efforts as innovative compared with programs of other relevant land management agencies. It also concludes that additional Forest Service improvement remains possible. An example of a well received program innovation is the Prescott National Forest's (Arizona) distribution of free parking passes to low-income users on a first-come, first-served basis. The program is considered relatively convenient and easy to use, and is valued by program recipients and the distributing agencies and organizations. Although their innovation is well received, program managers are concerned that less than 20% of the targeted audience (low-income visitors) is aware of the program.

Many studies have been done regarding the effects of recreation fees on low-income visitors. In general, these studies show that low-income visitors are more affected by fees and increases in fees than those visitors with higher levels of income, as indicated by a variety of responses. While low-income visitors are largely less supportive of fees and fee increases, many low-income visitors appear to generally support fees for some services, especially when price structures take into account different abilities to pay. Responses to the price increase are also influenced by income level. Low-income visitors to National Parks, state parks, Army Corps of Engineers sites, a public game enhancement project, and specific day-use sites stated (or had observed) a variety of effects resulting from fees, including reduced camping activity, reduced participation, lower support for fees, or a change of recreation activities.

The Forest Service is aware of the potential effect fees may have. Throughout the life of the Recreational Fee Demonstration program, they have sought to minimize or mitigate unfair burdens from fees. The agency has specifically tried several methods to offset the effects of fees, including low priced annual passes, free days, and free passes for volunteers. Fees per by car rather than by individual are another way the Forest Service has sought to reduce the effect on families. In 1999, with a move unique to the agency, the Forest Service required fee demo projects to amend their business plans to include information designed to mitigate the effect of fees on non-traditional groups. The agency also produces a civil rights impact assessment for every project.

Effects on Local Residents

Recreation fees raise questions of fairness and equity for local residents. These questions are also often related to local resident's willingness to pay recreation fees, a topic addressed separately. Again, as with the issue of effects on low-income populations, two areas of concern exist: the effect itself and how the Forest Service addresses it. Efforts to address this concern have included discounted annual passes.

The principle issue and concern regarding effects on local residents is often stated as follows:

- Whether recreation fees are an inequitable or unfair burden on local residents.

Related arguments rely on either economic reasons or philosophical principles. Economically, local residents can be more affected by an increase in entrance fees because the frequency of their visits means they bear a greater cumulative cost. Similarly, local residents travel less far to the local Forest, so any fee can be a larger percentage of their overall recreation cost compared to the cost paid by visitors with higher travel costs. Philosophically, some local residents express desire for a discount or an exemption from fees based upon their historical access.



Concerns about whether recreation fees might cause inequitable effects to local residents are particularly challenging to address because local residents who are frequent visitors realize recreation opportunities more frequently and their more frequent visits lead to greater proportion of maintenance and operation costs and habitat enhancement costs. Local residents who frequently recreate on publicly owned federal land also more frequently realize benefits from Forest Service expenditures to operate and manage recreational opportunities and from expenditures that offset the effects of recreation on habitat.

Effects on Recreation-Related Businesses

Several recreation business advocacy organizations have expressed concern about how the fee program affects or might affect their members and customers. The concern is:

- Whether the program unfairly burdens recreation-related businesses, such as outfitter guides, whitewater boaters, or concessionaires, who already must obtain fee permits to operate.

Addressing this issue and concern is challenging because perceptions of risk make the question of fees quite sensitive. Recreation fees can be more easily charged to businesses and visitors who must already obtain permits, such as outfitter guides and hunters, whitewater boaters, and other commercial groups. Also, other restrictions are more easily placed on and enforced on these groups, as compared to private visitors who are not required to obtain the same permits. Similarly, consequences for not complying with fees and other requirements are more significant for those whose livelihood depends upon obtaining permits. The challenge is that those who must obtain permits as part of their recreation-related business may see additional fees as a risk or threat and may already feel greater exposure to fee collection and possible penalties.

Effects on Local Businesses

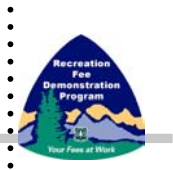
Another concern is that this fee program may provide incentive for development of federal lands to provide services that would compete with services provided by local private organizations. This issue and concern is stated as follows:

- Whether the fee program will lead to federal land management agencies deciding to provide services directly that have been or could be provided by non-governmental organizations, such as not-for-profit cooperators or private operations.

The current legislation encourages land management agencies to maintain existing partnerships and to pursue additional ones, including partnerships with those who have concessionaire contracts. A variety of examples exist of the Forest Service innovatively addressing this concern. Continued attention to this concern remains needed because partnerships will continue to grow as essential means for the Forest Service to adequately address its stewardship responsibilities in the future. Partnerships that help the agency exercise those responsibilities are critical, as is avoiding partnerships that lead to outcomes contrary to the agency's stewardship tasks.

Effects on the Forest Service as an Organization

Questions about the fairness of recreation fees also apply to the Forest Service as an organization. Agency employees and the General Accounting Office have raised an issue and concern that is largely about equity and described as follows:



- Whether the Forest Service has sufficient flexibility to distribute recreation fee revenue fairly and equitably within the agency to address organizational-wide needs on a priority basis.

The current Forest Service system allocates 90%-100% of fee revenues to the site where the fee is collected. A 2001 GAO report notes, neither the Forest Service nor any other agency the GAO reviewed has established a formal system to allocate fee revenue to different sites within the agency. As a result, some high-priority projects in areas where sufficient fee revenue is unavailable could remain unfunded while lower priority projects in popular areas are accomplished. This situation, if it occurred, could result in inequitable attention to organizational needs. The GAO and the Forest Service agree that no over-funding situations currently exist.

The Forest Service has identified two organizational concerns also related to inequitable effects on the organization. Currently, costs related to recreation fee sites and programs are covered with funding taken from other agency programs because the Recreational Fee Demonstration program legislation does not authorize the agency to cover those costs with fee revenue. As a result, existing program budgets are reduced to cover recreation fee program related costs. The following two concerns are largely outside the agency's ability to address:

- Whether the fee program legislation is sufficiently clear about agency discretion to apply fee revenue to pay for recreation fee program related costs, such as program design, project design, program accounting, and program evaluation;
- Whether Congress should provide the Forest Service with funding to address recreation fee program related costs rather than having recreation fee revenue cover those costs.

Lessons Learned About Inequitable Effects

- Recreation fees are likely to affect some visitors enough economically that they decide to recreate in non-fee areas;
- Some visitors choose to avoid fee sites because of personal objection to the Recreational Fee Demonstration program;
- Forest Service efforts to innovatively reduce potentially inequitable effects have been well received;
- Recreation fees are more likely to directly affect traditional visitors who have low levels of disposable income than potential visitors who have low incomes;
- Agencies can only spend revenue from the current Recreational Fee Demonstration program in limited ways while additional administration costs must come from other funding sources;
- Funding of activities related to administration of the Recreational Fee Demonstration program reduces current funding available for other Forest Service programs.

Knowledge Gaps Regarding Inequitable Effects

- Whether inequitable effects associated with fees change over time and what might reduce inequitable effects within the agency's control;



- Whether and how recreation fees might affect efforts to attract more urban visitors, some of whom have low incomes and some of whom have low levels of disposable income;
- What evaluative criteria and methods are most responsive to issues and concerns related to equity and fairness while also most applicable to daily Forest Service business needs and budget realities and within agency control.
- How to evaluate recreation fee programs in a manner that is responsive to visitors, scientifically defensible, and relevant to regular Forest Service business needs at local, regional, and national levels.

Agency Adaptation and Innovation Regarding Inequitable Effects

- Throughout the life of the Recreational Fee Demonstration program, the Forest Service has sought to minimize or mitigate unfair burdens from fees. This is restressed in the 1999 report to congress.
- In 1999, with a move unique to the agency, the Forest Service required fee demo projects to amend their business plans to include information designed to mitigate the effect of fees on non-traditional groups.
- The agency requires a civil rights impact assessment for every project.
- In an attempt to mitigate the effects of fees on any group, the FS has introduced reasonably priced annual passes, free days, and free passes to volunteers.
- A free day-use parking pass for low-income forest visitors was implemented on the Prescott National Forest in Arizona to reduce the impact of fees on certain groups. A Forest Service evaluation of this project considered it to be a success.
- Fees per by car rather than by individual are another way the Forest Service has used to reduce the effect on families.

Attitudes Towards Fees

Attitudes towards fees are diverse. Attitudes towards fees generally and attitudes towards the Forest Service’s Recreational Fee Demonstration program specifically are distinct. Distinguishing between those attitudes, however, is challenging and difficult. Likewise, attitudes towards the Forest Service’s program and attitudes towards specific examples of the agency’s program are distinct. For some individuals, all fees are unacceptable. For others, while fees are generally acceptable, the Forest Service program needs improvement to address perceived problems. For still others, any program that shifts costs to those who benefit most directly from the recreation experience is acceptable. In each case, acceptability is often related to other concerns, such as those about equity and fairness, as well as those about pricing and accountability, among others.

Addressing concerns about acceptability requires addressing the related concerns first because acceptability generally follows as a response to how the Forest Service has addressed other more specific concerns.

Acceptability is a particular attitude of interest. Addressing concerns about acceptability generally requires addressing the related concerns first because acceptability generally follows as a response to how the Forest Service has addressed some more specific concern. Acceptability is directly related to public willingness-to-pay for



specific, hypothetical fee amounts and to fee payment compliance. Another often related concern is whether recreation fees are fair when compared to fees paid for other activities on federal lands, such as logging, mining, or grazing. Several concerns related to acceptability of fees are beyond agency control, so the ability of the agency to address those concerns is limited.

Managers are helped most by understanding the underlying reasons for acceptability or its absence because those reasons are more clearly related to desired outcomes and desired benefits visitors and others hope to see.

General Acceptability Of Fees

Much research has addressed questions about acceptability. A wide range of measures and research designs exist, often focusing on “support” and “opposition”. The wide range of designs underscores the complexity of measuring acceptability. For example, a study done at a developed campground where fees have been charged for years may produce one measure of support that is markedly different from the measure obtained from visitors responding to a new fee to park anywhere in a previously free national forest. Similarly, a general survey question about fees for access to public lands produces vastly different results than a survey question that includes specific examples of services for which fees might be charged. Comparing results from different research studies requires designs which support that comparison. Direct, unqualified comparisons are most appropriate when the type of site, its history, and the population of visitors are consistent.

Issues and concerns about the general acceptability of fees raise questions that are largely beyond agency control. The principle issues and concerns related to the acceptability of fees are the following:

- Whether recreation is a social good and, therefore, Congress should allocate sufficient tax dollars to fund federal agencies to do the work of providing recreation opportunities free to the public;
- Whether recreation fees are appropriate in light of current grazing fees and timber contract requirements, as well as any other Forest Service program.

There are several variations of these issues and concerns. The general argument, as described in material reviewed for this document, is that recreation is a social good and that tax dollars should pay costs to provide recreation opportunities, manage those opportunities, and offset the effects of recreation. This argument tends to reflect a value conflict between those who highly value recreation over other activities on public lands and those who also value grazing, timber, or other activities.

A 1995 national survey explored attitudes towards covering recreation-related costs through general fees, tax dollars, or some combination. The survey focused on ten recreation services: visitor centers, special exhibits, trails, picnic areas, campgrounds, rest rooms, parking areas, historic sites, and unspecified other facilities. Key survey findings appear in the list of lessons learned regarding acceptability.

Acceptability of the Fee Demonstration Program

Although often related, attitudes towards general recreation fees are distinct from attitudes towards the Forest Service’s Recreational Fee Demonstration program. The Forest Service, for example, has a different history of applying recreation fees than some other agencies, most notably the National Park Service. Therefore, visitors typically have different expectations when visiting a National Forest or National Grassland than when visiting a National Park.



Issues and concerns related to the Forest Service program are the following:

- Whether Forest Service recreation fees for general access are appropriate;
- Whether Forest Service recreation fees for dispersed recreation, such as trail access or backcountry camping in undesignated campsites, are appropriate;
- Whether Forest Service recreation fees conflict with the agency's responsibilities to States for making payments in lieu of taxes.

Congress at least partially addressed the issue and concern about recreation fees and agency payments to States in lieu of taxes when it passed into law the Secure Rural Schools and Community Self-Determination Act of 2000 (P.L. 106-393). The Forest Service also has addressed these concerns at least somewhat by applying recreation fee revenue to especially noticeable projects and publicizing the work.

Acceptable Fees: Willingness To Pay

Willingness-to-pay is a measure developed by economists to gauge the amount a person is willing to pay for a specific experience or service. With such a measure, economists can estimate the value or worth of that experience and compare that value to other possible experiences or other economic goods. Especially helpful willingness-to-pay studies include measures of fee acceptability, likely behavioral responses to fees (also called *price sensitivity*), alternative pricing options, and alternative configurations of services.

Several studies illustrate factors that may influence an individual's willingness-to-pay for recreation related services. These studies focus on fees in general, not the Recreational Fee Demonstration program. The principle issues and concerns related to willingness-to-pay is the following:

- Whether Forest Service's recreation fee program would benefit from additional willingness-to-pay studies;
- Whether willingness-to-pay alone is sufficient to establish fee levels.

Results from existing studies may be sufficient for many of the current Forest Service needs. For example, the studies generally suggest that respondents who are informed about the cost of providing a service are willing-to-pay more for that service. Willingness-to-pay also typically varies with both campground and camper characteristics, so summary statements are difficult. Generally, a significant number of people visiting a Forest Service fee site would have a higher willingness-to-pay for wildlife and landscape than recreational information and museum facilities. Typically, individuals are willing-to-pay more if they like the scenic qualities of a camping area. Similarly, a higher willingness-to-pay is often positively correlated with longer lengths of stay, a greater number of previous trips to a given campground, the level of campsite development, whether the campground was the only destination, and household income. There is also some evidence that a greater potential for increased solitude is associated with greater willingness-to-pay at primitive areas.

Willingness-to-pay also increases when revenue is returned to the local site and, in some cases, willingness-to-pay is influenced by how much an individual last paid for similar services. Similarly, willingness-to-pay measures may not reflect some of the most important variables that influence visitor decisions, such as the desirable consequences of the activity or any moral or ethical considerations that might come into play.

Efforts to establish fee prices tend to benefit from combining willingness-to-pay measures with measures of price sensitivity, which gauge visitor responses to different price levels. Price sensitivity is strongly related to visitor displacement, discussed later in this



document, and to fee revenue generation. Price sensitivity studies show that, in particular cases, lower fees can generate more revenue if more people visit the area. For example, a specific study at one wilderness area showed a fairly high average willingness-to-pay and that a fee below that average figure would attract more visitors and increase revenue by about 40%. Similarly, another study noted that a lower price for annual passes will generate more revenue than higher fees in southern California.

Acceptability Of Fees In Wilderness

Congressionally designated Wilderness areas are managed to minimize the influence of human activities on otherwise natural systems, so very few human developments exist. An issue and concern related to charging recreation fees for wilderness is:

- Whether recreation fees are appropriate for wilderness areas that have few developed recreation facilities.

Several research papers argue that fees may affect those who visit these areas by turning the experience into a consumer good and fundamentally changing the experience to a commodity. In addition, fees may suggest greater importance for functional utilitarian values than for emotional and spiritual values shown as especially important to wilderness visitors. Recreation fees can seem to put a price on nature and on the spirituality of the wilderness experience. Fees for wilderness recreation are complicated by social and historical factors, often reflected in place attachment, that are often related to wilderness as a public good.

The concern that charging fees for particular types of recreation experiences, like wilderness recreation, may conflict with those types of experiences has not been addressed through research except to substantiate the concern. While existing research shows that visitors tend to report that willingness-to-pay measures fail to adequately express the non-economic value of wilderness, researchers have yet to develop and test substitute measures that would allow better understanding of the effect of fees on non-economic values. Still, the existing research offers an explanation for why some people simultaneously support fees and oppose treating wilderness as a commodity.

Improvements are not always necessary for visitors to support wilderness fees. Wilderness visitors are likely to support maintaining the current level of service more than improvements. They are also quite likely to prefer spending fee revenue on restoration and maintenance rather than development and new services. Also, the acceptability of wilderness fees and fee levels is not strongly related to past fee paying behaviors. As past payment history increases, support for wilderness fee levels tends to decrease.

Lessons Learned Regarding the Acceptability of Fees

- General statements about support or opposition for fees contribute little to this discussion because the topic is more complicated than any general statement can address and general statements tend to distract from the question about how to meet the real need of maintaining recreation sites and enhance habitat affected by recreation;
- Reported support for the program is notably higher—often twice that of opposition—when surveys are conducted at recreation fee sites, as compared with support reported as part of national surveys or when surveys are conducted at comparable non-fee recreation sites;
- Fees for general access are typically less acceptable and more controversial than fees for either undeveloped sites or developed sites;



- Boat ramps, campgrounds, and special exhibits tend to draw the most support for funding from recreation fees while visitor centers, trails, picnic areas, restrooms, parking areas, and historic sites tend to draw greater support for funding from taxes or a combination of tax dollars and fee revenue;
- Extremely strong public support (>95% of those who responded to a peer-reviewed national survey) exists for funding at least some of the basic recreation services commonly provided on public land by charging recreation fees or through a combination of fees and tax dollars;
- Whole or partial reliance upon tax dollars is supported for funding several of the basic recreation services commonly found on public lands (visitor centers, trails, picnic areas, parking areas, and historic sites);
- Strongest support for a free, tax dollar supported service is for bathrooms;
- Those with lower income tend to support fees less while still tending to support some fees;
- Ethnic and cultural differences seem to correspond with differences in support for fees generally, with self-reported Black and Hispanic respondents typically supporting fees less than self-reported whites or Asians;
- Greater acceptability of fees and more willingness-to-pay tends to follow from obvious signs of facility improvements, good explanations of why fees are charged, and awareness of fees prior to the visit;
- Efforts to promote fee-based recreation are often more successful if they focus on the quality of the recreation experience;
- Perceptions change over time after fees are instituted and, generally, levels of support for paying fees tend to increase;
- How the Forest Service addresses fee compliance and law enforcement affects public support, revenue generation, and program effectiveness;
- Actively reporting fee related accomplishments through posters, brochures, newsletters, and press releases can help build public support;
- Information regarding fees and how the revenue helps can mediate negative reactions to new fees and fee increases, especially information about immediate facility improvements, including habitat improvement projects;
- Visitors tend to prefer reasonable fee options, simplicity, equity and fairness, and good value (see the discussion on pricing that follows).

Knowledge Gaps Related to the Acceptability of Fees

- Whether a project funded by recreation fee revenue will change the character of immediate area in unwanted or unanticipated ways;
- Whether and how recreation fees affect visitor expectations;
- Whether agency understanding of public attitudes towards recreation fees sufficiently reflects attitudes of visitors who avoid sites where agencies charge recreation fees;
- Whether the increased role of recreation fees is changing the relationship between visitors and land managers to more of that between customer and seller, the effects or consequences of such a change if it is occurring, and whether the relationship



might be characterized differently to avoid any unwanted consequences that are identified.

Agency Adaptation and Innovation Regarding the Acceptability of Fees

- The Forest Service has funded numerous research studies to increase understanding about the acceptability of fees and its fee program;
- The agency has sought to make fees less confusing by increasing coordination internally and externally to simplify the fee program. An example of this is the Northwest Forest Pass;
- In 2000, the Forest Service became a part of the Interagency Recreational Fee Demonstration Program Coordination Task Force which was organized to facilitate interagency coordination;
- The FS has sought to improve pass sale convenience by using several different methods such as annual passes, auto-pay machines, internet sales, mail-order, and 1-800 number pass sales.

Pricing Recreation Fees

Direct effects of recreation fees, felt by individuals and groups, are often related to pricing of recreation fees. Better pricing decisions tend to follow from an understanding of visitor attitudes towards fees.

Two primary issues and concerns related to stakeholder responses to pricing are as follows:

- Whether visitors are being charged numerous or layered fees by the same agency or by multiple public land management agencies;
- Whether the price of each recreation fee is appropriate for the level of service provided;
- Whether recreation fees could lead to greater levels of service that require more funding and higher or more common recreation fees.

The issue and concern about numerous or layered fees is often expressed by stakeholders, field officers, and congressional sources as the “nickel-and-dime” issue. When there are fee sites in close proximity, a number of small individual fees can add up to become burdensome or confusing, leading to visitor dissatisfaction. This concern is most relevant when sites managed by the Forest Service are in close proximity with those managed by other agencies charging fees.

In 1998, the General Accounting Office (GAO) reported that there was a need for coordination among agencies with sites in the same general area. In 2001, they noted that there is still a need for agencies to resolve these interagency management issues, although they also note that the Forest Service coordinates fees at the highest level of the four relevant agencies (see Table 1). Congressional sources have expressed concern about the perceived layering effect of fees in some areas. Field level personnel recognize that mixed land ownership in close proximity can present problems if different fees are charged by separate agencies. Layered fees within an agency can also be confusing and unpopular. One suggestion from a study relating to multi-agency fees is the sale of an annual recreation use pass good at different agency sites, then allocating the revenue among agencies based on visitor days. This idea is now being field tested.



Stakeholders are also generally concerned that a recreation fee price corresponds with the level of service they receive. This suggests that different fee prices for different recreational opportunities are appropriate. The discussion of differential pricing that follows addresses this issue and concern more completely. Regarding services from public lands, some stakeholders argue that fees are inappropriate for areas where there is no direct management cost recognizable to visitors.

Addressing stakeholder concerns regarding recognizable service must occur carefully. There is some evidence that a cycle can occur whereby recreation fee increases lead to more costly improvements and more fee increases. Visitors tend to expect more services if they pay a higher fee, although low to moderate fees may not lead to this cycle.

Differential Pricing

One specific type of pricing that has been used to produce a desired effect is differential pricing. Differential pricing is when prices vary based upon considerations such as time, place, or visitor income. Differential pricing can reduce concerns about inequity of fees to low income or low disposable income. It is also effective for distributing visitation or capturing the higher market value of especially popular activities or times.

A 2001 GAO report found that the Forest Service applies significantly more innovative pricing structures than other participating agencies. In some cases, the Forest Service has made visitor centers cost-free to encourage people to casually drop by en-route as first time visitors. As a result, fee revenue at the main destination site increased. Several knowledge gaps exist related to differential pricing and recreation fees because existing research has not addressed newly emerging questions.

Forest Service Activities Related to Price and Pricing

Congress has challenged the agencies participating in the Recreational Fee Demonstration program to use innovative methods for fee implementation and pricing. In doing so, the Forest Service has based pricing methods on both research and public concern. In several cases, the agency's initial fee strategy was to charge for general access. Over time, in response to public concern about this approach, the Forest Service has replaced several of these general access fees with fees for specific recreation sites. The White Mountain National Forest project in New Hampshire and the Sawtooth project in Idaho, for example, dropped general access fees and replaced them with fees for designated sites. In addition, the agency has sought to make fees less confusing by increasing coordination internally and externally to simplify the fee program. An example of this is seen in the evolution of the Northwest Forest Pass in Oregon and Washington.

Research Recommendations Related to Prices and Pricing

Several research topics appear especially valuable for informing pricing decisions. These include price comparability studies that explore discounted prices; differential pricing based on amenities, time, and location; attitudes towards raised fees for existing fee services, towards introducing "special services" for a fee, and towards self-operation of concessionaire facilities.

Available research suggests the following key points are particularly worth taking into account when considering charging or setting fee prices:

Lessons Learned About Pricing Recreation Fees

- Stakeholders and managers benefit from clearly stated program goals and specific descriptions of likely accomplishments (i.e., added value) from new fee revenue;



- Clear and flexible criteria are essential when deciding the proportion of recreation related costs that fee revenue should cover locally;
- Pricing decisions benefit from considering the need for revenue together with concerns about displacement, as well as four related concerns: fairness, equity, visitor's ability to pay, and congestion;
- A well-formed local management philosophy helps fee pricing decisions;
- Selecting revenue maximization as the main focus for charging fees is likely to price out many current visitors who will likely choose a similar, local area for their recreation;
- Designing an equitable and efficient fee system requires knowing and responding to basic socioeconomic characteristics of current visitors;
- Pricing decisions most easily affect low-income visitors and visitors with low discretionary income;
- Trends in local, regional, and national popularity of recreation activities are important to consider.
- The Forest Service has tried several innovative pricing strategies, often based upon visitor comments.

Knowledge Gaps Related to Pricing Recreation Fees

- How to address questions about recreation fees and pricing so that values, attitudes, and beliefs are simultaneously measured with traditional economic methods (neoclassical) and with other methods, including non-economic ones.
- Whether differential pricing strategies add undesired complexity to a fee program;
- Whether basic differential pricing strategies can capture the added value of popular times and locations;
- Whether differential pricing aggravates or mitigates concerns about real or feared inequities.

Agency Adaptation and Innovation Regarding Pricing Recreation Fees

- The Forest Service has tried to use innovative approaches to fee implementation as requested by Congress.
- Since the first year of the Recreational Fee Demonstration Program, there has been a greater emphasis on interagency cooperation and coordination
- The White Mountain National Forest project in New Hampshire and the Sawtooth project in Idaho dropped general access fees and replaced them with fees for designated sites. This change is based on expressed public concern and has brought increased program success.
- Shasta Trinity NF decided not to implement an access pass based on expressed local concern. Instead they instituted fees for specific sites.
- The Forest Service has sought to make fees less confusing by increasing coordination internally and externally to simplify the fee program. An example of this is the Northwest Forest Pass in Oregon and Washington.



- In 2000, the Forest Service became a part of the Interagency Recreational Fee Demonstration Program Coordination Task Force which was organized to facilitate interagency coordination.

Displacement of Visitors

Recreation fees can lead some visitors to choose non-fee sites. When a new fee leads some visitors to choose a different place to recreate, the effect is called displacement. The issue or concern regarding displacement is stated as follows:

- Whether visitors are being displaced by recreation fees or visiting less frequently and whether any displacement that might occur is by definition problematic.

Two studies specifically mention visitor displacement resulting from fees. In a study of non-fee areas in a Southwest national forest, half of the respondents chose the forest site because it was free and one third of the visitors had changed their visitation in response to fees. Of those who changed their behavior, half chose a different site either within the same area or elsewhere. Most of those who changed their behavior (70%) also said they visit less frequently. In this example, displacement appears to be a consequence of the fee program. The other study showed that fees were less likely than crowding to displace users at specific (non-forest) recreation sites in South Carolina.

In 1998, after the first year of Recreational Fee Demonstration program operation, the General Accounting Office (GAO) concluded that fees had no major adverse effect on overall visitation numbers. They caution that this is based on only one year of data. Results from modeling studies do, however, show that small to moderate increases in fees can affect site choices made by some individuals. No research, however, yet shows whether the effect of displacement is temporary for at least some of those visitors who might initially choose a non-fee site. An improved recreation site, for example, might lead some displaced individuals to eventually return to the fee site. Similarly, no study shows whether those who choose a non-fee site have a lesser quality recreation experience because of that choice. Some visitors who prefer non-fee sites may discover they have a more personally preferable experience, although that possibility is as yet unexplored. Lastly, visitor expectations play a key role in reactions to the presence of fees or any other characteristic of a recreation site.

Lesson Learned Regarding Displacement

- Some visitors choose not to visit fee sites and are displaced when new fees are instituted because they prefer non-fee sites;
- Some visitors choose to visit fee sites less frequently;
- Visitors who choose to visit less frequently or to visit another location because of fees may do so for economic reasons, philosophical objections, or both.

Knowledge Gaps Related to Displacement

- Whether displacement that may occur when fees are established at scattered locations is more acceptable than disgruntlement towards general access fees at Forest Service sites;
- Whether displacement is a temporary effect for some visitors;
- Whether visitors who choose non-fee sites have a less-preferable recreation experience because of that choice;



- Whether efforts to ensure realistic visitor expectations reduce displacement or increase acceptance of the choice.

Agency Adaptation and Innovation Regarding Displacement

- The Forest Service has sought to address inequitable effects, as discussed earlier in this document, and, in doing so, addressed the most likely economic reasons for displacement;
- The Forest Service has sought to address philosophical objections to recreation fees through actions associated with concerns about the acceptability of fees while continuing to recognize that those who object are making a personal choice about an issue and concern largely beyond agency control.

Effects on Volunteerism

The Forest Service has a long history of providing opportunities for individuals and groups to volunteer their time and energy to help the agency accomplish stewardship tasks. Several national and regional organizations are primarily devoted to working closely with the Forest Service and other land management agencies to accomplish volunteer service. A key selling point for marketing volunteerism is the opportunity to give back to the public lands. An issue and concern related to recreation fees and volunteerism is the following:

- Whether payment of recreation fees reduces the ability of volunteer groups to attract willing participants to accomplish needed work on public lands.

According to materials reviewed for this document, this concern has not been addressed by research that would allow for a description of it beyond the anecdotal comments offered from several sources. Therefore, for the purposes of this document, it is described as a knowledge gap as well as an issue and concern. While some groups and individuals have expressed the concern, the degree to which volunteerism might be affected by recreation fees remains unknown. Nevertheless, Forest Service actions related to the recreation fee program at local, regional, and national levels demonstrate clear efforts to offset any detrimental effect on volunteerism that might be associated with recreation fees. Volunteer work crews have been and will remain an important part of the agency's effort to maintain and improve recreation sites and enhance habitat affected by recreation.

Lessons Learned About Effects on Volunteerism

- Concerns about the effect of recreation fees on volunteerism are important.

Knowledge Gaps Related to Effects on Volunteerism

- Whether the possible effect of recreation fees on volunteerism is actually occurring in specific situations;
- Whether differential pricing or exchanges of service-in-kind for fees have addressed those concerns.

Agency Adaptation and Innovation Regarding Effects on Volunteerism

- In some areas, the Forest Service has instituted a program that rewards volunteers with free passes as a "service-in-kind" alternative to fee payment.



Issues and Concerns Beyond Forest Service Control

Several issues or concerns regarding the Forest Service's Recreational Fee Demonstration program are beyond the agency's control.

Origin of Recreational Fee Demonstration Program

Some groups are concerned about the process by which the Recreational Fee Demonstration program came to exist. Several groups publicly express continued concern that the program originated from a rider on an appropriations bill instead of a distinct piece of legislation. Congress has the prerogative to address concerns about the legislation or its origin. This concern is stated as follows:

- Whether Congress was appropriately justified when it established the Recreational Fee Demonstration Program through an Appropriations Bill rider rather than with a distinct legislative act.

Separate Funding to Establish a System of Financial Accountability

Improvements to the Forest Service's current system of financial accountability related to the Recreational Fee Demonstration program require funding to design and implement. That funding could come from existing agency budget allocations, from recreation fee revenue, or from specific budget authorization. If it comes from existing budget allocations, the cost of establishing a system of financial accountability for this new program is borne by existing programs. Whether the cost is in personnel time, information technology resources, or design efforts, those resources are not otherwise available for existing programs. This concern is stated as follows:

- Whether Congress should provide the Forest Service with funding to establish a system of financial accountability, rather than having existing agency programs bear the cost of establishing such a program.

Appropriateness Of Fees To Fund Recreation Management And Habitat Enhancement

Congress directed the Forest Service to establish a Recreational Fee Demonstration program to address a specific need: Federal funding directed towards managing recreation and enhancing habitat is insufficient to meet maintenance backlogs while offsetting social and environmental effects occurring as public land recreation becomes more popular. The following concern is frequently raised:

- Whether recreation is a social good and, therefore, Congress should allocate sufficient tax dollars to fund federal agencies to do the work necessary to provide recreation opportunities and restore or maintain habitat affected by recreation.

Arguments about the appropriateness of recreation fees to address this funding need tend to present fees as only part of the solution to the funding shortage. Some go further and argue that recreation is a basic social good to which every individual is entitled and, secondly, that the federal budget is sufficient to pay the costs of supplying that good.

Several related issues and concern appear earlier in this document because the Forest Service can more directly address them. For example, fees may lead some citizens to choose non-fee public lands over fee sites, even though those fee sites are also held in trust for all citizens. A similar issue, also discussed earlier, is that some individuals and groups see fees as a bill for access to land already paid for by taxes. Likewise, some argue that fee revenue applied to maintenance and habitat enhancement is paying for



activities that tax revenue should have already funded. This issue and concern is largely described as “double taxation” or “regressive taxation”. It is beyond the Forest Service’s ability to address this issue and concern.

Appropriateness Of Recreation Fees In Light Of Other Forest Service Programs

Perceptions of subsidization are an issue and are often stated similarly to the following issue and concern:

- Whether recreation fees are appropriate in light of current grazing fees and timber contract requirements, as well as any other Forest Service program where nuisance outcomes or social costs—arguably—outweigh social good production.

Two basic arguments compete on this concern. The first is that recreation fees charge for access to the social good of recreation while extractive activities that have social and environmental costs, such as logging, grazing, and mining, are subsidized. The alternative argument is that recreation has real costs that have been subsidized by taxpayers rather than being borne by those who most directly benefit from the activity.

Congress has the prerogative to address the relationship between the federal budget and social goods, as well as taxation and the distribution of federal tax dollars. Research can help provide information for discussion and agencies can work to implement Congressional directions in locally sensitive ways. Nevertheless, Congress allocates tax dollars through the federal budget process and determines fundamental agency direction through legislation. The Forest Service works within those boundaries.



Lessons Learned

The Forest Service's experience with the Recreational Fee Demonstration program since its inception has taught numerous lessons. Some of those lessons are reflected in research studies, others in Forest Service reports, and others in critical evaluations. The previous discussion of issues and concerns contains discussion of lessons learned associated with each issue or concern. These are the ones that stood out in the material reviewed for this document:

- Recreation fees have become increasingly important as a way to allow those who most directly benefit from recreation opportunities to most directly support the costs of providing those opportunities.
- Recreation fees are an important addition to other means already employed to meet needs of operating and maintaining recreation areas and sites and enhancing habitat affects by recreation; they are not the only answer.
- Negative public responses to the recreation fee program often reflect perceptions of how federal land management has addressed other responsibilities.
- The program is controversial in some areas and not others and for some individuals and not others, so program accountability and related evaluations require diverse criteria to adequately reflect related issues and concerns.
- Accounting for program expenditures in an understandable and professionally valid way that is also clearly associated with accomplishing recognizable outcomes is a significant challenge that the program must meet to establish, retain, or increase credibility.
- A fee program with adequate accountability, as described by sources reviewed for this report, would include three essential characteristics:
 - Clear sideboards and limitations on such things as where fees are collected and how fee revenue is spent;
 - Program sideboards would have national consistency as well as sufficient flexibility to adapt to local situations;
 - A clearly understandable evaluation system based upon established sideboards and other relevant criteria.
- Partnerships between the Forest Service and non-governmental organizations are a valuable program component and are also a focus of criticism from those who fear over-commercialization or undue influence on agency decisions.
- Security and safety of fee collection staff is a critical aspect of any recreation fee program.
- Organizational challenges of managing a demonstration program, such as attracting and retaining qualified staff to perform a temporary job, affect the program and its outcomes.
- Management challenges include inadequate sharing of specific lessons learned which reduces consistency and efficiency as lessons and tools are recreated.



- Extensive existing research is available and additional questions continue to emerge; yet, few program managers rely on research to evaluate the program.
- Program related evaluations are most often either focused on a narrow range of research criteria (with less broad program relevance) or, if more broad in scope, heavily-reliant upon less corroborated anecdotal evidence (with less scientific credibility).
- Public comments have helped the Forest Service learn of opportunities for improving the program.
- Public interest in participating in revising the program and in ongoing program management is strong and apparent.
- Recreation fees are likely to affect some visitors enough economically that they decide to recreate in non-fee areas.
- Some visitors choose to avoid fee sites because of personal objection to the Recreational Fee Demonstration program.
- Forest Service efforts to innovatively reduce potentially inequitable effects have been well received.
- Recreation fees are more likely to directly affect traditional visitors who have low levels of disposable income than potential visitors who have low incomes.
- Agencies can only spend revenue from the current Recreational Fee Demonstration program in limited ways while additional administration costs must come from other funding sources.
- Funding of activities related to administration of the Recreational Fee Demonstration program reduces current funding available for other Forest Service programs.
- General statements about support or opposition for fees contribute little to this discussion because the topic is more complicated than any general statement can address and general statements tend to distract from the question about how to meet the real need of maintaining recreation sites and enhance habitat affected by recreation.
- Reported support for the program is notably higher—often twice that of opposition—when surveys are conducted at recreation fee sites, as compared with support reported as part of national surveys or when surveys are conducted at comparable non-fee recreation sites.
- Fees for general access are typically less acceptable and more controversial than fees for either undeveloped sites or developed sites.
- Boat ramps, campgrounds, and special exhibits tend to draw the most support for funding from recreation fees while visitor centers, trails, picnic areas, restrooms, parking areas, and historic sites tend to draw greater support for funding from taxes or a combination of tax dollars and fee revenue.
- Extremely strong public support (>95% of those who responded to a peer-reviewed national survey) exists for funding at least some of the basic recreation services commonly provided on public land by charging recreation fees or through a combination of fees and tax dollars.



- Whole or partial reliance upon tax dollars is supported for funding several of the basic recreation services commonly found on public lands (visitor centers, trails, picnic areas, parking areas, and historic sites).
- Strongest support for a free, tax dollar supported service is for bathrooms.
- Those with lower income tend to support fees less while still tending to support some fees.
- Ethnic and cultural differences seem to correspond with differences in support for fees generally, with self-reported Black and Hispanic respondents typically supporting fees less than self-reported whites or Asians.
- Greater acceptability of fees and more willingness-to-pay tends to follow from obvious signs of facility improvements, good explanations of why fees are charged, and awareness of fees prior to the visit.
- Efforts to promote fee-based recreation are often more successful if they focus on the quality of the recreation experience.
- Perceptions change over time after fees are instituted and, generally, levels of support for paying fees tend to increase.
- How the Forest Service addresses fee compliance and law enforcement affects public support, revenue generation, and program effectiveness.
- Actively reporting fee related accomplishments through posters, brochures, newsletters, and press releases can help build public support.
- Information regarding fees and how the revenue helps can mediate negative reactions to new fees and fee increases, especially information about immediate facility improvements, including habitat improvement projects.
- Visitors tend to prefer reasonable fee options, simplicity, equity and fairness, and good value (see the discussion on pricing that follows).
- Stakeholders and managers benefit from clearly stated program goals and specific descriptions of likely accomplishments (i.e., added value) from new fee revenue.
- Clear and flexible criteria are essential when deciding the proportion of recreation related costs that fee revenue should cover locally.
- Pricing decisions benefit from considering the need for revenue together with concerns about displacement, as well as four related concerns: fairness, equity, visitor's ability to pay, and congestion.
- A well-formed local management philosophy helps fee pricing decisions.
- Selecting revenue maximization as the main focus for charging fees is likely to price out many current visitors who will likely choose a similar, local area for their recreation.
- Designing an equitable and efficient fee system requires knowing and responding to basic socioeconomic characteristics of current visitors.
- Pricing decisions most easily affect low-income visitors and visitors with low discretionary income.
- Trends in local, regional, and national popularity of recreation activities are important to consider.



- The Forest Service has tried several innovative pricing strategies, often based upon visitor comments.
- Some visitors choose not to visit fee sites and, when new fees are instituted, are therefore displaced to sites they prefer.
- Some visitors choose to visit fee sites less frequently.
- Visitors who choose to visit less frequently or to visit another location because of fees may do so for economic reasons, philosophical objections, or both.
- Concerns about the effect of recreation fees on volunteerism are important.



Knowledge Gaps

Part of the current understanding of issues and concerns is that gaps exist in the current knowledge about recreation fees and, more specifically, about the Forest Service's Recreational Fee Demonstration program. These gaps may exist as clearly stated research questions or as yet unexplored questions raised by those outside the traditional research community. The previous discussion of issues and concerns also describes each knowledge gap with an associated issue or concern. The following are the most apparent questions at this time:

- Whether and how the program affects other Forest Service programs.
- Whether and how alternatives to recreation fees, when evaluated against criteria such as feasibility, efficiency, equity, acceptability, and practicality, can help meet the need of maintaining and operating recreation sites and improving habitat affected by recreation.
- How potential Forest Service actions might affect low levels of social trust regarding recreation fee program management and public land management.
- What visitors mean when they say they want to see obvious results from spending recreation fee revenue.
- What managers mean by adequate and relevant research and what researchers can do to provide it as part of program evaluation efforts.
- Whether public involvement might serve as a way to ensure that the fee program evaluation focuses on public purposes in addition to financial analyses.
- Whether visitors are concerned about the opportunities and quality of opportunities for public involvement in this program.
- Whether perceptions of inequitable effects associated with fees change over time and what might reduce inequitable effects within the agency's control.
- Whether and how recreation fees might affect efforts to attract more diverse visitors, some of whom have low incomes and some of whom have low levels of disposable income.
- What evaluative criteria and methods are most responsive to issues and concerns related to equity and fairness while also most applicable to daily Forest Service business needs and budget realities and within agency control.
- How to evaluate recreation fee programs in a manner that is responsive to visitors, scientifically defensible, and relevant to regular Forest Service business needs at local, regional, and national levels.
- Whether a project funded by recreation fee revenue will change the character of immediate area in unwanted or unanticipated ways.
- Whether and how recreation fees affect visitor expectations.
- Whether agency understanding of public attitudes towards recreation fees sufficiently reflects attitudes of visitors who avoid sites where agencies charge recreation fees.



- Whether the increased role of recreation fees is changing the relationship between visitors and land managers to more of that between customer and seller, the effects or consequences of such a change if it is occurring, and whether the relationship might be characterized differently to avoid any unwanted consequences that are identified.
- How to address questions about recreation fees and pricing so that values, attitudes, and beliefs are simultaneously measured with traditional economic methods (neoclassical) and with other methods, including non-economic ones.
- Whether differential pricing strategies add undesired complexity to a fee program.
- Whether basic differential pricing strategies can capture the added value of popular times and locations.
- Whether differential pricing aggravates or mitigates concerns about real or feared inequities.
- Whether and how attitudes towards stewardship and volunteerism are affected by attitudes towards recreation fees and how to minimize any unwanted effect.
- What visitors mean when they say they want to see obvious results from spending recreation fee revenue.
- How to address the tension between (1) general public preferences for not having general access fees, (2) displacement that may occur in response to establishing a site-specific fee, and (3) general public preferences for not having land management agencies apply fees as a deliberate way to change visitation patterns through displacement.
- Whether and how recreation fees displace visitors during different seasons and how recreation fee prices might reflect that understanding.
- How to address broad social questions, such as whether certain basic conveniences, like restrooms, are most appropriately funded by appropriated tax dollars and base funding rather than by recreation fees revenue.
- How recreation fees might affect potential low-income visitors as compared with affecting actual visitors who have little disposable income.
- How equity might be interpreted by various sources (e.g., fair revenue distribution vs. fair pricing and treatment).
- Whether displacement that may occur when fees are established at scattered locations is more acceptable than disgruntlement towards general access fees at Forest Service sites.
- Whether displacement that may occur is a temporary effect for some visitors.
- Whether visitors who choose non-fee sites have a less-preferable recreation experience because of that choice.
- Whether efforts to ensure realistic visitor expectations reduce displacement or increase acceptance of the choice.
- Whether the possibly detrimental effect of recreation fees on volunteerism is actually occurring in specific situations and whether differential pricing or exchanges of service-in-kind for fees have addressed those concerns.



Agency Adaptation and Innovation Regarding Issues and Concerns

Congress directed the Forest Service and three other federal land management agencies to implement a new recreation fee program on a demonstration and experimental basis aimed at exploring the program's feasibility. Since initiating the program, the agency has sought to innovatively adapt to public comments, research results, and management experience. The following are examples of that innovation:

- Since the first year of the Recreational Fee Demonstration Program, there has been a greater emphasis on interagency cooperation and coordination.
- The Forest Service has sought to make fees less confusing by working both internally and with other external agencies to simplify the fee program. An example of this is the Northwest Forest Pass.
- In 2000, the Forest Service became a part of the Interagency Recreational Fee Demonstration Program Coordination Task Force which was organized to facilitate interagency coordination.
- Recreation fee collection costs have continued to decline as projects with high collection costs have been modified or dropped.
- The FS has sought to improve pass sale convenience by using several different methods such as annual passes, auto-pay machines, internet sales, mail-order, and 1-800 number pass sales.
- In response to research and public comments, the Forest Service has tried to implement fees that are easy to pay and where fees stay at collection sites.
- After finding a lack of visitor support for access fees, the Forest Service has dropped several access fee programs and replaced them with fees for more developed recreation.
- After finding that compliance at dispersed sites is harder to enforce, the Forest Service has relied less on general access fees and also focused on providing better fee information to visitors, with warnings and citations as a last resort. The Forest Service has used local community concerns, user comments, and backlog information to determine how revenue recreation fee revenue will be spent.
- The Forest Service has actively sought public comments at local and national levels. The following website has further information: [Recreation Fees on National Forests \(http://www.fs.fed.us/recreation/fee_demo/fee_intro.shtml\)](http://www.fs.fed.us/recreation/fee_demo/fee_intro.shtml).
- A survey of visitors at several sites in the Mono Basin Scenic Area, with questions asked relating to customer service, suggested that the visitor center would function better as a free site because it is often used by first time visitors and visitors seeking information. As a result, the visitor center is now free.
- The Forest Service has funded research dealing with many aspects of recreation fees so as to better understand issues and concerns raised elsewhere.
- In response to visitor input, the agency modified the Adventure Pass project in Southern California to include free passes for volunteers and school groups and free days.



- The White Mountain National Forest project in New Hampshire and the Sawtooth project in Idaho dropped general access fees and replaced them with fees for designated sites. This change is based on expressed public concern and has brought increased program success.
- Shasta Trinity NF decided not to implement an access pass based on expressed local concerns. Instead, they instituted fees for specific sites.
- The public was confused and frustrated over the complexity and number of fees in the Northwest. In 2000, the Northwest Forest Pass was made official. This pass covers day use fees in Oregon and Washington.
- Throughout the life of the Recreational Fee Demonstration program, the Forest Service has sought to ensure that fees do not have a negative effect on any category of visitor. This is re-stressed in the 1999 report to Congress.
- In 1999, with a move unique to the agency, the Forest Service required fee demo projects to amend their business plans to include information designed to mitigate the effect of fees on non-traditional groups. The agency requires a civil rights impact assessment for every project.
- To provide additional choices to everyone, the FS has introduced reasonably priced annual passes, free days, and free passes to volunteers.
- A free day-use parking pass for low-income forest visitors was implemented on the Prescott National Forest to reduce the impact of fees on certain populations. A Forest Service evaluation of this project considered it to be a success.
- Fees per by car rather than by individual were another way the Forest Service has used to reduce the effect on families.
- The Forest Service has sought and established innovative approaches to fee implementation as requested by Congress and recognized by the GAO.
- Project coordinators must review and update business plans, communication plans, and the civil rights impact analysis yearly. The FS also has set criteria for measuring program success based on equity, efficiency, consistency, revenue production, and revenue distribution.
- Local project managers are given wide discretion on how to use fee revenues. Regional boards have been set up to monitor, evaluate, provide oversight, and coordination for fee projects in their region.
- Regional boards have been given the responsibility to oversee fee projects. They conduct periodic reviews of each project. The Washington Office also reviews one or more regions each year. Fiscal reviews of accounting and cash handling occur more for every region.
- Region 6 provides a good example of regional monitoring and evaluation. This region regularly updates its business plans, and actively highlights its accomplishments. One forests in the region worked with their civil rights coordinator to plan and implement fees. Another forest coordinated with their forest accountant to support management decision making. The region regularly conducts research to gather feedback from users and residents.
- The Enterprise Forest-Adventure Pass Program in California has provided for monitoring various aspects of the program such as public support and collection operations. The agency has also increased use of technology to manage fee



projects within the program. One of the highlights of this program is that crime has been reduced in nearby urban national forests. The program is fairly standardized and consistent over 3.8 million acres.

- The Forest Service has sought to address inequitable effects, as discussed earlier in this document, and, in doing so, addressed the most likely economic reasons for displacement.
- The Forest Service has sought to address philosophical objections to recreation fees indirectly through actions addressing concerns about the acceptability of fees while continuing to recognize that those whose objections remain largely philosophical are expressing personal choices regarding an issue and concern largely beyond direct agency control.
- In some areas, the Forest Service has instituted a program that rewards volunteers with free passes.



Conclusions

This document provides a summary description of issues and concerns, lessons learned, knowledge gaps, and agency innovations related to its Recreational Fee Demonstration program. Based upon this material, the following conclusions are worth consideration:

- The two years of remaining temporary authorization provide an opportunity to revise the demonstration program in response to issues and concerns, address knowledge gaps in response to agency and congressional goals for the program, and continue agency innovations in response to lessons learned.
- Wide distribution of this document, as well as the two related supplemental documents, is a means to share information with interested individuals and organizations.
- Those who read this document are encouraged to see it as a valuable summary of all the information invested in by the Forest Service as it tested the feasibility of the demonstration program and innovatively adapted to issues and concerns as they became apparent.
- Additional innovation will follow from continuing to pay attention to lessons already learned, including lessons regarding issues and concerns, and continuing to seek more learning through management-oriented research.
- A management-oriented research program can extend the Recreation Fee Demonstration program's potential for innovation if the research program seeks first to address knowledge gaps identified in this document, to identify additional knowledge gaps, and to set priorities for addressing the combined set of knowledge gaps.
- The Forest Service's mature approach towards testing the feasibility of its Recreational Fee Demonstration Program is shown by its willingness to identify issues and concerns, attempt innovative changes, look for knowledge gaps, and learn from its efforts.



Document Background and Analysis Method

The USDA Forest Service's Collaboration Services team produced this document during December, 2001, and January, 2002. CST is part of the Content Analysis Team (CAT), based in Salt Lake City, Utah, and part of the agency's Ecosystem Management Coordination staff, Washington Office. The work was done under contract with the Recreation, Heritage, and Wilderness Program, also part of the Forest Service's Washington Office.

Methods applied during this analysis began with developing a meta-analytical framework of issues and concerns based upon a rapid assessment of source materials. A meta-analytical framework, as applied here, is a summary set of the key questions or topics regarding the USDA Forest Service's Recreational Fee Demonstration program. The questions were either explicit or implicit to the source material and directly related to the revision effort's need for strategic thinking and an eventual decision.

Following the initial meta-analysis, the next phase was to validate and detail the results by going through the source material more carefully. During the second phase, questions identified in the meta-analysis were clarified, rearranged, and detailed. At that point, other issues and concerns became more apparent, as did relationships between the issues and concerns.

For the purposes of this document, issues and concerns are treated synonymously. Some issues and concerns help identify possible problems, weakness, or negative effects associated with the program. Other issues and concerns reflect possible problems that might follow from changing or ending a recreation fee program. In that second sense, the issue or concern points at a perceived strength of the existing program that the eventually revised program might retain. Wherever possible, a distinction is made between questions addressed by research and questions that have not been addressed by research, as well as questions raised because of research.

Citation of this document should occur with the following format:

U.S. Department of Agriculture. Forest Service. 2002. Issues and Concerns Related to the USDA Forest Service's Recreational Fee Demonstration Program: A Synthesis of Published Literature, Critical Reports, Media Reports, Public Comments, and Likely Knowledge Gaps, by Peter B. Williams and Justin Black, USDA-Forest Service, Content Analysis Enterprise Team. Report to Recreation, Heritage, and Wilderness Program, USDA-Forest Service. Logan, Utah: USDA-Forest Service.

The two related supplemental documents have the following citations:

U.S. Department of Agriculture. Forest Service. 2002. Supplement 1: Short Index of Additional Readings Related to Recreation Fees and the USDA Forest Service's Recreational Fee Demonstration Program, by Peter B. Williams and Justin Black, USDA-Forest Service, Content Analysis Enterprise Team. Report to Recreation, Heritage, and Wilderness Program, USDA-Forest Service. Logan, Utah: USDA-Forest Service.

U.S. Department of Agriculture. Forest Service. 2002. Supplement 2: Extended Index of Additional Readings Related to Recreation Fees and the USDA-Forest Service's Recreational Fee Demonstration Program, by Peter B. Williams and Justin Black, USDA-Forest Service, Content Analysis Enterprise Team. Report to Recreation, Heritage, and Wilderness Program, USDA-Forest Service. Logan, Utah: USDA-Forest Service.



Source Material

A primary source for this document is an annotated bibliography completed in 1999 by staff of the USDA Forest Service's Rocky Mountain Research Station. It contains descriptions of 294 research publications related to recreation fees or the Recreational Fee Demonstration program and published between 1963 and 1999. That document is currently an unpublished reference resource available electronically and publicly on the Internet at [Recreation Fee Bibliography - Wildland Resource Valuation](http://www.fs.fed.us/rm/value/research-recfee_bibliog.html) or through the following direct address: (http://www.fs.fed.us/rm/value/research-recfee_bibliog.html).

Other significant sources include Congressional Hearing testimony, annual agency reports submitted to Congress, reports related to Individual Recreation Fee Demonstration program pilot projects, and reports compiled by the General Accounting Office and Congressional Research Service. The Forest Service distributes electronic copies of annual agency reports and other materials related to the program through the [Recreation Fees on National Forests](http://www.fs.fed.us/recreation/fee_demo/fee_intro.shtml) website. A direct link to the site is available at the following internet address: (http://www.fs.fed.us/recreation/fee_demo/fee_intro.shtml).

General Accounting Office reports are available at the [Find GAO Reports](http://www.gao.gov/docdb/lite/form.php?entry=1) website and the | GAO Reports | Find GAO Reports | menu options where a search under the keyword "recreation" will find the relevant reports. The direct link is available at <http://www.gao.gov/docdb/lite/form.php?entry=1>.

Congressional Research Service's nonpartisan reports related to the Recreational Fee Demonstration program are redistributed through the Library of Congress's National Library for the Environment website at [Congressional Research Service Reports at the National Library for the Environment \(NLE\)](http://cnie.org/NLE/CRS/) which is at <http://cnie.org/NLE/CRS/>.

A rapid review of public comments submitted in recent years to the Forest Service's Recreational Demonstration Fee program website looked for any comments that added to the list of issues and concerns that had emerged from other sources. No comment added a new issue or concern not already noted, yet the review helped ensure that this work was not overlooking a noticeable topic. The review also ensured that comments from citizens contributed directly to the understanding of issues and concerns. Comments are submitted at [Online Comment Form -- Fee Demonstration Program](http://www.fs.fed.us/recreation/fee_demo/commentform.html) which is reached through http://www.fs.fed.us/recreation/fee_demo/commentform.html.

Material presented in this document characterizes the breadth and range of issues and concerns relevant to the Recreational Fee Demonstration program. Except in a few general cases, the document does not reflect the amount or degree of either support or opposition associated with any particular issue or concern. Where possible, the document presents recognizable arguments for addressing a given issue or concern in a particular way. Work to prepare this document did not include collecting any original data through surveys, interviews, or any other mechanism.