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Mayor Wentworth: Recreation Economy Resource Guide, Expanded Partnership Authority

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Recreation Economy Resource Guide

For USDA Forest Service, Rural Development and
National Institute for Food and Agriculture Field Staff

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BACKGROUND

USDA's 2014-2018 Strategic Plan emphasizes rural economic development and forest conservation. Restoring watershed and forest health is central to USDA's efforts in our national forests and grasslands. Watersheds and forests also serve as important economic drivers for adjacent rural communities. Jobs and businesses in natural resources management, stewardship and restoration, agri-tourism, hospitality, renewable energy and other sectors that strengthen the distinctive character and vibrancy of the surrounding area offer opportunities for these nearby communities.

Growing and maintaining a healthy recreation sector that benefits local residents over the long term requires balancing natural resource management, conservation efforts, infrastructure investment, business development, and many other factors. It also necessitates active stakeholder engagement, a robust understanding of potential challenges and opportunities, collaboration among various levels of government and landowners and a strong plan for the region's future. These efforts present unparalleled economic opportunities—to revitalize main street, preserve cultural heritage, support entrepreneurship and small business growth, reinvest in communities and more.

The National Forest System Trails Stewardship Act, understanding the economic value of national forests and the importance of strategic partnerships to efficiently use of existing resources to support recreation economy, directs the Secretary of Agriculture to increase the role of volunteers and partners in National Forest System trail management. The importance of strategic partnership and coordination and tracking impact is also highlighted in the revised 2012 Forest Service Planning Rule, the 2016 Outdoor Recreation Jobs and Economic Impact Act and 2016 Native Tourism Act.

USDA's Forest Service (FS), Rural Development (RD), and the National Institute for Food and Agriculture (NIFA) have developed this resource guide for field staff use to improve the coordination of delivery of assistance.

PURPOSE

This guide will help FS, RD and NIFA employees in the field:

- Understand agency roles in supporting recreational economy
- Leverage each other's expertise and planning, financing and training programs
- Cross-promote success stories and best practices.

RECREATIONAL ECONOMY FACT SHEET

Building recreation economy is one of USDA's top priorities. USDA has enrolled a record number of private working lands in conservation programs and implemented new strategies—such as landscape-scale efforts—to restore our forests and clean our water supply. Through economic development investments, USDA is also supporting the creation of private-sector jobs protecting and rehabilitating our forests and wetlands, and providing increased opportunities for outdoor recreation.

America's 193 million acres of public forests and grasslands supply drinking water for 60 million Americans, support approximately 200,000 full and part time jobs and contribute more than $13 billion to local communities each year. At the same time, new conservation markets are enhancing the value of our nation's farmlands, while also supporting conservation practices, improving farmers' bottom line and ensuring a cleaner planet for our next generation.

Outdoor recreation is an economic powerhouse in the United States; each year generating $646 billion in consumer spending and 6.1 million direct jobs. In many rural places, hunting, fishing and wildlife watching have boosted rural tourism, spurred business growth and contributed to strong land value gains. The brightest prospects, though, still lie ahead. Rural communities fortunate enough to have other amenities to complement their natural resource base are in the best position to reap new economic benefits from this booming industry.

The National Forests and grasslands provide the greatest diversity of outdoor recreation opportunities in the world, connecting people with nature in an unmatched variety of settings and activities. Opportunities include hiking, biking, horse riding, driving off-highway vehicles, picnicking, camping, hunting, fishing, navigating waterways, viewing wildlife and scenery and exploring historic places. Visitors can glide though powder at world class alpine resorts and challenge themselves on primitive cross-country ski or snowmobile routes.

Outdoor recreation is fun—and so much more. It provides physical challenges, requires development of life-long skills, provokes interest and inquiry and inspires wonder and awe of the natural world. It contributes greatly to the physical, mental, and spiritual health of individuals, bonds family and friends, instills pride in heritage and provides economic benefits to communities, regions and the nation. Indeed, outdoor recreation is an essential part of our American culture.

Trails and greenways create opportunities in construction and maintenance, rentals (e.g., bicycles, kayaks and canoes), services (e.g., shuttle buses and guided tours), historic preservation, restaurants and lodging. Today, community leaders and planners are using trails as important parts of their overall strategies for economic revitalization to build and strengthen local businesses.

U.S. FOREST SERVICE FACT SHEET

The U.S. Forest Service's (FS) mission is to sustain the health, diversity and productivity of the nation's forests and grasslands to meet the needs of present and future generations. FS is a multi-faceted agency that manages and protects 154 national forests and 20 grasslands in 43 States and Puerto Rico. FS consists of an elite wildland firefighting team, the world's largest forestry research organization and experts who provide technical and financial help to a variety of stakeholders to help protect and manage privately owned forests and associated range and watershed lands. FS is divided into four levels.

Headquarters
The Washington Office is led by the Chief, who reports to the Under Secretary for Natural Resources and Environment. The Chief's staff provides broad policy and direction for the agency, works with the President's Administration to develop a budget to submit to Congress, provides information to Congress on accomplishments and monitors activities of the agency.

Region
FS has nine geographic regions that encompass broad areas. A regional forester oversees each region. Regional office staff coordinate activities between national forests and grasslands, monitor activities on those lands to ensure quality operations, provide guidance for forest plans and allocate budgets to the forests.

Forest Supervisors
Each National Forest has several ranger districts. A forest supervisor directs the work of district rangers and reports to the regional forester. Forest supervisors are responsible for coordinating activities between districts, allocating the budget and providing technical support to each district.

District Ranger
FS consists of more than 600 ranger districts that are each staffed with 10 to 100 people depending on size. Districts vary in size from 50,000 acres to more than 1 million acres. A district ranger leads activities at the district level and reports to the Forest Supervisor. The district ranger directs many on-the-ground activities, including trail construction and maintenance, operation of campgrounds and management of vegetation and wildlife habitat.

How does FS interact with the public?
FS interacts with the public through public meetings and workshops; public comment periods; targeted outreach efforts to Federally recognized Tribes, youth, new audiences, permittees and neighboring landowners; and coordination with State governments and other entities. The local FS office also provides guidance on special use permit authorization (for a permit, lease or easement), both for private and commercial purposes.

How to contact FS Staff
Visit the Forest Service's website to find FS staff in the closest ranger district. Another possible avenue for collaboration is the office of Cooperative Forestry (within the branch of State and Private Forestry) which works with States, private landowners and other partners to promote healthy forests and livable communities throughout the United States. For more information, and regional offices and contacts, visit the Cooperative Forestry office.

USDA RURAL DEVELOPMENT FACT SHEET

Rural Development's (RD) mission is to increase economic opportunity and improve the quality of life for all rural Americans. That mission touches every facet of rural America throughout the country. RD has more than 40 loan, grant and technical assistance programs to create opportunities in housing, business, and infrastructure. RD serves as a catalyst to improve conditions in rural America by increasing the flow of capital through leveraged partnerships that help make prosperity and better living a reality in rural America.

Rural Development's programs are administered by three agencies:

Rural Housing Service (RHS)
The Rural Housing Service offers a variety of programs to build or improve housing and essential community facilities in rural areas. We offer loans, grants and loan guarantees for single- and multi-family housing, child care centers, fire and police stations, hospitals, libraries, nursing homes, schools, first responder vehicles and equipment, housing for farm laborers and much more. RHS also provides technical assistance loans and grants in partnership with nonprofit organizations, Native American and Alaska Native Tribes, State and Federal government agencies, and local communities.

Rural Business-Cooperative Service (RBS)
The Rural Business-Cooperative Service offers programs to support business development and job training opportunities for rural residents. RBS programs help provide the capital, technical support, educational opportunities and entrepreneurial skills that can help rural residents start and grow businesses or access jobs in agricultural markets and in the bio-based economy.

Rural Utilities Service (RUS)
The Rural Utilities Service administers programs that provide much-needed infrastructure or infrastructure improvements to rural communities, including water and waste treatment, electric power and telecommunications services. All of these services play a critical role in helping to expand economic opportunities and improve the quality of life for rural residents.

How to contact RD staff
RD delivers programs through a network of more than 400 area offices and 47 State offices, a customer service center and finance office in St. Louis, Missouri, and its headquarters in Washington, D.C. Visit RD's website for national, State and local office contacts. Community Economic Development Leads in each State provide assistance with planning, financing and training projects.

NATIONAL INSTITUTE FOR FOOD AND AGRICULTURE (NIFA) LAND GRANT UNIVERSITIES FACT SHEET

The National Institute for Food and Agriculture (NIFA), part of USDA's Research, Education and Economics mission area, uses an integrated approach to ensure scientific discoveries reach the people who can put them to use. Through partnerships with the Land Grant University System and government, private and nonprofit organizations, NIFA delivers research, education and extension programs that provide solutions to those who need them.

The 1862 Morrill Act created the Land Grant University system to provide individuals in every State opportunities to receive education in agriculture, science, military science and engineering. Land grant universities provide affordable educational opportunities for those lacking extensive financial resources.

Each of the 50 States is home to a Land Grant University. The District of Columbia and 6 U.S. territories also have Land Grant institutions. The 1890 Morrill Act extended the Land Grant system to include 18 separate land grant institution for African-American students. Further, in 1994, 29 Tribal colleges and universities became Land Grant Institutions. This number has since expanded to 32. Access NIFA's map of all land grant colleges and universities.

Cooperative Extension System
The 1914 Smith-Lever Act expanded the mission of the land grant university system, creating the Cooperative Extension System. The Extension System has broad resources to help with planning associated with the recreational economy. A national network of Extension professionals has worked to bring resources to a single website for easy cross-State sharing. Visit the online network, National Extension Tourism (NET), for a multitude of resources.

Regional Rural Development Centers
There are four Regional Rural Development Centers that link the important work done at extension centers within their respective 12-13 State regions. These centers help connect initiatives to expertise within the region to provide specific technical assistance. For example, through the Stronger Economies Together initiative, the Southern Regional Development Center serves as the conduit for Land Grant Universities in partnership with USDA Rural Development to provide regional economic development technical assistance to communities across the nation.

A few examples of Extension's work with the recreation economy are below. Communities considering economic development options may find additional resources by reaching out to their local Extension Service and/or their respective Regional Rural Development Centers for help.

- Nature Tourism Development, Texas A&M University
- Vermont Tourism Research Center, the University of Vermont
- West Virginia University Extension Service Community Resources and Economic Development
- North Carolina State University Tourism Extension Program
- University of Tennessee Extension, Center for Profitable Agriculture Agritourism Program
- University of California Cooperative Extension Agritourism Conversations
- National Extension Tourism.

AREAS FOR COLLABORATION FOR FS, RD, NIFA/LAND GRANT UNIVERSITIES

In order to sustainably manage the National Forest System, while bringing economic opportunities to forest-adjacent communities, FS, RD and NIFA/Land Grant Universities have many opportunities to partner. Here are examples:

Planning
In 2012, FS updated its land management planning requirements with a new Planning Rule. Because of the importance of sustainably managing the National Forest System with the help of the public and other stakeholders, this rule emphasizes FS's responsibility to engage with the public and to work more closely with State, local and Tribal governments when national forest managers amend or revise their land management plans. Economic impact analysis and planning is an important component of the planning process. Since RD, NIFA and Land Grant Universities have the expertise and vested interest in economic development, the agencies can coordinate and collaborate at various stages of planning and implementation processes. For example, land management planning efforts can be coordinated with overlapping regional economic development planning technical assistance efforts that RD and NIFA/Land Grant Universities provide. Partnerships built early in this manner can also support coordination efforts at the implementation stage.

Financing for Infrastructure and Business Development
RD has a loan portfolio of almost $216 billion that is financing infrastructure and business development projects. RD has staff in every State to provide grants, loans, and loan guarantees that help rural communities become stronger and more vibrant. RD is an agency that continues to create job opportunities in rural America through investments in rural businesses and cooperatives. At the same time, RD provides loans, grants and loan guarantees to support reliable and necessary services such as water, energy, housing, broadband, schools and hospitals. Collectively, these investments support families that call rural areas home. RD is focused on leveraging the strengths of rural areas, building new markets to increase regional competitiveness and continuing to expand investment opportunities that create prosperous, sustainable communities.

Training and Outreach
The agencies can continuously collaborate to cross-promote best practices and success stories that have supported the growth of recreation economy through webinars, toolkits, success stories, and other promotion avenues.

FACTORS TO CONSIDER IN BUILDING RECREATION ECONOMY

The following factors should be considered when supporting communities in developing and implementing a regional plan that supports or incorporates recreational economy:

- **Connect local and regional community and economic development planning and natural resource planning.** A successful recreation economy requires the integration of policies and projects taking place both within forests and natural areas and in adjacent communities.
- **Identify critical issues.** Public concerns, natural resource management challenges, assets, opportunities and threats should all be identified through collaborative stakeholder involvement.
- **Meet legal and regulatory requirements.** There are numerous Federal, State and local laws and regulations regarding use of natural resources. Notably, the 1969 National Environmental Policy Act established the President's Council on Environmental Quality and the requirement for environmental assessments and environmental impact statements for any project receiving Federal funding.
- **Implement best available practices.** It is both a legal requirement and professional imperative to duly consider the best available science and expertise in the planning process and plan implementation.
- **Incorporate "SMART" goals and strategies.** A SMART goal is one that is specific, measurable, assignable, realistic and time-based. The clear objectives and direction laid out by SMART goals and strategies are most likely to result in meaningful progress.

- **Be inclusive.** Any economic or community development plan should involve actions that convene stakeholders, government agencies, educational institutions, community-based organizations, natural resource managers, environmental and other nonprofit groups and the private sector.
- **Be clearly assigned.** Assign the plan's recommended actions to specific responsible parties, and hold those parties accountable for implementing their items. Responsible parties should periodically evaluate and report to the public and relevant leadership on progress and accomplishments to date, factors affecting the plan's implementation and changes pending or made to the approved plan.
- **Be responsibly budgeted.** Specify plan implementation costs and identify funding sources. In this way the plan is a tool to prepare and justify annual budgets, allocate budgets, guide annual work priorities and facilitate the scheduling and sequencing of projects.

The "Triple Bottom Line" (TBL) approach helps all parties think not just about economically sustainable businesses, but also businesses that strive for environmental and social sustainability. (Sustainability experts coined the term, which originates from the accounting sector. Bottom line refers to profits or losses, usually recorded at the very bottom line on a statement of revenue and expenses.) The TBL approach to business planning and financing asks the user to consider a range of factors on how to conduct and grow successful businesses and add value to their surrounding community. It may also help identify niche businesses that might be overlooked when profit is the only consideration.

Some examples of issues to consider, using TBL standards, when identifying a loan candidate in a recreation economy-linked are:

- Numbers and impacts of the end users
- Benefits for the local community and businesses
- Working with socially and environmentally responsible suppliers
- Whether the business will hire local employees(perhaps those with disabilities or other underemployed groups) and pay employees a living wage
- How day to day operations will impact the natural environment (will they recycle or use renewable energy? How will they dispose of waste and water?)
- Whether the business plans to use a portion of its income to invest back into the community and/or natural or cultural resources.

While there is no universal method for measuring TBL standards, FS, RD, and NIFA field staff are encouraged to consider the factors mentioned above when identifying potential business opportunities.

Figure 1: Triple Bottom Line—Balance Between Nature, People and Economic Impacts

FINANCING SOURCES SUPPORTING RECREATIONAL ECONOMY

This section lists RD and FS programs that can support technical assistance, infrastructure and business development as well as conservation/easement projects. FS, RD and NIFA field staff are encouraged to use this list to explore cross collaboration opportunities under each of these programs or to provide guidance to community partners on available support resources.

FINANCING TECHNICAL ASSISTANCE

RD technical assistance resources can be used for regional economic development planning, conducting project development feasibility studies, developing training programs or sustainably managing infrastructure.

Program	Agency	Eligible Applicants	Authorized Purposes	Typical Funding Amount
Stronger Economies Together (SET)	RD	Two or more counties with 70% land area or 51% population in rural areas.	Technical assistance for regional economic development planning.	Technical assistance
Local Food Local Places (LFLP)	RD and partner agencies	Agricultural businesses, Agricultural cooperatives, Producer networks, Producer associations, Community Supported Agriculture (CSA) networks, Community Supported Agricultural associations, Local government, Non-profit organizations, Producer network, Public benefit corporations, Tribal Governments, Regional farmers authorities	Technical assistance to create walkable, healthy, economically vibrant neighborhoods through the development of local food systems and natural resource amenities. Helps gateway communities to national forests revitalize and attract visitors to their downtowns.	Two types of projects are offered: Planning Grants: $25,000-$100,000 Implementation Grants: $100,000-$500,000
Community Facilities Loans and Grants	RHS	Public bodies, community-based nonprofit corporations, Federally recognized Tribes.	Improve, develop, or finance essential community facilities for rural communities in rural areas and cities and towns of 20,000 or less.	Grants: $15,000-$50,000 Loans: $100,000-$5 million
Water and Waste Loans and Grants	RUS	State and local government entities, private nonprofits, Federally recognized Tribes.	Build, repair and improve public water systems and waste collection and treatment systems in rural areas and cities	Long-term, low-interest loans. Grants may be available to keep user costs reasonable.

			and towns of 10,000 or less.	
Rural Business Development Grants	RBS	Towns, State agencies, nonprofit corporations, authorities, Federally recognized Tribes, rural cooperatives.	Targeted technical assistance, training and other activities leading to the development or expansion of small and emerging private businesses in rural areas.	$10,000-$500,000
Rural Cooperative Development Grant	RBS	Nonprofit organizations, institutes for higher learning (universities).	Provide support to centers for cooperatives. Eligible work plans can include trail development/maintenance, feasibility studies, marketing, lodging development, business development, strategic planning.	Maximum-$200,000

FINANCING CONSERVATION, EASEMENT AND CULTURAL RESOURCE MANAGEMENT RESOURCES

Both RD and FS have support programs for conservation and easement programs.

Program	Agency	Eligible Applicants	Authorized Purposes	Typical Funding Amount
Rural Business Development Grants	RBS	Towns, State agencies, nonprofit corporations, authorities, Federally recognized Tribes, rural cooperatives.	Targeted technical assistance, training and other activities leading to the development or expansion of small and emerging private businesses in rural areas.	$10,000-$500,000

FINANCING INFRASTRUCTURE DEVELOPMENT

RD has loan and grant programs that can be used to support rural infrastructure projects such as broadband, water and waste, and community facilities.

Program	Agency	Eligible Applicants	Authorized Purposes	Typical Funding Amount
Community Facilities Loans and Grants	RHS	Public bodies, community-based nonprofit corporations, Federally recognized Tribes.	Improve, develop, or finance essential community facilities for rural communities in rural areas and	Grants: $15,000-$50,000 Loans: $100,000-

			cities and towns of 20,000 or less.	$5 million
Water and Waste Loans and Grants	RUS	State and local government entities, private nonprofits, Federally recognized Tribes.	Build, repair and improve public water systems and waste collection and treatment systems in rural areas and cities and towns of 10,000 or less.	Long-term, low-interest loans. Grants may be available to keep user costs reasonable.
Community Connect Grants	RUS	Most State and local governments, Federally recognized Tribes, nonprofits, for-profit corporations.	Helps fund broadband deployment into rural communities where it is not yet economically viable for private sector providers to deliver service.	Minimum: $50,000 Maximum: $1 million Amounts are published in Notices of Funding Availability and may vary.
Telecommunica-tions Infrastructure Loans and Loan Guarantees	RUS	State and local government entities, Federally recognized Tribes, nonprofits, for-profit businesses.	Financing to construct, maintain, improve and expand telephone service and broadband in rural areas.	Refer to the rules for loan and terms and conditions.

FINANCING BUSINESS DEVELOPMENT

The following RD business programs support the creation of new businesses or longevity of existing ones.

PROGRAM	Agency	Eligible Applicants	Authorized Purposes	Typical Funding Amount
Business and Industry Guaranteed Loans	RBS	Lenders: Banks and credit unions Borrowers: For-profit businesses, nonprofits, cooperatives, Federally recognized Tribes, public bodies, individuals.	Business conversion, enlargement, repair, modernization or development; purchase and development of land, easements, rights-of-way, buildings or facilities.	$1 million-$25 million
Rural Business Development Grants	RBS	Towns, State agencies, nonprofit corporations, authorities, Federally	Targeted technical assistance, training and other activities	$10,000-$500,000

		recognized Tribes, rural cooperatives.	leading to the development or expansion of small and emerging private businesses in rural areas.	
Rural Economic Development Loans and Grants	RBS	Former RUS borrowers, nonprofit utilities, current RUS borrowers.	Funds business incubators, community development assistance to nonprofits and public bodies, start-up venture costs and business expansion.	Grants: Up to $300,000 Loans: Up to $1 million
Rural Microentre-preneur Assistance Program	RBS	Organizations eligible to become Microenterprise Development Organizations including nonprofits, Federally recognized Tribes, higher education institutions	Microloans for microenterprise startups and growth through rural microloan revolving funds.	$50,000-$500,000
Intermediary Relending Program	RBS	Nonprofits, cooperatives, Federally recognized Tribes, public agencies.	Provides 1% low-interest loans to local intermediaries that re-lend to businesses and for community development projects in rural communities.	Up to $2 million for the first financing; $1 million at a time thereafter; total aggregate debt may not exceed $15 million.

SUCCESS STORIES: PLANNING FOR A RECREATION ECONOMY

OAKRIDGE, OREGON—TRANSITION FROM TIMBER EMPIRE TO MOUNTAIN BIKE CAPITAL

Historically dependent on the timber industry, the communities of Oakridge and Westfir identified the increasing popularity of its trails by mountain bikers as a saving grace to their economies when approximately 1,600 jobs were lost following the closure of local saw mills. Through partnerships with the Forest Service, trail groups, bicyclists, hikers and equestrians, and the community at large, the Oakridge-Westfir Community Trails Plan was developed in 2008. USDA Rural Development supported regional infrastructure and business development through its Water and Waste Disposal Loan Program, Business and Industry Guaranteed Loan Program and Intermediary Relending Program. The community has successfully marketed the location to a specific type of recreation, helping small businesses supporting this industry thrive, as well as attracting an increasing number of new residents and tourists. For example, one major mountain bike event alone generated more than $1 million in visitor spending. In 2011, the International Mountain Bicycling Association designated Oakridge as one of its first Silver-Level Ride Centers; Oakridge achieved gold status in 2015. Through local leadership and partnerships with volunteer groups, the region is planning to keep stewarding existing trails and connecting the trail systems with nearby recreations areas.

RURAL JOBS ACCELERATOR IN SOUTHWEST VIRGINIA

The Appalachian Spring initiative in Southwest Virginia (SWVA) established two goals to impact the region: to brand SWVA as an international outdoor recreation destination and create an outdoor recreation industry. Through this 3-year project, the region has developed stakeholder groups committed to making improvements in eight key outdoor recreation anchor areas, developed plans to connect communities to their natural assets, developed a regional destination brand, and supported more than 130 entrepreneurs. Appalachian Spring worked with eight communities to revitalize their downtowns into outdoor recreation gateways. Partnerships with local planning districts, State and Federal agencies, individual communities and other nonprofits have been essential to success.

LOCAL FOOD LOCAL PLACES IN FOREST COUNTY, PENNSYLVANIA

Forest County, Pennsylvania, received technical assistance through Local Food Local Places in 2015 to develop a plan to renovate the Marienville Depot and make it a regional trail hub with a micro-retail business incubator and a rail trail connected to the Marienville library. Since then, with a grant from Lumber Heritage, the community completed a conceptual drawing of the trail hub and has applied for grants to construct a walking trail, trail connector and a parking lot and station. Jenks Township and community members have committed financial and in-kind contributions to the project. The county is developing a façade improvement grant program for downtown Tionesta, and a community kitchen at the Forest Folk School. The rail corridor was purchased by private developer Headwaters Group of Dubois, promising additional economic development opportunities. For a full list of awarded projects please click here

FARMERS MARKET PROMOTION PROGRAM IN MONTANA

Alternative Energy Resources Organization (AERO) in Helena, Montana, which received $100,000 to enhance the Abundant Montana Directory listings and their accessibility, develop a public calendar system for local food events, create a local food marketing campaign, research and collaborate on agritourism, and develop an online agritourism resource. For a full list of awarded projects please click here.

FEDERAL LANDS LIVABILITY INITIATIVE: INCREASING COMMUNITY LIVABILITY THROUGH RECREATION AND ECONOMIC DEVELOPMENT

The Federal Lands Livability Initiative was launched in 2013 to improve the livability of gateway communities—places adjacent to public lands that attract visitors and residents looking for unique recreational and cultural experiences. The Conservation Fund, a national nonprofit organization focused on ensuring that conservation works for America's

communities, collaborated with the Federal Lands Livability Workgroup, comprised of the Federal Highway Administration , the U.S. Fish and Wildlife Service, the National Park Service and other land management agencies to engage four pilot communities in Colorado, Michigan, Oregon and South Carolina.

In Sweet Home, Oregon, recommendations on how to strengthen livability led to several action plans and on-the-ground results. The community expanded the existing bus transit system used by workers, college students and senior citizens to provide weekend transit service from the city to summer recreation areas. In addition, the Forest Service and more than 30 private and public groups signed a declaration of cooperation to create the South Santiam Community Forest Corridor, a community recreation destination with a network of trails as well as maintain the working forest landscape. The group is also working with local Tribes to protect the privately owned Cascadia Cave that has early Native American wall paintings and has been used as a gathering place for thousands of years. The region is also seeking to meet the needs of all residents and visitors through additional economic opportunities to address the community's high rate of under-resourced people. Ten percent of Sweet Home's population relies on social services, and a sizable number of youth are homeless.

STRONGER ECONOMIES TOGETHER REGIONS—NORTHERN NECK, VIRGINIA

Through Stronger Economies Together, a USDA funded technical assistance program, Eastern Virginia's Northern Neck, an Economic Development Administration-designated Economic Development District, developed a 5-year regional economic development plan. Building entrepreneurship and sustainable tourism, improving infrastructure and jobs skills were the main goals identified in the plan. Since then, through funding obtained from RD's RBDG program, the region has established the VA Watermen Heritage Tour Program to assist watermen and women improve their entrepreneurial skills and encourage business development. The Northern Neck Artisan Trail was also established in partnership with the Artisan Center of Virginia to form strategic alliances with artisans, venues, galleries and retailers across the State, while connecting points of interest, restaurants, and accommodation locations in the related communities to boost regional tourism. Through USDA and other partner funding, the region is implementing downtown revitalization projects in Montross and Colonia Beach to create cultural hubs in downtown areas. Since 2013, the Northern Neck region has leveraged more than $17 million in Federal, State and private resources to implement its vision, and has seen a 2.7 percent increase in tourism related employment.

PARTERNING WITH HIGHER EDUCATION TO DEVELOP CERTIFICATION PROGRAM—HAWAII ECOTOURISM ASSOCIATION

In 2013, to promote sustainable tourism, the Hawaii Ecotourism Association (HEA), a nonprofit, collaborated with the University of Hawaii at Manoa to develop a sustainable tour certification program. In 2016, the Hawaii Tourism Authority recognized HEA's success and funded efforts to triple the number of operators in the certification program. HEA began including tours of agricultural operations in the program because agritourism is important across the State to help ag producers increase the profitability of their operations. Additionally, the International Union for the Conservation of Nature (IUCN) is considering ways to improving ecotourism standards to help ensure sustainability as a long-term outcome. Alaska and Hawaii are the only States in the U.S. with certification programs for businesses in the tourism sector.

PARTNERING WITH HIGHER EDUCATION TO MANAGE CONFLICT WITH SCIENCE—THE GREEN MOUNTAIN, VERMONT NATIONAL FOREST

When the Green Mountain National Forest was revising its Forest Plan in 2002, University of Vermont Extension assisted with the planning process by facilitating opportunities for public input. To ground the discussions in science, a series of meetings on different topics were organized where leading scientists presented the latest research and addressed questions from the public. The topics of wildlife, acid deposition, and silviculture were selected because they were especially controversial aspects of the Forest Plan. Research on the impacts of the public meetings indicate that participants gained a better understanding of the subject matter discussed and some shifts in perspective occurred. Direct interaction with scientists appeared to be a key component of participant learning. Given the need for credible science in policy and planning processes, this research has important implications for management of stakeholder engagement. (More information is available in the journal article: *Chase, L.C., K. Norris, and C. Ginger. 2008. Does science matter? Resource planning in the Green Mountain National Forest. Society and Natural Resources 21(4):345-353.*)

LOCAL, STATE, FEDERAL PARTNERSHIPS IN CHEROKEE NATIONAL FOREST, TENNESSEE

Surrounded by 360 degrees of mountain views, Unicoi County, Tennessee is known as the "Valley Beautiful." It is host to the Cherokee National Forest, the Appalachian Trail and whitewater paddling. Not too long ago the community was divided about the possibility of additional conservation of the largest unprotected tract of land in the Southern Appalachians; 9,800 acres of scenic wilderness known as Rocky Fork. With the assistance of the Conservation Fund and its Balancing Nature and Commerce training and technical assistance, local leaders embraced a new course, realizing how Rocky Fork's natural assets could lead to additional economic opportunities by establishing the region as a nature-based recreation and tourism destination. Along the way, the community and the National Forest transformed their relationship, recognizing their shared interest in cultivating success for the region.

The results included FS's action to work with the county on revitalizing a popular mountain overlook, improving access to recreational facilities and natural features and sponsoring community events including running and mountain bike races on public lands. Simultaneously, the county encouraged entrepreneurism, with early successes including a farmers market, a welcome center that houses the Tanasi Artisan Center where local artists sell their wares and a community kitchen for aspiring businesses. In October 2012, Tennessee Governor Bill Haslem and Senator Lamar Alexander announced that the final 2,000 acres of the Rocky Fork property would become Tennessee's newest State park, further coupling conservation with additional economic opportunity for the community.

WESTERN JUNIPER ALLIANCE IN OREGON

Over the last 100 years, a lack of management has turned the native Western Juniper into an aggressive invasive that threatens the health and wellbeing of Oregon's rangelands and the communities and wildlife that depend on them. From an ecological perspective, there is strong agreement that this invasive tree needs to be removed from public and private lands. But harvesting Juniper also has tremendous potential to create jobs and provide new economic opportunities to the timber and wood products industries throughout the State. In July 2013, Oregon Governor John Kitzhaber launched the Western Juniper Alliance (WJA), a collaborative effort managed by Sustainable Northwest. WJA has coordinated with over 50 government partners, business leaders and other organizations to create jobs in Juniper supply and market chains in rural communities.

With the help of RD business grants, this collaborative effort has turned a challenge into an opportunity for restoration and economic growth. USDA funding supported initial founding and organizing, market and supply chain development, product testing and network coordination. WJA now sustains restoration, manufacturing and retail businesses employing more than 70 full time and seasonal staff. By using Juniper, these businesses are improving grazing conditions, discouraging the spread of invasive weeds, increasing water supplies, decreasing wildfire risks and restoring habitat for sensitive species, all while creating local jobs.

SUCCESS STORIES: INFRASTRUCTURE DEVELOPMENT TO SUPPORT THE RECREATION ECONOMY

LOCAL PARTNERSHIPS DRIVING RECREATION SUCCESS—MARQUETTE MICHIGAN

Marquette, Michigan, in Marquette County is on the southern shores of Lake Superior. Historically known for mining and shipping iron ore, today Marquette is flourishing as one of Michigan's premier recreation-based economies. Marquette was listed as one of CBS's 10 best places to retire in 2012, one of the 10 top mountain bike towns in the U.S. according to the Active Times in 2013, and the 8th best small city (out of 1,300) in America according to Nerdwallet in 2015. With 10 miles of paved trail, Marquette received a silver Bicycle Friendly Community Award from the League of American Bicyclists in 2014.

Besides its natural beauty, water-front location, and four distinct seasons, which maximize year-round appeal, the area has benefited from a core group of knowledgeable, creative, dedicated and passionate advocates who executed a clear vision for their area. The formation of a recreation authority to manage the Iron Ore Heritage Trail, and ongoing collaboration with Travel Marquette, has been critical. Visually distinctive signage along the trail describes the mining heritage of the area and adds unique character to the user experience, contributing to a sense of place among residents and visitors alike. Building relationships with local people and businesses, and actively seeking and showcasing ecotourism destinations, have also contributed to Marquette's continuing success.

DIVERSIFYING ECONOMY THROUGH TOURISM—TOWN OF THOMAS, WEST VIRGINIA

The remote, rural town of Thomas in West Virginia, a coal-dependent economy since the 1880s, is using tourism to diversify its economy. New Historic Thomas was formed as a nonprofit community group to revitalize the town by preserving its unique history, cultural heritage and resources. The nonprofit began to focus on developing cultural amenities that would complement outdoor recreation opportunities. The cornerstone of the recreational trail opportunities adjacent to Thomas is the Blackwater Canyon Trail. A partnership with the U.S. Forest Service Cheat-Potomac District was established to further development and recreational use of the former rail grade along the Blackwater River. FS is continuing to work with private owners to conduct trail maintenance and promote recreational assets which benefit Thomas and have the ability to attract considerable numbers of recreational trail users.

SUCCESS STORIES: CONSERVATION/EASEMENT INITIATIVES

PUBLIC PRIVATE PARTNERSHIP FOR RESTORATION

USDA and the Coca-Cola Company's ground-breaking partnership achieved an ambitious milestone and is on track to double that commitment by 2018. Through a partnership between FS, the National Forest Foundation, Coca-Cola and other Federal and local partners, and a total investment of $4.5 million, restoration of damaged watersheds and meadowlands returned more than a billion liters of water to the National Forest System which provides drinking water to more than 60 million Americans. This project also restored 1200 acres of land and restored and maintained more than 70 miles of trail.

DRY FOREST INVESTMENT ZONE IN OREGON AND NORTHERN CALIFORNIA

The Dry Forest Zone project was a 5-year initiative to support forest stewardship and economic development in eastern Oregon and northern California. With support from RD and the U.S. Endowment for Forestry and Communities, a core team of four organizations collectively leveraged their strengths and networks to take innovations in community-based forestry "to scale." A regional nonprofit organization, two community-based organizations and an applied research group led the project. The project has supported at least 72 full-time equivalent jobs, directly treated 8,843 public and private acres, analyzed 214,350 acres, increased planning efforts on more than 4 million acres, and implemented a number of policies and programs that support sustainable forest stewardship. By working at all levels from local to national, the team not only effected changes at a local level but also transformed larger policy conditions.

SUCCESS STORIES: BUSINESS DEVELOPMENT IN THE RECREATION ECONOMY SECTOR

MOTIVATING ENTREPRENEURSHIP THROUGH CONTEST—"GET ON THE TRAIL" PENNSYLVANIA

In order to encourage and accelerate small business opportunities for business owners and entrepreneurs, the Oil Region Alliance (ORA) of Venango County, kicked off a "Get on the Trail Business Plan Contest" in May 2015. Following the kick off, ORA provided two training seminars and coordinated a "Best Business Plan" contest in partnership with Clarion University. Prize-winners received cash awards and marketing technical assistance through this initiative. Within the first year of operation, a $55,000 investment to implement this project leveraged $205,000 in private investment, $16,000 in public investment, created 7 jobs, retained 18 jobs and assisted 9 businesses.

A REGION REINVENTING ITSELF—SAINT-RAYMOND REGION OF QUEBEC

The Saint-Raymond region of Quebec, once dominated by the timber industry, is busy reinventing itself as an adventure and ecotourism based economy—but on its own terms. Founded in 2002, Vallée-Bras-du-Nord is a cooperative of land owners (providing rights of access), local businesses (offering tourism services), and workers (employed in the tourism industry). All three of the co-op's membership classes share a desire for sound management and quality development as the region creates the infrastructure for mountain biking, hiking, snowshoeing, canoeing, kayaking, back-country skiing and camping. The region is one hour north of Quebec City and about five hours from Boston.

More than $5 million has been invested in building trails, developing hospitality infrastructure, acquiring equipment and staging events. In the process of building infrastructure, the co-op has put community members back to work. Every year they hire a dozen at-risk youth and offer them a few months of work in what the co-op calls "a different kind of school"—

the great outdoors. The youth build and maintain the trail system. Co-op members believe this approach helps the participants adapt to adverse conditions, develop patience, tolerance, discipline, teamwork, determination and perseverance.

USING TECHNOLOGY TO PROMOTE TOURISM—WASHINGTON STATE INSIDER APP

The power of the road trip is alive and well, thanks to a group of students and new technology from a mobile marketing entrepreneur in Washington State. Calling it "ProjectWA," this group of eighth-graders designed a way to reward people for seeking out and sharing information on historic places around the State. The Washington State Insider app created by the Lopez Island students offers discounted admission to the Washington State History Museum as its user reward. The app went live in June 2016 with nearly 100 sites. Within a month, it had been downloaded nearly 2,000 times, generating significant media attention across the State for both ProjectWA and the off-the-beaten-path rural sites it was designed to promote.

AMERICA'S FIRST AND ONLY SKIER-OWNED MOUNTAIN—MAD RIVER GLEN, VERMONT

Mad River Glen became one of Vermont's first major ski areas back in 1948 when a single chair carried skiers to the top of General Stark Mountain. Ranked by Ski Magazine as the most challenging terrain in the east, its moto boasts, "Ski it if you can." In 1995, skiers came together to remain independent and preserve a brand of skiing that exists nowhere else, forming the Mad River Glen Cooperative to preserve low skier density, the natural terrain and forests and the friendly community atmosphere. About 1,800 skiers are member-owners of the Mad River Glen Cooperative. Nearly $4 million has been invested in capital projects, with another $500,000 planned for the coming five years.

PROMOTING HORIZONTAL LINKAGES TO SUPPORT TOURISM—VIRGINIA

The Artisans Center of Virginia and Round the Mountain Southwest Virginia's Artisan Network are using the web to create a network of support to the artisan community, shops and local growers located along scenic roads and mountain vistas, to improve their economic outcomes. According to a 2016 study, artisan visitor spending totaled more than $250 million, with the average visitor spending $260 per person per trip. Further, the first Statewide benchmark study reports that nearly 700,000 travelers visit Virginia's artisan attractions and businesses. The Artisans Center of Virginia and Round the Mountain Southwest Virginia's Artisan Network are coordinating efforts to leverage this talent into a recognized and established industry that is connected, branded, promoted and celebrated online and through workshops, training and exhibits. Similarly, the Crooked Road has created the Heritage Music Trail, a network connecting musician artists across Southwest Virginia.

ECONOMIC VALUE OF RESTORATION ACTIVITIES IN CENTRAL IDAHO

With the help of USDA Rural Development funding, Salmon Valley Stewardship (SVS) conducted an analysis of the economic value of restoration activities in central Idaho. The assessment considered 137 restoration projects accomplished from 2008 to 2013 in the Upper Salmon River Region, as well as 14 conservation agreements in Custer and Lemhi County on working ranches. SVS found that local workers and companies earned more than $17.2 million of the total $39.6 million spent on restoration and mining reclamation. The study also concluded that restoration activities directly supported an average of 47 jobs and that the industry in the region has about 14 percent annual growth.

SVS took its initial study findings and produced a form that tracks economic impacts of the emerging restoration and stewardship segment. The form is used by Federal and State agencies, county governments and nonprofits, and the Idaho Departments of Labor and Commerce has committed to analyzing the data and providing annual reports. SVS also created a restoration services directory to help raise awareness of emerging restoration sector businesses in the region. Finally, the firm created a guide describing how the National Forest Service and Bureau of Land Management can affect business entities who rely on abundant public lands, case studies of successful examples from other regions and initial recommendations for a citizen involvement strategy.

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USDA

UNITED STATES DEPARTMENT OF AGRICULTURE

Expanded Partnership Authority for Interpretive Services:

Frequently Asked Questions & Best Practices

June 13, 2017






Expanded Partnership Authority for Interpretive Services
Cooperative Funds and Deposits Act, 16 U.S.C. 565a-1, as amended.
Effective January 1, 2014; Expires September 30, 2019

U.S. FOREST SERVICE

Expanded Partnership Authority for Interpretive Services

Cooperative Funds and Deposits Act, 16 U.S.C. 565a-1, as amended.

Effective January 1, 2014; Expires September 30, 2019

This document provides FAQs and examples of how other people have used the expanded authorities and new agreement templates. The authorities can be used to enhance and clarify on-going projects and operations with current partners and to work in different ways with both new and existing partners.

In your efforts to explore new ideas in working with your partners – or borrowing some ideas shared here – it's critical to include the critical players throughout your planning. Typical people to keep in the loop include Forest Service line officers, partner organization executive officers, program staff from both organizations, grant and agreements staff, and field staff at the district or forest level who will be involved in project implementation ordelivery of the service to the public

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America's National Forests were created with a grand aspiration- to provide the greatest good for the greatest number in the long run. This goal has endured for more than 100 years of the Forest Service's existence, and will continue to guide our work in perpetuity. Our National Forests are a priceless legacy, and the American public places its trust in our agency to preserve this ideal for the common good and for the benefit and enjoyment of all people.

The interpretive services program of the Forest Service is committed to providing meaningful outdoor experiences and increasing understanding and appreciation for our natural and cultural resources. As an agency, we wouldn't be able to complete this work without our Interpretive Associations and other educational nonprofit partners, who support our public lands by enhancing the educational, interpretive and scientific programs that we provide. From walking tours, cultural events, and operation of bookstores and visitor centers, to performances, signage, and youth activities, our interpretive and non-profit partners help encourage stewardship of these special places today and for generations to come.

This best practices guide was developed to help the Forest Service and our partners clearly navigate the Expanded Partnership Authority for interpretive services, as authorized by the 2014 Farm Bill, which increases our collective ability to care for the unique natural and cultural heritage that our National Forests protect. We hope that our staff and partners will use the guidance in this publication to develop new and innovative ways of ensuring that our public lands are places of education, recreation, and inspiration for everyone. Go forth and partner!

Cheers,

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General Expanded Authority Questions

Does the expanded partnership authority in the Cooperative Funds and Deposits Act apply only to agreements with interpretive associations?

No. The expanded authority allows the Forest Service to enter into agreements with interpretive associations plus a broad spectrum of partners to accomplish with Federal, tribal, state, or local government or nonprofit entities, such as scientific, historical, educational, and other societies and organizations, as well as interpretive associations, for certain purposes. The authority does not allow the Forest Service to enter into agreements with for-profit entities.

What does the expanded authority authorize cooperators to do?

To facilitate administration of the programs and activities of the Forest Service, cooperators can enter into agreements with the Forest Service to:

- Develop, produce, publish, distribute, or sell educational and interpretive materials and products;
- Develop, conduct, or sell educational and interpretive programs and services;
- Construct, maintain, or improve facilities, not under the jurisdiction, custody, or control of the General Services Administration (non-GSA facilities) on or in the vicinity of National Forest System (NFS) lands for the sale or distribution of educational and interpretive materials, products, programs, and services;
- Operate facilities (with or without Forest Service employees) in any public or private building or on land not under the jurisdiction, custody, or control of GSA (non-GSA land) for the sale or distribution of educational and interpretive materials, products, programs, and services, pertaining to NFS lands, private lands, and lands administered by other public entities;
- Sell health and safety products, visitor convenience items, or other similar items (as determined by the Forest Service) in non-GSA facilities on or in the vicinity of NFS lands; and
- Provide for Forest Service employees to collect funds on behalf of the cooperators from the sale of educational and interpretive materials, products, programs, and services, as identified above, when the collection of funds is incidental to other duties of Forest Service employees.
  The expanded authority also addressed the contributions of volunteers from partners.
- The Forest Service may consider the value of services performed by persons who volunteer their services and are recruited, trained, and supported by a cooperator as an in-kind contribution of the cooperator for purposes of cost sharing requirements under any Forest Service authority to enter into mutual benefit agreements.

Agreement Development and Administration

What/who determines the appropriate interpretive services participating agreement template to use? (Master Participating Agreement with Supplemental Participating Agreements vs a stand-alone Participating Agreement.)

Each situation is somewhat unique and depends on the relationship and activities being authorized. Program managers need to consult a local G&A specialist to start out with the right template(s).

What documents are required in addition to the agreement?

You should always work with your G&A specialist, but typically you'll need the agreement (and SPA if required), and operating plan, scope of sales, and financial plan. There are templates for the new version of the interpretive services agreement and financial plans on the G&A and Partnership Resource Center (PRC) websites. The WO Interpretation office has sample formats of operating plans and scope of sales documents if needed.

Who signs interpretive services agreements?

The Executive Director or Board Chair/President typically signs for the Interpretive Associations. The appropriate person will vary with other partners. A line officer signature is required for the Forest Service but who signs can vary among regions and complexity of the agreement.

Agreements involving multiple forests are signed by the Regional Forester or their designee.

In some regions signing authority is delegated to Forest Supervisors for agreements between a single forest and interpretive partners. (R6, ...)

In other regions, all agreements with interpretive partners are signed by the Regional Forester whether it is with one or multiple forests. (R4, ...)

Operating plans in most cases are signed by the Forest Supervisor.

Refer to the G&A handbook and FSM 1230 in addition to checking with your G&A specialist for further details.

What reporting is required by the agency for interpretive service agreements?

Typical reporting requirements in NRM. There are reporting templates available on the PRC website if you'd like to use them.

The current templates for the Interpretive Services Participating Agreements include specific training requirements, information about sales items and sales operations, and other functions that are not pertinent for all interpretive partners but are required clauses. Can the temBplate be edited to remove those clauses if they don't pertain to the defined roles?

When the agreement templates are updated those inconsistencies are being reviewed. You can also work with your G&A specialist on how to address those clauses in the interim.

Are the expanded authorities only used with Participating Agreements Interpretive Services?

The new authorities can be used with other types of instruments as long as there is a mutual benefit and mutual interest purpose. (Participating Agreements, Challenge Cost-Share, Collection Agreements etc).

Projects, products or services accomplished under the expanded authorities must be mutually beneficial and mutually agreed upon, need to align with the public service missions of both the partner and agency, and must have an educational or interpretive connection that enhances visitor awareness and knowledge.

If funds are used to improve facilities or conduct other activities using this authority, must those costs be reflected in the agreements financial plan?

Improvements to FS facilities would be considered a benefit to the agency so basic upgrades to paint, carpet, etc should be included as non-cash or in-kind contributions to the partnership whether from the partner or agency. The combined efforts to improve a facility to provide better customer service and educational opportunities is important to capture.

Special Use Permits (additional information in fee section)

When are other instruments needed to define and authorize the work of partners involved with interpretive and educational efforts?

The new authority expanded and clarified the activities that interpretive associations and other partners can offer, but the focus is still on enhancing interpretive and educational opportunities. Other types of activities and programs provided by interpretive associations or other partners require additional permits or agreements.

What are other situations where an interpretive association or other cooperator needs a special use permit?

When an interpretive association or other cooperator provides other commercial recreation services to the public, such as a campground concession, a special use permit is required per 36 CFR 251.50(c).

Cooperators must obtain an outfitting and guiding permit if they intend to charge for educational and interpretive programs and services to the public on NFS lands outside of facilities they operate under an agreement entered into under the expanded authority. Forest Service regulations at 36 CFR 251.51 define "guiding" as "providing services or assistance (such as . . . education . . . or interpretation) for pecuniary remuneration or other gain to individuals or groups on National Forest System lands." Forest Service regulations at 36 CFR 251.50(c) and Forest Service directives in Forest Service Handbook 2709.14, Chapter 50, require a special use permit for outfitting and guiding.

If the cooperator offers courses and instruction to the public for a fee at the facilities covered by the agreement (e.g., a visitor center) then an outfitting and guiding permit is not required. However, if the cooperator provides additional courses or instruction off site, on NFS lands for a fee, then an outfitting and guiding permit would be required.

Activities, Programs, and Services

What types of activities, programs, or services are commonly conducted by Interpretive Associations?

Out of 89 total survey responses in 2016 nearly all Interpretive Association and FS respondents indicated that they/their partner operates sales outlets, provides staffing at FS offices/VCs, and provides funds for various projects. Approximately one-half of the associations that responded operate field institutes or similar educational programs, seek and manage grants to support interpretive opportunities for visitors, and manage volunteer or conservation corps programs. A few also manage Children's Forests and operate campgrounds.

Other activities provided in cooperation with the local FS unit included: trail maintenance, wilderness patrols, wilderness restoration work, presenting interpretive and living history programs, managing historic sites and museums, and selling various recreation and motor vehicle permits.

It's important to note that some of the activities mentioned or provided require other agreements or special use permits.

Can interpretive associations and other cooperators collect Forest Service recreation fees charged under the Federal Lands Recreation Enhancement Act (REA)?

Yes, provided that the recreation fee revenues are deposited and accounted for in accordance with REA. REA authorizes the Forest Service to enter into fee management agreements with any non-governmental entity for the collection of recreation fees charged under REA. The fee management agreement may provide for the cooperator to receive a reasonable commission or reimbursement for fee collection services.

Can associations be involved in planning efforts with forests to develop an interpretive plan for FS unit or for a facility where the Interpretive Association has sales or other operations?

Absolutely! The association should be involved throughout any forest interpretive planning processes. For building design or renovation planning it's important to engage the association early in the process to ensure that utilities, space, and other physical features will support their operations for the sales outlet or other activities.

If we are taking students out for an educational activity, does the new authority allow us or our partners to include lunch?

As long as partner funds are used for it, they can provide food for most events but agency funds cannot be used. This authority does not override or negate other policies related to providing food or refreshments for participants or employees.

Aid to the Agency

How is the amount/type of "Aid" or support to the agency determined?

Interpretive Associations (and other non-profits) are businesses and must cover their operating costs before proceeds can be considered for agency or association projects or otherwise distributed.

Aid, whether in-kind or cash contributions, should be discussed, determined and agreed to during the annual review process. The amount and type of aid provided will be different for each situation, relationship, and through time.

While it is often described as a percent of gross or net sales made available to the forest for interpretive projects, it may also be an in-kind contribution where the association operates and maintains a visitor center or historic site, supports a Children's Forest operation or youth education program, or operates a volunteer/docent program

What systems are in place to account for funds collected by interpretive associations and other cooperators under the expanded authority?

The Forest Service does not need to account for funds collected by cooperators under the expanded authority. Funds collected by a cooperator are the sole property of the cooperator and must not be commingled with Forest Service funds. Under a participating agreement, the cooperator may, but is not required to, expend funds collected under the agreement on projects that are mutually beneficial to the cooperator and the Forest Service and on services which the Forest Service has agreed to and which meet the terms of the agreement.

How is success defined in terms of aid or support provided?

There are many ways to be successful in our combined efforts to provide interpretive opportunities and services to the public. Open and continuous communication is critical to maintain a successful relationship between partners. Each party must take the time and make an effort to understand the expectations of their partner and address their needs - whether it's the working through the mandates and procedures of the agency or understanding the realities and requirements of operating a business. The best approach in any given situation and the success of the joint effort requires active participation and communication from all parties.

Can Interpretive Associations place and administer donation jars in FS facilities?

Yes. Donation jars in Forest offices and visitor centers may be managed by the interpretive association. A clear explanation of the purpose of the donations must be displayed and all funds must be accounted for and expended according to agency or Interpretive Association policy.

Reporting Accomplishments

What is the best way to report interpretive partnership accomplishments?

It's important to provide both financial and operational accomplishments in annual reporting. It is also recommended to arrange a meeting with representatives from the partner organization, FS program staff, and line officers to discuss overall accomplishments, working relationships and planning for future projects and needs. Please see an example of a reporting template in the appendix.

The agreement calls for an annual report but doesn't provide a specific format. The annual financial report provided to NPS has space for reporting FS and other agency operations. Could we use that form as a template?

The Forest Service did utilize that interagency reporting form for a few years in the past. The FS Interpretive leadership is exploring the possibility of adding a reporting outline example to the agreement template.

Can the value of work performed by volunteers who are recruited, trained, and supported by a cooperator count towards that cooperator's required contribution under an agreement with the Forest Service?

Yes. The expanded authority provides that when a mutual benefit agreement with a cooperator has a cost-sharing requirement, the Forest Service may count the value of work performed by volunteers who are recruited, trained, and supported by that cooperator towards the cooperator's required contribution under the agreement. Work performed by volunteers should be valued commensurate with local labor rates for similar work (FSH 1509.11, sec. 73.2, para. 2b(4)(d) (Cooperator, Third Party In-Kind Contribution, Non-Federal).

Sales Outlets and Sales Operations

How are sales items selected and approved?

The interpretive association researches and selects items based on input from the Forest Service, the Scope of Sales and other interpretive themes of the Forest units served. The selected items must be reviewed and approved by the Forest Service Interpretive Association coordinator.

FS policy supports the selling of authentic souvenirs that tell the story of place, its history, culture and natural resources. These kinds of souvenirs can sustain local cultures AND provide economic benefit to local artisans, handicrafters, and artisan food producers.

What kind of health and safety products, visitor convenience items, and similar items may be sold by interpretive associations and other cooperators?

A preliminary list of approved items is attached. Cooperators may sell these items in non-GSA facilities on or in the vicinity of NFS lands. Some health and safety items may be sold at all sites (e.g., flashlights), while others may be specific to a particular location and season (e.g., "yak tracks"). Additional items may be added to the list upon approval.

Can Forest Service and partners cooperate in the development of new sales items?

Yes. Working together for developing, producing, publishing, distributing, or selling educational materials and products pertaining to National Forest System lands is authorized. Under an agreement, Forest Service employees could perform part of the research, text writing, layout, design, review, and editing work for material that would be published cooperatively to the extent the publication is not subject to restrictions in agency policy and applicable law, which governs publication of Federal documents.

Can Forest Service employees collect funds from the sale of cooperators' educational and interpretive materials, products, programs, and services?

Yes. Forest Service employees can collect funds from the sale of interpretive association's and other cooperators' educational and interpretive materials, products, programs, and services authorized under the expanded authority, when the collection of those funds is incidental to the employees' other duties. Funds collected by Forest Service employees on behalf of a cooperator must not be commingled with Forest Service funds.

Can Forest Service employees manage inventory of educational and interpretive materials and products they sell on behalf of cooperators?

No. FS managing cooperator's inventory is not covered by the expanded authority.

Can cooperators collect funds from the sale of the Forest Service's educational and interpretive materials, products, programs, and services?

Yes. Under the expanded authority, the Forest Service may enter into agreements with cooperators to sell educational and interpretive materials, products, programs, and services. Under this authority, cooperators may sell the Forest Service's educational and interpretive materials, products, programs, and services. Funds collected by cooperators on behalf of the Forest Service must not be comingled with cooperator funds.

Can cooperators manage inventory of educational and interpretive materials and products they sell on behalf of the Forest Service?

No. Cooperators managing FS inventory is not covered by the expanded authority.

Can cooperators sell interagency America the Beautiful, senior, and individual forest passes?

Cooperator's employees can sell America the Beautiful passes and local forest or regional recreation passes. Senior and Access passes must be sold by federal employees.

Although the profit margin in selling passes is minimal, many associations sell them as a service for visitors since association sales outlets may be open different hours or in different locations than the forest offices.

Could interpretive associations and other partners be authorized to sell forest products such as firewood permits under the expanded authorities? Would the person selling the permits need to be a collection officer?

The expanded authorities authorize the agency to enter into agreements pertaining to interpretive or educational programs, services, materials, and products. At this time the best option may be to set Partner organizations can be set up as vendors to sell firewood and Christmas tree permits.

Partners Selling Forest Visitor Maps

Can interpretive associations and other non- profit organizations sell Forest Visitor Maps?

Yes. Many associations sell forest visitor maps in their sales outlets whether in FS offices or other locations. For outlets with small sales volume, map sales can be an important part of the business model.

Where can interpretive associations acquire maps to sell at their outlets?

Forest visitor maps to be resold can be purchased throughFS regional offices or local forest offices.

Non-profit organizations with IRS 501c3 designation (including Interpretive Association partners) are allowed to receive up to a 30 percent reduction in price when purchasing 100 or more maps. A combination of maps may be used to meet the minimum purchase of 100.

Associations can also work directly with the USGS Business Partner program or the National Forest Store to acquire maps.

Can interpretive associations and other non-profit organizations that have purchased maps from the Forest Service through the bulk discount program sell those maps at prices higher than the established FS pricing guidelines?

Prices for maps produced by the Forest Service or other government agencies are determined by FSM 7140 and annual interim directives. All maps specified in the directives shall be sold at established prices when sold by FS employees or within U.S. Forest Service facilities.

The FS does not control pricing when maps are sold by business partners such as USGS and REI at non-FS facilities. The same holds true for IAs that are not located in FS facilities.

Can interpretive associations charge shipping & handling costs (postage) for orders that are filled and shipped?

As noted in the current interim directive, shipping and handling is no longer a part of the map sales program. Non-profit partners may charge for shipping and handling, even if they are located in an FS facility, so long as they are bearing the packing

Many interpretive associations are small organizations and purchasing 100 maps at a time can be a challenge. Can the Forest Service apply the 30% discount on individual orders totaling less than 100 maps?

There has been some discussion in past years about reducing the quantity but no policy change has yet been made. Maps from different forests can be combined to meet the 100 minimum. FS employees working with interpretive associations should watch for map policy updates and share new information with non-profit partners. Regional Geospatial Program Managers may have further information about regional interim policies on bulk map discounts.

Charging Fees for Programs

What types of fees are authorized under the new authority?

Fees for educational and interpretive programs and services can be covered through the agreement.

How have units dealt with Interpretive Associations or similar partners charging fees for programs or services outside of the interpretive agreement?

Other types of programs or activities that are offered by the partners where fees are charged may require a special use permit so you should work with the person who administers those types of permits on the unit.

Facility Operations

Does the new authority clarify construction and maintenance of interpretive and educational facilities?

Yes. The Secretary and cooperators are authorized to construct, maintain, or improve facilities not under the jurisdiction, custody, or control of the Administrator of General Services on or in the vicinity of National Forest System lands for the purpose of selling or distributing educational materials, products, programs, and services pertaining to National Forest System lands. For example, a cooperator could contribute to the construction, maintenance, or improvement of a visitor center built on or in the vicinity of National Forest System lands. This would also allow the Forest Service to contribute to the construction, maintenance, or improvement of a facility located nearby, but not on Federal lands.

Does the new authority address FS employees to working in non-FS facilities and employees of interpretive associations and other partners working in FS facilities?

Yes. The new authorities authorize the Secretary to enter into agreements with cooperators to staff outlets in any public or private building or facility not under the jurisdiction, custody, or control of the Administrator of General Services for the sale or distribution of educational materials, products, programs, or services pertaining to National Forest System lands, private lands, and lands administered by other public entities. For example, a visitor center operated by a cooperator located in a State office or local chamber of commerce building could be staffed by Forest Service employees. In addition, a visitor center operated by a cooperator located in a building managed by another Federal agency could be staffed by Forest Service employees, and the sales outlet at the visitor center could be operated by a cooperator.

As related to the authority to construct, maintain or improve certain facilities, what is the definition of "non-GSA facilities" and "facilities not under jurisdiction, custody or control of GSA"?

Most Forest Service owned facilities (ranger stations, visitor centers, etc) are considered "non-GSA facilities". Most leased facilities are considered to be under the jurisdiction of GSA, whether the facility is leased through GSA or leased by the Forest Service under GSA authority.

Can interpretive associations and other cooperators maintain a Forest Service developed recreation site, e.g., clean cooking grills and group shelters, under the expanded authority?

No. This authority to operate and maintain facilities does not include maintenance of developed recreation sites under the jurisdiction of the Forest Service.

What procedures apply to reviewing and authorizing agreements with cooperators for the construction, maintenance, and improvement of non-GSA facilities on or near NFS lands for the sale or distribution of educational and interpretive materials, products, programs, and services?

Line officers, grants and agreements officials, and engineering and interpretive services program managers are responsible for reviewing and authorizing agreements with cooperators for construction, maintenance, and improvement of non-GSA facilities on or near NFS lands for educational and interpretive purposes. These Forest Service officials should follow policies and guidelines on interpretive services in FSM 2390 and engineering facilities in FSM 7300 to ensure that the Forest Service meets its responsibilities in reviewing and authorizing these agreements.

Can this authority be used to partner with a commercial store or other commercial enterprises?

This authority does not apply to working with commercial entities in most cases but the FS does work with those types of partners through other types of agreements, permits, etc. It would be unlikely to define the mutual benefit or aligned missions of a commercial entity and the agency to allow that to work in an FS facility. There may be other options in a non-FS visitor center (a chamber of commerce for example) where a shared operation could be worked out through other authorities.

What are the Forest Service's real property obligations if federal funding is used for the construction, maintenance, and improvement of non-GSA facilities on or near NFS lands for the sale or distribution of educational and interpretive materials, products, programs, and services?

Under the expanded authority, the Forest Service may contribute to construction, maintenance, and improvement of non-GSA facilities on or near NFS lands for the sale or distribution of educational and interpretive materials, products, programs, and services. Non-GSA facilities are not the property of the United States. Therefore, the Forest Service has no real property obligations for these facilities, other than as specified in the agreement.

Where can cooperators sell or distribute educational and interpretive materials, products, programs, and services?

Under the expanded authority, cooperators may operate facilities in any public or private building for the sale or distribution of educational and interpretive materials, products, programs, and services. There may be differences in sales procedures and policy depending on ownership and location of the building.

Can interpretive association or other cooperator rent facilities, e.g., an amphitheater, educational building, or visitor center, operated by the cooperator under an agreement with the Forest Service for non-educational and non-interpretive purposes?

No. The expanded authority does not authorize a cooperator to allow third parties to use facilities operated by the cooperator under an agreement with the Forest Service for non-educational and non-interpretive purposes.

Can the Forest Service enter into an agreement with a state or non-profit partner for use of federally owned interpretive/educational facilities and allow other parties to use the facilities, e.g., the great hall and overnight accommodations, for other purposes?

Yes, provided that the agreement with the state or non-profit organization specifies that use of the facilities is limited to educational and interpretive purposes and does not include, e.g., rental of the overnight accommodations or use of the facilities for conferences or weddings, and provided that the agreement reserves the right of the Forest Service to authorize other uses of the facilities in accordance with applicable law. For example, use of the facilities for conferences or weddings would require a special use permit.

Resources for more information

NOTE: Work with your FS contact to access documents and other resources on any internal FS-web pages.

Partnership Resource Center

https://www.fs.fed.us/working-with-us/partnerships

FS Grants and Agreements Resource Page (FS internal only)

http://fsweb.wo.fs.fed.us/aqm2/wo/grants/

Public Lands Alliance (PLA) Website

http://publiclandsalliance.org/

PLA Link to Webinar: US Forest Service Expanded Authority Best Practices

http://publiclandsalliance.org/what-we-do/webinars/expandedauthority-bestpractices

USDA Space Utilization Rate Policy

https://www.dm.usda.gov/pmd/docs/Advisory_14-01_Space_Utilization_Rate Policy.pdf

Appendix I

Interpretative Association Background

Interpretive Association History

The Forest Service has a long history of working with interpretive associations beginning in 1967. Currently, there are approximately 60 interpretive associations that are actively working with the agency. The Forest Service works with many other organizations that also provide interpretive or educational services for visitors through the 2014 expanded partnership authorities.

While the Forest Service works with a wide variety of partners, the relationship with interpretive associations is uniquely structured and recognized in agency policy and manual direction (FSM 2390). The relationship that the Forest Service has developed with interpretive associations is a synergistic one that benefits the public. It is important to keep in mind that even though associations support Forest Service interpretive efforts in many ways, their primary purpose is to serve the public.

Interpretive associations primarily function to help Forest Service visitors better understand an area's natural history, historical significance, and available recreational opportunities. Many associations operate locally within a single national forest or grassland, others may function in several regions or on multiple units as well as working with other government agencies. More recently, Congress granted the Forest Service the legal authority to work with other NGOs and governments (including Federal, tribal, state, and local) through what had previously been solely interpretive association authorities.

Interpretive Services Authorities

- The Cooperative Funds and Deposit Act of 1975 (Public Law 94-148) provides the fundamental legal authority for the Forest Service to work with interpretive associations.

- The Consolidated Appropriations Act, 2014 (House Resolution 3547) amended the Cooperative Funds and Deposit Act of 1975 to: (1) allow the Forest Service to engage with a broader range of partners, including other governments and NGOs and (2) clarify what specific activities are allowable through these relationships.

- Finally, the Consolidated Appropriations Act signed in December 2007 (Division F, Title IV, Section 417) authorizes Participating Agreements as the legal operational instrument.

Working with Interpretive Associations

Interpretive associations and those organizations operating through the expanded partnership and interpretive association authorities empower visitors by ensuring they have the information and other necessities needed for their enjoyment and appreciation of public lands. Interpretive association activities often include the following:

- Developing environmental education and interpretive materials, including guides, maps, and signs

- Providing educational materials about natural and cultural history, and health, safety, and convenience items for forest visitors

- Providing information services and conducting educational programs and field institutes

- Raising funds through sales, grants, donations, memberships and other methods to support Forest Service educational efforts

Interpretive Association Contributions

Interpretive associations contribute both tangible or intangible goods and services back to the Forest Service annually. These contributions are outlined in the operating plan and can be in the form of cash, equipment, in-kind service, or supplies in keeping with the association's purpose while remembering the ultimate beneficiary is the public.

Use with 2008 IRS 990

Name of Organization

Organization Function:

- ☐ Cooperating Association/ Interpretive Association Selling Educational Materials
- ☐ Friends Group-Fundraising
- ☐ Membership Organization
- ☐ Institute/ Field School
- ☐ Other:

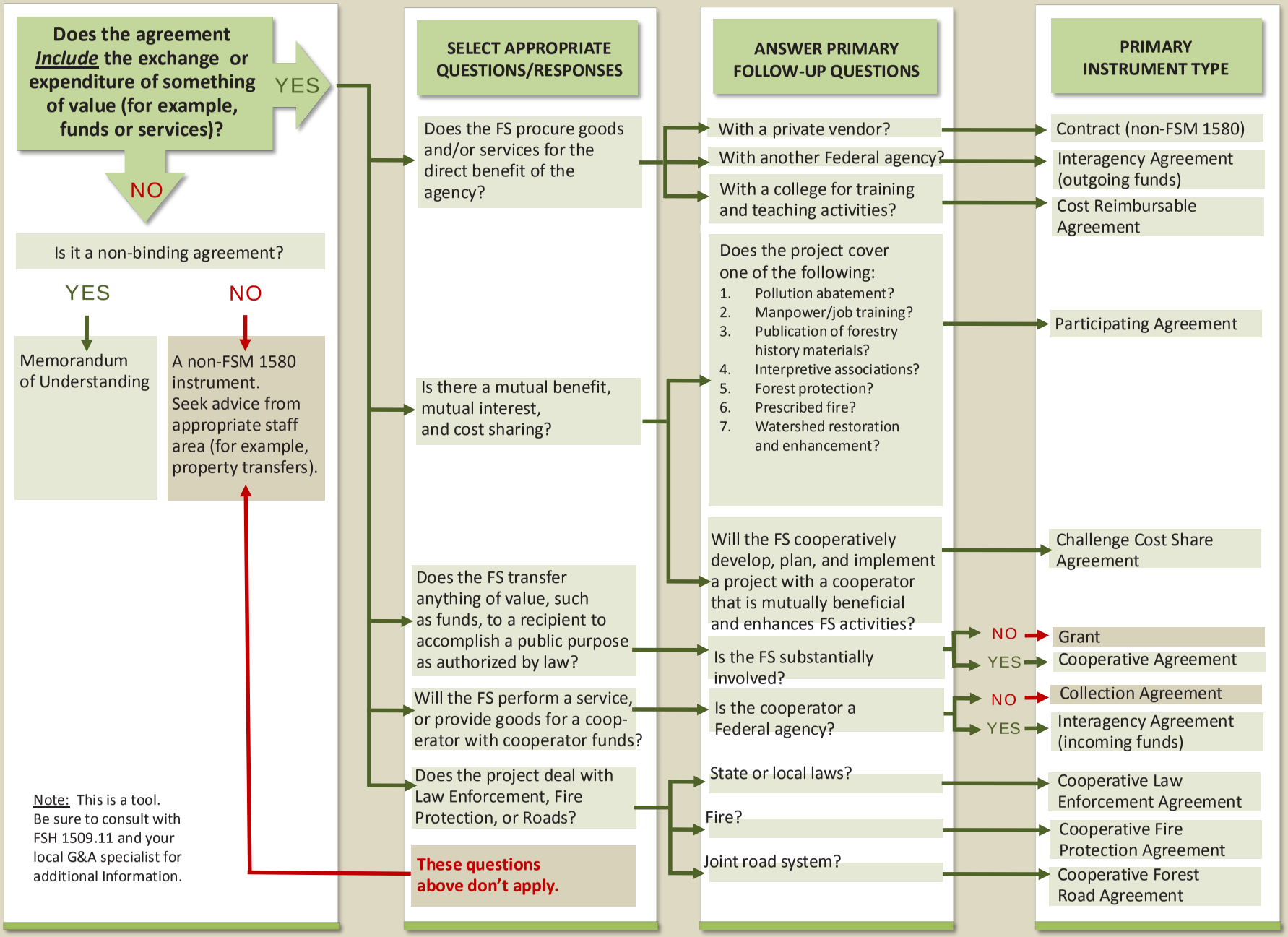
Fiscal Year End:

Please see Instructions for Completing 2008 Nonprofit Organization Annual Report of Operations and Aid to Federal Land Management Agency(ies)

STATEMENT OF OPERATIONS

Agency Served	NPS	USDAFS	ACOE	B	Other Agencies	Total Agencies
Revenue (2008 IRS Form 990 Part VIII)						
Line #						
1. **Contributions, Gifts, Grants**						
a. Donations from Outside Sources						$ -
b. Membership Income						$ -
c. Fundraising Events						$ -
d. Government Grants						$ -
e. All Other Contributions, Gifts, Grants						$ -
Total	$ -	$ -	$ -	$ -	$ -	$ -
2. **Program Service Revenue:**						
a. Sales						
i. Interpretive Materials						$ -
ii. Visitor Convenience Items						$ -
iii. Other						$ -
iv. **Total Sales**	$ -	$ -	$ -	$ -	$ -	$ -
b. Cost of Goods Sold						$ -
c. **Gross Profit**	$ -	$ -	$ -	$ -	$ -	$ -
d. Interpretive/Cooperative Programs						$ -
3. **Other Revenue**						$ -
4. **Total Net Revenue**	$ -	$ -	$ -	$ -	$ -	$ -
Functional Expenses (2008 IRS Form 990 Part IX)						
5. Program Service [Column (B), Lines 24-43]						$ -
6. Management and General [Column (C), Line 44]						$ -
7. Fundraising [Column (D), Lines 44]						$ -
8. **Total Operating Expenses**	$ -	$ -	$ -	$ -	$ -	$ -
9. Excess (Deficit) Before Donations	$ -	$ -	$ -	$ -	$ -	$ -
10. Grants and Other Assistance Made to Agency (Should equal line 8: Statement of Financial Aid)	0					$ -
11. **Excess (Deficit) for the Year** (Subtract Line 10 from Line 9)	0	0	0	0	0	$ -

The Agreements' Decision Tree



Appendix III

G&A Agreement Decision Tree

Appendix IV

INTERAGENCY PASS MARKETING POLICY October 2015

The following Marketing Policy is for the America the Beautiful – National Parks and Federal Recreational Lands ANNUAL Pass only.

The Decal, Senior and Access passes, as well as the Free Annual Pass for Military, all require proof of eligibility and have sales and issuance restrictions. These passes and the Decal may only be sold or issued by designated Federal personnel.

A. BACKGROUND

The Federal Lands and Recreation Enhancement Act (REA) allows the government to establish sales and marketing relationships with "Retail Vendors" as a convenience to customers. The following policy ensures that all participating agencies manage and market Retail Vendor relationships consistently on one of two levels:

1. "Local" - Field, regional, or state office/site level, OR 2. "National" level - Interagency Pass Program Office

The size, location, and scope of the Retail Vendor partner will determine whether the partnership is managed at the Local or National level. Administrative manageability, cost effectiveness, and the need to balance Central Sales with field site sales are taken into consideration when reviewing potential new partners.

B. GENERAL GUIDELINES FOR BOTH LOCAL AND NATIONAL RETAIL VENDOR PARTNERSHIPS

1. The Retail Vendor must not be in litigation with any Department of the Interior (DOI) or US Department of Agriculture (USDA) agency and must not have had any criminal convictions.

2. All Annual Passes will be sold to the public for $80, (except at provided for in Section D.2.b.x); no discounting permitted.

3. An agreement will be required for each Retail Vendor partner, allowing for government revocation or non-renewal based upon changes to legislation.

4. Agencies and individual recreation sites may use their own agreements as appropriate, following the parameters and business rules in this guideline.

5. Retail Vendors must validate (punch with an expiration date) passes at the time of sale.

6. Retail Vendors are required to purchase and use a 1/8" hole punch.

7. All agreements shall include a clause that reserves the right to require advance review of any advertising, publicity or other material prepared by Retail Vendors for any national or regional promotional campaign for public distribution. In so far as the material reflects upon the Federal agencies or bears agency logos or trademarks, such right of approval shall also be based on whether the material properly reflects agency missions; conveys an educational message; promotes appropriate and responsible behavior at 2. Federal recreation sites and/or encourages continued public support and preservation of public lands.

8. The National Pass Program Office will review all National Retailer web pages that reference the Annual Pass before they go live to assure that information is accurate.

9. No product or service endorsement will be allowed when a pass is sold.

10. Name Capture: The recording of a customer's personal information in a database for later use by the Retail Vendor

may only be allowed with National level agreements. Name capture will be subject to compliance with the Systems of Records Notice, and the Privacy Act.

11. "Value-add" Promotions (passes packaged with other appropriate items), are allowed as long as the value of the package exceeds the price of the pass (i.e. a retailer packages a night in a hotel room with a pass and sells the package for $159, or retailer offers a pass for free if a customer purchases $300 in merchandise from the retailer) and the add-on item(s) meets the other requirements of these guidelines.

a) All promotional materials will be subject to review and written approval by the managing office.

b) The Retail Vendor must absorb all costs of the value-add items, and all additional fulfillment costs.

c) Items added with the Annual Pass must be appropriate for all audiences such as single-use cameras, phone cards, certificates for discounts at hotels or retailers, wildlife calendars, etc.

d) Items added to the Annual Pass must be clearly disclosed as being added by the Retail Vendor, and must not imply any approval or endorsement by the government

12. International Retail Vendors approved by the National Pass Program Office are permitted to sell the pass.

13. Refunds will not be issued to Retail Vendors for unsold passes, however, there is an exchange program (see following section).

14. Previous year's passes may not be sold (i.e. 2014 passes cannot be sold after December 31, 2014.)

15. Retailers must allow up to 2 weeks for delivery of orders.

C. EXCHANGE OF STOCK

1. Local Retail Vendors will conduct any stock exchange transactions directly with the Federal Recreation field site.

2. National Retail Vendors will exchange stock directly with USGS. a. National Retail Vendors will be assessed a cost recovery fee as indicated in their agreement.

3. The exchange policy will be reviewed annually and may be modified or terminated if accountability and manageability problems arise. 4. Only active Retail Vendors with a valid agreement for the following year can exchange stock from the preceding year. (i.e. In order to exchange unsold 2014 inventory for an equal amount of 2015 inventory, the Retail Vendor must have a valid agreement for 2015. If a Retail Vendor does not have a valid partner agreement for 2015, the Retail Vendor will not be permitted to return or exchange any unsold 2014 inventory).

3 The exchange policy will be reviewed annually and may be modified or terminated if accountability and manageability problems arise.

4. Only active Retail Vendors with a valid agreement for the following year can exchange stock from the preceding year. (i.e. In order to exchange unsold 2014 inventory for an equal amount of 2015 inventory, the Retail Vendor must have a valid agreement for 2015. If a Retail Vendor does not have a valid partner agreement for 2015, the Retail Vendor will not be permitted to return or exchange any unsold 2014 inventory).

5. One exchange will be allowed per agreement per calendar year. If a Retail Vendor has more than one sales outlet, the Retail Vendor is responsible for combining all stock into one return. Additional returns from a Retail Vendor will not be processed.

6. All Annual Passes for each calendar year must be received for exchange no later than March 30 of the next calendar year. Returns received after March 30 will not be exchanged.

7. Retail Vendors must properly record and account for all serial numbers of pass stock included in the return shipment. Stock that is submitted without proper documentation will be returned to Retail Vendor.

8. In years where there is no change or a decrease in pass price, returned passes will be replaced one-for-one with current year stock. (i.e. 2014 passes will be replaced with 2015). If the price of the pass increases, Retail Vendors will be responsible for remitting the difference between the price of the old and new passes.

9. If Congress terminates the Pass Program refunds will not be provided. If Congress changes the program, exchange options may be possible.

D. MANAGEMENT LEVELS OF RETAIL VENDOR RELATIONSHIPS

1. LOCAL - Field or State/Regional Office

a) General Guidelines

i) Field sites and Regional/State offices will be responsible for administering Local Retail Vendor relationships. Local Retail Vendors are generally within a 10-25 mile radius of a recreation site, have an established relationship, and generally sell fewer than 100 passes per year.

ii) Retail Vendors operating under a Local agreement/instrument may not offer passes for sale on their website as this competes directly with Interagency Central Sales.

iii) Local Relationships are classified into three types: • "Local Retailer(s)" • "Partner Groups"

(Friends/Coops/Concessions) • "One-time Promotion" or "Incentive Programs"

b) Local Retailer(s) - Specific Guidelines These are businesses that do not have a formal cooperative agreement/ instrument or concession contract and could include stores, theaters, hotels, restaurants, outfitters and other businesses that operate in close proximity to a recreation site.

i) Passes will not be consigned to Local Retailers.

ii) Agencies may offer Local Retailers the opportunity to purchase passes at a wholesale rate (10% discount).

iii) Payment is due at receipt of passes.

iv) Minimum order is 5 passes.

v) Unsold passes may be exchanged. See Section C, GENERAL GUIDELINES - EXCHANGE OF STOCK.

vi) Passes must be ordered through the affiliated recreation site.

vii) Shipping/handling and fulfillment costs for Local Retail Vendor inventory may be assessed.

viii) It will be the responsibility of the Federal recreation site administering the Local Retail Vendor agreement/instrument to account for pass stock and report revenue and sales.

c) Local One-time Promotion or Incentive Program - Specific Guidelines A local One-time Promotion or Incentive Program is one that allows the sale of passes to organizations, corporations, public relations firms, or other non-commercial groups for small local promotions or contests.

i) Agencies may offer partners the opportunity to purchase passes at a wholesale rate (10% discount).

ii) Passes will not be consigned.

iii) Payment is due at the receipt of passes.

iv) Promotions must reflect the value of the pass as $80.

v) Passes must be requested through affiliated recreation site.

vi) Unsold passes may be exchanged. See Section C, GENERAL GUIDELINES - EXCHANGE OF STOCK.

vii) The minimum order is 10 passes.

viii) The Partner must convey pass rules and benefits as part of the promotion, and must not

misrepresent the rules in advertisement material.

ix) No government services may be packaged with the pass as part of the raffle, giveaway, or prize, except as stated on the pass.

2. NATIONAL - Interagency Pass Program

a) General Guidelines: To maintain equity among the agencies and field sites, larger Retail Vendors with outlets in more than one state, or a headquarters office in one state that manages business on a national or regional level, or that sell passes through an internet site, are required to work with the National Pass Program Office.

Sales of passes through the official pass program fulfillment provider (USGS) are considered Central Sales. Revenue generated through Central Sales is used to develop, produce, market, and fulfill passes and collateral materials for the entire Interagency Pass Program.

b) National Retailer National Retailer(s): Include national chain stores, tour operators, and other businesses that operate on a national scale. Examples include: REI, Cruise America, GI Joes, Dick's Sporting Goods, Travelocity, etc.

i) All passes must be ordered from the national fulfillment provider (USGS).

ii) Passes will not be consigned to National Retailers.

iii) National Retailers purchase passes at a wholesale rate (10% discount).

iv) Payment is at time of receipt of passes. v) Passes may be sold via the National Retailer's website (see "Online Store" section below. vi) The minimum order is 10 passes.

vii) Unsold passes may be exchanged. See Section C, GENERAL GUIDELINES - EXCHANGE OF STOCK.

viii) Shipping/handling from the fulfillment provider will be paid for by the National Retailer.

ix) USGS will not accept returns, or issue refunds, for passes sold by National Retailers. If returns are permitted by National Retailer then the National Retailer will absorb the costs of the returned passes.

x) Passes must be sold for $80. However, the National Pass Program Office may, in some limited circumstances, authorize a retailer to sell the pass for any amount between $79.95 and $80.05, if a vendor presents a compelling case, in writing, to the pass office.

National Retailer – Online Store

i) National Retailer must clearly display the following on their website:

Your Annual Pass covers Entrance Fees or Standard Amenity Fees at sites managed by USDA FS, NPS, FWS, BLM and Reclamation.

- Valid for one full year from month of purchase.
- Provides entrance or access to pass owner and accompanying passengers in a single, private, non-commercial vehicle at Federally operated recreation sites across the country.
- Covers the pass owner and three (3) accompanying adults age 16 and older at sites where per person entrance fees are charged. No entry fee for children 15 and under.
- Photo identification may be required to verify ownership.
- Passes are NON-REFUNDABLE, NON-TRANSFERABLE, and CANNOT BE REPLACED IF LOST OR STOLEN.

- Fees vary widely across the thousands of Federal Recreation sites. Please contact specific sites directly for information on what is or is not covered.

ii) To ensure that customers purchasing a Pass are not eligible for the Senior or Access Pass, or the Free Annual Pass for Military, thereby avoiding potential customer service problems, the online store must display the following statement and hyperlinks:

"The pass (passes) available on this website is (are) just one (a few) of many options. If you are a U.S. citizen or permanent resident age 62 or older, have a permanent disability, or a member of the U.S. Military, visit Recreation. gov http://www.recreation.gov/marketing.do?goto=/ATBPass/America%20th e%20Beautiful%20Pass%20Series.html) *to find out about discount passes you may qualify for.*

xii) National Retailer must also post the following disclaimer:

"This is not an official U.S. Government website. Company is an authorized reseller of the America the Beautiful - the National Parks and Federal Recreational Lands Annual Pass. "

xiii) National Retailer will charge appropriate shipping and handling fees on all orders. For an individual Annual Pass sale, domestic shipping and handling fees shall not exceed $10.00 for standard delivery, and shall not exceed the actual shipping cost plus a $10 handling fee for expedited deliveries.

xiv) National Retailer will provide a customer service e-mail address and\or telephone number on the purchase confirmation page. National Retailer will respond to all customer inquiries/complaints within 2 business days.

xv) National Retailer must display the current year image of the Annual Pass.

xvi) National Retailer will fulfill all orders within 5 business days. xvii) Customers who order a Pass and do not receive their Pass prior to departing on the trip which they plan to use the pass, shall be refunded the purchase price by National Retailer, provided that the pass returned is unused/unsigned. National Retailer may exchange a returned pass for a new un-punched pass through the National Pass Program Office. xviii) National retailer will punch all passes with the current month until five business days from the end of the month, then the next month will be punched.

c) National One-time Promotion or Incentive Program -- Specific Guidelines A National One-time Promotion or Incentive Program is one that is offered by large corporations or public relations firms such as American Express, Loyalty Innovations and others.

i) Passes will not be consigned for National Promotions

ii) National Retailers offering a National Promotion purchase passes at a wholesale rate (10% discount).

iii) Payment is due prior to receipt of passes.

iv) Promotions must reflect the value of the pass as $80.

v) Pass orders must be placed through the official fulfillment provider (USGS).

vi) Unsold passes may be exchanged. See Section C, GENERAL GUIDELINES - EXCHANGE OF STOCK.

vii) The minimum order is 10 passes.

viii) The Retail Vendor must convey pass rules and benefits part of the promotion, and must not misrepresent the rules in advertisement material.

ix) No government services may be packaged with the pass as part of the raffle, giveaway, or prize, except as stated on the pass.

E. MISCELLANEOUS

In some cases, a retail Vendor may have more than one agreement. An example would be a cooperating association that has a local agreement with a field site to sell passes at that site through their bookstore and a national agreement for their web sales. Existing locally managed agreements between recreation sites and regional or national retail Vendors may continue to be managed locally upon review and approval by the National Pass Program Office. There must be no apparent conflict with other national retail Vendor partnerships.

Appendix V

Annual Pass Exchange Form

AMERICATHEBEAUTIFUL™
THE NATIONAL PARKS AND FEDERAL RECREATIONAL LANDS PASS

Date: _____

Organization Name: _____

Contact Name: _____

Address 1: _____

Address 2: _____

City, State, Zip: _____

Phone (Required): _____

Email: _____

Annual Pass Inventory – Use this space to list all returned passes. For a continuous series of passes list the entire series on one line. Use separate lines every time there is a break in the series or if you have an individual pass.

	Serial Number Range		
INDIVIDUAL PASS	**FROM**	**TO**	**QUANTITY**
TOTAL PASSES RETURNED			

OFFICIAL USE ONLY

Replacement Pass Inventory – Use this space to list replacement passes issued to vendor.

	Serial Number Range		
INDIVIDUAL PASS	**FROM**	**TO**	**QUANTITY**
TOTAL PASSES RETURNED TO VENDOR			

December 12, 2017
Regular Meeting
Item # 12

Board Report

Supervisor Corless: RCRC Board Meeting Highlights 12-6-17

To: RCRC Board of Directors

From: Greg Norton
President and CEO

Date: December 11, 2017

Re: RCRC Board Meeting Highlights (December 06, 2017)

President's Report
RCRC President and CEO Greg Norton provided an update on recent county presentations and visits by RCRC Board Members and staff, and highlighted some recent legislative wins, including the Governor's signing of Assembly Bill 1499 (Gray), which dedicates a portion of the state's share of sales and use tax collected from transactions at fairgrounds to support the network of fairs. Mr. Norton also referenced the Governor's veto of Senate Bill 649 (Hueso) related to small-cell wireless structures, noting RCRC's efforts in its defeat.

Mr. Norton encouraged RCRC Board Members to attend the upcoming RCRC-hosted Global Trade Services Workshop in Tehama County. The workshop is scheduled for December 14, 2017 at the Red Bluff Community Center. This is the third in a series of workshops aimed at teaching local businesses about exporting opportunities. Details on the workshop can be accessed here.

Administrative Matters
RCRC Bylaws Proposed Revisions to the Composition, Qualifications, and Terms of the Executive Committee – ACTION
At the direction of the RCRC Executive Committee, Mr. Norton presented proposed revisions to the composition, qualifications and terms of RCRC Executive Committee seats. The proposed revisions included requiring at least one year of service on the RCRC Board of Directors prior to participating on the RCRC Executive Committee, increasing the length of service of each region representative from one-year to two-years, and including the Golden State Finance Authority (GSFA) Chair as an ex officio (non-voting) member to the RCRC Executive Committee.

The RCRC Board of Directors approved the proposed revisions. The memo can be accessed here. The amended Bylaws, as approved by the RCRC Board of Directors, can be accessed here.

Election of 2018 RCRC Officers and Corporate Officers – ACTION
In December of each year, the RCRC Officers for the subsequent year are to be elected by the RCRC Board of Directors. The RCRC Board of Directors approved the ascension

of Supervisor Rex Bohn (Humboldt) to Chair, and Supervisor Randy Hanvelt (Tuolumne) to First Vice Chair. The RCRC Board of Directors elected Supervisor Matt Kingsley (Inyo) as Second Vice Chair, and Supervisor Bob Williams (Tehama) will become Immediate Past Chair. RCRC's 2018 Officer slate becomes effective January 1, 2018.

The memo can be accessed here.

Election of the 2018 Executive Committee – ACTION
RCRC Chair, Supervisor Bob Williams (Tehama), directed the RCRC Board of Directors to caucus by region to select the remaining 2018 RCRC Executive Committee Members. The RCRC Board of Directors selected the following regional representatives to complete the 2018 RCRC Executive Committee:

Region 1: Supervisor Michael Kobseff (Siskiyou)
Region 2: Supervisor Aaron Albaugh (Lassen)
Region 3: Supervisor Diane Dillon (Napa)
Region 4: Supervisor Stacy Corless (Mono)
Region 5: Supervisor Daron McDaniel (Merced)

The memo can be accessed here.

RCRC 2018 Proposed Budget – ACTION
RCRC Chief Financial Officer Lisa McCargar provided an overview of the RCRC 2018 Proposed Budget. Ms. McCargar provided an overall summary, highlighting revenue and expenditures, and outlining the key differences between the 2018 and 2017 Expenditure Budgets.

The memo can be accessed here. The 2018 RCRC Operating Budget approved by the RCRC Board of Directors can be accessed here.

Support of iFoster 1 Laptop Program for Foster Youth – ACTION
Mr. Norton provided a presentation on the iFoster 1 Laptop Program, which provides laptops to eligible foster youth ages 16-21. iFoster's mission is to ensure that every child growing up outside of their biological home has the resources they need to become independent adults and have access to opportunities to reach their full potential.

The RCRC Board of Directors approved a one-time contribution of $200,000 to iFoster to partially fund the 1 Laptop Program for all eligible foster youth in RCRC's 35 member counties. RCRC affiliate, National Homebuyers Fund, Inc., is partnering with RCRC in this effort to complete the funding. The memo can be accessed here. The iFoster presentation on the 1 Laptop Program can be accessed here.

Update on CalPERS Discussions Involving Increased Costs to RCRC Member Counties
Ms. McCargar and RCRC Vice President of Governmental Affairs Paul A. Smith provided information on the status of concerns raised by RCRC member counties regarding the California Public Employees' Retirement System (CalPERS). RCRC, along with select county representatives, has had the opportunity to share information on critical issues surrounding pension funding, costs, and sustainability with CalPERS executives and board members. RCRC staff will continue to monitor and participate in discussions

related to employer relations and pensions noting that costs to most rural counties who participate in CalPERS have dramatically escalated and will continue to do so in the coming years.

RCRC staff encouraged individual Supervisors to have conversations with their respective county staff. The memo can be accessed here.

RCRC Rural Leadership Awards

Mr. Smith announced that the RCRC Executive Committee had reviewed RCRC staff submissions for the Rural Leadership Awards, and selected Assembly Member Anna Caballero (D-Monterey) and Senator John Moorlach (R-Orange) as recipients of the 2017 awards. The awards will be presented at the 2018 Installation of Officers and Rural Leadership Awards Reception.

2018 Installation of Officers and Rural Leadership Awards Reception

RCRC Vice President of External Affairs Justin Caporusso provided an update on the 2018 Installation of Officers and Rural Leadership Awards Reception to be held January 17, 2018 at the California Chamber of Commerce in Sacramento. RCRC Board Members are encouraged to submit their lodging requests to RCRC External Affairs Coordinator Santinia Pasquini (spasquini@rcrcnet.org) by December 27, 2017. Details on the event can be accessed here.

Governmental Affairs

Tree Mortality Task Force Update

RCRC Regulatory Affairs Advocate Staci Heaton provided an update on the workings of the California Tree Mortality Task Force (Task Force), which continues to meet monthly. Earlier this summer the USDA Forest Service (USFS) conducted updated tree mortality aerial surveys, which are expected to be released sometime this month.

While not yet released for public comment, the Little Hoover Commission (LHC) staff presented draft recommendations stemming from the ongoing forest management study, which included the concept of morphing the Task Force into a forest management advisory council at some point to set long-term management strategies for California's forest lands. Additionally, the Task Force's Insurance Subgroup (Insurance Subgroup) continues to work on finding ways to address homeowners' insurance cancellations and non-renewals, and issued a joint letter to the insurance industry presenting proven risk mitigation factors that would be appropriate for incorporation into the risk analysis process. The response received in late September largely rejected the recommendations.

The memo can be accessed here.

Proposed 2018 Policy Principles

Mr. Smith explained that RCRC staff and the RCRC Executive Committee determined that a major overhaul was needed on the RCRC Policy Principles. The proposed overhaul would remove redundancies and tighten-up content, making the document shorter, less-cluttered and more practical.

The proposed Policy Principles can be accessed here, and will not be acted upon until the January 17, 2018 RCRC Board of Directors meeting. RCRC Board Members are requested to submit any proposed edits in writing to RCRC Governmental Affairs Coordinator Maggie Chui (mchui@rcrcnet.org) by January 3, 2018. A side-by-side comparison of the existing and proposed Policy Principles can be accessed here.

Senate Bill 5 (De León): Parks & Water Bond – ACTION

RCRC Senior Legislative Advocate Mary-Ann Warmerdam provided an analysis of Senate Bill 5 (De León), also known as the Drought, Water, Parks, Climate, Coastal Protection & Outdoor Access for All Act of 2018, a bond proposal to be considered by California voters in June 2018.

The RCRC Board of Directors adopted a "No Position" position on SB 5. The memo can be accessed here. The text of SB 5 can be accessed here.

Legislative Committee

2017 Legislative Housing Package

RCRC Legislative Advocate Tracy Rhine provided information on the 2017 Housing Package, 15 legislative measures signed into law by Governor Brown on September 29, 2017.

Ms. Rhine urged individual Supervisors to share the memo with appropriate county staff, and encouraged them to direct feedback on possible implementation issues. The memo can be accessed here.

Update on Farm Bill

Ms. Warmerdam addressed the current status of the 2018 Farm Bill, and outlined RCRC's priorities in reauthorization efforts. Of particular importance, RCRC is focusing on the Rural Development Title as it relates to broadband deployment, housing, energy efficiency, and community development, and the Forestry Title as it relates to fire-borrowing and forest health.

The memo can be accessed here.

Federal Tax Reform

Mr. Smith provided an update on the status of Congressional efforts to reform the federal tax code. Over the past two weeks, both the House of Representatives and the U.S. Senate have passed their respective tax reform packages, exclusively relying on votes from Republican members of Congress. Select representatives from the two chambers will convene a conference committee to reach a final agreement.

The final version of the Senate bill reinstated a deduction for state and local property taxes (SALT) with a $10,000 cap. This is the same proposal that was included in the House plan, however, House Republicans from high-tax states are expected to push for greater SALT deductions during conference. SALT is one of several issues that must be reconciled in conference, but another contentious issue includes the mortgage interest deduction, which is capped by the House plan at $500,000, while the $1,000,000 level is retained in the Senate plan. The two bills also treat the estate tax differently. The House doubles the exemption from the estate tax before a complete repeal in 2024. The Senate

retained the House language that doubles the exemption; however, this provision will expire in 2026. In addition, the House and Senate will need to reconcile the differences in the individual rate between their two bills. The House has four individual rates, and retains the current top rate of 39.6 percent, while the Senate plan has seven individual rates, and cuts the top rate to 38.5 percent. Reductions to individual rates under the Senate plan will expire in 2026 along with the increased exemption to the estate tax.

The memo can be accessed here. The comparison chart highlighting the significant differences between the two bills can be accessed here.

Please refer to the Board Packet and Supplemental Packet for further details related to the items above, as well as all items covered during the December 2017 RCRC Board of Directors meeting. The December 2017 Board Packet can be accessed here.