An Assessment of State Outdoor Recreation Planning

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State planning for outdoor recreation is at a crossroads. Political and economic conditions have changed. The federal government no longer provides much of the financial assistance for planning that historically has been so important to the development of state comprehensive outdoor recreation plans. As this support has declined, many unprepared planning agencies and programs have languished, and a few have even vanished temporarily. Still, some state planning programs have demonstrated that they can do more with less. These programs strive for relevancy, political influence, and effectiveness.

The 1980s have been particularly hard on state outdoor recreation planning. The U.S. Congress sharply cut back on appropriations to the Land and Water Conservation Fund (LWCF), and, at the same time, federal planning requirements became more extensive. In response to a U.S. General Accounting Office (GAO) study critiquing state planning, federal administrators required detailed planning reports. The result has been more demanding federal planning requirements at a time of sharp declines in state planning staff and financial resources.

State planners and state liaison officers have long criticized federal planning requirements as outdated and bureaucratic. State planners believe that the federal emphasis on expansive inventories, supply-and-demand data, and overall “comprehensiveness” has made these plans uninspired, regimented, and ineffective. Given that the federal government has substantially reduced its financial support, these planning requirements are seen as “burdensome,” “intrusive,” and “unreasonable.”

Seeking resolution of this conflict, the National Park Service and the National Association of State Recreation Planners (NASRP) contacted the American Planning Association (APA) early in 1988 and requested that APA assess the “state of the art” in state outdoor recreation planning. To facilitate the process, NASRP invited APA to meet with state planners in Traverse City, Michigan, in May 1988. APA held a day-long workshop on state planning in a series of round table discussions with state planners, regional representatives of the National Park Service, and representatives of the National Association of State Outdoor Recreation Liaison Officers (NASORLO).

This report is the result of the Traverse City meetings and interviews with state planning officials and National Park Service staff. Many of the quotes in this report are taken from an APA survey and from letters from state planners to the National Park Service regarding proposed changes in federal planning requirements. The report examines state comprehensive outdoor recreation planning history, current practice, successes, failures, and potential. The introduction puts state planning in perspective and examines some national goals for planning identified by the President's Commission on Americans Outdoors. The first chapter explains the origins of state planning and the active federal interest in state planning programs. The chapter also looks at how federal planning requirements have shaped state programs. Chapter 2 evaluates the best current planning in terms of its influence on state and local decision makers. It highlights some of the most effective plans and demonstrates how these plans have guided state policy, budgeting, and capital investments. Chapter 3 examines current practice in state comprehensive planning and its successes and failures. Chapter 4 examines how alternative planning techniques (e.g., strategic planning, policy planning, and capital budgeting) can be applied to state outdoor recreation planning. Finally, Chapter 5 includes recommendations for state planning and for changes in federal planning requirements.
# An Assessment of State Comprehensive Outdoor Recreation Plans

By Thomas P. Smith

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Executive Summary

In 1964, President Eisenhower's Outdoor Recreation Resources Review Commission (ORRRC) concluded that state comprehensive outdoor recreation plans (SCORPs) were essential parts of the national effort to improve outdoor recreation opportunities. In its assessment of current state planning efforts, the American Planning Association (APA) draws a conclusion similar to the one reached by ORRRC 25 years ago, but recommends that state planning de-emphasize comprehensive planning and, instead, be action oriented and focused on a few specific issues. A more targeted approach to state planning is needed today because cuts in appropriations for the Land and Water Conservation Fund (LWCF) mean greater care must be taken with dwindling resources.

Chapter 1 of the APA report looks at the historical importance of the ORRRC conclusions. It discusses the establishment of LWCF and the federal requirements governing state eligibility for LWCF grants. These requirements have governed state planning efforts since the 1960s. On the basis of a survey of state planners and state liaison officers, the APA study concludes that federal requirements are out of sync with the times—the requirements make excessive demands of SCORP staff at a time when LWCF grants are almost insignificant and many states are committing fewer funds and support to SCORP programs.

APA's survey of recent and current state plans found that some states already produce plans that are tightly focused on a few strategic issues. Chapter 2 of the report highlights numerous exemplary practices that might serve as models for all the states. For example:

- In the early 1970s, Maryland state comprehensive outdoor recreation plans focused on one issue—the continued loss of open space to suburban sprawl. This early state planning resulted in one of the nation's most successful open space preservation programs—Program Open Space.
- In 1988, the Louisiana SCORP galvanized state policy makers on the need to halt the tremendous losses of coastal wetlands in the state. Louisiana's wetland conservation plan was a call to action and was instrumental in the development of strong state policies for wetland preservation. The Louisiana plan was recently granted a Take Pride in America award by the director of the National Park Service.
- In the early 1980s, California state planners issued a stewardship plan that identified, for the first time, the environmental threats to existing state parks. The planning document quantified the significance of threats, including poor park maintenance, vandalism, and pollution. The plan elevated the stewardship concept to a guiding principal of the California park system and resulted in a special bond issue for park maintenance.

This kind of focused, goal-oriented planning must be encouraged by the regional offices of the National Park Service. Federal administrators must look for opportunities to support such plans because, ultimately, this type of planning makes a difference both for the planners and the public they serve.

In Chapter 3 of the report, APA suggests that state planners can come closer to achieving their goals by examining not only the models offered by some state plans but by rethinking the composition of their plans. Specifically, the study critiques many of the current methods being employed by the states, especially the "laundry lists" of objectives and the excessive data gathering that seems to be encouraged by the federal requirements. Instead, state planners should focus on answering a series of questions when preparing plans. Those questions are:

1. Why are state plans prepared?
2. Who is the audience for state plans?
3. How can plans be better organized?
4. What information is needed for state planning?
5. How should state plans reduce generalities and deal with specifics?
As alternatives to the comprehensive planning model that has become ineffective in light of funding and staff limitations, state planners should consider strategic planning, policy planning, or capital improvements programming. Chapter 4 of the study briefly describes the elements of these alternative planning models.

In Chapter 5, the study concludes that the best of state planning is not mandated by federal rules or requirements. The best of state planning is the result of individual state initiative. To support the improved quality of state planning, the APA study makes a number of specific recommendations about federal legislation, state planning, federal standards, and the relationship between state planners and National Park Service personnel.

With regard to federal legislation, APA suggests that a national trust fund for parks and recreation be created to provide stability in state planning programs and to allow for long-range recreation planning programs. Such trust fund legislation should include support and incentives for local planning.

APA goes on to suggest that states deemphasize comprehensive planning, and, instead, focus on using other efficient, low-cost planning methods to draft state plans. These plans should address critical issues so that they are more timely, influential, and relevant to the interests of state conservation groups, local recreation program administrators, private conservation organizations, and recreation activists—the proper audience for state plans. State plans must also address critical fiscal issues and work to identify relatively stable sources of state funds for planning and recreation programs.

The recommendations for federal standards discuss the importance of including a mission statement in the standards that identifies overall goals for SCORPs. The standards should aim to establish a new partnership and collaborative process for evaluating state plans, but these evaluations should continue to be based on how effectively state plans direct the use of LWCF grants. The whole emphasis of federal requirements should be shifted from separate products, like action plans, to results.

The final set of recommendations suggests that the personnel of the National Park Service preserve and build upon their partnership with state planners and state liaison officers. To assist state planners in devising plans and meeting objectives, the National Park Service regional offices must develop stronger research and technical assistance programs. Regional Park Service staff can better evaluate state plans if they understand the overriding planning objectives of each state within their region and if they receive training in planning, contract negotiation, and conflict resolution. Furthermore, APA recommends that any revision of federal standards involve input from National Park Service’s regional office personnel because, ultimately, they will be the ones who interpret federal requirements for the state planners.

In sum, state planning should be redefined. The move must be away from the comprehensive planning emphasized by federal requirements adopted in the 1960s. Toward this end, federal standards will need to be rethought, and federal funding will need to be stabilized. In conjunction with such change, the National Park Service must rethink its criteria for evaluating state plans and state eligibility for LWCF grants. The regional offices of the National Park Service must look for opportunities to support meaningful state planning, and these offices must become partners in the state planning process. The new state planning methods recommended by this report will have objectives defined by particular and specific state needs. These plans will speak to an audience of groups and individuals who will help the states implement those plans and exert the political pressure to ensure necessary support and funding at the state level. State planners must learn to do more with less. The recommendations of the study hope to encourage a new era of relevancy, political influence, and effectiveness in state recreation planning.
Introduction

State outdoor recreation planning needs to be refocused and reinvigorated. The time is right. There is a heightened public awareness of outdoor recreation issues. The President's Commission on Americans Outdoors underscored the critical importance of outdoor recreation and parks systems. Although the commission did not recommend specific changes in state outdoor recreation planning, it repeatedly called for greater state and local government involvement in critical planning issues. It recommended planning that responds to the continued loss of open space to urban development and to the fiscal constraints of maintaining and expanding recreational programs. The commission warned that "we are losing open space, wetlands, and wildlife areas often because their value does not register in the economic calculus of development."

The commission itself adopted a strategic planning approach. The four components of the commission's strategy were to interview key individuals with special knowledge and interest in recreation; to identify the most important social trends influencing recreation programs; to describe the issues related to these trends; and to define a course of action. For state and local planning, the commission called for vigorous planning at the suburban fringe, where valuable open spaces and natural resources are being lost everyday. It called for planning that:

Identified unique biological and cultural resources. Such planning should help ensure that these resources would not be inadvertently lost simply because no one realized that they were there or that they were important.

Quantified the economic, environmental, and social values of community parks and recreation areas so as to better integrate recreation planning and development decisions. This information is important for putting public planning agencies in a better negotiating position with private developers who threaten valuable resource lands or who influence the demand for recreational services.

Improved capital budgeting practices that make state and local rehabilitation and maintenance efforts more systematic and efficient. Fiscal planning, according to the President's Commission "should go beyond one-time funding and address the more fundamental problem of failure to recognize the value of existing investments."

The commission called for active state programs for greenway protection, river corridor conservation, wetland and shoreline management, and many other substantive areas. It also called for fiscal planning that recognizes that annual facility maintenance costs, over time, far exceed initial capital investments. In many ways, the commission has helped set the substantive agenda for state outdoor recreation planning for the immediate future.

The commission's report is a rallying cry for renewed commitment to state recreation programs and state recreation planning. The first chapter of this report examines the historical antecedents of the commission's report. Chapters 2 and 3 examine the format, style, and fundamental objectives of state plans.
Chapter 1. The History of State Outdoor Recreation Planning

In 1958, President Dwight D. Eisenhower established the Outdoor Recreation Resources Review Commission (ORRRC) to recommend future directions for conservation and outdoor recreation in America. The commission's charge was to “determine the amount, kind, quality, and location of recreational resources and opportunities and to recommend what policies should be adopted and what programs initiated at each level of government.” The multivolume report produced by ORRRC in 1962 constituted a landmark in the history of recreation in America. The ORRRC report shaped the nation's conservation and outdoor recreation agenda for more than a decade. The most important recommendation of the commission was that a program be established to fund conservation and outdoor recreation projects at the federal, state, and local levels. That recommendation resulted in the establishment of the Land and Water Conservation Fund (LWCF) in 1964. Since then, LWCF has provided more than $6.8 billion for federal, state, and local programs for land acquisition and development. LWCF has been the single most important source of funding behind the creation of federal, state, and local park systems.

ORRRC AND THE STATES

ORRRC concluded that state governments should play a pivotal role in the national effort to improve outdoor recreation opportunities. But it also concluded that the majority of the states were incapable (at the time) of fulfilling this role. The commission found the following problems facing most state park programs:

- Practically all state park agencies report difficulty in securing adequate funds, even for minimum operations. Facilities at some state parks have not substantially improved since 1940.
- Personnel is severely limited. Management tools, such as planning and accounting systems, are lacking. Underlying all of these difficulties is the absence, in many states, of well-developed civic and political support.

ORRRC recommended that states build a new governmental infrastructure for recreational services. It called upon the states to create an effective organizational structure for the development of statewide policies on outdoor recreation. Furthermore, the commission said that states should undertake a program of vigorous land acquisition and development. Finally, it called for each state “to prepare a long-range plan for the development of outdoor recreation opportunities”—comprehensive plans were seen as the best way for states to fulfill their responsibility as major suppliers of recreational services.

According to the commission, state plans must “take account of the state resource base and the demands from residents and visitors”; “identify objectives and estimate the funds needed to meet these objectives”; and “set forth the successive steps necessary to achieve the objectives.” Although written nearly 30 years ago, these elements of state planning are still required by the federal government.

ORRRC expressed great faith in state planning. In its call for a new federal grant-in-aid program, it tied any grant to the completion of a state plan. Planning was considered so important that the commission recommended that 75 percent of the cost of developing such plans be paid by the federal government. As finally adopted, however, planning grants must have a 50 percent state match. In contrast, the commission recommended only a 50 percent federal contribution for land acquisition.

For the commission, the development of a state plan was the key to building state capacities and institutions. It concluded that the total dollar outlay for planning would be “small” but essential for the development of state and local recreation programs and the responsible use of federal dollars.

ORRRC RECOMMENDATIONS AND THE GROWTH OF STATE PLANNING

ORRRC was correct in assuming that the federal grant-in-aid program and planning requirements would help build a state structure for recreation programs. LWCF and the state plans helped states develop new policies, new constit-
$3.2 billion. (See Figure 1.) These dollars, matched with state, local, and private funding, allowed states to create major new opportunities for outdoor recreation. Nearly every county in the country has benefited from LWCF grants.

In addition to providing money for land acquisition, LWCF also stimulated state initiatives. Those programs, listed here, created a new organizational and financial infrastructure for state and local recreation programs. Although many state and local recreation boards and bond programs predate LWCF, most of these efforts only became firmly established after LWCF created a stimulus for outdoor recreation programs.

Every state, all the territories, and the District of Columbia have created a recreation commission, department, council, or board that serves as a focal point for statewide recreation interests.

Every state, all the territories, and the District of Columbia have designated liaison officers to work with the federal government on outdoor recreation matters. In 1967, the state liaison officers formed the National Association of State Outdoor Recreation Liaison Officers to represent state and local interests in the administration of LWCF.

In the majority of states, voters have approved bond issues for acquisition and development of land for recreation. In addition, the majority of state legislatures have authorized bond issues totaling billions of dollars for outdoor recreation and other land conservation programs.

The majority of state legislatures have authorized state recreation agencies or departments to finance land acquisition through the floating of bonds.

Legislatures in the majority of states have authorized county and municipal governments to establish recreation boards, commissions, and departments and to establish bonding programs or special taxing authorities to advance these programs.

The new federal grants-in-aid program was highly effective in creating vigorous state programs for outdoor recreation and a state administrative capacity for comprehensive planning and program administration.

THE EVOLUTION OF FEDERAL PLANNING REQUIREMENTS

The federal requirements for state outdoor recreation planning have gone through three distinct stages. In the first stage, the Bureau of Outdoor Recreation emphasized what might be characterized as "supply-and-demand" planning. The earliest requirements were intended to force the states to start coping with the wide gap between existing recreational resources and growing demand. In the second stage, the Heritage Conservation and Recreation Service (HCRS) emphasized "flexibility" and "policy planning." Although many of the requirements for needs assessments and demand analyses remained, HCRS emphasized planning that was issue-oriented and directed to problem solving. In the current stage, the National Park Service has emphasized fiscal responsibility and accountability. The service has required that states do a better job of reporting on the use of federal funds and the relationship between the plan and state and local expenditures.

Over the past 25 years, the federal planning requirements have shaped state planning and have greatly influenced the relationship between federal agency personnel and state planners. The significance of these federal requirements can be assessed in a closer review of their evolution and refinement.

Stage 1. Supply-and-Demand Planning

The Bureau of Outdoor Recreation's early rules on state planning made it clear that federal program administrators wanted to lead the states into uncharted territory. The bureau's requirements for state planning were exhaustive. In fact, the bureau suggested that states could simply follow "the sequence and general format" of the requirements in writing their plans. In effect, the federal program administrators had concluded that the states just needed to fill in the blanks regarding the questions and issues raised by federal planning requirements.

Early federal rules required states to gather substantial amounts of data related to findings, inventories, and demand analyses. Inventories had to:

- List all lands and waters presently dedicated to outdoor recreation, including the design capacities of these areas;
- Identify and evaluate all existing public lands and all private lands with recreational qualities;
- Identify all historic sites;
- Catalog all rivers and streams with significant potential for inclusion into the national wild and scenic rivers program.

The objective of the demand analyses was to "secure an appropriate measure of the present and projected demand . . . in major categories of outdoor recreation." According to the bureau, the "projection of future demand should not be predicated solely upon the present patterns of outdoor recreation use." It did not want the projections of future needs "controlled by studies of existing uses of recreational..."
areas but to look forward and to anticipate all future needs."

These early requirements also meant that state plans had to sort out the roles and responsibilities of state government, local government, and private individuals in providing recreation. Plans were to identify "those types of outdoor recreation opportunities" that should be the primary responsibility of each level of government and the private sector. State plans were to estimate the "level of demand to be met by other levels of government and the private sector."

Stage 2. Issues Assessment and Policy Planning

HCRS revised the bureau's requirements during the mid-1970s. These revisions stated that "the federal guidelines for State Comprehensive Outdoor Recreation Plans (SCORPs) were to be designed to provide each state maximum opportunity and flexibility to devise and carry out its own planning process." These rules emphasized broad public participation and policy planning. State planning during this time was to be issue-oriented, defining problem areas and apparent deficiencies and including judgmental statements on issues for which no quantitative data are readily available. A new requirement for an action plan was also included in the HCRS guidelines. This plan was to include a statement of those actions to be taken according to an annual schedule.

During this period, the LWCF grants program was considered to be highly successful by state and federal officials. Hundreds of millions of dollars were flowing to the states and local governments. Important state land acquisitions were made, and many important local recreation programs were initiated. State plans were not critically assessed because important state and local goals were being achieved. The generous federal support drove the program, and state planning was a minor part.

Stage 3. Fiscal Management and Accountability

Funding of LWCF peaked at nearly $900 million in 1978 with approximately $370 million going to the states. The same concerns about deficit spending that swept Ronald Reagan into office in 1980 resulted in a decrease in congressional appropriations to the fund after 1978. Federal agencies also began to take a closer look at how grants for outdoor recreation were being spent. At this time, the U.S. General Accounting Office (GAO) initiated its study of the relationship between state planning and state expenditures of LWCF grants. It concluded that state planning failed to provide any policy and criteria for the important fiscal decisions involved in land acquisition. Specifically, GAO cited planning for failing to provide the type of budgetary controls that would help define priorities in the use of limited federal and state funds.

The changing political and federal fiscal circumstances of the 1980s have resulted in significant changes in the federal requirements for state plans. Federal requirements have become a hybrid of the earliest federal objectives and the more recent concerns of fiscal control and accountability—they still require inventories of existing facilities, needs assessments, and issue analysis, but they also stress fiscal responsibility and management. According to the federal guidelines, "SCORP's must be able to guide the public investment in LWCF grants projects." The plan "must be sufficiently specific to identify priorities for spending apportioned funds" and must include the state's "policies for distributing LWCF allocations among state and local governments."

An annual report describing the use of LWCF grants and the accomplishments of state plans is also now required. And, for the first time, the federal guidelines establish standards to determine state eligibility for LWCF grants. State eligibility is based on the evaluation of SCORP submissions to the regional offices of the National Park Service. SCORPs are reviewed for their completeness of coverage, including their relevance to known needs and their pertinence to a broad range of recreation opportunities within the state. They are also evaluated on the basis of their usefulness in guiding public decision making in matters related to future recreation investments and resource management.

A SCORP is considered useful in this regard if it contains priorities and recommendations.

If SCORP submissions do not meet these requirements, the Park Service's regional director is authorized to place the state on 90-day probation. Within these 90 days, states have to correct planning deficiencies if they want to maintain eligibility for federal grants. If a state fails to make the necessary corrections within the probationary period, the regional director can deny the state LWCF grants and can specify the remedial actions necessary to regain eligibility. Appeals of the regional director's action can be taken to the director of the National Park Service.

THE FUTURE OF FEDERAL PLANNING REQUIREMENTS

To many state planners, the current federal planning requirements seem out of sync with the times. Gary Thorson, Chief of the State Parks Division in Wyoming, states that "with the advent of new wetlands requirements along with what appears to be a more strict interpretation of the federal planning manual . . . and the continuing decline in federal funds, Wyoming may soon be faced with the question of continuing the program." Henry Agonia, State Outdoor Recreation Liaison Officer of California, shares this perspective—"federal requirements are increasing the workload of most states' SCORP staffs at a time when LWCF grant levels are almost insignificant and when . . . many states themselves are providing less funding and internal support for their SCORP efforts."

The complaints, however, are not tied just to the decline in federal dollars. If LWCF was generously funded, it is likely that state planners would still have problems with the federal requirements. The deeper issue is the question of how to make planning more meaningful.

In subsequent chapters of this report, we examine state planning in detail and make suggestions that should help state planners make their plans more influential. These suggestions should also have an impact on the federal requirements for state planning. They clearly point out that a new model or paradigm for planning is needed. Some parts of the current rules should be maintained, but others should definitely be eliminated. The recommendations in Chapter 5 speak directly to the type of revisions needed to update and improve state planning.
Chapter 2. Identifying Good Practices in State Planning

In revising the national requirements for state recreation planning, the federal government must look at ways to encourage innovation and excellence. The examples identified below show that the states are fully capable of producing fine planning studies. Federal administrators should learn from these examples and give states the freedom to continue this type of planning. It is not likely that good planning will be encouraged through a series of rules and requirements. Good planning is more likely to be accomplished when state planners are encouraged to use innovation and creativity to respond to their state's particular needs.

This chapter reports on what APA's survey of state plans identified as examples of good planning. These examples are based on a small sample of state planning documents (see the list in the appendix), and they are not meant to be exhaustive. We do not think that every state should do the type of planning described below. We do think that it would be instructive for both federal administrators and state planners to study the best of state planning and to encourage these practices. A study of the best in state planning will make it much easier to set standards for state planning.

We found that the best plans are often tightly focused on a few selected issues and conclude with a few specific recommendations. Often, these plans put the greatest emphasis on solving pressing problems. According to one state liaison officer, "if planners are to be effective and responsive to both politicians and recreation interest groups, they must concern themselves with only a limited number of issues that are definable, concrete, and solvable." The excessive number of goals and policy statements contained in many plans discourages action. These "laundry lists" obscure priorities and add unnecessary complexity to state planning.

STATE PLANNING WITH VISION

Some of the earliest Maryland state recreation planning focused on one critical issue—the loss of open space in fast-growing suburban areas. In the 1960s, an eight-member study commission, appointed by the governor and chaired by Senator James Clark, Jr., set out priorities and an action strategy that are still the key to state planning and program administration today. The Clark Commission, formally known as the Legislative Council Committee on Recreational Areas, concluded that the state's population trends indicated that a crash program of land acquisition for at least five years was needed to erase an estimated deficit of about 50,000 acres of open space. By focusing on one critical issue that was easily identifiable by state and local legislators, important to community groups, and visible to the media, the commission was successful in stimulating state action.

To accomplish the commission's plan, a bill was introduced to provide funds for the purchase of land by the state and local governments. The bill called for an open space acquisition program financed by the sale of general obligation bonds and by the remainder of revenue derived from a transfer tax on land sales. The idea behind the transfer tax was that a person who bought land for a home or other private development diminished the supply of open space and increased the demand for recreation areas. By paying a tax equivalent to one-half of one-percent of the property, the developer or homeowner helps to support the preservation of land at the same time he/she is using land. The state law was enacted as The Outdoor Recreation Land Loan of 1969. This state program has become to be known as Program Open Space.

State planning received a tremendous boost from this new state-financed program of open space acquisition. Program Open Space currently generates income of $71 million per year. State parks and local governments currently receive $39 million generated by the tax (the other $32 million goes to the general fund), but local governments are lobbying the state legislature to increase this allotment to the full $71 million.

Open space preservation has been the focus of Maryland's SCORP planning. State plans tie the need for open space to the problems of sprawl and the loss of valuable wetlands and natural areas. Maryland SCORPs in the early 1970s called for:
The earliest state outdoor recreation plan in Maryland focused on open space preservation. The state has developed one of the nation's most successful land preservation programs—Program Open Space.

Giving high priority to acquiring recreation areas within the Baltimore-Washington, D.C., corridor and other heavily developed urban areas.

Encouraging low-intensity recreation uses on open tracts, such as floodplains, wooded areas, steep slopes, and other significant environmental areas.

Creating corridors for bicycling, hiking, and other recreation activities along streams, shorelines, and other natural and historic areas.

Program Open Space was created in 1969 and started issuing its first grants in the early 1970s. Half of the money in the program is used for state projects, and half is distributed to local governments. Local governments can use these funds for both land acquisition and development, although at least half of any local grant must be used to purchase land. A committee, appointed by the governor, has established a formula to determine how funds will be distributed among local governments. This formula has gone through 39 different revisions and has been the most controversial aspect of the program.

State planning and the state commitment to the open-space acquisition program has created a tremendous incentive for local planning. According to Offutt Johnson of the Maryland Department of Natural Resources, the program has been a "shot in the arm" for local governments. He reports that, when the program started, less than half of Maryland's 23 counties had parks and recreation programs. Now all but two have these departments. In order to qualify for the program, counties must develop a comprehensive plan, and projects that are funded must be consistent with the plan.

The program has created a tremendous local constituency for open-space preservation and has stimulated significant investments by local governments for parks and recreation. According to Johnson, Prince Georges County has a capital budget for parks and open-space acquisition that is 80 percent local funds and only 20 percent state dollars. Johnson reports that many of the local programs for recreation and open space are as sophisticated as the state's parks and recreation programs, if not more so.

STATE PLANS CLARIFYING PROBLEMS AND BUILDING CONSTITUENCIES

Some state plans include information that is of widespread interest and not found in other places. This is information that allows state and local government officials to evaluate where state or local recreation programs stand.

The State of Washington 1985 SCORP includes useful information about the huge gap between state and local capital needs for recreational facilities and the available dollars. The 1985 SCORP includes a summary of a survey of 255 local government capital improvements programs for recreation.
This survey identified the financial resources needed by 255 local governments for acquisition, development, and renovation of recreation facilities for the period 1983 through 1988. The survey found needs of nearly $465 million for the five-year period. The new acquisition and development needs reported by local governments amounted to 87 percent or $405 million of the capital needs identified.

Despite capital needs of $465 million, the SCORP plan reported that only $18.5 million was available to local governments through seven different funds, including LWCF. The gap between the estimated capital needs of local governments for acquisition and development and the pattern of most recent spending was $386.5 million.

The State of Washington 1985 SCORP includes a description of both a gubernatorial committee report and a state congressional report on the financing of park and recreation programs. Both these reports concluded that “current outdoor recreation systems, and the means of financing these systems are in crisis.” The governor’s advisory panel called for the establishment of a “long-range, permanent, and stable funding source to meet the budgetary needs of all agencies that provide public recreation opportunities.” The Washington SCORP puts the financial crisis in sharp focus. It summarizes local capital needs for parks and recreation in detail—which is important to state legislators who represent a local constituency.

The North Carolina 1984 SCORP also includes some hard-hitting information about financial resources available for outdoor recreation. The SCORP reports that the per capita state expenditures for parks and recreation have always been very modest. It further reports that these expenditures peaked in 1975 and that they have been on the decline ever since. Figure 2 is taken from the 1984 SCORP and it indicates how North Carolina state and local government expenditures compare to national averages.

According to Bayard Alcorn, SCORP planner for the North Carolina Department of Natural Resources, the fact that the state expenditures compare so poorly with the national averages is powerful information. He reports that many people active in state parks and recreation programs are embarrassed by the fact that the state’s per capita expenditures are the lowest among all of the 50 states. According to Alcorn, the state’s standing—relative to others state’s per capita expenditures—is a rallying point for greater support by advocates of parks and recreation programs.

California’s plan also contains important information for persons active in recreation programs. Early in 1987, the California Department of Parks and Recreation conducted a direct mail survey of city, county, and special district recreation agencies throughout the state. The purpose was to obtain basic information about the level of service and the financial status of local park and recreation programs. This survey hit a responsive chord. Eighty-five percent of the jurisdictions responded with complete information. The survey collected information about 7,738 local parks. It identified trends in local park budgets, maintenance programs, and planning and management.

This data has made the California plan the focal point for information about the state’s diverse recreational resources. Local parks and recreation administrators look to the plan to compare their programs with those of other counties, municipalities, and special districts. The state is providing leadership by building a network of recreation planners and administrators statewide.

SPECIAL STUDIES THAT MAKE A DIFFERENCE

In recent years, some state planners have worked to develop plans for special topics or issues. These special studies or specific plans make a bridge to the general state plan. They are more adaptable than comprehensive plans and can be quite detailed. According to Tom Cieslinski, Maine Bureau of Parks and Recreation, special studies have proven more timely, relevant, and influential than com-

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**FIGURE 2. STATE AND LOCAL EXPENDITURES FOR PARKS AND RECREATION: NORTH CAROLINA VERSUS U.S. AVERAGE**

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Source: Statewide Comprehensive Outdoor Recreation Plan 1984. North Carolina Department of Natural Resources and Community Development.
The state of California has adopted a stewardship policy for the protection of popular park and recreation resources such as the Big Sur area above.

Cieslinski believes that such plans provide a special opportunity for planners to demonstrate that plans and planning criteria can be used to direct programs and allocate funds. Special studies are often a "window of opportunity" for state planners to demonstrate special skills. Usually, special studies are requested when direction and leadership are needed immediately.

The Louisiana Wetland Priority Conservation Plan of 1988 is a special plan that provides a frank assessment of the state's wetland losses. The plan concludes that Louisiana's history of wetland losses is a "national disaster." The plan pulls together information from a wide variety of sources and reports that:

There is no understanding at the national level of the magnitude of the biological and economic disaster occurring in coastal Louisiana. . . . No other state tolerates such massive desecration of its land and water resources.

The SCORP planners found that Louisiana is losing both coastal and inland wetlands. The state has lost 1.1 million acres of coastal wetlands since 1900. These losses are attributed to major flood control and navigation projects along the Mississippi River and the construction of channels and canals by gas and oil companies in the state's coastal marshes. In inland areas, the SCORP planners found that the state has been losing 57,000 acres of bottomland hardwoods and marsh areas per year since 1952. These losses are primarily due to agricultural activities and to flood control projects. The wetlands plan reports that these forested wetlands are essential to the preservation of habitats for migratory and native birds, deer, bear, crawfish, alligators, and many other animals.

The wetlands plan points out clearly what is at stake in preserving coastal and inland wetlands. For example, coastal wetlands support a commercial and sport fishing industry that ranked first in the nation and is worth over $265 million in fisheries markets according to a 1984 study. The wetlands plan also reports that, in 1980, recreational fishing and hunting alone pumped $637 million yearly into the state's economy. According to John Glenn, SCORP planner for the Louisiana Department of Culture, Recreation, and Tourism, a critical point of the wetlands plan has been the development of some priorities for wetlands preservation and restoration. Glenn says that the "die has been cast" and that it is simply too late for many of the state's wetlands. He reports that the state and federal government need to focus their conservation priorities on those wetland areas that are still salvageable. The state wetlands plan helps achieve this by establishing priorities for wetland preservation based on an assessment of their functions and values. The plan is specific to the known wetland areas of the state.

A major strategy of the wetlands plan was to help unify
the various actors in the development of wetlands policy in the state. To accomplish this, the SCORP planners set up an advisory group composed of 11 public agencies and private interest groups active in the area of wetlands protection. According to Glenn, this process of bringing together all the actors has been of strategic importance and is consistent with Governor Rohmer's efforts to build a consensus on what actions the state needs to take to prevent more wetland losses. Glenn also says that, for the first time, the state's congressional delegation is now a unified voice on wetlands protection. He reports that the SCORP wetlands plan came along at the right time; it has helped make recreation planning relevant to a key state issue. Furthermore, many state and federal agencies that had been taking independent actions to protect wetlands in the state now have the SCORP plan to help formalize their activities.

In the early 1980s, California state planners also conducted a special study that had a significant impact on that state's policy. The Stewardship Plan of 1983 examined 'threats' to state parks. These threats included problems of pollution, mining, nearby development, vandalism, and poor management. This study asked state park managers for qualitative information about the different threats and asked them to rank them. The study identified a critical lack of staff for basic maintenance activities, and it reported on the damaging effects of intrusive urban developments on park borders and the growing problems of litter, vandalism, and noise. It noted that over half of the state parks had been damaged by off-road vehicles and general overuse of park facilities.

The study called for the elevation of resource stewardship as a guiding policy for parks management. It specifically recommended completing general plans for each park, strengthening staff expertise, raising private funds for resource stewardship programs, mapping sensitive areas, and increasing public education.

The stewardship report was released in late 1983 at a time of severe state budgetary constraints. This relatively small, low-cost report, however, could not be ignored. Its persuasive data motivated state decision makers and influenced special interest groups to act. As a result, more funds are being targeted to stewardship, and resource management and long-term maintenance issues have become important issues in California.

The findings of the study, along with pressure from interest groups, led to a $5 million issue being targeted "to increased stewardship of the public scenic features of the existing state parks system." These funds were the first bond proceeds ever earmarked specifically for stewardship.

Numerous other state plans demonstrate excellence in methods and techniques. The Texas 1985 Outdoor Recreation Plan includes an incredible level of detail in the assessment of regional recreation problems and issues despite the enormous geographic size of this state. Although the Texas plan follows a conventional comprehensive planning format, this approach appears appropriate because of the need to inventory rural resources and the lack of local capacities to conduct any basic planning programs. Some smaller states, like Rhode Island, also provide a level of detail in their SCORP assessments of local needs that allows for recommendations that are excellent and meaningful. Special plans, like Arizona's central lakes plan and Colorado River studies, Montana's grizzly bear management studies, and Indiana's studies of the recreational uses of man-made reservoirs, have also provided leadership and direction through effective planning.

Federal requirements for outdoor recreation planning should encourage the methods, techniques, and qualities used in the best SCORPs. The best state plans demonstrate an enormous variety of methodologies. If federal requirements allow the states the maximum freedom, it is likely that each state will develop a SCORP best suited to meet its particular, unique needs.

SCaRPs continue to assess statewide needs for parks and recreation facilities at a time when federal grants are at an all-time low. Sometimes, the results are long, bulky, and boring plans that can never be implemented because funding is so scarce. The image of state recreation planning suffers because of the huge gap between the comprehensive assessment of state recreation needs and the paltry sums available to achieve plan objectives. SCaRPs appear completely out of touch with the realities of severe budgetary limitations.

State planners argue that these problems of scope, substance, and style are caused by the federal planning requirements. They argue that the scope and complexity of the federal requirements stifle any targeted planning that focuses on achievable objectives. The federal requirements create a rigid template for state recreation planning, forcing all states to take a comprehensive approach. The format, style, and contents of many of the state plans are so predictable that, if you substituted the name of one state for another (no matter how different the states), the casual reader might never know. For example, the basic components (needs assessment, supply and demand data) of planning documents from Wyoming, where grizzly bear management is a problem, are not significantly different from those of the District of Columbia, where recreation administrators are faced with the challenges of counseling young people using drugs and facing the problems of teenage pregnancy and unemployment.

This chapter asks some basic questions that state planners should answer when preparing a state plan. It also outlines some ideas for improving the quality, format, and style of state outdoor recreation plans. It provides examples that illustrate how some states are already making these improvements.

WHY ARE STATE PLANS PREPARED?

A basic problem of federal planning requirements and state planning reports is their failure to define objectives for recreation plans. Too many of the state plans appear to be developed simply to qualify for LWCF grants. Their only aim is to meet minimum federal requirements. According to Jim Graves, Alternate State Liaison Officer, Mississippi Department of Natural Resources, "we all agree, in substance, that SCaRPs should benefit the planning communities of each state by serving as an accurate tool for immediate and future recreation planning... However, the bottom line is the receipt of a letter from our regional director indicating an approved document, making the state eligible for federal funds."

The federal objectives for state recreation planning are also unclear. Do federal administrators want state plans to guide individual expenditures of LWCF grants or do they want these plans to serve as statewide assessments of existing recreational facilities and future needs? Federal regulations have always required that state recreation plans establish aims for the use of LWCF grants, and this is a laudable goal. But the link between the state comprehensive plan and the use of federal grants has always been weak. As a result, general state plans appear to be poorly thought out or inadequate. State planners argue that, since an average of 75 percent of LWCF grants go to local governments, it is unrealistic to believe that the state plan can anticipate the diversity of LWCF expenditures.

A more realistic objective for state planning would be for it to identify a handful of critical issues (e.g., waterfront access, open space preservation at the suburban fringe, the recreational needs of the elderly). Then, some portion of LWCF grants would be directed to these needs. The use of other funds could be evaluated through the standards and guidelines established through the Open Project Selection Process (OPSP).

In the long run, the objective of federal planning requirements should remain geared toward ensuring reasonable use of federal funds. Federal administrators should not expect state recreation plans to anticipate all uses of federal grants, but they should expect these plans to provide leadership and direction in a few critical areas.

If the objectives of state plans are clearly identified, the state planners can target their inventories and data collec-
tion. For example, if the objective of a state plan is to influence state legislation, data collection can be pared down to finding facts that support legislative agendas.

Good state plans, according to the APA survey, include clear statements of their most significant objectives. In many cases, these plans have far-reaching statements of purpose that engage the reader and enhance the significance of the planning document. The State of California's 1988 Plan objective "is futuristic . . . going beyond a description of 'what is' to an exploration and analysis of the issues—both problems and opportunities." According to Bruce Kennedy, the Manager of State Planning for California's Department of Parks and Recreation, a primary goal of the plan is to establish an "overall mission that most people can agree with and respect, if not work positively towards." He argues that state plans must recommend "specific projects and programs that are useful to park and recreational professionals because these professionals are the most likely group to use planning information." They must contain critical information that cannot be found elsewhere. Consistent with this, Kennedy believes that state plans should serve as a "focal point" for park and recreation professionals and other interest groups to examine issues, resolve differences, and determine actions needed for the common good.

The State of New York's 1988 Draft Plan also includes a strong statement about its purpose. The New York plan "is the state's premier assessment [of state recreation needs] and premier policy document for the executive and legislative branches of government, recreation and preservation interest groups, and the general public." The New York plan focuses on "deficiencies"—that is, the critical recreation resources needs of the state.

WHO IS THE AUDIENCE FOR STATE PLANS?

State outdoor recreation planners need to think about who can best use planning information and how it can be used. For too many years, the critical audience for state plans was the National Park Service's regional administrators. In the 1960s and 1970s, when millions of dollars hung in the balance, state plans were written only for the Park Service audience. The emphasis on satisfying federal administrators should change, and state planners should have the freedom of writing to a different audience.

The APA sample of state recreation plans found that many do not identify an audience. The exceptions try to reach a broad audience well beyond the limited technical audience that may read most state plans. The Virginia state plan, for example, states that "every effort has been made to make the plan readable and usable by both the professional and the layman interested in outdoor recreation in Virginia." The Rhode Island plan states that the "primary audience of this plan is state and local officials responsible for administration of Rhode Island's recreation and open space programs," but it also states that the plan's "themes and ideas must be understood and supported by a broad cross-section of Rhode Islanders."

If state plans are to be more politically influential, state planners have to think about how to write to decision makers with limited time and diverse interests. To influence state policy, state planners must present data and information that reflects the interests and objectives of those key policy makers who support recreation programs. To build constituencies for state outdoor recreation programs, state plans must be written with the interests and priorities of recreation activists, environmental groups, state conservation coalitions, and local recreation program managers in mind.

HOW CAN PLANS BE BETTER ORGANIZED?

The comprehensiveness of state plans makes them difficult to read and understand. Too often, the enormous number of facts in many plans seem only loosely related to their recommendations. The plans are so comprehensive that, overall, they appear directionless.

All state plans should have a table of contents and an executive summary. A table of contents offers direction to the reader with a limited amount of time to devote to the plan. An executive summary gives the reader the "big picture." Most readers of state plans are only interested in clearly stated recommendations, not the analytical acrobatics required to reach them. Unfortunately, fewer than half of the state plans provide an executive summary. The best executive summaries (e.g., those of Vermont, South Carolina, and Virginia) are issued as separate documents. These summaries can be published in larger numbers for broader circulation.

Major findings and recommendations must be prominent. Too many state recreation plans bury their recommendations after hundreds of pages of data. The recommendations of the 1983 North Carolina Plan appear on page 283 of a 327-page document.

Economical and straightforward state plans also make use of graphics to summarize findings. Sketches, maps, graphs, and charts can provide information that it would take pages and pages of written text to explain. In drafting plans, state planners should ask. Could this information be explained better graphically?

WHAT INFORMATION IS NEEDED FOR STATE PLANNING?

Most state plans include the information needed to support the directions and objectives identified in state plans. The federal requirements for comprehensive data and information, however, keep many state planners from focusing on the most important facts and planning recommendations. The excessive detail also wastes the reader's time and obscures the overall message. Too often, state plans ultimately include information that is unrelated to the document's recommendations.

State planners argue that the federal planning requirements force the collection of unnecessary information. Jo Luck Wilson, Executive Director of Parks and Tourism in Arkansas, sarcastically questions whether the federal requirements for "an assessment . . . of the public and private land, water, and facilities capable of providing outdoor recreation opportunities requires the counting of all of the state's rocks, trees, and flowers?" Henry Agonia, state liaison officer from California, says that, if federal requirements for the assessment of demand were strictly applied, a massive data collection effort would be required. Currently, the State of California conducts telephone inter-
views with 2,140 individuals, but Agonia reports that, if the state truly assessed the demand for outdoor recreation “specific to the state and political jurisdictions thereof” (as required by federal rules), a sample of 90,000 persons would be required.

The most superficial examination of state plans argues for some elimination of the excessive amounts of data. The 1983 New York Recreation Plan is an imposing 450 pages (the 1988 draft New York Plan is 117 pages), and the 1985 Texas Outdoor Recreation Plan is 400 pages. Although the Texas plan is well organized and includes excellent three- and four-color graphics, it is too bulky and exhaustive to be a document of significant circulation or impact.

When state planning officials are not selective about the information they publish, plans can appear trivial and unimportant. Not all the information collected in the process of state recreation planning should be published in state plans. For example, the State of Arkansas Recreation Plan, an otherwise valuable document, reports that a state BB-gun manufacturer produces 55 million BBs a day. New Jersey’s 1984 State Plan includes data on state residents’ desire to wade (i.e., to stand in water up to their knees). The New Mexico comprehensive plan reports on the marital status and educational level of people who participate in hot-air ballooning.

The data collected must relate to the report’s objectives. It should reinforce the report’s recommendations. It is a luxury to collect data just for the purpose of collecting information. State planners need to develop strategies that will allow more economical and valuable data collection.

HOW SHOULD STATE PLANS REDUCE GENERALITIES AND DEAL WITH SPECIFICS?

GAO criticized state plans because they did not give enough detail to guide decision making regarding funding for different recreation facilities and land acquisition projects. It concluded that state plans should be specific enough to allow state planners to critically evaluate different acquisition projects.

State planners and the National Park Service took great exception to this critique. National Park Service staff and many state planners concluded that GAO did not understand the realities of state planning and funding decisions. According to Neil Johannsen, Director of the Division of Parks and Outdoor Recreation for Alaska, “SCORPs help define major statewide issues, not the fine detail between funding a ballfield or a soccer field.” In response to the GAO critique, the National Park Service established OPSP, which allows states to develop criteria for local projects outside of the overall SCORP document. OPSP acknowledges that state recreation plans cannot anticipate all local needs.

Still, a middle ground is needed between an extremely general state plan and a precisely defined capital expenditure plan. Some states are moving to this ground because of their own interests. The 1983 New York Recreation Plan included 48 policy statements; the state’s 1988 draft plan identifies only seven policy directions. California’s 1982 Plan identified 29 critical issues; the 1988 plan pared the number down to 10.

Other states have demonstrated skills at developing plans with greater specificity. Some small states (e.g., New Hampshire, Vermont, Rhode Island) include very specific community-based assessments of recreational needs. Other states have developed specific plans that include detailed recommendations about precise funding priorities.

If the states are freed from the federal requirements for comprehensive planning and statewide needs assessments, they can focus their recreation planning documents. Plans that focus on seven or 10 policy issues—like those of New York and California, respectively—are likely to be very specific. If the federal government will allow state planners the liberty to tailor their planning to unique needs and specific state problems, the corresponding planning documents will be more manageable and effective.
Chapter 4. Planning Innovations

Traditional state outdoor recreation planning has essentially been a technical exercise. The comprehensive planning requirements of the federal regulations assumed that planners had the technical capability to predict the future with precision. Other underlying assumptions about comprehensive planning were a belief that there was broad-based agreement on goals (e.g., that the states should meet all of the recreation needs of their residents) and that the state planning offices could exercise centralized control over the financial resources needed to achieve goals.

As most state recreation planners know, planning occurs in a very different political and economic climate than it did in the early 1960s. Decision-making processes are more open and more democratic. The competing interests and agencies involved in recreation services have grown considerably. Given the diversity in political and economic realities within the states, recreation planners need the opportunity to explore all planning models. No single method is appropriate. Federal rules should recognize all the different types of planning techniques available. States should be able to choose the technique that best meets their needs. In some states, the comprehensive planning model is still the best, but, in others, state recreation planners should have the flexibility of choosing policy planning, strategic planning, or capital improvement programming.

This chapter describes three alternative planning techniques that could be used by state outdoor recreation planners. It describes strategic planning, policy planning, and capital improvement planning, and the methods and advantages of each. All of these types of planning should be permitted by the federal rules for state outdoor recreation planning, and all should be considered by state planners before choosing a planning method.

STRATEGIC PLANNING

Recently, there has been a major stream of thought in public planning that comprehensive planning could be substantially improved by using techniques developed by private corporations. Paradoxically, government has used such planning far longer than the private sector. It was only about 20 years ago that the idea of long-range planning came into vogue in the private sector. The private sector called its long-range planning "strategic planning." About five years ago, a number of national accounting-management consulting firms that worked in both the private and public sectors began to introduce the concept of strategic planning into government planning processes. Given the public philosophy of the last decade, wherein it was assumed that the private sector performed better than the public sector, there was fertile ground for experimentation.

A detailed description of strategic planning is beyond the scope of this report. However, the essential characteristics of strategic planning are relatively simple and can be quickly summarized. Strategic planners ask five major questions about an enterprise or organization. State recreation planners might ask the following questions:

1. What is our overall mission?
2. What are the strengths of the state outdoor recreation system?
3. What are the weaknesses of the state outdoor recreation system?
4. What are the opportunities open to the state outdoor recreation system for future action?
5. What are the major threats facing the state outdoor recreation system?

It should be noted that the questions related to strengths and weaknesses demand analyses of the internal operations of the organization and its programs and services. For years, the District of Columbia recreation planning process has included an internal assessment of strengths and weaknesses. The District's 1986 Comprehensive Recreation Plan reports that the Department of Recreation still suffers from problems of poor staff morale and productivity related to a reduction in the labor force of about 50 percent in the early 1980s. The internal assessment also identified the need to
hire more staff who had graduated from "accredited recreation programs" and who were actively seeking "professional certification." The District's plan includes descriptions of concrete steps to upgrade staff training and to create new opportunities for professional growth and advancement.

There are special problems in applying strategic planning in public sector organizations like a planning agency. While it is easy to discuss an agency's strengths in a public document, planners may be quite reluctant to talk about weaknesses—especially if they deal with the performance of the agency itself. Nevertheless, it is essential to do so if the strategic planning process is to make any sense at all.

A variety of techniques are used to answer the five strategic planning questions. These include the development of data, the use of advisory groups, extensive staff participation, and the development of financial information.

Some states have already gone through strategic planning processes. In the mid-1980s, the New York State Office of Parks, Recreation, and Historic Preservation initiated a strategic planning process that developed goals and objectives, which were later integrated into the state outdoor recreation plan. This strategic planning group was a management/employee committee designed to undertake a major internal assessment of the Office of Parks, Recreation, and Historic Preservation. The group examined fundamental issues, including the agency's mission statement, its guiding principles, and its commitment to resource preservation and recreation services. California also used a group process for developing the overall goals and direction for both its 1983 and 1988 plans. The state hired a professional facilitator to enhance the formulation of overall planning directions. California staff now always begin the planning process by examining the strengths and weaknesses of the previous plan and the agency's successes and failures during the succeeding five-year period. Staff critically evaluate the impact of the previous plan on subsequent events, determining which planning efforts proved useful and which did not.

An organization that has gone through a strategic planning process wants to correct its weaknesses, build on and exploit its strengths, seize opportunities, and deal with threats as best as it can. In developing a mission statement, it is essential that the agency really deal with a critical self-examination and clearly set forth "what business is it in." In both the private and public sectors, as bureaucratic organizations mature and decline over years, original missions are frequently lost sight of or become obsolete.

An extremely important point must be made about strategic objectives: organizations that do an effective job of strategic planning focus on very few strategic objectives. This stands in contrast to traditional comprehensive planning, which identifies scores of objectives.

In the private sector, strategic planning does not stop with the formulation of the mission and strategic objectives. It continues on with the development of detailed work programs and administrative/budgetary steps that must be implemented to move toward achieving the strategic objectives. Departments are expanded or contracted, budgets are increased or decreased, marketing plans are formulated, and so on. Unfortunately, strategic planning in the public sector has not had this emphasis on implementation. It appears that some organizations have taken the new nomenclature of strategic planning and substituted it for comprehensive planning. But they continue to make the same blunder by not specifying in detail the management and fiscal steps that an organization must take if it is serious about its plans.

Strategic planning also requires that an organization develop evaluation-monitoring-feedback mechanisms to determine how well it is achieving its objectives. Such knowledge helps to show an organization where it is moving well and where it is not or which objectives must be redefined.

The literature of strategic planning stresses that it is different from traditional long-range planning in a number of important respects (e.g., scope, time frame, and focus of data collection). (See box.)

Strategic planning should not be blindly adopted without very careful consideration about the environment and institutional framework in which recreation planning operates. Planners must be cautious for several reasons. First, too many so-called strategic plans that merely mimic the terminology do not demonstrate creative thinking and, unfortunately, appear to be traditional plans. Second, federal, state, and local governments have a long history of adopting new management or planning systems with inadequate custom-tailoring to the functional program at hand. During the last several decades, there have been several innovations in government planning and management techniques that promised substantial improvements in performance. Such techniques as management by objectives, zero-based budgeting, planning-programming-budgeting systems, and other systems appeared in federal, state, and local governments with great regularity. There were great promises, but seldom were such systems kept in place over the long run. Third, there is also a long history of adoption of federal program guidelines that require state
Characteristics of Strategic Planning

- Strategic planning asks fundamental questions about an organization and its mission.
- Strategic planning requires making decisions with a sense of their future impact.
- Strategic planning emphasizes the setting of realistic objectives.
- Strategic planning assumes the organization wants to make a change.
- Strategic planning is not the same as forecasting.
- Strategic planning cannot succeed without firm support of top management personnel.
- Strategic planning is a group activity designed to improve organizational effectiveness.
- Strategic planning may define long-range missions and objectives, but it emphasizes mid-range implementation strategies and making immediate decisions.
- Strategic planning can weed out unnecessary programs, activities, or units.
- Strategic planning identifies key strategic issues for elected officials to consider and act upon.
- Strategic planning provides a better framework for work programming and agency budgeting.
- Strategic planning helps identify critical skills or resources available and needed.
- Strategic planning forces the organization to deal with issues that are usually not discussed.

and local program participants to deal with new requirements and to jump through new conceptual hoops. In general, however, these programs also do not allow a long enough time for a local program to learn how to use the new system. Finally, there are many consulting firms only too willing to provide services to state and local groups. These “experts” can provide documents with all the right buzz words, and the golden opportunity for staff development and learning is passed up.

POLICY PLANNING

Policy planning requires the formulation of goals and objectives against which all future proposals for specific action can be measured. It requires the development of a broad, general basis for action, whereas traditional comprehensive planning is concerned with specific steps to meet identified needs. Policy planning is concerned with values, whereas comprehensive planning is concerned with methods.

Policy plans are a commitment to specific directions. They are more flexible than traditional planning methods because they do not try to prescribe future actions in detail. A policy plan says in effect that “when we encounter a situation, we will probably act this way for these reasons.” General principles rather than specific proposals are the heart of the policy plan. The delineation of goals and objectives is considered sufficient to guide future park and recreation investments—no other more elaborate plans need to be made.

Policy planning typically starts with the identification of problems and the development of strategies to solve these problems. The strategies are formulated into policies that give direction and set goals. The final step in policy planning is the examination of various governmental programs or public–private initiatives that will carry out the established policies.

The advocates of policy planning cite the following benefits:

1. The drafting of clear and essential statements of policy facilitate public understanding and participation in the planning process.
2. The formulation of state recreation policies often encourage or require the participation of public officials or department managers.
3. Policy plans provide some stability and consistency because policies are less likely to be made obsolete by changing conditions.
4. Policy plans often give administrators, boards, and commissions guidelines for making decisions about unique proposals for the use of funds and resources. The policies make it easier to understand administrative decisions because the policy basis for these decisions is clear.

Current state outdoor recreation planning includes the formulation of overriding policies. Most, however, are a combination of policy formulation and technical data collection. Some state plans include policies adopted by state legislative and executive boards so that the plan is simply a consolidation and synthesis of existing policies. However, some state plans (e.g., those of California, New York, and Arizona) reflect an elaborate process in which policies are refined to map out a limited number of important goals for state planning. These plans are excellent examples of policy plans.

CAPITAL IMPROVEMENTS PROGRAMMING

Some state recreation planning agencies have used a capital improvements program (CIP) as the critical link between their comprehensive plan and annual (or biennial) budget decisions. For example, the Washington, D.C., SCORP includes a capital budget. The District’s capital budget is geared toward rehabilitation and restoration. This priority was identified through the planning process in the mid-1970s. At that time, planners for the District’s Department of Recreation found that 30 percent of the District’s 170
The condition of recreation facilities is represented in the chart above. This figure suggests a frequency distribution as a representation of all the agency properties surveyed. Condition score 1 = poor condition and condition score 10 = excellent condition.

Source: District of Columbia Comprehensive Recreation Plan.

Recreation properties could be classified as being in "poor" condition. More than 60 percent of these buildings were more than 25 years old, and only 10 buildings have been renovated in the last 10 years. It was clear that a CIP was necessary, and the District moved quickly to add a CIP to its comprehensive plan.

The 1988 New York SCORP also relates statewide outdoor recreation objectives to the CIP for state parks. There appears to be consistency between the SCORP objectives and the state parks capital budget. Both stress the need for better maintenance programs, for acquiring inholdings and important natural assets, and for the rehabilitation and restoration of some neglected facilities.

The CIP is a well-known planning-budgeting tool with a long history (some 60 years) in state and local government fiscal management. It involves several time-tested steps to ensure sound planning. These steps include:

1. A fiscal analysis of the state's capacity to fund capital expenditures from its own sources—general obligation bonds, revenue bonds, ear-marked tax revenues, and user fees. Such emphasis is placed on long-range projections of expenditures and revenues, and debt service schedules.

2. Estimates of likely federal funds over a period of time.

3. Development and analysis of data on past and future maintenance costs for present and future facilities. This includes analyses of life-cycle costing—that is, knowing why and when maintenance and rehabilitation costs will occur.

4. The development of a realistic list of capital projects for a five- to ten-year period—no longer.

5. The development of a realistic five-year list of capital projects together with estimated costs and potential sources of funds.

6. The development of a set of fiscal policies, based on the first five steps, that will guide recreation planners in developing priorities.

7. The development of a set of explicit criteria, based on fiscal policies, life-cycle maintenance costing, strategic objectives, service policies, and availability of aid, that will help recreation planners and elected officials choose projects for the five-year CIP and the annual capital budget. The five-year CIP is a commitment to proceed on specific projects (planning, grant applications, etc.). The annual capital budget is a legislative appropriation to fund these specific projects.

8. The redevelopment of the CIP list each year to determine progress, fine-tune priorities, and allow for adjustments because of changed fiscal or program considerations.
A CIP is an essential tool to help agencies carry out plans, match resources with need, provide a comprehensive mid-range perspective, and bring fiscal realism into the process. Planning is taken far more seriously when planning objectives are related to capital budget priorities.

The President’s Commission on Americans Outdoors recommended that capital improvements programming be a part of state recreation planning and management. The commission suggested that capital budgeting be initially focused on the pressing maintenance, rehabilitation, and restoration needs of state and local parks and recreation resources.

Strategic planning and policy planning have some advantages in the this era of diminishing resources for state outdoor recreation planning. Both require less time and expense than traditional comprehensive planning. Strategic planning may have some special merits for planning offices with scarce resources to invest in the preparation of planning documents. Capital improvement planning is most important when planning is intended to direct investment decisions. If the dollars available through LWCF grants or a successor grant program increase significantly in the future, state outdoor recreation planners should be encouraged to use CIP planning techniques.
Chapter 5. Recommendations

Current federal planning requirements are out of sync with the trends in state planning. In fact, federal requirements have increased despite dramatic reductions in federal grants. According to a recent survey of state planners, state planning agencies have diminishing resources for fulfilling federal planning requirements. The 1988 survey showed that the state median level of staffing for working on SCORPs is 1.5 full-time employees. This is down from approximately two full-time persons in 1985. Fifty-nine percent of the states reported that staffing had declined and that the median level of support for state planning had been reduced from $62,000 in 1985 to $55,500 in 1988. Adding new federal planning requirements in the face of dwindling resources for state planning is unrealistic.

Based on our review of federal legislation, state planning, federal requirements, and best planning practices, we can make the following recommendations. These recommendations set out objectives for a legislative agenda, a state planning agenda, and the criteria for federal review of state plans. They also suggest new relationships between the staff of the National Park Service and state planning personnel.

RECOMMENDATIONS FOR FEDERAL LEGISLATION

1. A national trust fund for parks and recreation should be created to provide stability in state planning programs and to allow states to conduct meaningful long-range planning for needed recreation programs.

One of the primary objectives in establishing LWCF grants was to build a capacity for state outdoor recreation planning. This objective is threatened by the current level of federal support. Generally, LWCF has been successful in building state capacities for planning, but this capacity will diminish without permanent, stable, and consistent funding. For nearly a decade, state planning documents have identified capital improvements needs, and local governments have requested LWCF grants that have far exceeded the available resources. A stable, long-term fund will allow states and localities to prepare meaningful plans for acquiring and developing recreational resources. The original recommendation of ORRRC was "a true trust fund — where revenues earmarked for LWCF would flow into a separate account that would not be used for other purposes." This idea is still valid and should be implemented in the process of adopting the American Heritage Trust Act or similar national trust fund legislation.

2. Any new trust fund legislation should include support and incentives for local planning.

The federal government should support local planning that relates recreation facility and land conservation needs to the community’s overall goals for development. More active local government planning for land conservation and parks and recreation services will strengthen SCORP planning because each state will be able to coordinate their planning activities with the multitude of local agencies. More active local planning will create more opportunities for partnerships between state and local governments.

The proposed American Heritage Trust Act would go a long way toward encouraging local governments to start planning for the long-term use of waterfronts, riverbanks, and natural areas and to begin evaluating the use of these areas as open space and recreational areas versus their use for housing and economic development.

The most pressing outdoor recreation needs remain in urban areas and along the suburban fringe where land costs are high and local financial resources are scarce. Local governments need financial assistance to initiate the planning that balances urban development objectives with the need for added recreational resources.

Rural communities also need support for land conservation and recreation facilities that stimulate the local economy and promote a higher quality of life. A new trust fund that included support for a variety of rural, urban, and suburban local planning programs would help build a capacity for planning where it is needed most.

Courtesy of Division of Planning, Rhode Island Department of Administration.
RECOMMENDATIONS FOR STATE PLANNING

1. **De-emphasize comprehensive, long-range planning.**

State planning should be less than comprehensive. Comprehensive planning has always stressed the collection of as much data as possible and the examination of issues over long-range planning horizons (15 to 20 years). Collecting enormous amounts of data, however, clouds the issue of what is and what is not important.

2. **State officials should be encouraged to use strategic planning, policy planning, and other efficient, low-cost planning methods.**

Effective state plans focus on a few strategic issues. These plans include only the data needed to support conclusions and recommendations. The best plans involve key state decision makers, important public and private business interests, and high-level recreation program managers at the earliest stages of the planning process. These plans relate major goals and objectives to fiscal limitations and budgetary priorities and focus on day-to-day problems and short-term objectives.

Strategic planning and other types of planning innovations should answer the questions, Who is going to do what?, By when?, and Where are the dollars coming from? State planners should explore all the alternative planning methods and select that approach most appropriate for their needs. Some of the options are identified in Chapter 4 of this report.

3. **State plans should begin to develop planning elements that address critical issues and that make state planning more timely, influential, and relevant to significant state concerns.**

SCaRPs should focus on a few pressing recreation issues. State recreation planners in Maryland have been successful because they focused on one issue—the loss of open space to urban sprawl. Louisiana recreation planners have been successful because they focused on the massive losses of state wetland resources. State planning is most effective when it focuses on important special issues. SCaRP documents are ineffective when critical information is diluted in the context of broad, all-inclusive, comprehensive plans.

There is no mystery as to what the most pressing issues are in each state. Most state planners can identify them quickly. In Arizona, the top priority is expanding public access to the state’s lakes and rivers; in New York, a top priority is development of a state greenway system; and, in Wisconsin, a priority is demonstrating the economic value of expanding trails for snowmobiles and opportunities for recreational boating. In each state, the critical issues should be clarified and refined, and the laundry lists of broad goals and objectives should be eliminated from SCaRP documents.

State plans may be more effective when they are broken up into different modules or elements. The state of Wisconsin has broken its comprehensive plan into different discrete planning elements. The brevity and directness of each of these documents makes them easier to use and understand. The Wisconsin plan is an example of a “modular” planning approach. Each module of this plan is written to a specific audience, and the sum of these modules is a comprehensive plan.

4. The state planning process should work for the establishment of more state-level trust funds as recommended by the President’s Commission on Americans Outdoors.

State planners must work to identify relatively stable and logical sources of funds for planning and recreation programs. Short-term planning for recreation resources is compromised by dramatic swings in funding schedules, and long-term planning is impossible without a steady source of revenue. There should also be a logical relationship between the source of the fund and the projects being financed. Maryland’s tax on real estate transfers is logically related to the need for recreation facilities—new development results in the conversion of open land to different activities and new homeowners create an added demand for recreation services.

5. **State recreation plans should be encouraged to address the interests of state conservation groups, local recreation program administrators, private conservation organizations, nonprofit groups, and recreation activists.**

SCaRPs should be important documents to their primary audience. The groups that make up this audience must be part of the state planning process and must have a vested interest in the state plan. State recreation plans will become more influential with the support of local governments, environmental groups, and the private sector. Private land trusts, private conservation groups, and local governments are critical actors in the financing and acquisition of recreation resources identified within the context of state recreation plans. State planners must develop new methods for addressing the growing number of actors involved in the development of recreational resources. These groups should feel that they have a stake in the state recreation plan.
RECOMMENDATIONS FOR FEDERAL STANDARDS

1. Federal standards should include a mission statement that identifies the overall goals for state outdoor recreation plans.

The federal standards for SCORPs should define the fundamental objectives for state plans. This mission statement should be developed by the National Park Service in collaboration with state liaison officers, state recreation planners, and staff of the regional offices of the National Park Service.

The mission statement should specify the extent to which SCORPs are expected to guide decisions regarding the use of LWCF grants. The mission statement should also clarify the objectives for SCORPs in terms of identifying issues, incorporating action strategies, and recommending policy directions. The statement should make clear the "intent" of federal standards, and it should be the guiding force in the federal evaluation of state planning procedures and documents.

The wording of the mission statement should be derived by consensus of all the parties involved. It should recognize the variations in state planning capacities and the limits of different institutional settings, but it should also strive to make state outdoor recreation planning timely, influential, and action oriented.

2. Establish a new partnership and collaboration process for the evaluation of state plans.

Federal standards for state planning should be tailored to meet the objectives and capacities of individual states. The standards should be self-imposed by the states, but they should be agreed upon by National Park Service personnel, state liaison officers, and state recreation planners prior to the initiation of the planning process. This proposed approach is similar to contract or grants management common in federal agencies.

Prior to instituting planning activities, states should be required to submit a description of their planning program and process. This description of planning goals and objectives would serve as the basis for later evaluations of planning products and outcomes. State planners would describe a work program and the ultimate planning products. Federal administrators would evaluate the planning project and process on the basis of the quality and efficiency of the work program, the value of the proposed products, the relationship between the planning program and the federal mission statement, and the relationship between the program and state goals for parks, recreation, and open space. National Park Service personnel could also evaluate whether the proposed project would help direct and justify the use of LWCF grants, and National Park Service administrators could negotiate with states on a case-by-case basis to establish the required planning process and products.

This process may result in less region-to-region consistency, but the overall result would be better planning. State programs would then be evaluated on the basis of state-defined priorities and the ability of state planners to efficiently meet the objectives of the planning process.

The negotiated, contract management approach to planning grants would be more labor intensive for National Park Service personnel, but it would result in higher-quality planning. This more intensive review would also develop a record and file demonstrating responsible and sensible use of LWCF grants.

To ensure that the negotiated process works, states must be required to maintain a state outdoor recreation planning staff, including at least one professional planner. The interactive process of evaluating state planning will not work if states are not committed to maintaining a planning capacity. They must also be committed to maintaining some continuity in the planning staff.

Representatives of the National Association of State Recreation Planners and the National Association of State Outdoor Recreation Liaison Officers need to work with the National Park Service to develop a process of biennial work programs and program objectives.

3. State recreation plans should continue to be evaluated on the basis of whether they direct the use of LWCF grants.

State recreation planning should help direct the use of LWCF grants. This may be done within the framework of a broad policy plan or a specific special study.

Grants that are used for state land acquisitions and development of state-owned facilities should clearly be related to state planning objectives. A state capital improvements program for the use of LWCF grants should be encouraged in order to relate state expenditures to overall planning objectives. Local governments that are given grants through the state agencies should also be required to demonstrate a relationship between these grants and locally defined goals and objectives.

As recommended in this report, state planning should be more focused and action oriented. If this occurs, it should be easier to relate state planning objectives to the use of LWCF grants.

4. The National Park Service should eliminate the requirement for a separate "action plan."

Action strategies should be an integral part of state plans so that there is no longer a need for separate action plans. When a strategic planning model is used, the action plans are not separated from the analysis of the critical issues. If a negotiated process is implemented, the exhaustive state plans of today will be shortened, and the recommendations for action can easily fit in the more streamlined format.

The whole emphasis of federal requirements should shift from separate products, such as action plans, to results. As an alternative to an action plan, federal requirements should call for an annual report on accomplishments and progress on planning tasks. The questions should be: How has state recreation planning made a difference? How has state planning ensured a responsible use of limited financial resources? and How have recreation planning objectives been carried out?

RECOMMENDATIONS FOR THE NATIONAL PARK SERVICE

1. National Park Service personnel must preserve and build on their partnership with state planners and state liaison officers.

The National Park Service must maintain its "partnership" philosophy in working with state planning agencies. State outdoor recreation planning will achieve maximum results when state and federal agencies agree on mutual goals.
and develop cooperative strategies for enhancing state planning programs.

With the decline of federal dollars and the retrenchment in state planning, the federal program administrators must look for opportunities to support and assist state planning efforts. Support and assistance may be accomplished through special national studies of the best practices in state recreation planning, through workshops or training sessions, or through other technical assistance services.

Bill Spitzer, Chief of the Division of Recreation Resources and Assistance of the National Park Service, has emphasized the partnership philosophy. He believes that state planners must "weather the current fiscal storms" while trying to revise the SCORP so that it is a more relevant and politically effective document.

2. The regional personnel of the National Park Service should understand the overriding planning objectives of each state within their region, and a state's success in reaching these objectives should be the basis for evaluating planning programs.

The mutually agreed upon mission statement for state outdoor recreation plans and state-defined goals should direct the regional reviews of state recreation planning documents. The reviews must be tailored to the individual states. The National Park Service's regional staff should review with state planners their overall goals, their work plans, their planning process, and the proposed products designed to reach these goals. Assessments of the successes and failures of state planning activities should be based on criteria that the states, in cooperation with the National Park Service personnel, have established for themselves.

Regional administrators should focus more on the quality of a planning process and program, rather than the elements of a finished document. Knowledge of the unique objectives of each state and a record of how the state is trying to meet its objectives should provide regional administrators with the critical standards for evaluating state planning efforts.

3. The regional offices of the National Park Service need to establish a stronger research and technical assistance program for the states.

The regional offices of the National Park Service should establish "working" libraries of state recreation plans and state planning studies. These offices should maintain copies of any planning agreements negotiated between the National Park Service and individual state planning officials. The working libraries should be offices where state planners can find examples of good practices from other states. These libraries should not include only the SCORP documents; they should include the numerous special studies conducted by different states throughout the United States.

The regional offices should also develop technical assistance documents for use by state and local recreation planners. The Mid-Atlantic Office of the National Park Service has led the way in developing manuals and guides on issues related to liability insurance, citizen participation, wetlands planning, land appraisal techniques, and alternative planning approaches. This type of active assistance should be initiated by all the regional offices and coordinated by the Washington, D.C., office.

4. Staff of the regional offices of the National Park Service should receive training in planning, contract negotiation, and conflict resolution.

A more active evaluation process for state planning will require staff of the National Park Service regional offices to develop new skills. This staff should receive added training in planning, contract negotiation, and conflict resolution. The more flexible, negotiated evaluation process recommended in this report will require greater familiarity with state planning goals, procedures, and capacities. This more active role will require regional staff to know more about planning and the unique planning problems of each state.

National Park Service regional staff should know the basics of outdoor recreation planning and the negotiating skills needed to reach agreements about state planning goals, planning schedules, and final products.

National Park Service staff should also be given full opportunities for training and continuing education. Staff should be skilled at both grantsmanship and technical assistance to state planning programs, and they should be given opportunities to work in other regional offices and to learn of the variety in state planning programs. Opportunities to work in other National Park Service regional offices would also enhance the process of learning negotiation skills needed to set standards for state planning—standards tailored to meet the unique characteristics and capacities of individual states.

5. The regional staff of the National Park Service should be active participants in the revision of federal standards for state planning.

The regional staff of the National Park Service must be directly involved in the needed new approach to state planning. This involvement will allow regional office personnel to help frame meaningful processes and understand the spirit and philosophy behind this process. Since the regional staff are the key persons interpreting the requirements, they should know the background and origins of any new federal standards. This is more important than knowing the letter of the requirements.

CONCLUSION

State planning must be redefined. Too much state planning has been conducted simply to maintain eligibility for LWCF grants. These plans have less and less meaning as LWCF grants continue to decline. Even if Congress suddenly appropriates higher levels of funding for a grants program, the basic objectives of state planning need to be rethought. The fundamental objectives of state plans should be defined in terms of state needs. State plans should not be directed by

The regional staff of the National Park Service must be directly involved in the needed new approach to state planning. This involvement will allow regional office personnel to help frame meaningful processes and understand the spirit and philosophy behind this process. Since the regional staff are the key persons interpreting the requirements, they should know the background and origins of any new federal standards. This is more important than knowing the letter of the requirements.
Appendix. SCORP Documents Received for This Study
(listed alphabetically by state; executive summaries and policy plans are not listed)

Alabama Statewide Comprehensive Outdoor Recreation Plan, December 1986
The Arizona Statewide Comprehensive Outdoor Recreation Plan, 1983
The Arkansas Statewide Comprehensive Outdoor Recreation Plan, 1985
California Outdoor Recreation Plan, 1988
Delaware Outdoors, 1984
District of Columbia Comprehensive Recreation Plan, 1986
Outdoor Recreation in Florida, 1987
Indiana Outdoor Recreation, 1984
Maryland Outdoor Recreation and Open Space Plan, August 1974
The Minnesota Statewide Comprehensive Outdoor Recreation Plan, 1984–1989, 2 volumes
Mississippi Recreation, 1985
Montana Statewide Comprehensive Outdoor Recreation Plan, 1988
Outdoor Recreation Plan of New Jersey, November 1984
Outdoor Recreation: A Comprehensive Plan for New Mexico, 1986
New York Statewide Comprehensive Outdoor Recreation Plan, 1988
People, Resources, Recreation: The New York Statewide Comprehensive Recreation Plan, 1983
The North Carolina Statewide Comprehensive Outdoor Recreation Plan, December 1983
The North Dakota State Comprehensive Outdoor Recreation Plan, 1985
The Ohio Statewide Comprehensive Outdoor Recreation Plan, 1986
Ocean State Outdoors: Recreation and Conservation Strategies for Rhode Island, September 1986
Outdoor Recreation: A Plan for South Carolina, 1985
The South Dakota Comprehensive Outdoor Recreation Plan, 1987
Tennessee State Outdoor Recreation Planning Report, 1984
The 1985 Texas Outdoor Recreation Plan
The Vermont Comprehensive Outdoor Recreation Plan, 1983–1988
The 1984 Virginia Outdoors Plan
Washington’s Statewide Comprehensive Outdoor Recreation Plan, 1985
The Wisconsin Statewide Comprehensive Outdoor Recreation Plan, June 1986, volume 5 of 9 volumes