

TAB

**U.S. ARMY CORPS OF ENGINEERS
RECREATION STUDY**

VOLUME II: APPENDIX G

Survey of Interested/Impacted Organizations Report

Contract No. DACW72-86-D-0012
Task Order 0008

U.S. Army Corps of Engineers
Humphreys Engineer Center Support Activity
Fort Belvoir, Virginia

Final Report:

U.S. ARMY CORPS OF ENGINEERS RECREATION
STUDY:

A SURVEY OF INTERESTED/IMPACTED
ORGANIZATIONS

May 3, 1990

FINAL REPORT

U.S. ARMY CORPS OF ENGINEERS RECREATION STUDY:
A SURVEY OF INTERESTED/IMPACTED ORGANIZATIONS

<u>SECTION</u>	<u>TABLE OF CONTENTS</u>	<u>PAGE</u>
	EXECUTIVE SUMMARY	i
1.0	INTRODUCTION	1
	1.1 Purpose of Project	1
	1.2 Role of The Greeley-Polhemus Group Inc.	1
2.0	SURVEY APPROACH	2
	2.1 Use of Telephone Survey	2
	2.1.1 Letter of Introduction	2
	2.2 Development of Questionnaires	2
	2.2.1 Non-Federal Public Agency Questionnaire	3
	2.2.2 Corps Concessionaires	3
	2.2.3 Resort Developers/Non-COE Concessionaires	3
	2.2.4 Other Service Providers	3
	2.2.5 User/Conservation Groups	3
3.0	ORGANIZATIONS AND CONTACT NAMES FOR SURVEYS	3
	3.1 Non-Federal Public Agencies	4
	3.2 Corps Concessionaires	4
	3.4 Other (Ancillary) Service Providers	4
	3.5 Users/Conservation Groups	5
4.0	FREQUENCY ANALYSIS & SURVEY RESULTS	5
	4.1 Non-Federal Public Agencies	7
	4.1.1 Characteristics of Response Group	7
	4.1.2 Impact & Corps Fee Policy on State/Local Fee Policy	7
	4.1.3 Constraints in the Management of Public Recreation Areas	7
	4.1.4 Willingness to Participate in O&M	8
	4.1.5 Benefits and Drawbacks of a Joint Effort	9
	4.1.6 Who Should Provide O&M at Corps Recreation Areas	10
	4.1.7 Innovative Ideas to Provide O&M	11
	4.2 Corps Concessionaires	11
	4.2.1 Characteristics of Response Group	11
	4.2.2 Advantages/Disadvantages of Operating in a Public Area	12
	4.2.3 Government Requirements Preventing Renewal of Contract	14
	4.2.4 Benefits to the Customer	14
	4.2.5 Potential Expanded/Additional Services	14
	4.2.6 Innovative O&M Programs	15
	4.2.7 Affect on Concessionaires of Increased State and Local Involvement	15
	4.2.8 Should Corps Continue to Operate Recreation Areas?	16
	4.3 Resort Developers/Non-Corps Concessionaires	17
	4.3.1 Characteristics of Response Group	17
	4.3.2 Essential Elements for Development Projects	17
	4.3.3 Disadvantages of Development on Public Lands ¹	18

U.S. ARMY CORPS OF ENGINEERS RECREATION STUDY:
A SURVEY OF INTERESTED/IMPACTED ORGANIZATIONS

<u>SECTION</u>	<u>TABLE OF CONTENTS</u> (Continued)	<u>PAGE</u>
	4.3.4 Incentives to Development	18
	4.3.5 Operation and Maintenance of Corps Facilities	19
4.4	Other (Ancillary) Service Providers	20
	4.4.1 Characteristics of Response Group	20
	4.4.2 Advantages and Disadvantages of Operating Near a Public Recreation Area	20
	4.4.3 What Would Prevent the Service Providers from Seeking a Concession Contract?	21
	4.4.4 Should the Corps Continue to Provide O&M at Public Recreation Areas	21
4.5	Users/Conservation Groups	22
	4.5.1 Characteristics of Response Group	22
	4.5.2 Rating the Recreation Facilities	22
	4.5.3 Rating the Recreation Services	23
	4.5.4 Facilities that Should/Should Not Be Allowed	23
	4.5.5 Effect of increased Role for State/Local Government at Federal Facilities	23
	4.5.6 Rating the Corps, State, Local and Private Recreation Facilities	24
5.0	CONCLUSIONS AND SUMMARY OF MAJOR FINDINGS	24
APPENDIX A: LETTER OF INTRODUCTION		
APPENDIX B: QUESTIONNAIRES AND RELATED INFORMATION		
APPENDIX C: DATA RESULTS		
APPENDIX D: ADDITIONAL COMMENTS FROM SURVEY RESPONDENTS		
APPENDIX E: SUGGESTED CONTACTS FOR IN-DEPTH INTERVIEWS OR WORKSHOP ATTENDANCE		
APPENDIX F: ADDITIONAL SURVEY RESULTS		

FINAL REPORT

U.S. ARMY CORPS OF ENGINEERS RECREATION STUDY: A SURVEY OF INTERESTED/IMPACTED ORGANIZATIONS

EXECUTIVE SUMMARY

The Greeley-Polhemus Group, Inc. (GPG) was contracted by the U. S. Army Corps of Engineers (Corps) to perform the survey effort of the Corps overall study to identify and evaluate options for operating and maintaining public recreation opportunities at Corps recreation areas. Five questionnaires were developed and targeted towards five representative groups: non-Federal public agencies; Corps concessionaires; resort developers and non-Corps concessionaires; other service providers; and users and conservationists. To implement the survey the telephone technique was used. Approximately 50 percent of GPG's original contact lists resulted in completed surveys. Following is a brief summary of the survey results.

Non-Federal Public Agencies

Over 100 surveys were completed with individuals representing non-Federal public agencies with an emphasis placed on contacting state and county agency personnel. Due to the nature of the groups we contacted with this questionnaire, nearly all of these agencies operate and maintain their own park facilities.

In addition, almost 75 percent of these agencies are interested in acquiring additional land to meet recreation and open space needs. However, with fiscal concerns facing nearly every state and county with whose representatives we spoke, it is unlikely that many will be willing to add new recreation demands to their budgets. When asked if their agency would be willing to cooperate with the Corps in providing O&M at Corps recreation areas, most implied that they would be willing and able, but the lack of available funds would make this approach prohibitive. With total Federal funding as an incentive, however, most respondents felt that their agency would welcome the opportunity.

A cooperative effort between the Corps and a non-Federal public agency would have both benefits and drawbacks. The primary benefits identified by respondents include the ability to provide more recreation opportunities to the public, more efficiency in providing operation and maintenance needs, and a greater responsiveness to local recreation needs. On the other hand, the drawbacks of such an effort discussed by the respondents, focused on the increase in bureaucracy resulting from another layer of government, the lack of state and local funds to be committed to this effort, the lack of a long-term Federal funding commitment, and a conflict of management philosophies between the various agencies.

Corps Concessionaires

A variety of Corps concessionaires were contacted for purposes of this study. A good portion of those contacted were small, privately owned businesses, and all are currently under some type of lease agreement with the Corps to operate their business. Represented were those with full-service marinas, slip and dock rentals, campgrounds, R-V parks, and a few with lodges and restaurants.

Only a few of those surveyed are dissatisfied enough with their relationship with the Corps that they would consider relinquishing or not renewing their lease agreements. However, there are many areas within this relationship which in general many feel needs improvement. The majority of those interviewed have a good understanding of the problems they face, and the possible solutions.

Some of the main concerns include lease agreements, the lack of autonomy, and the direct competition with the Corps confronting some concessionaires. Although the "typical" 20 or 25 year lease agreement is satisfactory, the lease renewal procedures are not. Not knowing until the lease expires whether or not it will be renewed prevents the concessionaire from making capital improvements to his/her operation. At times, "overwhelming" bureaucracy, according to these respondents, and strict government standards imposed by the Corps handicap the concessionaires in their ability to provide the quality of services and facilities they would like. And in other cases, concessionaires find themselves directly in competition with a Corps managed area which they feel is subsidized by their tax dollars.

Resort Developers/Non-Corps Concessionaires

The responses to this questionnaire reflect the attitudes of resort developers and concessionaires towards potential private operation and maintenance of Corps recreation facilities. Approximately half of the surveys represent resort developers, marinas, campgrounds and other services in currently operating public areas.

Four essential elements required for resort/recreation project development on public lands were identified by the majority of respondents. First, prime scenic location was identified by 75 percent of the developers/concessionaires as essential to successful development. Secondly, since private developers would have an underlying profit motive, it is not surprising that 72 percent of the respondents felt that a revenue potential was essential. In addition, 58 percent felt that a long term lease agreement and a financial package were important. And last, fifty-eight percent (58%) of the developers felt that a favorable lease period would be an incentive to induce development. However, tax breaks, grants and government subsidies were not identified as incentives by the majority of respondents.

The respondents identified two disadvantages of development on public lands recurred throughout the surveys: (1) the lack of fee simple (private) ownership of the land, and (2) the bureaucracy and red tape involved with dealing with the government. The overall consensus finds, however, that the resort developers/concessionaires feel that private developers can and should provide operation and maintenance within public recreation areas.

Other Service Providers

This group of survey respondents consists of private campground owners and RV park operators. Very few of them have ever operated their business in any way other than as a private venture; however, fifty-four percent (54%) of them claim that operating near a public recreation area is an advantage to their business. The "draw" provided by the recreation area provides them with a ready-made market. Although this presents a potential economic opportunity to the private business operator, a large portion of respondents claim that government concessionaires or direct government provision of the same services as they provide have taken away the advantage of being located near a public recreation area. Thirty-three percent (33%) responded that government concessionaires were a disadvantage to their operation, and fifty percent (50%) feel the same about direct government involvement.

This claim is largely supported by the response of fifty-four percent (54%) of these providers that the Corps' fee structure prevents them from charging the fees they otherwise could charge. Many of these respondents continue to explain that since Corps and other public agencies are subsidized, there is no need for them to recover costs. The lower fees and charges levied by public agencies certainly attract all of the campers, and they manage to get the overflow customers.

Users/Conservation Groups

The members of this survey group represent a variety of user and conservation groups. Many of those questioned classify themselves as both user and conservationist, and approached the survey from both perspectives.

The survey results indicate that it is quite difficult for the general public to determine which public agency operates a particular recreation area. Generally, it is felt that public agencies provide the most attractive, efficient, and least costly facilities, but which agency and whether or not a private concessionaire is involved often goes unnoticed by the user. In contrast, the majority of respondents suggest that recreation services provided by private providers are of higher quality, though more costly than those provided by the public sector.

Few limitations were placed by these respondents on the type of recreational services and facilities that should be allowed in a public recreation area. Facilities and services which encourage the enjoyment of the natural surroundings were fully supported. On the other end of the spectrum were commercial type resort development projects which are not favored by a majority of users and conservationists; however, resort projects which blend well with the environment and encourage the enjoyment of the out-of-doors were generally approved. The one limitation most often voiced to recreation or resort development of any kind, is that no project should be allowed which would cause significant damage to the environment.

Summary of Major Findings

The general results of the surveys that were conducted for this project are presented here. These findings are based on a review of the response frequency of respondents and are presented as composite reactions of the various interests. These results reflect the perceptions, attitudes, and opinions of a representative sampling of the survey groups.

- o Both state and local public agencies as well as private sector providers of recreation view themselves as capable of and willing to provide recreation services and facilities at Corps areas. However, for this alternative to be implemented, Federal funding would be required by public agencies, and favorable lease arrangements would have to be established with the private sector. The degree of private sector involvement is dependent on the profit potential of the opportunity. For example, providing O&M for "primitive" recreation services, such as hiking trails in wilderness areas, would not be of interest to private sector providers.
- o Users generally are indifferent with respect to the source of operation and maintenance for recreational services and facilities. The quality of O&M provided is more important to them than the public or private sector providers.
- o The user fee policy of the Corps has fostered a competitive situation between the Corps and other providers of similar recreational opportunities. This is acknowledged by a majority of private providers who claim the Corps (and other public providers as well) has undercut their profitability by providing better facilities at lower rates to the user. If the Corps were to increase user fees, they believe, it would not only establish a more equitable relationship between them and other providers, but could also be a source of new funding to cover O&M outlays. (The outcome of this concept, however, would result in reduced recreational opportunities.)
- o Additional bureaucracy resulting from a cooperative arrangement with both the private sector and other public agencies is a universal concern. An added layer of government, such as cooperative Federal and State approach, would most likely increase paperwork, add

regulations, and hinder the overall process. The private sector, more sensitive to the "time is money" concern, prefers dealing with as little government as possible.

- o Although current Corps concessionaires are satisfied with their relationship with the Corps, there are several concerns they would like to have addressed by the Corps. They believe: (1) lease agreement periods should be longer in length or the process of lease renewal should be altered to inform concessionaire in advance if leases are to be renewed. This would allow concessionaires to commit more capital improvements to businesses; (2) Corps standards are too complex and inconsistent to be effectively dealt with by a small business operator. The concessionaires would like more autonomy, allowing them to expand and enhance their operations if it is deemed appropriate; and, (3) generally current Corps policy discourages and hinders expansion and improvement of concessionaire operations.
- o Large-scale providers of recreation (i.e., resort developers and firms providing leisure services) are anxious to explore the possibilities of utilizing their resources to provide recreational opportunities at Corps areas. In order to support and justify capital improvement expenditures, long-term or automatically renewable lease agreements, are essential elements to a cooperative effort with this group of providers. Also essential to them is a large degree of freedom and flexibility to be able to provide what the consumer demands.
- o Users and conservationists are not vehemently opposed to large-scale development of recreation areas; however, most are opposed to commercial-oriented resort/convention centers. A consensus of the respondents agree that allowing a resort development which would encourage the enjoyment of our natural environment would be acceptable. A consensus also states that under no circumstance should a resort development project be allowed to pose a significant threat or danger to the environment or our natural resources.
- o Many state park programs are implementing innovative sources of funding which are proving successful. This would indicate that at least partial alternatives to current Federal funding can be found that are acceptable to taxpayers.
- o The Corps of Engineers is recognized as a key in providing operation and maintenance in many areas, which explains the 82 percent survey response rate. Significant benefits are recognized where the Corps is a catalyst for state funding and a protector of environments.

FINAL REPORT

U.S. ARMY CORPS OF ENGINEERS RECREATION STUDY: A SURVEY OF INTERESTED/IMPACTED ORGANIZATIONS

1.0 INTRODUCTION

The Corps of Engineers (Corps) is currently the second largest recreation management agency in terms of visitor days, in the Federal Government. While this mission has become one of the most politically powerful missions of the Corps, the cost of operations and maintenance (O&M) of these recreation areas has steadily increased. With the continuing need to reduce the Federal deficit and the current administration's policy to preserve open space, it is essential that a balanced approach be established that will be in accord with both of these goals.

1.1 Purpose of Project

The Corps has been directed to identify and evaluate options for maintaining or enhancing the public recreation opportunities at Corps' recreation areas while reducing Federal outlays.

Categories of options to be identified and evaluated include:

- o Involvement by state and local government agencies.
- o Expansion of the participation of concessionaires and private developers in providing recreational facilities.
- o Expansion of user fees or other revenue programs.

Several approaches would be used in collecting the data necessary to identify and evaluate the management options. These approaches would include a survey effort to elicit views and innovative ideas from a wide spectrum of individuals; one-on-one interviews with those known to have valuable information and expertise; literature reviews; and, discussions with other Federal agency providers of recreation.

1.2 Role of The Greeley-Polhemus Group, Inc. (GPG)

The Greeley-Polhemus Group, Inc. (GPG) is under contract to the Corps of Engineers to perform the tasks necessary to complete the organizational survey of the overall information gathering effort. The primary objective of this research is to determine attitudes, opinions, and perceptions of representatives from the various agencies and groups which could be impacted by alternative management strategies or programs.

A frequency analysis of the general trends in the survey findings has been performed. The results of this analysis are discussed in Section 4 of this report. The results are not intended to be a statistical sample, but rather a comprehensive analysis of recurring trends in opinions and perceptions. The results are intended to assist in guiding the Corps in establishing a recreation policy that is compatible to its mission of providing the public with quality recreational opportunities while reducing Federal outlays.

2.0 SURVEY APPROACH

2.1 Use of Telephone Survey

After consideration of possible survey approaches, including the use of telephone and mail, the telephone approach was determined to be the most effective. This decision was made because a telephone survey offered flexibility and would probably produce a higher response rate (successfully completing as many

surveys as possible). The telephone survey could be easily and quickly evaluated and adjusted, if necessary, to achieve the project objectives.

2.1.1 Letter of Introduction

The first step of the survey effort was to send a letter of introduction to each potential respondent prior to being contacted by a member of the survey team. The intent of the letter was to familiarize the potential respondent with the project and to encourage his/her willingness to participate. A copy of this letter is included in Appendix A.

The usefulness of this letter was a function of the amount of time which elapsed between receipt of the letter by the respondent and the telephone survey call. If the call was made within two or three weeks of receipt of the letter, the respondent generally recalled the letter and was somewhat familiar with the project. These respondents generally agreed more readily to participate in the survey. If more than three weeks elapsed, the potential respondent generally did not recall receiving the letter, and although they usually agreed to participate, there was more explanation of the project required during the initial stages of the telephone conversation.

2.2 Development of Questionnaires

It was determined through discussions between GPG and the Corps that five different questionnaires would be necessary in order to get the needed information from representative groups. The questionnaires were developed for the five following target groups:

- o Non-Federal Public Agencies
- o Corps Concessionaires
- o Resort Developers/Non-Corps Concessionaires
- o Other Service Providers
- o Users/Conservationists

The questionnaires were developed with several goals in mind: first, to get an overview of current practices used by non-Federal public agencies and private sector providers of recreation; second, to identify areas of opportunities for joint involvement between the Corps and other providers, or to identify obstacles that could prevent joint involvement; and third, to uncover unique and innovative O&M ideas which others are implementing and could possibly be put into practice at Corps recreation areas. All of these goals are supportive of the objectives established by the Corps for initiating their overall study effort in establishing a "forward looking posture on recreation".

The questionnaires were developed by GPG. Following review, comments and suggestions from Corps' personnel and others were incorporated into the final questionnaires. Comments were solicited from several outside sources, including members of the Interstate Conference on Water Policy (ICWP) and other individuals who were used as a "test" group. A copy of the final version of each questionnaire is included in Appendix B.

The following section describes the contents of each of the five questionnaires.

2.2.1 Non-Federal Public Agency Questionnaire

This questionnaire was used to survey representatives from state and local (i.e. county/municipality) public agencies. Based on an individual's knowledge of an agency's policies and positions and on their own perceptions, the questionnaire attempted to identify an agency's ability, interest and willingness to increase

their involvement in the O&M of Corps recreation areas. The questions also addressed concerns, benefits, and drawbacks that may accompany a partnership between the Corps and a non-Federal public agency.

2.2.2 Corps Concessionaires

The group of concessionaires who provide services to the Corps consists of private providers of recreation who currently lease property and operate their business within Corps recreation areas. The intent of the questionnaire was to identify Corps regulations or policy issues which positively or negatively impact the concessionaire.

2.2.3 Resort Developers/Non-COE Concessionaires

This questionnaire was used to survey developers of resort opportunities and concessionaires affiliated with public agencies other than the Corps. The questionnaire was designed to identify the criteria these business people would require if considering the development or establishment of their facilities or services within a Corps recreation area. It also assisted in identifying any obstacles perceived by a resort developer or non-Corps concessionaire to a relationship with the Corps.

2.2.4 Other Service Providers

Other service providers refers to strictly private operations which provide recreational opportunities. These providers own their business as well as the land on which they operate. Their only connection with a public recreation area may be their location in proximity to one. In this case, the policies and operations of the public area may impact their business. The survey questions asked of this group were used to determine their views. The questions also identified any government restrictions or requirements which would prevent them from seeking a contract to allow them to provide their service in a public area as a convenience.

2.2.5 User/Conservation Groups

Questions for representatives of user groups and conservation groups were designed to determine their perceptions and attitudes regarding the O&M of public recreation areas. Individuals were asked to respond to questions regarding who provides the highest quality, most efficient and least expensive services and facilities. They were also questioned about what types of recreational activities should or should not be allowed in public recreation areas.

3.0 ORGANIZATIONS AND CONTACT NAMES FOR SURVEYS

In order to conduct the survey phase of this project, it was necessary to have available an extensive listing of individuals who potentially would be able to offer their insights into the issues. Because it is the intent of this survey to reveal the perceptions, attitudes, and opinions of individuals representing a broad range of backgrounds, experience, and interests, it was necessary to identify a representative group of agencies and associations which could provide contact names.

Several approaches were used to organize the contact lists. A valuable resource was the Encyclopedia of Associations, which identified numerous organizations representing individuals with interests coinciding with the objectives of this study.¹ Suggested lists of contacts from the Corps were useful, as were

¹Burek, Deborah M., Karen E. Koek, and Annette Novallo (editors). 1990. Encyclopedia of Associations. Gale Research, Inc., Detroit.

professional contacts with whom we spoke. The following discussion provides a breakdown of the source of contact names used for each of the five questionnaires.

3.1 Non-Federal Public Agencies

Representatives of non-Federal public agencies were identified through professional associations and state agency directories. Contact lists were obtained from the following organizations:

- o State Park Directories
- o State Tourism Directories
- o National Association of County Park and Recreation Officials
- o National Association of State Park Planners
- o National Society for Park Resources
- o National Association of State River Conservation
- o Interstate Conference on Water Policy

At least 175 potential contacts were selected from the above lists. The majority of names selected for the non-Federal public agency questionnaire represented state and local park and recreation agencies. Additional names were provided as referrals by those surveyed.

3.2 Corps Concessionaires

Lists of Corps concessionaires were supplied by the Corps. All Corps Districts where concessionaires are used to provide recreation opportunities were represented by these lists. At least 150 names were selected from these lists as contacts for this questionnaire. Additional names were suggested by those who participated in the survey effort.

3.3 Resort Developers/Non-Corps Concessionaires

The majority of contacts representing resort developers were supplied by the American Resort and Residential Development Association. Members from this association are affiliated with major resort development corporations, camp resort operations, and vacation ownership projects.

Non-Corps concessionaire lists were acquired through the National Park Service Directory of Concessioners. Names were randomly selected from this directory as potential respondents with an effort to have a group evenly distributed both geographically and by areas of service.

Although the original list of contacts fell short of a goal of 150, the individuals contacted for this survey effort were adequately representative of resort developers and non-Corps concessionaires.

3.4 Other (Ancillary) Service Providers

A list supplied by the National Campground Owners Association comprised a substantial part of the contact names for the Other Service Providers questionnaire. Additional names were supplied by participants in the survey effort. At least 50 individuals were included in our contact list for this group.

3.5 Users/Conservation Groups

Since associations are very reluctant to give out names of their membership, acquiring names to represent this group proved to be most challenging. As a result, some associations agreed to supply the

names of their officers and directors for inclusion in the survey effort. Groups of users and conservation organizations represented in this study include the following:

- o National Audubon Society
- o National Wildlife Federation
- o Trout Unlimited
- o Winnebago-Itasca Travelers
- o Interstate Conference for Water Policy
- o Natural Resources Defense Council
- o Appalachian Mountain Club
- o National Campers and Hikers Association
- o U.S. Boardsailing Association
- o Upper Mississippi River Conservation Commission

Approximately 150 names were included in the contact lists, representing users and conservation groups.

4.0 FREQUENCY ANALYSIS OF SURVEY RESULTS

From a contact list which was comprised of 698 names, a total of 351 surveys, or fifty-one percent (51%) were completed. An additional 24 telephone calls were completed. However, the results of these calls were not usable in the survey analysis. In these cases either the individual contacted was not willing to cooperate or, the survey was only partially completed. The largest group represented by the completed surveys are the non-Federal, public agencies, with thirty-four percent (34%). The complete breakdown of survey completion is as follows:

	<u># of Surveys Completed</u>	<u>% of Total</u>
Non-Federal Public Agencies	121	34 %
Corps Concessionaire	93	27 %
Resort Developer/ Non-Corps Concessionaire	36	10 %
Other Service Providers	24	7 %
Users/Conservation Groups	<u>77</u>	<u>22 %</u>
TOTAL	351	100 %

Although the non-Federal public agencies and Corps Concessionaires have greater representation in the survey effort, this should not be construed as an unwillingness or uncooperativeness within the ranks of the other groups. Primarily the difference is a function of two factors: first, an emphasis placed on acquiring responses from these two groups, and second, a greater volume of available contact names. The tabulation below is a summary of the contact lists, number of completed calls, and an approximate number of telephone calls required to complete the survey effort, for each of the five questionnaires.

SUMMARY OF CONTACT LISTS/COMPLETED SURVEYS

	<u>Original Contact List</u>	<u>Completed Surveys</u>	<u>Unwilling/ Not Usable</u>	<u>Not Available</u>	<u>Approx.No. Phone Calls</u>
Non-Federal Public Agency	209	121 (58%)	4 (2%)	84 (40%)	382
COE Concessionaires	197	93 (47%)	8 (4%)	85 (43%)	492
Resort Developers/ Non-COE Concessionaires	85	36 (42%)	4 (5%)	45 (53%)	139
Other Service Providers	54	24 (44%)	2 (4%)	28 (52%)	72
Users/Conservation Group	<u>153</u>	<u>77 (51%)</u>	<u>6 (3%)</u>	<u>71 (46%)</u>	<u>299</u>
Total	698	351 (51%)	24 (3%)	323 (45%)	1,384

The remainder of Section 4 is a summary of the frequency analysis performed on the survey results. These data are presented in detail in Appendix "C" of this report.

4.1 Non-Federal Public Agencies

4.1.1 Characteristics of Response Group

A total of 121 surveys have been completed with individuals representative of various non-Federal public agencies. State and county officials comprise the largest portion of this population. A breakdown of the number of respondents from each agency type is shown in Table 4-1.

TABLE 4-1
RESPONSES BY AGENCY TYPE

State Agencies	80
County Park & Recreation Dept	37
Regional Park Department	1
Academic Community	2
Other Federal Agency	<u>1</u>
Total Responses	121

The largest group of survey respondents, state agency personnel, come from a variety of backgrounds, including directors of state park and recreation agencies, state tourism personnel, and those affiliated with departments of environmental resources or protection. All but four directors of state park systems are represented in the survey results. Most of these individuals took the time to complete the survey themselves, and in other cases assigned a member of their staff to complete the survey. Two of the four states not participating in the survey have no Corps recreation areas in their states; the other two did not respond to numerous telephone calls.

Fifty percent (50%) of the agencies represented currently lease land from the Corps for recreation or open space purposes. Due to the nature of the groups contacted, nearly all of these agencies operate and maintain their own park facilities. Nearly seventy-five percent (75%) of these agencies are interested in acquiring additional land to meet recreation and open space needs. Ninety-three respondents felt their agency would like to acquire these additional lands through purchase. However, sixty-two said they would be interested in a lease arrangement as well.

4.1.2 Impact of Corps Fee Policy on State/Local Fee Policy

Currently, the Corps primarily charges fees only for camping facilities at its recreation projects. Concern has been expressed that this policy has hindered the ability of state and local park agencies to levy entrance fees or user fees at recreation areas in close proximity to a Corps area. When asked about this situation, only ten percent (10%) responded that the Corps' policy did adversely affect their ability to charge the fees they would like to charge. Although this is a low percentage, these individuals felt strongly about this "unfair" situation. Follow-up remarks often referred to the element of competition which now exists between the agencies. One state agency official stated that they can definitely attribute the decline in use of one of their parks to the fact that they charge fees and the Corps does not.

4.1.3 Constraints in the Management of Public Recreation Areas

The survey results indicate that there are very few legal, financial, or philosophical constraints that govern the management of recreation areas provided by state or local agencies. Eighty-two percent (82%) of the agencies, while ultimately responsible, are able to use private contractors to provide operation and maintenance needs at their facilities. Similarly, seventy-eight percent (78%) can, and many do, use private concessionaires to provide recreational opportunities.

Even though sixty percent (60%) of those surveyed acknowledge no legal, financial, or philosophical constraints within their agencies preventing them from developing resort facilities within their public recreation areas, very few are considering the development of a resort project. This is largely due to concern over public attitudes regarding this type of project. A recent study performed by the Pennsylvania Department of State Parks documents this public concern in that state. Twenty percent (20%) of the agency personnel surveyed feel that their agency has philosophical constraints to allowing resort developments within their state park system.

The collection of fees and charges has become an acceptable approach to funding operation and maintenance needs within state and county park systems. Sixty-five percent (65%) of the responses claim no constraints to the use of fees and charges. Another twenty-three respondents, or nineteen percent (19%), mentioned legal constraints to the practice of charging fees. In a majority of cases these constraints refer to the procedure used in raising fees, or to laws which provide that the fees collected must be placed in a fund for the operation and maintenance of park and recreation needs. This would indicate that a much larger percentage than the 65% do have the ability to charge fees to the public for use of recreation areas.

4.1.4 Willingness to Participate O&M

Table 4-2 indicates the areas which the respondents felt that their agencies would be willing to participate in Federally-owned recreation projects. It should be explained that the survey participants were asked to give their professional opinion to this question, and not try to guess their agency's "official" response. One percent (1%) of the respondents felt that this question was not applicable to their situation.

TABLE 4-2
WILLINGNESS TO PARTICIPATE IN
FEDERALLY-OWNED RECREATION AREAS

	<u>Yes</u>	<u>No</u>	<u>Don't Know</u>
o Technical Assistance	82 %	13 %	4 %
o In-Kind Services	66 %	23 %	10 %
o Partial Financial Responsibility for O&M	52 %	39 %	8 %
o Take over O&M in Accordance with Corps standards	52 %	34 %	13 %
o Complete control of O&M	50 %	39 %	10 %

It is clear in the above table that the willingness to participate in joint ventures with a Federal agency begins to decline when funding becomes an issue. The sharing of technical assistance and in-kind services is much more acceptable to the respondents than the actual outlay of funds. Repeatedly these representatives of state and local agencies emphasized their need for more budget allocations in order to meet the current operation and maintenance demands within their existing park system.

This also explains why the greatest incentive to encourage further participation in the O&M of a Federally-owned recreation area by a state or local agency is money. Eighty-two percent (82%) of the respondents felt that if their agency could operate an area at less cost, and they would be given total Federal funding to cover their costs, then it would make sense and they would be willing to participate in the O&M.

Additional incentives that were suggested to respondents and the results of their replies are provided in Table 4-3.

