

U.S. Fish & Wildlife Service

# Visitor Services Standards

*A Handbook for Evaluating  
Visitor Services Programs*

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# Introduction, Standards, and Using the Handbook

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*605 FW 1.2A—“The overarching goal of our wildlife-dependent recreation policy is to enhance wildlife-dependent recreation opportunities and access to quality visitor experiences on refuges while managing refuges to conserve fish, wildlife, plants, and their habitats.”*

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## Introduction

A regular and consistent visitor services program evaluation is vital toward determining the strengths and weaknesses of ongoing visitor services programs in the field and developing a visitor services program for the future. Putting together a knowledgeable evaluation team, gathering the proper information, and asking the most effective evaluation questions will help you develop an organized plan for creating a successful and progressive visitor services program.

*Visitor Services Standards—A Handbook for Evaluating Visitor Services Programs* is a valuable tool for evaluating U.S. Fish and Wildlife Service (Service) visitor services programs. This handbook is written specifically for visitor programs on national wildlife refuges, but can be adapted for visitor programs on other Service lands. This handbook will help you:

- Learn how to put together an effective evaluation team, gather the essential materials and information for the evaluation process, and determine the most useful questions for maximizing your evaluation; and
- Determine how to most effectively use the information generated from your evaluation to improve both your visitor services program and your ability to obtain funding to support your program.

## How the Handbook Is Organized

- Introduction, Standards, and Using the Handbook
- The Evaluation Process: Tips and Techniques
- Questions that Guide the Evaluation: General, the 10 Standards, and Other Uses

## Purpose of a Visitor Services Program Evaluation

Over the years, visitor services programs can become out-of-date and lackluster without anyone becoming aware of the situation. Perhaps the schools in your area no longer focus on birds in their 5th grade curriculum, so they don't see a reason to visit the refuge each year. Perhaps the local community is no longer interested in the same activities that you put together for your National Wildlife Refuge Week event year after year. Within the Service, changes in policy and management practices can quickly make your program out-of-date.

A visitor services program evaluation encourages you to look at your program critically and determine needed changes and how to execute those changes. Through the use of other experts in the field of visitor services, you can gain a fresh perspective that will breathe new life into your visitor services program.

### **What is the Policy?**

The National Wildlife Refuge System Improvement Act of 1997 states that “compatible wildlife-dependent recreation is a legitimate and appropriate general public use of the System.” *Chapter 605 FW 1, General Guidelines for Wildlife-dependent Recreation* states that, “The overarching goal of our wildlife-dependent recreation policy is to enhance wildlife-dependent recreation opportunities and access to quality visitor experiences on refuges while managing refuges to conserve fish, wildlife, plants, and their habitats.” Both documents encourage quality wildlife-dependent recreation opportunities on refuges.

*Chapter 603 FW 1.3A, Appropriate Refuge Uses*, states, “As defined by the National Wildlife Refuge System Improvement Act of 1997 (Improvement Act), the six wildlife-dependent recreational uses (hunting, fishing, wildlife observation, photography, environmental education, and interpretation) are determined to be appropriate. However, the Refuge Manager must still determine if these uses are compatible” (see *Chapter 603 FW 2, Compatibility*). Thus, as stated above, the Refuge Manager determines if the six wildlife-dependent recreational uses are compatible and whether to prohibit or modify their use.

Attachment 1 lists the relatively new policy and Director’s Orders that establishes clear wildlife-dependent recreation policy. This handbook provides guidance toward implementing these policies.

### **The Ten Visitor Services Program Standards**

Our policy establishes 10 visitor services standards that, when appropriate and compatible, should be a part of most national wildlife refuge visitor services programs throughout the country. Service employees, volunteers, concessionaires, and others should conform to these standards when planning, conducting, and evaluating visitor services activities, and when developing and maintaining visitor services facilities on national wildlife refuges. While staffing, funding, and the opportunities to enjoy a variety of wildlife-dependent recreational activities will vary from field station to field station, we should meet the visitor services standards whenever possible.

Following are the 10 visitor services standards. You can find this list and their definitions in *605 FW 1, General Guidelines for Wildlife-dependent Recreation*.

- Standard 1. Develop a Visitor Services Plan
- Standard 2. Welcome and orient visitors
- Standard 3. Provide quality hunting opportunities
- Standard 4. Provide quality fishing opportunities
- Standard 5. Provide quality wildlife observation and photography opportunities

- Standard 6. Develop and implement a quality environmental education program
- Standard 7. Provide quality interpretation of key resources and issues
- Standard 8. Manage for other recreational use opportunities
- Standard 9. Communicate key issues with off-site audiences
- Standard 10. Build volunteer programs and partnerships with Friends organizations

The questions used in the visitor services evaluation center around these 10 visitor services standards. Later in the handbook, you will find each of these standards and the associated evaluation questions that were created to determine how well your station meets each standard.

While these 10 visitor services standards are the foundation of a visitor services program on a field station, there are many other elements to a visitor services program that are also important. Through this handbook, we also evaluate the following:

- Recreation Fee Program
- Concessions
- Commercial uses
- Wilderness

The 10 standards and other elements are not listed in priority order. Wildlife-dependent recreational priorities will vary from one field station to another.

### **What is a Quality Visitor Services Program?**

A good visitor services program stems from quality wildlife-dependent recreation. We have defined the components of quality wildlife-dependent recreation in *605 FW 1.6*. This section of the policy also states that the Service should “develop our wildlife-dependent recreation programs in consultation with State fish and wildlife agencies and stakeholder input...” Involvement of our partners and constituents in the development of wildlife-dependent recreation programs at our field stations can increase the quality of and support for these programs.

Policy (*603 FW 1.6D 1-11, and 605 FW 1.6A-K*) defines the criteria you use to determine a quality recreational experience. All recreational activities taking place on a national wildlife refuge should meet the quality criteria below. You should also keep these criteria in mind as you evaluate your visitor services program.



*Quality Recreational Experiences*

Following are the criteria we use to determine a quality recreational experience.

- a) Promotes safety of participants, other visitors, and facilities;
- b) Promotes compliance with applicable laws and regulations and responsible behaviors;
- c) Minimizes or eliminates conflicts with fish and wildlife population or habitat goals or objectives in an approved plan;
- d) Minimizes or eliminates conflict with other compatible wildlife-dependent recreation;
- e) Minimizes conflicts with neighboring landowners;
- f) Promotes accessibility and availability to a broad spectrum of the American people;
- g) Promotes resource stewardship and conservation;
- h) Promotes public understanding and increases public appreciation of America's natural resources and our role in managing and protecting these resources;
- i) Provides reliable and reasonable opportunities to experience wildlife;
- j) Uses facilities that are accessible and blend into the natural setting; and
- k) Uses visitor satisfaction to help define and evaluate programs.

**Guidelines for Using the Handbook**

The *Visitor Services Standards Handbook* was written so that people with varying skill levels can use it. Depending on your experience with evaluating visitor services programs, you may need to read the entire handbook or just reference the questions for each of the standards. Regardless of whether you're a novice or an expert, all of the guidelines you need to properly evaluate a visitor services program are in this handbook.

As you read the handbook, you will see that not all of the standards or the evaluation questions are applicable to all field stations. We encourage you to customize a series of evaluation questions based on the needs of the station you are evaluating.

In an effort to avoid redundancy, we have placed information and questions common to many of the visitor services standards into one section titled, "General Section." You can start with this section, or save it for later in the evaluation.

# The Evaluation Process: Tips and Techniques



## The Keys to Success

The keys to a successful visitor services program evaluation are the people involved, the knowledge and experience they bring to the process, and their ability to communicate throughout the evaluation. It is important to ask the right questions, and then work with your evaluation team to find the solutions to any problems or issues. Some problems and issues will require further planning. Others may be addressed in a future Visitor Services Plan or Comprehensive Conservation Plan. A well-conducted visitor services program evaluation will not only help identify the strengths and weaknesses of the visitor services program, but will also you capitalize on the strengths and eliminate weaknesses of your program.

Careful evaluation and planning of your visitor services program provides visitors with the maximum opportunities to enjoy and appreciate fish, wildlife, plants, and other resources at your field station. As a result, visitors will develop an understanding of, and appreciation for, their role in the conservation of our nation's fish and wildlife resources.

## Guidance and Tips for Conducting a Visitor Services Program Evaluation

This section provides the details necessary for putting together your evaluation team and conducting a visitor services program evaluation. If you have conducted an evaluation before, you may want to skim this section and move on to the review questions starting on page 11.

Feel free to modify the evaluation process described below to accommodate differences in the visitor services program at your field station. However, we recommend that you pay special attention to the makeup of the evaluation team, the questions being asked, and the solutions and recommendations provided for each issue discussed.

### *The Purpose and How Often*

- The purpose of the visitor services program evaluation is to determine the future direction of the field station's visitor services program, not to dwell on mistakes made in the past. Focus on the positive. Look at what you have accomplished and then what you can do to leverage those accomplishments and create a more effective visitor services program.
- To keep your visitor services program up-to-date and in line with current policy, you should formally evaluate your visitor services program every 10 years. Consider conducting self-evaluations more frequently.
- Policy (605 FW 2 and 605 FW 3) requires field stations to evaluate hunting and fishing programs annually; you can evaluate all other programs "regularly."

### *The Evaluation Team*

The evaluation team can be made up of any combination the following:

- Project Leader
- Visitor services professionals from the station being evaluated and/or other stations
- Other interested staff from the station being evaluated and/or other stations
- Regional Office visitor services professionals
- Friends Group representatives or volunteers
- Community members
- Staff from Federal, State, or local agencies, tribes, and other such partners

Whenever possible, Regional Office visitor services program staff should be involved in your evaluation. The Regional Office staff bring a broad scope of experience and a Regionwide, or sometimes even nationwide, perspective to the evaluation. In addition, when the Regional Office staff become familiar with your visitor services program, they can become an advocate for your program when there are opportunities or questions about funding, staffing, or other matters related to your program.

The Project Leader should be involved in as much of the evaluation as possible. Without the support and understanding of the Project Leader, any future plans for the visitor services program could potentially struggle or fail.

To get the best evaluation of your program, be sure to invite people who are fairly unfamiliar with your station to join the team. These individuals will bring fresh eyes and a new perspective to the team.

### *Preparation Tips for Evaluators*

To conduct a successful visitor services program evaluation, you should obtain as much information about the field station as you can before your visit. We recommend you collect the following information, at a minimum:

- *Review the Refuge Annual Performance Planning (RAPP) database*—The RAPP database will allow you to see visitation figures and visitor use trends at the station. You can also see if the station has partnerships with Friends Groups, if they have a volunteer program, and view data regarding welcoming and orienting visitors. How many people visit this refuge, and has this number grown or decreased over the years? What kind of activities do visitors participate in the most? What are the trends in the volunteer hours and numbers? Pull this data for the last 3 years or so.



- *Refuge Operating Needs System (RONS) and Service Asset Maintenance Management System (SAMMS) data*—Review the projects listed in these databases to determine the needs and priorities for the station’s staffing, facility, and maintenance. Find out what they feel they need in the area of visitor services.
- *Real Property Inventory (RPI)*—Your Regional Facility Management Coordinator can provide you with a wealth of information about the on-the-ground facilities (over \$50,000 annual budget at any given field station), including lists of visitor services-related facilities and their condition. Most Regional Facility Management Coordinators have been to the majority of the field stations in your Region and may be able to provide more information about facility conditions and use, or problems they have seen with the facilities, such as accessibility issues.
- *Comprehensive Conservation Plan (CCP)*—This document provides the basic road map for all management at the field station, including the visitor services program. Some stations have not completed a CCP at their station yet.
- *Refuge-specific publications and Web site*—Review any available refuge-specific publications to familiarize yourself with the refuge and the current visitor services programs and regulations. Also note the quality of the publications and if they have been produced in the Service graphic standard. The refuge’s Web site should also provide a lot of up-to-date information.
- *Refuge or Area Maps*—Review any maps of the refuge or general area that you feel will help you understand the refuge layout, the location of the local communities, or the road system that leads to the refuge.
- *Refuge Annual Narratives*—These narratives provide an excellent overview of all the refuge programs and activities throughout the years. (*Note: many refuges no longer produce Refuge Annual Narratives, or the narratives may not be up-to-date.*)
- *Budget information*—It might be helpful to view the refuge’s budget to understand how much money they receive each year, how much is discretionary, and where the money comes from (i.e., all 1260 funds, or do they receive other funds such as Duck Stamp funds, construction funds, etc.)?
- *Visitor Facility Enhancement (VFE) funds or other special visitor services funds*—Did this station receive VFE funds or other special funds to be applied to visitor services projects? If so, review the planned use of these funds and the status of the projects.
- *Organizational charts and staffing plans*—Review current organizational charts and determine how many staff are dedicated to visitor services versus working on visitor services as a collateral duty.

- *Additional data/information to gather (if available) prior to the review:*
  - Current and projected demographics
  - Other public recreational opportunities in the area
  - Regional or State projections of public use for the area

In addition to gathering all this information, provide the *Visitor Services Standards Handbook* to the field station staff in advance so the staff can prepare for the evaluation.

### *The Evaluation Process—Tips*

- A visitor services program evaluation typically takes 2-5 days on site, depending on the size of the station, the size of the visitor services program, and the number of issues that need to be discussed.
- Orient the team:
  - To properly begin the evaluation, be sure to explain the entire evaluation process to your evaluation team.
  - Describe what the evaluation will entail, what you would like to see while at the station, and who you would like to have involved in the process and when you will need them.
  - Explain the final report that you and your team will produce, and the expectations of the field station staff for follow-up after the evaluation (e.g., entering information into databases, actively pursuing visitor services funds and grants, etc.)
- Make sure that the evaluation team, and particularly those on the team who are also field station staff, understand that it is not the team's intent to point out all the things that are wrong with the visitor services program. Their job is to work together as a team to improve the program.
- Unless the team is fully familiar with the field station, after orienting the team, take the team members on a full tour of the field station so the team members can see the existing facilities and understand the public use patterns, activities, and issues occurring at the station.
- During the tour and at other times during your station visit, take photos to document the status of facilities, signs, and other features at the time of your visit. The photos will help you remember details when writing your report at a later date.
- After the field station tour, much of the rest of the evaluation will take place at the field station office through discussion sessions based on the questions in the next section of this handbook.



- After completing the evaluation and before leaving the field station, hold a closeout meeting with the field station staff and your evaluation team. Review important concerns and action items, and clarify what the Project Leader will receive as documentation of the evaluation, and by when. It is important that the Project Leader attend this meeting, if possible.
- Some of the evaluation questions in the handbook are “yes/no” questions. To keep the handbook simple, we did not include additional leading questions. As the evaluator, you should determine if you need to ask additional questions to explore any particular topic further. The handbook is a guide, and as the evaluator you can add to or remove topics and questions.

### *Other Important Points to Remember When Conducting the Evaluation*

- *Scheduling your visit.* Schedule your visit when key staff are available and can focus on the evaluation. If possible and convenient for the refuge staff, try to schedule your visit during a peak visitation period so you can observe visitors using the refuge.
- *Listen carefully to the field station staff.* Listen to the station staff to learn about the visitor services program from their perspective. Take the time to learn about the history of the visitor services program and how the visitor services staff got to the point that they are today. Try to understand the station’s current constraints. Try to grasp who their audiences are and the kind of visitors they work with on a day-to-day basis. Keep an open mind and work together to develop the best set of recommendations for future improvement.
- *Use a visitor’s perspective.* Try to evaluate the field station from the eyes of a first time visitor: Could you find your way from the local town to the field station with only the maps and directional signs that visitors have at their disposal? Were you properly oriented when you entered the station so that you understood where to go and what you can do? Do you feel welcome? Do the facilities look dated and worn, or fresh and new?
- *Make sure that interpretation and environmental education programs have a well-defined purpose.* Many people fall into the trap of making interpretation and environmental education programs fun, but with no real purpose or intended message. Make sure that the interpretive and environmental education programs are addressing resource and management issues, and helping the visitor understand and appreciate these issues. Make sure the environmental education programs address State and local educational standards and meet the needs of teachers in the local community.
- *Take a tour on your own.* If there is time, tour the field station without the station staff along. This gives you a chance to see if you can find your way around the field station without an escort, and you’ll have time to evaluate the field station facilities on your own. It also gives you another opportunity to observe visitors and their actions.

- *Take careful notes; record your visit.* By taking careful notes, taking photographs, drawing diagrams, and recording observations, you will create a more accurate and helpful final report.

### *The End Result of the Evaluation—What To Do with All This Information*

- The end product of the visitor services program evaluation will be a written report indicating the findings of the evaluation and recommended actions. The team should send the final report to the Project Leader and the Refuge Supervisor. This report can be generated while the evaluation team is in the field, or it can be written after the team returns to their offices. If possible, include some of the photos taken during your evaluation.
- If you are unable to complete the final report during your visit, be sure to provide it as soon as possible so that it continues to be of help to the field station staff. Allow time for the Project Leader to review a draft and comment before you finalize the report so that there are no surprises or inaccurate information.
- If the station staff have not yet completed a CCP, then all appropriate information, recommendations, and action items noted as a result of the visitor services program evaluation should be incorporated into the CCP process and later, the CCP itself.
- If a Visitor Services Plan (VSP) does not exist, staff should write a new VSP after completing the CCP. The VSP should include the appropriate visitor services-related information from your evaluation, in addition to recommendations and action items from this review. (See the VSP policy—605 FW 1 1.3D.)
- The Project Leader should ensure that appropriate action items and visitor services projects the team identifies through this evaluation (and supported by the CCP or VSP) are added to the SAMMS and to the RONS databases for future funding.

# Questions that Guide the Evaluation: General, the 10 Standards, and Other Uses





# General Section

*Issues common to many of the visitor services standards and programs*

## Policy and References

605 FW 1.2B

*“Our general policy is to provide a broad spectrum of visitors with quality wildlife-dependent recreational opportunities. To accomplish this policy, we ensure consistency and professionalism in planning and implementing wildlife-dependent recreation programs in the Refuge System.”*

References:

- U.S. Fish and Wildlife Service Sign Manual
- U.S. Fish and Wildlife Service Graphic Standards
- Visitor Estimation Handbook

## Background

Shortly after the visitor services evaluation process begins, it becomes apparent that there are common ties or common elements for almost every activity within the visitor services program. These common elements include the facilities where the activities take place, the tools used for communication, the roads used for transportation, and much more. In an effort to decrease redundancy during the evaluation, we have incorporated these common elements and the associated evaluation questions into this “General Section.” When asking the questions in this section, be sure to keep all related visitor services activities in mind.

All aspects of your visitor services program should be accessible, whenever possible. This includes interpretive and education programs, facilities, publications, hunting and fishing programs, and more. We recommend formal training in accessibility for visitor services and other refuge staff. See Attachment 2 for a list of accessibility resources that may be helpful when making your programs and facilities accessible.



### Evaluation Questions—General Section

#### *Vision, Goals, Objectives, and Messages*

- List the purpose(s) of the refuge.
- What is the vision statement for the refuge?
- What are the resource management objectives for your field station?
- What are visitor services-related goals for each of the wildlife-dependent recreational uses? Where are these goals articulated (e.g., the Comprehensive Conservation Plan (CCP))?
- What are the visitor services-related objectives for each of your visitor services goals?
- How do these visitor services objectives support the resource management objectives for your field station?
- What changes would you like to make, if any, to the visitor services-related objectives or strategies?
- How are the messages in your various visitor services programs tied to the resource management objectives or issues?

#### *Visitation Numbers/Data*

- How do you collect visitation information? Are you familiar with the Visitor Estimation Workbook? If so, which of the methods outlined in the handbook do you use for estimating visitor numbers? (See Attachment 1 for information regarding where to find this workbook).
- How many total visitors does your field station host annually?
- What are the visitation trends over the last 5 years—have visitor numbers gone up or down, or stayed the same? If visitation trends have changed, what has caused these changes?
- What visitor services activity(ies) gets the highest visitor use (e.g., hunting, wildlife observation, etc.)?
- What visitor services activity(ies) gets the lowest visitor use?
- What visitor services-related activities are being duplicated in the surrounding area, and how do these activities affect visitation at the refuge?

#### *Visitor Demographics and Audiences*

- Have the demographics in your area changed recently, thus, changing your target audience?
- Who are the target audiences for each component of your visitor services program?
- What are the ethnic and cultural backgrounds of your participants?
- Does the information provided to your participants need to be in different formats or languages to better meet their needs?
- Who are the nontraditional or underserved audiences in your community?

- What changes could be made to your visitor services program to reach out to these audiences?

*Field Station Staff*

- How many permanent staff are at your field station?
- List names and official titles of all full time visitor services staff.
- Of the permanent staff that are not full time visitor services staff, how many assist with visitor services activities for the field station? List some examples of non-visitor services staff assisting with visitor services activities. What are some ways that the entire refuge staff could become more involved in visitor services activities?
- How many temporary staff conduct or participate in visitor services activities for the field station on a regular basis? How many volunteers do so?
- How many additional staff are needed at this station to meet the visitor services-related needs? What would their responsibilities be? What are the constraints that are keeping you from hiring these staff?
- What kind of visitor services-related training have the staff and volunteers had? What kind of training is still needed for any of the staff or volunteers?
- Do supervisors at the field station support the staff taking visitor services-related training?

*Law Enforcement*

- List all Law Enforcement Officers and Dual-function Officers on staff.
- Describe the working relationship between visitor services and law enforcement personnel at the refuge.

*Partners that Support the Visitor Services Program*

- Other than your formal Friends Group, who do you partner with to accomplish visitor services goals and objectives?
- What role do these partners play to help you achieve these goals and objectives? What type of support do they provide?
- What type of agreements, if any, do you have with these partners?
- Have the refuge staff that work with partners taken appropriate training related to the ethics and conduct of working with partners?
- What kind of challenges or conflicts have you had when working with partners, and how did you overcome or solve them?
- Are there other organizations you should be partnering with? What do you need to form these partnerships?

*Signs—General*

- Has anyone at the station conducted a sign inventory, perhaps as part of a road inventory?
- If a sign plan or inventory has not been conducted, how do you determine the deficiencies of your sign program or decide when it is time to replace or maintain your signs?
- What percentage of the signs and kiosk panels on the refuge need to be replaced (excluding boundary signs)?
- Have you put a work order into SAMMS and tagged it as a Visitor Facility Enhancement (VFE) project to get funding for sign replacement?
- Are the sign components compatible with the surrounding landscape materials and building materials?

*Entrance Signs*

- Are all entrance signs well-maintained, properly located, and in accordance with the Service Sign Manual or Director’s Order 120?
- If the entrance signs do not meet the Service standard or need to be replaced because of wear, what are the plans for replacement of these signs?

*Boundary Signs*

- Are refuge boundaries surveyed and properly marked?
- Are the boundary signs properly maintained?
- Where they should be, are the boundary signs clearly visible to the visitor?
- Is the use of alternate signs, such as open and closed area signs, appropriate and correct?
- Are the boundary signs consistent with the guidelines in the Service Sign Manual?

*Directional Signs*

- Are directional signs on the refuge logically located so they provide visitors adequate time to make decisions while driving at recommended speeds?
- Are the directional signs produced in compliance with Service Sign Manual standards?
- Are directional signs posted as required by the Federal Highway Administration’s Manual on Uniform Traffic Control Devices (MUTCD)?
- If the answer is “no” to any of the above questions, what are the plans to correct the situation?
- Are directional signs that are located off-refuge in the proper locations to effectively direct visitors to the refuge, keeping in mind that there are often many ways to get to a refuge? If not, what are the plans to correct this situation? (*Reminder: Directional signs off-refuge should be installed by the local Department of Transportation, not by the refuge staff.*)

*Roads and Parking*

- Are all public roads well-maintained and properly marked with traffic control signs (see the Service Sign Manual and MUTCD ([mutcd.fhwa.dot.gov](http://mutcd.fhwa.dot.gov)))?
- If any of the roads are not all-weather roads or become unsafe during inclement weather, is this information communicated to visitors in some way? If so, how?
- What changes can be made to the refuge road system to provide the best routes and safest public access, while at the same time minimizing negative affects of vehicle traffic on wildlife?
- Are all parking lots properly sized and located for the appropriate visitor uses? What changes need to take place?
- Is adequate accessible parking provided in all of the proper locations? What changes need to take place?

*Regulatory Information*

- Are regulations adequately communicated with visitors at your station? If not, what information is missing?
- What methods (publications, signs, etc.) are used to communicate regulatory information to the visitor? Are these methods effective for communicating this information?
- Is it clear where visitors can go or who they can contact to ask questions related to regulations or to report problems or violations?
- Are the regulations, no matter what format is used for communication, up-to-date, easy to understand, and worded in a positive manner, or do some changes need to be made?
- Is the language used for regulation information consistent from one product to another? (e.g., Does the language read the same on your Web site as it does in your hunting and fishing regulations?)
- Based on the demographics of your visitors, does this information need to be provided in languages other than English?
- Are the regulations available in other media for visitors with visual impairments or hearing impairments?

*Facilities*

- At least one set of restrooms should be available to the public after the refuge office is closed for the day. Are any restrooms available to the public after regular office hours? If not, what are the plans to make them available if needed?



*Facilities Information Continued:*

Fill out the facilities information table below for each visitor use (i.e., hunting, fishing, environmental education, interpretation, wildlife observation, wildlife photography), as per the heading for each column. If your station has completed a Comprehensive Condition Assessment (CCA), use the information collected in the CCA to fill out the table below. (Use additional pages, if needed.)

**Table 1. Visitor Facilities Status**

Visitor Use (e.g., hunting, wildlife observation, etc.)	List the facilities that support each visitor use by name and location	List any changes needed to make this facility accessible	List any changes needed to make this facility safe (e.g., OSHA issues)	List overall maintenance needed for this facility within the next few years	List additional facilities that you would like to construct to support this visitor use.
<b>Example: Hunting</b>	Duck blind on Mallard Pond	Change stairs leading into the blind to a ramp and widen the door	None	Roof will need replacement	One additional accessible duck blind on Pintail Pond

*Publications*

- All general brochures should contain the following basic information:
  - 1) Welcome and orienting,
  - 2) Refuge background and resource management,
  - 3) Important regulations,
  - 4) Information about permitted visitor services activities,
  - 5) A refuge map with visitor services facilities noted,
  - 6) Accessible program and facilities information, and
  - 7) Field station contact information, including field station phone numbers.
- What methods are being used to get publications to visitors who need them, and what other tools or ideas could be implemented to get the information disseminated more effectively?
- Beyond the existing publications, what other publications are needed at this station to communicate refuge information to visitors?
- What are the plans to provide the information contained within the existing or future publications in an accessible format (e.g., the auto tour information could be made into an audio tape; the general leaflet could be published in a large print format, etc.)?
- Do all publications (e.g., brochures, flyers, posters, announcements, etc.) include language addressing accommodations that will be made for people with disabilities (i.e., “If you have specific needs, please contact...”), as well as a declaration statement (i.e., “Equal opportunity to participate in and benefit from programs and activities is available...”)?

*Publications Continued*

- Fill out the publication status table below for each type of publication you have produced at your field station as per the heading for each column. (Use additional pages, if needed.)

**Table 2. Publication Status**

Publication Type (e.g., general brochure, hunting brochure or tear sheet, wildlife list, etc.)	When was this publication last updated?	List changes needed to update the information contained in the publication (e.g., maps, text, etc.)	Does the publication fully meet the Service Graphic Standards, and if not, what changes are needed?
<b>Example: General brochure</b>	2008	Update refuge boundary and make auto tour route changes on the map	Fully meets the Graphic Standards

*Communications*

- Who are your target audiences? What types of communication do your target audiences respond to the best?
- Do you have a field station Web site? Does it meet current Service Web Standards? How often is it reviewed and updated? Do you find it to be a successful means of communication? Is your Web site Section 508 compliant for accessibility ([www.section508.gov](http://www.section508.gov))?
- How do you market your Web site so that the public is aware of it? Are these means of marketing effective?
- What other forms of communication do you use to regularly communicate with the public (e.g., newspaper articles, field station dedicated radio frequency, etc.)? Are these effective? Are there other methods that you should implement to reach you intended audience(s)?

*Special Events (on-site)*

- What kind of on-site special events do you offer? What is the purpose and objectives of each of these events, and how do the events relate to the resource management objectives?
- Based on the purpose and objectives, how do you measure the success of the events?
- Who do you partner with to support these events? Are there other non-traditional partners we need to consider (i.e., medical community)?
- Should some of the events currently being offered be changed or discontinued?
- Are there other on-site special events that could be offered? What additional support do you need to offer other events or to make changes to current events?
- How do you make these special events accessible (programmatically and physically)?

*Audio-visual Programs*

- Is there a site-specific audio-visual program designed to welcome and orient visitors? If not, is such a program needed at this facility, and what are the plans to develop one?
- Does the existing program look and sound professional, and is it up-to-date?
- Is the information in the program engaging, does it provide appropriate Service and Refuge System messages, and is it written and produced at an appropriate level for the audience?
- Is the existing program open captioned for those with hearing impairments, or are other services provided to assist those with hearing impairments when viewing the program?

*Appropriate Use and Compatibility*

- Have appropriateness findings and compatibility determinations been completed for all visitor services activities on the refuge and their associated facilities, structures, and improvements? If so, please list and provide their date of completion.
- Review each of the appropriateness findings and compatibility determinations to ensure that they have been properly completed and address all of the visitor services activities and facilities at the station.

*Other*

- Have unmet program and facility needs been included in the Service Asset Maintenance Management System (SAMMS) and/or the Refuge Operations Needs System (RONS) databases?



# Standard 1. Develop a Visitor Services Plan

## Policy and References

605 FW 1.2A

*“The overarching goal of our wildlife-dependent recreation policy is to enhance wildlife-dependent recreation opportunities and access to quality visitor experiences on refuges while managing refuges to conserve fish, wildlife, plants, and their habitats.”*

605 FW 1.14A

*“Refuge Managers will develop a Visitor Services Plan (VSP) that addresses all compatible wildlife-dependent recreational uses on their refuge.”*

References:

- 601 FW 1, National Wildlife Refuge System Mission and Goals and Refuge Purposes
- 603 FW 1, Appropriate Refuge Uses
- 603 FW 2, Compatibility
- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation and Exhibit 1, Example of an Outline for a Visitor Services Plan.

## Background

A Visitor Services Plan (VSP) is a step-down management plan containing specific strategies formulated to meet the visitor services goals and objectives found in the refuge’s Comprehensive Conservation Plan (CCP). The VSP integrates wildlife-dependent and other recreational uses on a refuge or group of refuges. A VSP should contain detailed information and future plans for the appropriate “big six” wildlife-dependent recreational uses (hunting, fishing, wildlife observation, wildlife photography, interpretation, and environmental education), their supporting recreational activities and facilities, and any other recreational activities occurring on that refuge. If the Hunting Plan and the Fishing Plan were done before the overall VSP, they should be included in the VSP when it is developed.

Not all field stations will be able to support all of the “big six” wildlife-dependent recreational uses. For example, a field station may not have a viable fishery, or they may not have the staff to maintain a quality environmental education program. The station staff, through the VSP process, will determine what uses will occur at that field station and at what level.

A VSP is normally a step-down management plan to the CCP. However, if a CCP has not been completed, then you can develop a VSP before the CCP. When the planning process for a VSP comes before the CCP, then the VSP process must follow all appropriate National Environmental Policy Act (NEPA) guidelines, contain the required NEPA documentation and decision documents, and if necessary, contain other environmental compliance documentation (e.g., Endangered Species Act (ESA) Section 7 consultation, National Historic Preservation Act Section 106 consultation, etc.) When developing a VSP (either before or after the CCP), work closely with your Regional NEPA coordinator to insure that all NEPA requirements are met.

Through a VSP and its connection with the station CCP, you set goals, determine measurable objectives, identify strategies, and establish evaluation criteria for all elements of visitor services. You use this process to carefully plan how to provide the visiting public with quality opportunities to enjoy and appreciate fish, wildlife, plants, and other resources.



**Evaluation Questions—Visitor Services Plan (VSP)**

*If you have an approved Visitor Services Plan, please respond to the following questions. If not, skip to the next section.*

- When was the VSP approved?
- When was the last time the plan was reviewed and amended or updated?
- Did you complete the appropriate NEPA compliance documentation as you developed your VSP?
- Does the plan follow or contain the elements required for a VSP in the current policy (605 FW 1, Section 1.14A, Exhibit 1)?
- What elements of the plan have been implemented at the station, and how?
- What events, situations, or barriers are preventing the plan or parts of the plan from being implemented?
- Is the plan being used to develop annual work guidance or annual performance plans?
- Which staff positions have elements of their performance plans tied to the VSP?
- As a result of the VSP, what projects have you entered into the Service Asset Maintenance Management System (SAMMS) and the Refuge Operations Needs System (RONS) databases so there is a chance they can be funded through the Visitor Facility Enhancement (VFE) program or through other funding sources?
- What additional projects need to be developed and added to these databases?
- List any visitor-services related activities or programs currently occurring that do not support the refuge management goals and objectives. What are the plans to discontinue or modify these activities or programs?
- How often is the visitor services program evaluated, and how is it being evaluated? Who is conducting the evaluation?

*If you do not have an approved Visitor Services Plan, please respond to the following:*

- Does the station have an approved CCP? If so, when was it completed?
- If there is no CCP, when is it scheduled for completion?
- What is the target date for completing a VSP?
- Will you develop a VSP prior to the CCP being completed? If so, please explain the rationale.
- If you are not going to develop a VSP prior to completing the CCP, what tool will you use to plan and manage your visitor services program until the CCP and the VSP are completed?
- If the CCP is completed, what barriers or issues are preventing the completion of the VSP?
- What type of assistance and expertise do you need from outside the field station to help you write the VSP?
- What NEPA documentation will you use as you go through this process?

# Standard 2. Welcome and Orient Visitors

## Policy and References

605 FW 1.14B

*“We will assure that refuges are welcoming, safe, and accessible. We will provide visitors with clear information so they can easily determine where they can go, what they can do, and how to safely and ethically engage in recreational and educational activities. Facilities will meet the quality criteria defined in 605 FW 1.6. We will treat visitors with courtesy and in a professional manner.”*

Reference:

- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation

## Background

Excellent customer service and positive first impressions are key to visitors feeling safe and welcome at national wildlife refuges. Facilities that are clean, well-maintained, and accessible are a good reflection on the Service and the Refuge System. Refuge staff who are friendly, professional, and helpful create positive relationships with the public and make visitors want to come back. Positively worded regulations and information located in logical and appropriate locations create a relaxed and welcoming atmosphere. We will strive to make all visitors to national wildlife refuges feel safe, welcome, and comfortable while exploring and learning about the refuge.

Well-maintained and appropriately placed signs, professional-looking publications, and well-maintained facilities, roads, and parking areas are also all part of the welcoming and orienting experience. Questions and information related to these features are in the *General Section* of this handbook.



### Evaluation Questions—Welcome and Orient Visitors

#### *Kiosks*

- Are kiosks in the appropriate locations to welcome and orient visitors?
- Do the kiosks contain appropriate welcoming and orienting information, such as an up-to-date refuge orientation panel with a refuge map and current refuge publications?
- Does the information in the kiosk help the visitor understand where they can go on the refuge and what they are allowed to do?
- Are the kiosks accessible after normal office business hours? Is the information area well-lit and in an open area?
- Are the kiosks universally accessible (e.g., accessible parking pads located in conjunction with the kiosks)?
- Is there a need to provide this information in any additional languages?
- What are the plans to correct any problems or issues associated with the kiosks?

#### *The Service Logo*

- Is the Service logo prevalent throughout the facility and in appropriate locations (e.g., on all Service-produced publications, on the entrance sign, on the headquarters facility or the headquarters sign, etc.)?

#### *Visitor Center*

- Do you have a visitor center? When was it built?
- How old are the exhibits? When were the exhibits last refurbished?
- Do the exhibits need to be updated?
- What are the main themes or stories for the exhibits? Are there stories or messages the exhibits should tell, but don't?
- Is the visitor center universally accessible? If not, what changes need to be made?
- Are the exhibits universally accessible? If not, what changes need to be made?
- How many visitors come to the visitor center (daily average vs. peak day use)? Is the visitor center adequately sized to meet visitation? If not, what changes need to be made?
- Have you put a work order into SAMMS for exhibit updates or replacement?

*Visitor Hours*

- Where are refuge visitor hours and headquarters business hours posted for the public? Are these the appropriate locations for this information? Is the information well-lit and easy to find?
- If you have a visitor center, is it open during peak visitation periods, such as weekends, evenings, or other anticipated periods of high public use? If not, what options are available, such as the use of volunteers, to allow for extended hours in the visitor center?

*Customer Service*

- Are staff encouraged to seek training opportunities to enhance their skills for working with the public? What kind of training?
- If formal training has not been provided or is not available, how is the staff trained to provide good customer service?
- Does the staff maintain a professional appearance (e.g., correct uniform components, neat appearance, courteous toward visitors, etc.)?
- Do volunteers who will be visible to the public wear volunteer uniforms and maintain a professional appearance?
- Can the public reach a “live body” via the telephone during normal business hours?
- When a “live body” cannot be reached, does the telephone answering system provide proper information to the public, such as current visitor service activities, wildlife viewing opportunities, and special events, in addition to how to leave a message for obtaining further information or assistance?
- How quickly does the field station staff get back to the caller who left a message?
- Is information posted at appropriate locations at the refuge so that visitors can find staff to answer their questions or provide assistance?
- Has the refuge staff established a Web site to provide refuge-related information to the public? Does this site include welcoming and orienting information?
- Are there links to other trip planning sites, such as local visitor and tourism bureaus, on the Web site?
- How often is the Web site information updated?

*Visitor Feedback*

- Is a system in place that allows for visitor input and feedback regarding visitor services programs and activities, accessibility, special events, hunting and fishing opportunities, etc.?
- If not, what can be done to put such a system in place?
- If so, how is this feedback processed and used?



# Standard 3. Provide Quality Hunting Opportunities

## Policy and References

605 FW 1.14C

*“Hunting is a wildlife-dependent recreational use and, when compatible, an appropriate use of resources in the Refuge System. Hunting programs will meet the quality criteria defined in section 605 FW 1.6 and, to the extent practicable, be carried out consistent with State laws, regulations, and management plans.”*

References:

- 603 FW 1, Appropriate Refuge Uses
- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation
- 605 FW 2, Wildlife-Dependent Recreation—Hunting

## Background

Hunting is a priority public use of the National Wildlife Refuge System. Where appropriate and compatible, we will make hunting opportunities available to the public. Close cooperation and coordination with State and tribal fish and wildlife management agencies is important for the development and management of hunting opportunities on refuges and in setting population management goals and objectives. Regulations permitting hunting of wildlife on a refuge should be, to the extent practicable, consistent with State and tribal fish and wildlife laws, regulations, and management plans. Hunting programs should be safe, accessible, and managed to minimize conflicts with other priority wildlife-dependent recreational uses.



### Evaluation Questions—Hunting

#### *Hunting Plans*

- Have complete opening packages been submitted through the Regional Office (RO) to the Washington Office (WO) for all current hunting on the refuge? Was the plan approved at the RO and WO level? (This includes current categories, species, and hunt areas.)
- Does 50 CFR accurately reflect the hunting program currently conducted by the refuge? If not, what changes to 50 CFR are needed?
- Were the appropriate biological studies completed prior to determining the details of the hunt program (e.g., species to be hunted, quotas, open areas, etc.)
- What process do you use to annually review your Hunting Plan and the hunting regulations?
- When was the Hunting Plan last updated? Does the Hunting Plan follow the current Hunting Plan format and contain the required information as found in Attachment 3?

#### *Coordinating with State and Tribal Agencies and Other Partners*

- How do you coordinate with your State or tribal fish and wildlife agency when managing your hunting program?
- What other organizations do you partner with to provide hunting opportunities, and what does this partnership include?
- Do you partner with the State or tribal fish and wildlife agency to provide hunter education programs? If so, how often?

#### *Commercial Guide Operations*

- Do you have commercial guides operating on the refuge, and if so, what purpose do they serve? How do you monitor and manage them?
- Do you require Special Use Permits (SUP) for the commercial guide operations?
- Are the fees collected for this SUP included in the Recreation Fee Program?
- Is there a demand for commercial guides, and if so, what kind of service would they provide? Do you plan on meeting that demand, and how? If not, why not?

#### *Managing Conflict and Visitor Safety*

- What safety problems, if any, does hunting cause on the refuge?
- What types of time/zone restrictions are in place to avoid conflict and to achieve balanced hunting and other recreational opportunities? Are the restrictions adequate?
- How do you control the number of hunters?
- What do you do to ensure adequate law enforcement during hunts?

- How do you provide a comparable hunting opportunity for hunters with disabilities?

*Providing Visitor Information*

- How do you communicate refuge-specific hunting regulations and information to the public? Are these methods adequate?
- Do you provide information regarding your refuge hunting program on your refuge Web site, and if so, is that information kept up-to-date? If not, why not?
- Are all the regulations clearly communicated and understood by your visitors, or do changes need to be made?
- Are the areas open and closed to hunting clearly communicated to the public? What methods are used?
- What non-standard signs (i.e., health alerts, whooping crane alerts, special closures, etc.) are posted? What others need to be posted?
- Do you collect any type of visitor information (i.e., through permits, surveys, etc.), and if so, are you using the standard approved Office of Management and Budget (OMB) permit and survey forms or something else? If you are using something else, has OMB approved this form? If OMB has not approved the form, what are your plans for getting approval?
- Do you provide information on ethical hunting practices? If so, how is this information communicated?

*Quota Hunts, Applications, and Permits*

- Are all hunt applications and hunt permits on OMB approved forms? If not, what are your plans for getting approval?
- What quota hunts do you have? Why is the hunt managed as a quota hunt? Are there better ways to manage it instead of a quota hunt?
- Is there a fee for your quota hunts? Is there a fee for your quota hunt applications?
- How do you process quota hunt applications?
- How can the processing of applications be made more efficient?

*Check Stations*

- Do you have staffed check stations?
- What alternatives to a staffed check station have you considered?
- If volunteers are staffing check stations, have they been properly trained?
- Do you use hunt survey forms, and if so, do the forms have OMB approval? If OMB has not approved the form, what are your plans for getting approval?

*Special Hunts*

**\*\*Note:** Participants in special hunts can also participate in other refuge hunts.

- What special hunts (e.g., youth hunts, hunts for hunters with disabilities, hunts for under-represented groups, night hunts, etc.) do you offer? Should some of these hunts currently being offered be changed or eliminated?
- Are there other special hunts you would like to offer? What is keeping you from doing so?
- Who could you partner with to offer these special hunts?

*Program Evaluation*

- What information do you collect from hunters? Do you collect it with OMB's approval? If not, what are your plans to get OMB approval?
- Is there other information you need to collect to better determine the quality of the hunting program?
- How does the refuge staff evaluate the hunting program to determine what changes, if any, are needed? Are appropriate changes incorporated into the Hunting Plan?
- What changes would the refuge staff like to make to the current hunting program? Why?

# Standard 4. Provide Quality Fishing Opportunities

## Policy and Reference

605 FW 1.14D

*“Fishing is a wildlife-dependent recreational use and, when compatible, an appropriate use of resources in the Refuge System. Fishing programs will meet the quality criteria defined in section 605 FW 1.6 and, to the extent practicable, be carried out consistent with State laws, regulations, and management plans.”*

References:

- 603 FW 1, Appropriate Refuge Uses
- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation
- 605 FW 3, Wildlife-Dependent Recreation—Recreational Fishing

## Background

Fishing is a priority public use of the National Wildlife Refuge System. Where appropriate and compatible, we make fishing opportunities available to the public. Close cooperation and coordination with State and tribal fish and wildlife management agencies is important for the development and management of fishing opportunities on refuges and in setting population management goals and objectives. Regulations permitting fishing on a refuge should be, to the extent practicable, consistent with State and tribal fish and wildlife laws, regulations, and management plans. Fishing programs should be safe, accessible, and managed to minimize conflicts with other priority wildlife-dependent recreational uses.



**Evaluation Questions—Fishing**

*Fishing Plan*

- Have complete opening packages been submitted through the Regional Office (RO) to the Washington Office (WO) for all current fishing on the refuge? Was the plan approved at the RO and WO level?
- Does 50 CFR accurately reflect the fishing program currently conducted by the refuge? If not, what changes to 50 CFR are needed?
- What process is used to annually review your Fishing Plan and the fishing regulations?
- When was the Fishing Plan last updated? Does the Fishing Plan follow the current Fishing Plan format and contain the required information as found in Attachment 4?

*Coordinating with the State and Tribal Agencies and Other Partners*

- How do you coordinate with the State or tribal fish and wildlife agency in managing your fishing program?
- What other organizations do you partner with to provide fishing opportunities, and what does this partnership include?

*Commercial Guide Operations*

- Do commercial guides operate on the refuge, and if so, what purpose do they serve? How do you monitor and manage them?
- Do you require Special Use Permits (SUP) for the commercial guide operations?
- Are the fees collected for this SUP included in the Recreation Fee Program?
- Is there a demand for commercial guides, and if so, what kind of service would they provide? Do you plan on meeting that demand, and how? If not, why not?

*Managing Conflict and Visitor Safety*

- What safety problems, if any, does recreational fishing cause on the refuge?
- What types of time/zone restrictions are in place to avoid conflict and to achieve balanced fishing and other recreational opportunities? Are the restrictions adequate?
- What methods are in place to ensure that anglers monitor and remove unattended equipment/tackle in a timely manner?
- How do you control the number of anglers?
- What kind of law enforcement is provided for the fishing program?
- How do you provide a comparable fishing opportunity for anglers with disabilities?

### *Providing Visitor Information*

- How do you communicate refuge-specific fishing regulations and information to the public? Are these methods adequate?
- Do you provide information regarding your refuge fishing program on your refuge Web site, and if so, is that information kept up-to-date? If not, why not?
- Are all the regulations clearly communicated and understood by your visitors, or do changes need to be made?
- Are the areas open and closed to fishing clearly communicated to the public? What methods are used?
- Do you educate anglers on the risk of introducing invasive species onto the refuge, and how to avoid doing so?
- What non-standard signs (i.e., health alerts, tackle restrictions) are posted? What others need to be posted?
- Do you collect any type of visitor information (i.e., through permits, surveys, etc.), and if so, are you using the standard approved OMB permit and survey forms or something else? If you are using something else, has this form been approved by OMB? If OMB has not approved the form, what are your plans for getting approval?
- Do you provide information on ethical fishing practices? If so, how is this information communicated?

### *Special Events—Fishing*

- What kind of special fishing events do you offer?
- Who do you partner with to support these events?
- Are there other fishing events that could be offered? Should some of the events currently being offered be changed or eliminated?
- What additional support do you need to offer other events or to make changes to current events?

### *Tournament Fishing*

- If tournament fishing occurs on the refuge, what is done to ensure the event promotes recreational fishing and provides conservation information and education to the anglers?
- What restrictions prevent conflicts between the tournament anglers and other recreational users?



*Other Types of Fishing*

- If night fishing is allowed, how is it managed (i.e., permit system, limiting the number, etc.)?
- Are there other types of fishing offered such as frogging, crabbing, spear fishing, fishing with bows, etc.? If so, how are these activities regulated (e.g., special seasons or restricted areas, SUPs, etc.)?
- Is there a demand for special fishing opportunities?

*Program Evaluation*

- What information do you collect from anglers? Is there other information you need to collect to better determine the quality of the fishing program? Do you collect this information with OMB's approval? If not, what are your plans to get approval?
- How does the refuge staff evaluate the fishing program to determine what changes, if any, are needed? Are appropriate changes incorporated into the Fishing Plan?
- What changes would the refuge staff like to make to the current fishing program? Why?

# Standard 5. Provide Quality Wildlife Observation and Photography Opportunities

## Policy and References

605 FW 1.14E

*“Visitors of all ages and abilities will have an opportunity to observe and photograph key wildlife and habitat on the refuge when it is compatible with refuge purpose(s). Viewing and photographing wildlife in natural or managed environments should foster a connection between visitors and natural resources. Wildlife and photography programs will meet the quality criteria defined in 605 FW 1.6.”*

## References

- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation
- 605 FW 4, Wildlife-Dependent Recreation—Wildlife Observation
- 605 FW 5, Wildlife-Dependent Recreation—Wildlife Photography
- Photography Handbook—Welcoming Photographers to National Wildlife Refuges

## Background

Wildlife observation and wildlife photography are two closely related priority wildlife-dependent uses of the National Wildlife Refuge System. Many visitors to refuges hike a trail, drive an auto tour route, or spend a few moments at an observation overlook. Our challenge in managing these activities is to minimize conflicts between users and to ensure that visitors have opportunities to observe wildlife in ways that do not disrupt wildlife and damage wildlife habitat. Firsthand observation of wildlife in their natural habitats increases the visitor’s appreciation for America’s natural resources.

*Note: Commercial photography permitting is generally covered in 5 RM 17.11 as a commercial recreational use or economic use. Commercial photography is defined in 8 RM 16.4E.*



**Evaluation Questions—Wildlife Observation and Photography***Programs*

- What staff or volunteer-led wildlife observation or wildlife photography programs do you offer? (Types of programs could include wildlife photography classes or tours, bird walks, special events, etc.)
- How often do you offer these programs?
- Describe the target audiences for your wildlife observation and photography programs, and how you identified these audiences.
- How have you made your wildlife observation and wildlife photography programs accessible?
- For programs that are not accessible, what are your plans for making them accessible?
- What changes would you like to make to your wildlife observation and wildlife photography programs? What is keeping you from making these changes?

*Managing Conflicts and Visitor Safety*

- Are there potential or actual conflicts between wildlife observation and wildlife photography and other visitor uses?
- What do you do to minimize these conflicts?
- What do you do to ensure visitor safety while visitors are engaged in wildlife observation and wildlife photography activities?

*Program Facilities*

- Are the present facilities (i.e., trails, observation platforms, blinds, auto tours, etc.) located such that they enhance opportunities for wildlife observation and wildlife photography, while at the same time limiting disturbances to wildlife and habitat?
- If not, what are the plans to correct the situation?
- Are the present facilities properly designed to maximize opportunities? (For example, are the vehicle pull-out areas on the auto tour of an adequate size for the type of use they received? Are observation facilities built at appropriate heights for optimum wildlife viewing?)
- Which of the “20 Elements to Make Refuges Birder Friendly” have been incorporated into your program? What others do you plan to incorporate? [www.fws.gov/refuges/pdfs/a%20birder%20friendly%20refuge7.08.pdf](http://www.fws.gov/refuges/pdfs/a%20birder%20friendly%20refuge7.08.pdf)
- See the Facilities Section in the “General Section” of this handbook for additional questions and considerations.

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## Standard 5. Provide Quality Wildlife Observation and Photography Opportunities

### *Habitat Enhancements*

- Have you added any wildlife habitat enhancements to improve wildlife observation and wildlife photography in their present location or to provide wildlife observation and wildlife photography opportunities in more suitable and accessible locations? (Examples of enhancements include creating a pond or wetland environment to attract water birds and planting vegetation to attract songbirds.)

### *Specialized Equipment*

- Are there types of specialized equipment that you provide or could provide to enhance wildlife viewing opportunities (e.g., spotting scopes, binoculars, videos of wildlife during optimum viewing seasons, etc.)?
- Are there opportunities for remote viewing that you could offer without impacting wildlife? (Examples include eagle cam, wood duck box cam, etc., linked to a monitor in the visitor center or to a Web site.)

### *Providing Visitor Information*

- How do you provide visitors with information such as best viewing times, how to minimize their impacts, regulations, etc.? (Methods could include custom signs, information in bird/wildlife checklists and other publications, interpretive talks, guided walks, etc.)
- Are there other methods that you should be using (watchable wildlife guides, Web site, podcasts, etc.), and if so, what are your plans to implement those methods?
- Do you provide information on ethical wildlife observation and photography practices? If so, how do you communicate this information?

### *Partners*

- What organizations do you partner with to provide wildlife observation and wildlife photography opportunities?
- What other opportunities are there for partnerships?

### *Program Evaluation*

- What information do you collect from wildlife observers and photographers? Is there other information you need to collect to better determine the quality of this program? Do you collect it with OMB's approval? If not, what are your plans to get approval?
- How frequently do you monitor and evaluate your wildlife observation and wildlife photography programs?
- How do you use this information to change your programs?

# Standard 6. Develop and Implement a Quality Environmental Education Program

## Policy and References

### 605 FW 1.14F

*“Through curriculum-based environmental education packages based on national and State education standards, we will advance public awareness, understanding, appreciation, and knowledge of key fish, wildlife, plant, and resource issues. Each refuge will assess its potential to work with schools to provide an appropriate level of environmental education. We may support environmental education through the use of facilities, equipment, educational materials, teacher workshops, and study sites that are safe, accessible, and conducive to learning. Environmental education programs will meet the quality criteria defined in 605 FW 1.6.”*

### 605 FW 6.6D

*“Environmental education is a process designed to teach citizens and visitors the history and importance of conservation and the biological and scientific knowledge of our Nation’s natural resources. Through this process, we can help develop a citizenry that has the awareness, knowledge, attitudes, skills, motivation, and commitment to work cooperatively towards the conservation of our Nation’s environmental resources. Environmental education within the Refuge System incorporates on-site, off-site, and distance learning materials, activities, programs, and products that address the audience’s course of study, refuge purpose(s), physical attributes, ecosystem dynamics, conservation strategies, and the Refuge System mission.”*

## References:

- 605 FW 6, Wildlife-Dependent Recreation—Environmental Education
- For additional environmental education-related references, see Attachment 5

## Background

Environmental education on refuges builds awareness, understanding, and appreciation of our natural and cultural resources. Each year, thousands of children and adults take advantage of on- and off-site programs, many of which are developed in conjunction with Service partners. We partner with *The Nature of Learning*, *Project WILD*, *Project Learning Tree*, *Project WET*, and other conservation programs.

Refuges serve as the ultimate classroom for formal and non-formal educators who use the habitats we manage and the resources we provide to teach lessons that support local, State, and national education standards and other curricula. Life-long learning happens on refuges for all ages, and we should search out opportunities to facilitate this process.

**Evaluation Questions—Environmental Education***Audiences and Issues*

- Describe the target audiences for your environmental education program.
- How did you identify these audiences?
- What potential audiences do you and the refuge staff want to reach out to?
- What is preventing you from reaching out to them?
- Who are the non-traditional and under-served audiences in your community? How do you reach out to these groups through your environmental education program? How can these efforts be enhanced?
- What are the road blocks that keep you from reaching these audiences (e.g., language, uniforms, perspectives, etc.)?
- The messages found in your environmental education program should address the primary wildlife, habitat, and resource management objectives and issues at your station. What are these objectives and issues, and how are you addressing them?
- What other educational materials, curricula, or programs available through community, State, and national programs do you use, or partner with, to address Service, Refuge System, or site-specific resource management issues? What other programs would you like to use or partner with in the future?
- How do you make your programs accessible for all users?

*Strategies*

- Describe your environmental education program. Describe how your environmental education program is designed to change or measure knowledge, attitude, or behavior.
- What unique environmental education opportunities does your program offer that are not offered by other environmental education programs in the community/area?
- How are you prioritizing your environmental education programs in concurrence with policy and new initiatives?
- How many students participate in your program per year? What ages do you target?
- Do you provide teacher training? If so, describe your teacher training program.
- Have you used resources available from the *National Project for Excellence in Environmental Education* (see Attachment 5) for the development or revision of your program?
- Describe how your environmental education program meets the needs of the school system in your area.

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## Standard 6. Develop and Implement a Quality Environmental Education Program

- How does environmental education on your refuge support formal education standards (local, State, national)? What changes need to be made to your environmental education program to support these education standards?
- What are the measurable educational objectives for your environmental education programs? (Note: If you do not have measurable objectives, then you need to develop them.)
- Who presents/leads the environmental education programs at your site (i.e., staff, volunteers, interns, partners, teachers, etc.)?
- What training is provided to the presenters/leaders? What additional training is needed?
- Have you developed any formal partnerships with local schools or interested non-profits for developing and delivering environmental education programs? If so, briefly describe the partnership.
- How does environmental education on your refuge support non-formal curricula (i.e., programs not related to formal State or Federal education standards) such as scouts, 4-H, summer, and after-school programs? What changes need to be made to your environmental education program to support these curricula?
- What steps have been taken to ensure that your environmental education programming minimizes disturbances to wildlife on your refuge?

### *Program Facilities*

- Describe your environmental education facilities and outdoor learning areas.
- What other environmental education facilities are available locally? Have you considered partnering with these groups?
- Were your environmental education facilities and outdoor learning areas designed with the users in mind (e.g., school bus parking, equipment storage, child safety, accessibility, etc.)?
- What changes would you like to make to your environmental education facilities and outdoor learning areas? What is keeping you from making these changes?
- Have you considered developing an outdoor discovery learning area to give children and families a place to learn about nature through exploration and play?
- What training have your staff and volunteers received to help them make your environmental education programs and facilities accessible?
- Have unmet program and facility needs been included in the SAMMS database?



*Specialized Equipment*

- What refuge-specific equipment is available for use by educators on- or off-site?
- Is there a need to provide additional refuge-specific equipment for use by educators on- or off-site? Is there specialized equipment that you could purchase that would help make your programs more accessible to students with disabilities?

*Program Evaluation*

- How do you evaluate the effectiveness of your environmental education program? Is the evaluation process built into the design of the program from the beginning?
- Have you developed tools to measure changes in the knowledge, attitude, or behavior of your participants? What other methods do you use to evaluate your program?
- How often is your program evaluated?
- Have you modified your program based on evaluation results?
- If you have not developed an evaluation plan, do you plan to do so? Do you need assistance from outside the field station to develop this plan?



# Standard 7. Provide Quality Interpretation of Key Resources and Issues

## Policy and References

605 FW 1.14G

*“We will communicate fish, wildlife, and other resource issues to visitors of all ages and abilities through effective interpretation. We will tailor core messages and delivery methods to provide interpretation to refuge visitors and present them in appropriate locations. Interpretive programs will meet the quality criteria defined in 605 FW 1.6.”*

References:

- 605 FW 7, Wildlife-Dependent Recreation—Interpretation
- For additional interpretation-related references, see Attachment 6

## Background

Interpretation on refuges connects the hearts and minds of our visitors with the places, objects, and resources we protect. Interpretive programs should:

- Provide visitors with intellectual and emotional opportunities to connect with natural and cultural resources;
- Have a clear purpose; and
- Support the mission and goals of the Service.

Interpretive programs on refuges convey key natural and cultural resources messages to visitors through activities, talks, publications, audio-visual media, signs, tours, and exhibits. Everything that goes into a visit to the refuge—the directional signs, the wildlife drive, the interaction with a staff person—adds to or subtracts from the overall interpretive experience for the visitor. After visiting the refuge and participating in our interpretive programs, we hope visitors will understand their relationships to, and impacts on, these resources and will join us as stewards of the land.



### Evaluation Questions—Interpretation

#### *Audiences and Issues*

- Describe the target audiences for your interpretive programs. How did you identify these audiences?
- The themes and messages found in your interpretive program should address the primary wildlife, habitat, and resources management objectives and issues at your station. What are these objectives and issues, and how are you addressing them?
- How do you make your programs accessible for all users?

#### *Strategies*

- Describe your overall interpretive program. What kind of tools do you use to address the interpretive themes and messages that you have set at your station? Are these the appropriate tools for your messages? Are there more up-to-date and innovative tools you could use?
- Describe the measurable interpretive objectives for your programs. Where are these objectives found? If these interpretive objectives have not been developed, how do you plan on developing them?  
*Note: Interpretive objectives should be measurable and should indicate what your visitor will learn after participating in your interpretive program. Following is an example objective:*  
*After reading the interpretive signs at the Okefenokee Homestead, visitors will be able to:*
  - 1) Describe at least three personal hardships that homesteaders had to endure to settle in the Okefenokee, and
  - 2) Identify two ways that the natural resources of the Okefenokee were used in daily life.
- Have you developed interpretive themes for each of the interpretive programs at your refuge related to the interpretive objectives? A process to develop themes is found in *Meaningful Interpretation, How to Connect Hearts and Minds to Places, Objects, and Other Resources*. (Example theme: The approachable, fresh water and upland habitats of the Okefenokee allow first-hand discovery and connections with both the creative and destructive forces that created one of the most pristine swamps in the world.)
- Have you used *Meaningful Interpretation* (see Attachment 6) for the development or revision of your program? You can use all of *Meaningful Interpretation* or just a part of it to develop and improve your interpretive program. A visitor services professional can use it for self-paced learning. A supervisor can use it to coach an employee. An instructor can use it to design courses, selecting the elements that address his/her/their needs.

- Have you used the U.S. Fish and Wildlife Service *Interpretive Development Model* for the development or revision of your program?

*Note: You can find this model in two sections of Meaningful Interpretation, How to Connect Hearts and Minds to Places, Objects, and Other Resources. It is in the descriptions of “The Interpretive Process Model” and “The Interpretive Analysis Model.” You can use “The Interpretive Process Model” to develop new programs, while “The Interpretive Analysis Model” can help you evaluate existing programs.*

### *Program Facilities*

- Describe your existing interpretive facilities (i.e., signs, wayside exhibits, visitor center exhibits, etc.).
- Do you have any safety concerns related to your interpretive facilities?
- What changes would you like to make to your interpretive facilities to make them more functional as interpretive facilities?
- How have you minimized disturbances to wildlife resulting from your interpretive programs and facilities?
- See the Facilities Section in the “General Section” of this handbook for additional questions and considerations.

### *Interpretive Tools*

- What refuge-specific interpretive activities, talks, publications, audio-visual media, signs, and exhibits have been developed and are in use on the refuge?
- Which of these, if any, would you like to revise? What new tools would you like to develop?

### *Program Evaluation*

- What methods do you use to evaluate your interpretive programs? Are the evaluation strategies determined at the developmental phase of the program?
- Have you developed tools to measure changes in your participants’ knowledge, attitudes, or behaviors?
- How often is your program evaluated?
- Have you modified your program based on evaluation results?
- If you have not developed an evaluation plan, do you plan to do so? Do you need assistance from outside the field station to develop this plan?
- How often do you audit staff-led or volunteer-led programs and provide feedback?

# Standard 8. Manage for Other Recreational Use Opportunities

## Policy and References

605 FW 1.14H

*“We may allow other recreational uses that support or enhance one of the wildlife-dependent recreational uses or minimally conflict with any of the wildlife-dependent recreational uses when we determine they are both appropriate and compatible. We will allow uses that are either legally mandated or occur due to special circumstances.”*

References:

- 601 FW 1, National Wildlife Refuge System Mission and Goals and Refuge Purposes
- 603 FW 1, Appropriate Refuge Uses
- 603 FW 2, Compatibility
- 631 FW 5, Field Trials
- 8 RM 7, Off-Road Vehicles
- 8 RM 9, Other Recreation

## Background

The National Wildlife Refuge System Administration Act, as amended by the National Wildlife Refuge System Improvement Act of 1997, states that compatible wildlife-dependent recreational uses are priority public uses of the National Wildlife Refuge System and will receive enhanced consideration over other general public uses. When we allow other uses, they should be in support of one of the priority uses, and we must determine that they are both appropriate and compatible. These uses are generally defined as secondary uses. However, there may be additional recreational activities allowed on Refuge System lands. These often fall into the category of traditional uses. By allowing only those uses that are both appropriate and compatible, we manage the visitor services program to provide quality wildlife-dependent recreational activities that fulfill the mission of the Service and Refuge System.

We have determined that hunting, fishing, interpretation, environmental education, wildlife photography, and wildlife observation are appropriate, administratively. Other uses that support these priority uses may be appropriate, but also must be compatible. A Refuge Manager must determine if a new or existing use is an appropriate and compatible refuge use. Existing uses that are not appropriate and compatible must be modified or eliminated as quickly as practicable. Refuge Managers must not allow a new use that is not appropriate.

**Evaluation Questions—Manage for Other Recreational Use Opportunities**

*Programs*

- What recreation activities, in addition to the six priority uses, are allowed on the refuge?
- Do any of these activities support one of the six priority recreational uses? If not, then what is the rationale for allowing these additional recreational activities?
- Is there a high demand for these activities?
- Have you completed an appropriate use finding and a compatibility determination for all “other” uses?
- Do you provide Special Use Permits for some activities? If so, what are these activities?
- Which of these other recreational activities should you eliminate, phase out, or reduce? What measures are you taking to do so?
- What is the time frame for accomplishing a reduction or elimination of these activities?
- How do you manage requests for unusual activities that are not covered under any existing policy or practice?
- What additional staff, programs, or funds do you need to provide and manage these other recreational activities?
- How do you make these programs accessible? If some of the programs are not accessible, how do you plan on making them accessible?

*Managing Conflicts and Visitor Safety*

- Do any of these other recreational activities cause a conflict with other user groups, especially those participating in any of the six priority uses?
- If so, what are those conflicts, and what methods are you using to reduce or eliminate those conflicts?
- What, if any, visitor safety issues or extra liabilities are associated with allowing these other recreational activities?

*Habitat Enhancements*

- What benefits, if any, does allowing these other recreational activities provide to the habitat and wildlife?

*Specialized Equipment*

- What, if any, specialized equipment is needed either by the field station staff or participants for any of these other recreational activities?



*Providing Visitor Information*

- Does allowing these other recreational activities give you an opportunity to contact and provide information to any specialized user groups that you would not otherwise contact? Who are these groups?

*Partners*

- Do you offer any of these other recreational programs or activities in conjunction with a partnership agreement?
- Have you explored other partnering opportunities?

*Program Evaluation*

- How often are the other recreational activities being evaluated?
- What methods do you use to evaluate them?





# Standard 9. Communicate Key Issues with Off-site Audiences

## Policy and References

605 FW 1.14I

*“Effective outreach depends on open and continuing communication and collaboration between the refuge and its many publics. Effective outreach involves determining and understanding the issues, identifying audiences, listening to stakeholders, crafting messages, selecting the most effective delivery techniques, and evaluating effectiveness. If conducted successfully, the results we achieve will further refuge purpose(s) and the Refuge System mission.”*

References:

- For additional outreach-related references, see Attachment 7

## Background

Outreach is two-way communication between the Service and the public to establish mutual understanding, promote involvement, and influence attitudes and actions. The goal is to improve joint stewardship of our natural resources. Outreach includes, but is not limited to:

- Relations with:
  - Congress
  - Corporations
  - The news media
  - Constituent groups
  - Non-traditional groups who have similar missions
  - The health community to support the “Connecting People with Nature” priority
  - The community
  - State and local governments
  - State wildlife agencies
- Activities that involve:
  - Environmental education and interpretation
  - Public involvement
  - Traditional public information, such as presentations, open houses, etc.
  - Information products, such as brochures, leaflets, exhibits, Powerpoint presentations, videos, public service announcements, etc.

**Evaluation Questions—Communicate Key Issues with Off-Site Audiences***General Outreach*

- What are the top three outreach-related issues that are the most important to the refuge? Who are your primary audiences for these issues?
- Describe any outreach plans that have been developed for your station. Do these plans need to be updated? What other plans need to be developed? (Several models for developing outreach plans can be found in the Service's A Handbook for Outreach (see Attachment 7)).
- Have you developed a crisis communications strategy for those events that are predictable and possible (e.g., wild fires, oil spills, tornados, hurricanes, etc.)? Are there others that should be completed?
- How are you working with Regional Office staff on outreach efforts? What programs are you working with?

*Off-site Special Events*

- Explain how each special event that you conduct or participate in is directly related to the refuge-specific mission, resource management objectives, or enabling legislation.
- How do you publicize your special events to the different audiences?
- Do you check to make sure the space is accessible before committing to the event?

*Congressional Relations*

- Who are the national and State Congressional representatives for your refuge?
- Describe your relationship with your representatives and their support staffs.
- Describe how you communicate with the representatives and their staff, and how frequently this communication takes place.
- What is the current level of Congressional awareness toward refuge-related issues?
- Who is your Regional Congressional and Legislative Affairs contact?

*News Media Relations*

- What are the major news media outlets in your area? How often do you or others on the refuge staff interact with them? Have you developed a working relationship with them?
- Do you maintain an up-to-date contact list for local news media?
- What is the current level of news media awareness toward refuge-related issues?
- How do you get your news releases published or aired? Do you have a good success rate toward getting your news releases published or aired?

*Corporate Relations*

- Who are your corporate neighbors? How often do you or others on the refuge staff interact with them? Have you developed a personal relationship with them?
- What is the current level of corporate awareness toward refuge-related issues?

*Relations with Stakeholder Groups*

- Who are the major stakeholder groups for your refuge? How often do you or others on the refuge staff interact with them? Have you developed a personal relationship with them?
- What is the current level of awareness toward refuge-related issues?

*Community Relations*

- Who are your community decision-makers? How often do you or others on the refuge staff interact with them? Have you developed a personal relationship with them?
- What is the current level of community awareness toward refuge-related issues?
- Are there potentially adversarial groups that you should be communicating with? How could you reach out to them?

*State and Local Government Relations*

- Who are your State and local government partners? How often do you or others on the refuge staff interact with them? Have you developed a personal relationship with them?
- What is the current level of State and local government awareness toward refuge-related issues?

*Relations with State Wildlife Agencies*

- Who are your primary contacts in your State wildlife agency? How often do you or others on the refuge staff interact with them? Have you developed a personal relationship with them?
- What is the current level of State wildlife agency awareness toward refuge-related issues?

*Visitor Information Beyond the Refuge Boundary*

- Are there specific targeted audiences you would like to reach located outside the refuge boundary?
- What strategies are in place to reach these targeted audiences?
- Are refuge publications distributed to other locations, such as other agencies, parks, zoos, tourism locations, and other sites, to provide the public with refuge information?

- What other means do you use to provide information to the public outside the refuge boundaries?
- How do you market the refuge and visitor opportunities on a regular basis? How do you get information out to the public to promote special events?
- Do all publications (e.g., brochures, flyers, posters, announcements, etc.) have the appropriate accommodation statement (“If you have special needs...”) and assurance statement (“Equal opportunity to participate...”)?
- Is the refuge Web site kept up-to-date and is it effective toward communicating refuge-specific information to the public? Is the Web site used to promote special events and special wildlife viewing opportunities?

*Program Evaluation*

- How do you evaluate your outreach program and how often is it evaluated?
- What changes would you like to see made to improve the outreach program?
- What do you need to implement these changes (e.g., training, staff, funds, etc.)?



# Standard 10. Build Volunteer Programs and Partnerships with Friends Organizations

## Policy and References

605 FW 1.14J

*“Volunteer and Friends organizations fortify refuge staffs with their gifts of time, skills, and energy. They are integral to the future of the Refuge System. Where appropriate, refuge staff will initiate and nurture relationships with volunteers and Friends organizations and will continually support, monitor, and evaluate these groups with the goal of fortifying important refuge activities. The National Wildlife Refuge System Volunteer and Community Partnership Enhancement Act of 1998 strengthens the Refuge System’s role in developing effective partnerships with various community groups. Whether through volunteers, Friends organizations, or other important partnerships in the community, refuge personnel will seek to make the refuge an active community member, giving rise to a stronger Refuge System.”*

References:

- 150 FW 1-3, Volunteer Services Program
- 240 FW 9, Safety Program—Volunteer and Youth Programs
- 605 FW 1, General Guidelines for Wildlife-Dependent Recreation
- Volunteer and Community Partnership Enhancement Act of 1998
- Volunteer Handbook
- 8 RM 12, Cooperating Associations

The first part of this next section describes volunteers and lists appropriate questions. The second part describes Friends Groups and lists questions specific to them.

## Background—Volunteers

Volunteers and Friends Groups can be valuable allies in helping refuge staff meet Refuge System missions and goals. Through volunteer contributions, Friends Group fund-raising efforts, and other types of assistance, refuge staff can better focus on priority projects that will enhance the wildlife and habitat at that station.

Refuge staff will explore the use of volunteers and provide volunteer opportunities for the public according to the needs of the refuge. Although volunteer programs require an intense amount of staff time initially, once they are operating, the staff time is substantially reduced. The benefits far outweigh the initial and continued investment.

Volunteers should be managed in a manner similar to paid staff. This includes the use of position descriptions, performance standards and reviews, training, recognition programs, and involvement in appropriate refuge decisions.

Volunteers may have knowledge, skills, and abilities that can enhance the scope of field station operations, such as providing additional visitor services through interpretive programs and demonstrations or organizing special events.

**Evaluation Questions—Volunteers**

*Annual Number*

- What is the annual number of volunteers at your refuge?
- How many hours did volunteers contribute to your refuge last year?
- What volunteer hour trends do you see occurring? Are volunteer numbers generally going up or down, and why?

*Volunteer Program*

- Who is the volunteer coordinator for the station?
- How much of this person's time is dedicated to the volunteer program? Is this adequate to manage the program properly?
- What volunteer management-related training has the volunteer coordinator received? What additional training is needed?
- Which staff have identified jobs that volunteers can do to assist? What jobs have staff identified that volunteers can assist with?
- Which of these jobs have job descriptions?
- What other jobs could volunteers do on the refuge?
- What funding is available for volunteers at your field station? Where does the funding come from? Do you receive dedicated volunteer funds from the Region?
- Is your volunteer funding adequate? If not, how much more funding is needed, and what would you use it for?
- Do you have partners that provide support for your volunteer program? If so, who are they and what kind of support do they provide?
- What methods does the Regional Volunteer Coordinator use to regularly communicate with the volunteers at the station?

*Recruiting*

- How do you recruit volunteers?
- Do you have opportunities listed on the Web site at [www.volunteer.gov/gov/](http://www.volunteer.gov/gov/)? Do you keep this information up-to-date?
- When advertising your volunteer opportunities, do you base your recruitment information on specific needs found at the station?
- What are some things you have done to increase volunteer numbers and hours?

*Orientation*

- What orientation/training do you provide to volunteers?
- Do you have an orientation handbook or packet for new volunteers? If so, what information does it contain?
- When was it last updated?

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## Standard 10. Build Volunteer Programs and Partnerships with Friends Organizations

### *Homeland Security Presidential Directive 12 (HSPD-12)*

- Do any of the volunteers at this station require background investigations due to HSPD-12? If so, which jobs have this requirement?
- Are these background investigations needed because the volunteer's responsibilities require that they have access to federally controlled facilities and information systems, or because they are working in parts of the building where these information systems could be "accidentally" accessed?
- Could changes be made to the volunteer's duties or to the accessibility of the information systems that would eliminate the need for a background investigation?
- Are there other options for minimizing the number of volunteers who need background investigations?

### *Housing*

- If refuge housing is provided to volunteers, what kind of housing is it, and is the amount of housing adequate? (e.g., camper pads, bunkhouses, etc.)
- Do you use resident volunteers? (i.e., non-local volunteers who live on the field station for an extended period of time)
- How are they recruited?
- Are changes needed to make camper pads more accommodating for volunteers (e.g., utility hookups, changes to make them accessible, etc.)?

### *Performance*

- Do your volunteers receive regular or annual feedback about their performance?
- If so, on what do you base their performance (i.e., performance standards)?
- If performance standards and performance evaluations are not a part of your volunteer management program, what basis would you use to terminate or release a volunteer?

### *Recognition*

- What methods of volunteer recognition/appreciation do you use?
- What changes would you like to see in your recognition program or the recognition awards that are available for use from your Regional or national office?

### *Program Evaluation*

- How often do you evaluate the overall volunteer program, and what evaluation methods do you use?
- What changes would you make to improve the volunteer program?
- What additional support do you need from the Regional Volunteer Coordinator?



**Background—Friends Groups**

Friends Groups are a very important source of volunteers. These groups can also provide additional funding sources and support for a variety of projects and programs that are often related to, but not limited to, improving visitor services. Your Friends are often the face of the field station in the local community.

Service staff should work closely with their Friends Group to identify ways that the group can best support the field station. A Service staff person, preferably the Project Leader, will serve as the liaison between the Friends Group and the station. As the group continues to develop, they should consider applying for a mentoring visit from the National Friends Mentoring Program. Through the mentoring program, the Friends Group can identify what changes it should make to become an even stronger support group for the field station.

**Evaluation Questions—Friends Groups***Friends Program*

- Do you have a Friends Group?
- If not, what's keeping you from having a Friends Group?

*Administration*

- If you do have a Friends Group, has the Cooperative Agreement been finalized? When was it signed?
- Has the Friends Group established itself as a non-profit? If not, what steps do they still need to take?
- What is the mission of the Friends Group?
- Describe how the refuge staff and the Friends Group work together to get things done? (i.e., How are decisions made? How are differences worked out? Who picks the projects? Is there an annual work plan developed? etc.)
- Are your Friends Group members signed up as volunteers?

*Staff*

- Who is the refuge liaison to the Friends Group? What kind of training has this individual had related to forming and managing Friends Groups?
- If the refuge liaison is not the Refuge Manager, describe the role the Refuge Manager plays in the partnership with the Friends Group.

*Sales Outlet*

- Does the Friends Group or Cooperating Association operate a sales outlet? In general, what is the agreement between the Friends Group or the Cooperating Association and the refuge staff regarding use of funds collected as the result of sales?
- Does your Friends Group have the necessary training to operate the sales outlet?
- How is the sales outlet staffed?

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## Standard 10. Build Volunteer Programs and Partnerships with Friends Organizations

- What are the main items that are sold, and how are these items selected?
- What is the annual gross?
- What is the annual net to the Friends Group or Cooperating Association?
- What is the annual contribution from the sales outlet to the refuge program?
- How many visitors visit the sales outlet? If the typical goal for the sales outlet is roughly \$2.00 per person gross, is the sales outlet meeting this goal?

### *Program Evaluation*

- What are some specific benefits that the Friends Group has provided to the refuge (e.g., funding, projects, volunteer hours, community good will, etc)?
- What assistance do you need to improve/maintain the Friends Group?
- What changes, if any, would the refuge staff like to make to the Friends partnership? Why are these changes needed?
- What is preventing you from making these changes?
- Do the refuge staff and Friends Group need to participate in the Friends Mentoring Program?



# Recreation Fee Program

## Policy and References

*“The Federal Recreation Lands Enhancement Act of 2004 (FRLEA) allows land management agencies, such as the National Wildlife Refuge System, to charge fees for entry and certain amenities (user fees). The charging of entrance and user fees at national wildlife refuges can be a helpful management tool if the program is well-managed and implemented.”*

References:

- Federal Lands Recreation Enhancement Act of 2004 (PL. 108-447)
- U.S. Fish and Wildlife Service Guidance on the Recreation Fee Program—September 2008
- 261 FW 1, Cash Accountability
- 263 FW 1, Debt Recovery—General Policy, Responsibilities, and Definitions

## Background

Refuge staff have been able to charge fees on national wildlife refuges for a number of years under various authorities. Currently, the only valid authority for charging fees is the Federal Lands Recreation Act (FLREA). Refuges may charge entrance fees where there are limited entry points. It can be much easier to manage fees when there are only one or two ways to access a refuge. Charges for other amenities include limited or quota hunts, interpretive programs or tours, boat launches, auto tour routes, and other public uses. Field station staff need to be fully aware of the requirements for initiating and managing a fee program, such as the Federal Register process and the annual reporting requirements.



**Evaluation Questions—Recreation Fee Program***Programs*

- Does your station participate in the recreation fee program? If so, for what activities are you collecting fees?
- What is the fee rate, and is it competitive with other fee programs in the area?
- Do visitors use a large number of Duck Stamps or other Federal passes to enter the refuge?
- Are there other activities at this station for which you could collect fees? Do you now or have you considered selling the Federal Recreation Lands Passes as part of the recreation fee program?
- List any visitor services programs or facilities you provide solely through the recreation fee program.
- How are staff trained in the management of the recreation fee program?
- Are staff/volunteers trained to collect fees properly, and are they knowledgeable about the proper procedures for accountability and reporting requirements?
- How much staff time is required to manage the fee program? Is this reasonable?
- Is the recreation fee program meeting its objectives, such as being able to cover the cost of collection through the current fee program rates and type of management?
- If your station does not collect fees, have you evaluated the feasibility of collecting fees?

*Managing Conflicts and Visitor Safety*

- Does having a recreation fee program increase visitor safety because it allows you to hire additional staff to manage public safety?
- What conflicts, if any, are the result of having a recreation fee program?

*Program Facilities*

- Does the fee program require any specialized facilities?
- Are the facilities associated with the recreation fee program well-maintained?

*Habitat Enhancements*

- How does the recreation fee program provide support for habitat management?

*Specialized Equipment*

- Does having a recreation fee program require any specialized equipment, staff, or other needs?
- Are the “fee area” signs used and located appropriately?

*Providing Visitor Information*

- How do you provide information about the recreation fee program to visitors before they come to the refuge (so they know there is a fee program before they get there) and once they arrive at the refuge?
- How do you tell the public how you use the fee dollars you collect in support of programs and projects at the refuge?

*Partners*

- Do you have any partners associated with the recreation fee program who assist in collecting fees or managing facilities?

*Program Evaluation*

- What methods do you use to evaluate the fee program?
- Are the annual reporting requirements completed on time? What changes should be made to these annual reporting requirements?
- Have you developed a 5-year business plan to help you manage your program? When was the business plan last updated?
- Have you done a market analysis to determine if your fees are appropriate? When was it updated?
- What type of facilities and programs are provided through the use of recreation fees? Do you notify the public about the completion of these facilities and programs?
- Are fee program funds spent in a timely manner?

# Concessions

## Policy and References

*Director's Order N0.139, Concession Contracts, discusses the Service's current policy for concession management and provides guidance for permitting and administering concession operations on Service lands. We use concessions to assist us in providing wildlife-dependent recreation activities to the visiting public. We manage concessions using contracts between the Service and a private entity, where the private entity is allowed to charge a fee for services provided at a field station to the visiting public.*

References:

- Director's Order N0.139
- 50 CFR Part 25.61
- The Federal Acquisition Regulation

## Background

Concession operations are generally found on large field stations that offer a wide range of wildlife-dependent recreation activities. Concession operators provide such services as marina services, tour operations, transportation services, and equipment rentals. We select and permit concession operators through a competitive bid process. The concession can be for a single service or for a number of services that enhance the visitor experience. We must evaluate, monitor, and review concession operations on a regular basis to ensure quality and compliance with the contract.



## Evaluation Questions—Concessions

### *Programs*

- Do you have a concession operation?
- If so, what services does the concession provide?
- When does the contract expire? Are you planning on continuing the program after the contract expires?
- Is the concession operation providing any services that are no longer needed or may not provide and support the six wildlife-dependent recreational uses and the station's goals and objectives?
- If the station does not offer a concession operation, have you evaluated the need for one? Would a concession operation benefit the station?

### *Managing Conflicts and Visitor Safety*

- How does having a concession operation assist in managing visitor conflicts? (i.e. controlled numbers of users via the concession)
- Is the concession operation the cause of any additional visitor conflicts? If so, what are they, and how can they be resolved?
- Does the concession, including facilities and equipment, offer a safe operation for refuge visitors?
- Does the concession operation create a safer visit than what the refuge staff could provide (i.e., controlled operation, patrol staff, well-funded operation, etc.)?

### *Program Facilities*

- What types of facilities are associated with the concession operation?
- What is the overall condition of the facilities?
- Are they accessible?
- Has a condition assessment been accomplished for the concession facilities?
- If so, when, and what was the result of the assessment?

### *Habitat Enhancements*

- What benefits does the concession operation provide to the habitat and the wildlife?

### *Specialized Equipment*

- What specialized equipment, staff, or other needs does the concession operation require? Is this adequate to provide a quality experience for the visitor?



*Providing Visitor Information*

- How does the concession operation assist in providing visitor information or interpretation?
- What type of training for concession operation employees is provided? Is there a focus on providing accurate visitor information and interpretation in these training sessions?
- How is the training provided, and how often?
- How is information about the concession operation provided to visitors before they come to the station (so they know there is a concession operation at the station before they get there)?
- How is information about the concession operation provided at the field station?

*Partners*

- Does your concession operation also participate as a partner in any other program or in providing any other type of service on the station?

*Program Evaluation*

- How do you evaluate the concession operation, and how often is it evaluated?
- What methods are you using to evaluate not only the business operation, but also the delivery of visitor information?

# Commercial Recreational Uses

## Policy and References

- 50 CFR 29.1
- 50 CFR 27.97
- 8 RM 16, Audio-Visual Productions
- 603 FW 1, Appropriate Refuge Uses
- 605 FW 5, Wildlife Photography

## Background

A commercial recreational use is one that generates revenue or that results in a commodity which is or can be sold for income or revenue. Before considering compatibility, we must determine that the use contributes to the achievement of the refuge purpose or the mission of the Refuge System (see 50 CFR 29.1).

To be allowed on a refuge, a commercial use must go beyond the “not materially interfere with...” requirement and must contribute to the achievement of the refuge purpose or mission of the Refuge System. For any commercial use, the contribution must be clearly defined in the justification section of the compatibility determination.

50 CFR 27.97, Private Operations, prohibits an unauthorized commercial enterprise on any national wildlife refuge. Because of this, individuals or companies that may want to provide a commercial operation on a refuge must apply for a Special Use Permit (SUP) from the Refuge Manager. By establishing a SUP system, the refuge staff is able to set sustainable limits on the number of permits issued.

To determine if a commercial recreational use is compatible, you should be able to see a connection between it and the facilitation of at least one of the wildlife-dependent priority recreational use activities. These activities are directly related to the mission of the System (National Wildlife Refuge System Improvement Act of 1997).

### Evaluation Questions—Commercial Uses

#### *Program*

- Do you have commercial recreational activities on the refuge?
- What are these activities?
- How do these activities contribute to the achievement of the refuge purpose or the mission of the Refuge System?
- How do these activities help the refuge meet visitor services objectives?
- What benefits, if any, does permitting these commercial recreational activities provide to the habitat and wildlife?
- Have you completed a compatibility determination for the use(s), and if so, is the contribution of the commercial use defined in the justification section?
- What type of permit is issued for each of these activities?
- What does the refuge charge for each of these permits?
- How did you determine what price to charge?
- What is the process you use to regulate the number of commercial operators?
- How have you determined the appropriate number of operators to allow on the refuge?
- Are any of these activities part of the recreation fee program?
- If not, are there plans to put them in the recreation fee program?

#### *Managing Conflicts and Visitor Safety*

- How does having a commercial recreational use assist in managing visitor conflicts?
- Is it the cause of any additional visitor conflicts? If so, what are they, and how can they be resolved?

#### *Program Evaluation*

- Are the commercial uses periodically evaluated, and if so, how often?
- How are they evaluated?
- Are changes made to the program as a result of these evaluations?

# Wilderness

## Policy and References

*The Wilderness Act of 1964 directs the Secretary of the Interior, within 10 years, to review every roadless area of 2,024 or more hectares (5,000 or more acres) and every roadless island (regardless of size) within national wildlife refuges and national parks, and to recommend to the President the suitability of each such area or island for inclusion in the National Wilderness Preservation System by later special Acts of Congress. The Act provides criteria for determining suitability and contains provisions related to activities that can be undertaken on a designated area.*

*The Wilderness Act establishes additional purposes for the designated wilderness areas within refuges (50 CFR 29.12), which “shall be administered for the use and enjoyment of the American people in such manner as will leave them unimpaired for the future use and enjoyment as wilderness, and so as to provide for the protection of these areas, the preservation of their wilderness character; and for the gathering and dissemination of information regarding their use and enjoyment as wilderness.” Proposed wilderness areas are managed so as to protect their wilderness values pending action by Congress.*

## References:

- Wilderness Act of 1964 (U.S. C. 1131-1136) Public Law 88-577
- 610 FW 1—5, Wilderness Stewardship
- For additional wilderness-related references, see Attachment 8

## Background

The Wilderness Act of 1964 requires wilderness areas be kept in a wild and natural state, relatively free of human influence and control, while at the same time providing for their use and enjoyment.

Wilderness provides opportunities for challenge, risk and reward, self-reliance and solitude. Within wilderness we find unparalleled scenic beauty and a haven from the pressures of our fast-paced industrialized society. Wilderness areas are living classrooms through which visitors may learn conservation, preservation, ecosystem management, multiple use, and life-style choices. Through awareness of wilderness, visitors can become responsible stewards of all lands.

While visitor services staff on refuges are not usually responsible for the overall management of a wilderness area or proposed wilderness area, those with visitor services responsibility should ensure that recreational opportunities within the wilderness are managed within wilderness policy and provide a quality experience for the user.

**Evaluation Questions—Wilderness***Program*

- Does your refuge have designated wilderness or wilderness study areas? If so, how large is it, and what type of area is it protecting (i.e., native prairie, old-growth forest, etc.)?
- Is the wilderness area proposed or final?
- What is the establishing legislation for the wilderness, and are there any special provisions that affect refuge uses?
- Describe the recreational uses allowed in the wilderness area.
- Are these uses and the way they are conducted compatible with wilderness policy?
- Have you completed a Minimum Requirements Analysis, using the “Minimum Requirements Decision Guide,” to evaluate the impact of management activities on the visitor’s wilderness experience?
- What steps have been taken to ensure that visitors have the opportunity for solitude or a primitive and unconfined wilderness experience?
- What staff have had wilderness training, and what training have they had?
- Are there any commercial recreational uses in the wilderness (i.e., guides, outfitters, etc.)?
- Do permits for these activities outline appropriate practices for the commercial guides or outfitters and the visitors in the wilderness?
- What recreation standards have been established that will prevent degradation of the wilderness resource (e.g., encourage use in other areas, limit party size, prohibit activity, etc.)?
- What wilderness information do you include in the communication tools you give to the public?
- Is the wilderness area identified on your refuge map located in your kiosks and publications?
- Have “Leave No Trace” materials been made available to visitors?
- What partnerships have you formed to help do visitor services-related projects in the wilderness area? List the most recent projects.

# Attachment 1: List of Visitor Services-related Policy Chapters and Director's Orders

Note: The Appendix will be updated online as new policies or additional resources become available. To download the latest version of the Appendix go to [www.fws.gov/policy-library/manuals/](http://www.fws.gov/policy-library/manuals/)

## **Service Manual Chapters**

### *Service Image/Symbols*

- 041 FW 2—Emblems
- 041 FW 3—Signs

### *Service Image/Events*

- 042 FW 1—Dedications and Special Events

### *Planning and Management/Field Station Management*

- 055 FW 7—Public Relations

### *Information and Expression/Public Information*

- 115 FW 8—Information Published on the World Wide Web

### *Youth Programs/Boy Scouts of America*

- 142 FW 1—Boy Scouts of America

### *Youth Programs/Girl Scouts of America*

- 143 FW 1—Girl Scouts of America

### *Youth Programs/4-H Clubs of America*

- 144 FW 1—4-H Clubs of America

### *Volunteers/Volunteer Services Programs*

- 150 FW 1—Policy, Procedures, and Responsibilities for Volunteers
- 150 FW 2—Volunteer Eligibility Agreements
- 150 FW 3—Volunteer Program Operations

### *Cash Management*

- 261 FW 1—Cash Accountability
- 263 FW 1—Payments

### *Refuge Management/National Wildlife Refuge System Uses*

- 603 FW 1—Appropriate Refuge Uses
- 603 FW 2—Compatibility

### *Refuge Management/Wildlife-dependent Recreation*

- 605 FW 1—General Guidelines for Wildlife-dependent Recreation
- 605 FW 2—Hunting

- 605 FW 3—Recreational Fishing
- 605 FW 4—Wildlife Observation
- 605 FW 5—Wildlife Photography
- 605 FW 6—Environmental Education
- 605 FW 7—Interpretation

*Wilderness*

- 610 FW 1-5—Wilderness Stewardship Policy

*Public Use Management/Wildlife Oriented Recreation*

- 631 FW 5—Field Trials

*Special Program Series/Migratory Bird Hunting and Conservation Stamp*

- 901 FW 1—Authority and Responsibilities
- 901 FW 2—Contest Procedures and Events
- 901 FW 3—Stamp Production, Sales, and Disposition
- 901 FW 4—Licensing Stamp Reproductions
- 901 FW 5—Junior Duck Stamp Program

*Refuge Manual Chapters*

- 5 RM 17—Administration of Specialized Uses
- 8 RM 7—Off-road vehicles
- 8 RM 10—Research Natural Area Management
- 8 RM 11—Public Use Natural Area Management
- 8 RM 13—Visitor Protection
- 8 RM 15—Search and Rescue
- 8 RM 16—Audio Visual Productions

*Director's Orders*

- DO 120—Service Facility and Refuge Entrance Signs
- DO 139—Concession Contracts
- DO 183—Working with Friends Organizations and Cooperating/ Interpretive Association Sales Outlets and Book Stores
- DO 188—Expenditures in Support of the Volunteer and Community Partnership Act of 1998

*Handbooks and Other References*

- Visitor Estimation Workbook and Technical Supplements  
<https://intranet.fws.gov/region9/refuges/VS/visitationSupplements.html>



# Attachment 2: Accessibility Resources

## General Resources

*ADA and ABA Accessible Guidelines for Buildings and Facilities*—On July 23, 2004, the U.S. Access Board, an independent Federal agency, issued updated accessibility guidelines for new or altered facilities covered by Americans with Disabilities Act (ADA) and the Architectural Barriers Act (ABA). These guidelines address a wide range of facilities in the private and public sectors. The General Services Administration (GSA) later published regulations implementing the updated Architectural Barriers Act. The GSA refers to its regulatory standards as the Architectural Barriers Act Accessibility Standard (ABAAS) ( <http://www.access-board.gov/ADA-ABA/supplement.htm> ). ABAAS applies to facilities designed, built, altered, or leased with Federal funds.  
<http://www.access-board.gov/ada-aba/>

*U.S. Access Board*—The Access Board is an independent Federal agency devoted to accessibility for people with disabilities. Created in 1973 to ensure access to federally funded facilities, the Board is now a leading source of information on accessible design. The Board develops and maintains design criteria for the built environment, transit vehicles, telecommunications equipment, and for electronic and information technology. It also provides technical assistance and training on these requirements and on accessible design, and continues to enforce accessibility standards that cover federally funded facilities.  
<http://www.access-board.gov/>

*National Center on Accessibility*—The National Center on Accessibility (NCA) promotes access and inclusion for people with disabilities in parks, recreation, and tourism. Based at Indiana University and established in 1992 through a cooperative agreement with the National Park Service, NCA has emerged as a leading authority on access issues unique to park and recreation programs and facilities. Through the comprehensive services of research, technical assistance, and education, NCA focuses on universal design and practical accessibility solutions creating inclusive recreation opportunities for people of all abilities.  
<http://www.ncaonline.org>

## Interpretive Media Resources

*Harpers Ferry Center*—Harpers Ferry Center provides tools and services to help National Park Service field interpreters. Their website includes, among other helpful information, a document titled, *Programmatic Accessibility Guidelines for National Park Service Interpretive Media*.  
<http://www.nps.gov/hfc/accessibility/index.htm>

*Smithsonian Guidelines for Accessible Exhibition Design*  
<http://www.si.edu/opa/accessibility/exdesign/start.htm>

*Smithsonian Guidelines for Universal Design of Exhibits*  
<http://accessible.si.edu/gfude.htm>

*Audio Description Organizations and Services*—The link below provides contact information for organizations which provide Audio Description services around the world.  
<http://www.adinternational.org/ADIorgs.html#usacon>

### Resources for Outdoor Areas

*Proposed Architectural Barriers Act Accessibility Guidelines for Outdoor Developed Areas*—In June 2007, the U.S. Access Board issued a Notice of Proposed Rulemaking (NPRM) for Accessibility Guidelines on Outdoor Developed Areas under the Architectural Barriers Act. Until final standards are issued, the guidance in the NPRM provides the best available information for creating access in the outdoors. The proposed guidelines address access to new or altered trails, beaches, picnic, and camping areas on sites managed by the Federal government.  
<http://www.access-board.gov/outdoor/nprm/>

*USFS Accessibility Guidebook for Outdoor Recreation and Trails*  
<http://www.fs.fed.us/recreation/programs/accessibility/htmlpubs/hm06232801/toc.htm>

*American Trails Accessibility Resources and Library*—The American Trails online library has hundreds of articles, studies, and resources for trails and greenways.  
<http://www.americantrails.org/resources/index.html>

*Accessible Outdoor Telescopes*  
<http://www.seecoast.com/>  
<http://www.brasstelescopes.com/allweather.html>

*Accessible Hunting Blind*  
<http://www.ngpc.state.ne.us/hunting/pdfs/blind/blind.asp>



# Attachment 3: National Wildlife Refuge Hunting Plan Format

The Refuge Hunting Plan can be formatted either as a stand-alone document or as a chapter in a Visitor Services Plan (VSP). Ideally, a Comprehensive Conservation Plan (CCP) will be completed before the Refuge Hunting Plan is initiated; however, it is not mandatory that they be completed in this order. The Hunting Plan is only one document required to open or revise refuge hunting programs. A complete list of the required documents is found in the Appendix of this plan outline.

## **I. Introduction**

Include a general description of the refuge and information pertinent to the planned hunting program.

*Include the introduction only if this is a stand-alone hunting plan and not included as part of a VSP. This information should be available in the introductory section of the refuge Annual Narrative Report or the CCP.*

## **II. Conformance with Statutory Authorities**

Explain how the hunting program will be compatible with the purposes for which the refuge was established, and reference statutory authorities, such as establishing legislation, the National Wildlife Refuge System Improvement Act, and others.

*A list of laws and Executive Orders concerning visitor services programs is available in 605 FW 1.3.*

## **III. Hunting Program Goals**

Identify and list the major refuge goals and hunting program goals. Describe the effects of hunting on the refuge goals.

*If a CCP is completed, this should be consistent with the Visitor Services and Resource Management Goals contained in the CCP. If a CCP is not completed, be consistent with the goals identified in existing refuge planning documents (such as a Master Plan) or identify goals specific to the refuge hunt program.*

## **IV. Hunting Program Objectives**

Identify and list the major refuge objectives and hunting program objectives. Describe the effects of hunting on the refuge objectives.

*If a CCP is completed, this should be consistent with the Visitor Services and Resource Management Objectives contained in the CCP. If a CCP is not completed, be consistent with the objectives identified in existing refuge planning documents (such as a Master Plan) or identify objectives specific to the refuge hunt program.*

**V. Assessment**

Assess the wildlife/habitat resources on the refuge. Factors that should be considered and discussed in this section include the following:

- A. Are wildlife populations present in numbers sufficient to sustain optimum population levels for priority refuge objectives other than hunting?
- B. Is there competition for habitat between target species and other wildlife?
- C. Are there unacceptable levels of predation by target species on other wildlife forms?
- D. Are target species exotic or non-endemic to the refuge?
- E. If applicable, is hunting addressed as a strategy in the refuge's Habitat Management Plan?

**VI. Measures Taken to Avoid Conflicts with Other Management Objectives**

- A. Biological conflicts—Describe Section 7 consultations (and include documentation in the Appendix), and other measures proposed to mitigate or eliminate conflicts with endangered species or other species.
- B. Visitor Services conflicts—Include measures proposed to mitigate or eliminate conflicts between various visitor activities.
- C. Administrative conflicts—Cite measures proposed to mitigate or eliminate any administrative conflicts.

**VII. Audiences**

- A. Describe the current audience. Include information and statistics on current users if a hunting program already exists (i.e., local, residents, non-residents,).
- B. Describe any target audiences. Identify audiences who are expected to participate in the refuge hunting program, and include efforts to attract new and/or underserved audiences

**VIII. Description of Hunting Program**

Describe the hunting program, and include maps of the hunting areas. The description or maps should include the following:

- A. Areas of the refuge that support populations of the target species;
- B. Areas to be opened to the public;
- C. Species to be taken;
- D. Seasons;
- E. Justification for permit, if one is required;

- F. Procedures for ongoing consultation and coordination with the State and/or Tribal agency. (If refuge regulations regarding species to be taken and permitted methods of taking are to be more restrictive or more liberal than State and/or Tribal regulations, a justification must be provided.);
- G. Methods of control and enforcement;
- H. Funding and staffing requirements for the hunt. (Include a funding statement of the estimated initial and annual costs of the planned program in relation to the overall refuge budget. An estimate of annual hunter visits must also be included in the funding statement);
- I. If applicable, describe fees for applications, permits, and facilities; and
- J. Provide a description of facilities and improvements that exist or will be constructed (i.e., parking lots, blinds, signage, etc.)

**IX. Conduct of the Hunt**

- A. Refuge-specific hunting regulations. Work within existing State and/or Tribal regulations whenever possible. Guidance and timelines for submitting refuge-specific regulations are described in detail in 605 FW 2.
- B. Anticipated public reaction to the hunt and outreach efforts.
- C. Hunter application and registration procedures. If applicable, plans for obtaining Office of Management and Budget (OMB) approval if standard forms are not used.
- D. Description of hunter selection process.
- E. Media selection for announcing and publicizing the hunt.
- F. Description of opportunities for hunters to become familiar with the hunt area, including pre-hunt scouting, if applicable.
- G. Hunter requirements.
  - 1. Age (if restrictions are imposed by State and/or Tribal agency).
  - 2. Allowable equipment—dogs, vehicles, blinds, sporting arms, ammunition.
  - 3. Use of fires (for cooking, warmth, etc.)
  - 4. License and permits.
  - 5. Reporting harvest.
  - 6. Hunter training and safety (if required by State and/or Tribal agency).
  - 7. Shell limits (to reduce crippling loss)

- H. Harvest data requirements (check stations, forms, etc.). If applicable, plans for obtaining OMB approval if standard forms are not used.
- I. If applicable, procedure for proper storage and disposal of paper and electronic hunter records.

**X. Future actions**

Describe long-term plans for administering and maintaining the hunting program.

**XI. Monitoring and Evaluation**

Describe monitoring procedures for wildlife/habitat/populations, as well as hunt quality and administration (consistent with regulations and policies regarding information collection).

**Appendices to the Hunting Plan/Hunting Chapter**

The following documents must be included in the opening package for the refuge:

- (1) Compatibility determination, which must include analysis of the availability of resources with which to administer the use (should be consistent with the information in Section VIII G of the Hunting Plan);
- (2) NEPA documentation (categorical exclusion, environmental assessment, or environmental impact statement);
- (3) Appropriate decision document (e.g., finding of no significant impact or record of decision);
- (4) Endangered Species Act Section 7 evaluation;
- (5) Copies of letters requesting State and, where appropriate, Tribal involvement and the results of the request;
- (6) Draft news release;
- (7) Outreach plan; and
- (8) Draft refuge-specific regulations.

# Attachment 4: National Wildlife Refuge Recreational Fishing Plan Format

The Refuge Recreational Fishing Plan can be formatted either as a stand-alone document or as a chapter in a Visitor Services Plan (VSP). Ideally, a Comprehensive Conservation Plan (CCP) will be completed before the Refuge Recreational Fishing Plan is initiated; however, it is not mandatory that they be completed in this order. The Recreational Fishing Plan is only one document required to open or revise refuge fishing programs. A complete list of the required documents is found in the Appendix of this plan outline.

## **I. Introduction**

Include a general description of the refuge and information pertinent to the planned recreational fishing program.

*Include the introduction only if this is a stand-alone recreational fishing plan and not included as a part of a VSP. This information should be available in the introductory section of the refuge Annual Narrative Report or the CCP.*

## **II. Conformance with Statutory Authorities**

Explain how the recreational fishing program will be compatible with the purposes for which the refuge was established and reference statutory authorities, such as establishing legislation, the National Wildlife Refuge System Improvement Act, and others.

*A list of laws and Executive Orders concerning visitor services programs is available in 605 FW 1.3.*

## **III. Recreational Fishing Program Goals**

Identify and list the major refuge goals and recreational fishing program goals. Describe the effects of recreational fishing on the refuge goals.

*If a CCP is completed, this should be consistent with Visitor Services and Resource Management Goals contained in the CCP. If a CCP is not completed, be consistent with goals identified in existing refuge planning documents (such as a Master Plan) or identify goals specific to the refuge recreational fishing program.*

## **IV. Recreational Fishing Program Objectives**

Identify and list the major refuge objectives and recreational fishing program objectives. Describe the effects of recreational fishing on the refuge objectives.

*If a CCP is completed, this should be consistent with Visitor Services and Resource Management Objectives contained in the CCP. If a CCP is not completed, be consistent with objectives identified in existing refuge planning documents (such as a Master Plan) or identify objectives specific to the refuge recreational fishing program.*



**V. Assessment**

Assess the fishery resources on the refuge. Factors that should be considered and discussed in this section include the following:

- A. Is the fishery/aquatic resource capable of sustaining fishing pressures?
- B. Does the refuge control all access to the resource? If not, can the refuge regulate recreational fishing on these waters?
- C. Are fish species exotic or non-endemic to the refuge?

**VI. Measures Taken to Avoid Conflicts with Other Management Objectives**

- A. Biological conflicts—Describe Section 7 consultations (and include documentation in the Appendix), and other measures proposed to mitigate or eliminate conflicts with endangered species or other species.
- B. Visitor Services conflicts—Include measures proposed to mitigate or eliminate conflicts between various visitor activities.
- C. Administrative conflicts—Cite measures proposed to mitigate or eliminate any administrative conflicts.

**VII. Audiences**

- A. Describe the current audience. Include information and statistics on current users if a recreational fishing program already exists (i.e., local, residents, non-residents).
- B. Describe any target audiences. Identify audiences who are expected to participate in the refuge recreational fishing program and include efforts to attract new and/or underserved audiences

**VIII. Description of Recreational Fishing Program**

Describe the recreational fishing program, and include maps of the fishing areas. The description or maps should include the following:

- A. Areas of the refuge that support fishery resources;
- B. Areas to be opened to the public;
- C. Fish species to be taken;
- D. Seasons;
- E. Justification for permit, if one is required;
- F. Procedures for ongoing consultation and coordination with State and/or Tribal agency. (If refuge regulations regarding species to be taken and permitted methods of taking are to be more restrictive or more liberal than State, and where appropriate Tribal, regulations, a justification must be provided);
- G. Methods of control and enforcement;

- H. Funding and staffing requirements for the recreational fishing program. (Include a funding statement of the estimated initial and annual costs of the planned program in relation to the overall refuge budget. An estimate of annual angler visits must also be included in the funding statement);
- I. If applicable, fees for applications, permits, and facilities; and
- J. Provide a description of facilities and improvements that exist or will be constructed (i.e., parking lots, docks, signage, etc.)

**IX. Conduct of the Recreational Fishing Program**

- A. Refuge-specific recreational fishing regulations. Work within existing State regulations whenever possible. Guidance and timelines for submitting refuge-specific regulations are described in detail in 605 FW 2.
- B. Anticipated public reaction to the recreational fishing program and outreach efforts.
- C. Outreach efforts (multi-lingual, if necessary) related to State fish consumption advisories affecting refuge waters (per Directors Order 190).
- D. Angler application and registration procedures, if needed. If applicable, plans for obtaining Office of Management and Budget (OMB) approval if standard forms are not used.
- E. Media selection for announcing and publicizing the recreational fishing program.
- F. Angler requirements.
  - 1. Allowable equipment—nets, trotlines, seines, vehicles, gigs/spears, bow and arrow, barbed/barbless hooks, lead sinkers, etc.
  - 2. Use of open fires (for cooking, warmth, etc.)
  - 3. License and permits.
  - 4. If applicable, limits on live, non-native bait.
- G. Creel census requirements (forms, etc.). If applicable, plans for obtaining OMB approval if standard forms are not used.
- H. If applicable, procedure for proper storage and disposal of paper and electronic angler records.

**X. Future actions**

Describe long-term plans for administering and maintaining the recreational fishing program.

**XI. Monitoring and Evaluation**

Describe monitoring procedures for aquatic resources, as well as program quality and administration (consistent with regulations and policies regarding information collection).

**Appendices to the Recreational Fishing Plan/Chapter**

The following documents must be included in the opening package for the refuge:

- (1) Compatibility determination, which must include analysis of the availability of resources with which to administer the use (*should* be consistent with the information in Section VIII H of the Recreational Fishing Plan);
- (2) NEPA documentation (categorical exclusion, environmental assessment, or environmental impact statement);
- (3) Appropriate decision document (e.g., finding of no significant impact or record of decision);
- (4) Endangered Species Act Section 7 evaluation;
- (5) Copies of letters requesting State and, where appropriate, Tribal involvement and the results of the request;
- (6) Draft news release;
- (7) Outreach plan; and
- (8) Draft refuge-specific regulations.

# Attachment 5: Additional Environmental Education-related References (from Standard 6)

- The “Nature of Learning” is a community-based National Wildlife Refuge System conservation education program that uses national wildlife refuges as outdoor classrooms and seeks to promote a greater understanding of conservation issues while enhancing student academic achievement.  
<http://www.fws.gov/refuges/education/natureoflearning/index.html>
- *Rhythms Of The Refuge Guidebook: For Developing Environmental Education Strategy and Environmental Education Products*, U.S. Fish and Wildlife Service (available at the R6 Intranet Site)
- *Rhythms Of The Refuge Toolbox: For Developing Environmental Education Strategy and Environmental Education Products*, U.S. Fish and Wildlife Service (available at the R6 Intranet Site)
- *The National Project for Excellence in Environmental Education* (NPEEE) was initiated by the North American Association of Environmental Education (NAAEE) in 1993. NPEEE is a multi-year program designed to identify and provide examples of high quality environmental education practice. NPEEE is taking the lead in establishing guidelines for the development of balanced, scientifically accurate, and comprehensive environmental education programs. Online resources are available at <http://www.naaee.org/programs-and-initiatives/guidelines-for-excellence/>
- Web Site Resources for Environmental Education. This list is available in electronic format at <http://library.fws.gov>
- U.S. Fish and Wildlife Service, National Conservation Training Center, Division of Education Outreach. Online resources are available at <https://intranet.fws.gov/region9/extaff/DEOoutreachsii.htm>



# Attachment 6: Additional Interpretation-related References (from Standard 7)

- *Meaningful Interpretation, How To Connect Hearts And Minds To Places, Objects, and Other Resources* Edited by David L. Larsen  
[http://www.nps.gov/history/history/online\\_books/eastern/meaningful\\_interpretation](http://www.nps.gov/history/history/online_books/eastern/meaningful_interpretation)
- *Exhibit Labels, An Interpretive Approach* by Beverly Serrell
- *Interpreting Our Heritage* by Freeman Tilden
- *Interpretive Centers, The History, Design And Development Of Nature And Visitor Centers* by Michael Gross and Ron Zimmerman
- *Environmental Interpretation, A Practical Guide For People With Big Ideas And Small Budgets* by Sam Hamm
- *Management of Interpretive Sites, Developing Sustainable Operations Through Effective Leadership* by Tim Merriman and Lisa Brochu
- *Personal Interpretation, Connecting Your Audience To Heritage Resources* by Lisa Brochu and Tim Merriman
- *Interpretive Planning, The 5-M Model For Successful Planning Projects* by Lisa Brochu
- *Signs, Trails, and Wayside Exhibits, Connecting People And Places* by Michael Gross and Ron Zimmerman
- *Interpretation of Cultural and Natural Resources* by Douglas M. Knudson, Ted T. Cable, and Larry Beck
- *Interpretation for the 21st Century: Fifteen Guiding Principles for Interpreting Nature and Culture* by Larry Beck and Ted T. Cable
- U.S. Fish and Wildlife Service, National Conservation Training Center, Division of Education Outreach. Online resources are available at <https://intranet.fws.gov/region9/extaff/DEOoutreachsii.htm>

# Attachment 7: Additional Key Communication Issues through Outreach References (from Standard 9)

- *A Handbook For Outreach*, March 2001, U.S. Fish and Wildlife Service  
<https://intranet.fws.gov/region9/outreach/index.html>
- *National Outreach Strategy: A Master Plan For Communicating In The U.S. Fish and Wildlife Service*, U.S. Fish and Wildlife Service
- *The Public Meeting Survival Guide, A User Friendly Workbook For Getting Into- And Out Of- Meetings [Alive]*, U.S. Department of the Interior, U.S. Fish and Wildlife Service, Oregon Fish and Wildlife
- U.S. Fish and Wildlife Service, National Conservation Training Center, Division of Education Outreach. Online resources are available at <https://intranet.fws.gov/region9/extaff/DEOoutreachsii.htm>
- *U.S. Fish and Wildlife Service, Office of External Affairs, Outreach—The Users Guide*  
<https://intranet.fws.gov/region9/outreach/usersguide/>
- *A Strategic Approach to Communication*, December 2007, U.S. Fish and Wildlife Services  
<https://intranet.fws.gov/region9/outreach/usersguide/>
- Division of Congressional and Legislative Affairs WO and RO contacts can be found at: <https://intranet.fws.gov/region9/cla/about.html>
- Division of Congressional and Legislative Affairs standard operating procedures can be found at: <https://intranet.fws.gov/region9/cla/SOPs/StandardOperatingProcedures.html>

## Attachment 8: Additional Wilderness-related References (from Wilderness section)

- News, laws, policy, National Wilderness Preservation System wilderness area information, Leopold Institute research, Carhart Center training, education, discussion, etc. at <http://www.wilderness.net>
- Wilderness Managers tool boxes: fire, education plans, commercial services, motor vehicle trespass, Tribal relations, etc. at <http://www.wilderness.net/toolboxes>
- Minimum Requirements Decision Guide at <http://www.carhart.wilderness.net/mrdg>
- Research applications, publications, hot topics at <http://www.leopold.wilderness.net>
- Leave No Trace, Inc. at [www.lnt.org](http://www.lnt.org)
- 610 FW 1-5—Wilderness Stewardship Policy





# Attachment 9: Guidance for Developing Visitor Services Plans

You should refer to general guidance for developing a visitor services plan (VSP) in Service Manual Chapter 605 FWS 1, Exhibit 1, and Chapter 1 of this Handbook (pages 24–27). We recommend that you also contact your Regional Office Visitor Services Program for current VSP examples and for detailed guidance for developing VSPs within your region. Regional Office Visitor Services Program staff offer a broad range of experiences working with other refuges in your Region. The staff will be able to assist you in defining your VSP process and the level of detail needed for developing quality refuge visitor service programs through a VSP.