

# Example – Self Assessment Planning Tool Standard Operating Procedures SCORP Process\*

## Introduction and Purpose

This document outlines the standard operating procedures (SOPs) for planning activities within the <<State Agency name>> associated specifically with the Statewide Comprehensive Outdoor Recreation Plan. The goal is to provide a consistent framework for planning and decision-making, ensuring that planning efforts are aligned with both the department’s mission, vision, and goals and the NPS requirements for SCORP approval and/or recertification. This SOP will serve as a guide for staff at all levels, promoting efficiency, effectiveness, and accountability in the planning process.

## What is a SCORP and Why Is It Important?

The Land and Water Conservation Fund (LWCF) was established by Congress in 1965 to safeguard our natural areas, water resources, and cultural heritage, and to provide recreation opportunities to all Americans. The LWCF program is divided into the “State Side,” which provides grants to State and local governments to support state park development, and the “Federal Side,” which is used to acquire lands, waters, and interests necessary to achieve the natural, cultural, wildlife, and recreation management objectives of federal land management agencies.

A Statewide Comprehensive Outdoor Recreation Plan (SCORP) is required for states to receive federal grant funding from the LWCF program and must be routinely prepared and updated to maintain eligibility. SCORPs are used to evaluate the supply and demand of recreation resources in a state, identify needs and opportunities for improvements, and advance an implementation plan to meet the priorities identified by residents and various stakeholder groups.

This tool is meant to help guide agency staff and the NPS in determining decision-making at the various stages of the planning process. It also aims to direct the user to specific SCORP Toolbox Resources that will be helpful in moving a planning team through the process.

## Scope

This SOP applies to the planning activities undertaken by the <<State Agency name>>, and is limited to:

- Statewide Comprehensive Outdoor Recreation Plan (SCORP)

## Key Objectives:

The primary objectives of this SOP are to:

- Establish a standardized approach to preparing and planning for the SCORP. Ensuring consistency and quality across administrations.
- Provide a clear framework for decision-making, helping to prioritize tasks and allocate resources effectively, and the team assesses readiness for planning.
- Enhance collaboration and communication among planning staff, stakeholders, and the National Park Service.
- Improve the efficiency and effectiveness of the SCORP planning process.
- Ensure compliance with relevant state and federal laws, regulations, and policies.

## Statewide Comprehensive Outdoor Recreation Plan

This section outlines the steps and considerations in the planning process for the Statewide Comprehensive Outdoor Recreation Plan (SCORP).

### Step 1: Assessment of Current SCORP Accomplishments – (2-2.5 years prior to next SCORP)

- **Background/Need:** States are currently required to create a Statewide Recreation Plan that sets out the state’s outdoor recreation priorities for a 5 or 10-year period. The plan must be approved by the National Park Service and the state’s Governor to qualify for federal parks, recreation, and conservation funding opportunities. An implementation assessment should be fluid and ongoing so as to judge the readiness of the internal teams on the process timeline for the next SCORP development.
- Have a majority of the goals, objectives, or actions been accomplished, or are they on track to be accomplished? By when?

### Step 2: Pre-planning Questions and Assessment (2-1.5 years prior to next SCORP)

- Is the current SCORP doing what we intended it to do? Is it guiding or informing other planning projects or documents – either internally or externally?
- What hasn’t been accomplished that we thought would be? What did we leave out of the current SCORP that we must include in the next one? Think of big trends, movements, state issues, etc.
- What do we want a new SCORP to focus on? What is the current vision? Has it changed from the previous SCORP?
- Have discussions with staff, agency leaders, partners, and stakeholders (let the voice of the customer weigh in).
- Review and consideration of other state planning efforts and plans (e.g., through SCORP Community of Practice, SCORP Toolbox, recommendations from advisory groups, etc). Identify best practices.

- What is the cost associated with the most desired or essential activities, data collection, mapping, etc? (e.g., random sample survey, GIS mapping of needs assessment, etc). Are there companies that do these things on state contract?
  - Would these be appropriate projects to engage in with universities?
  - [See MOU with Universities](#). Develop guidance on when to contract with universities, state contract vendors, or when to do an RFP
- Identify potential funding sources (planning grants, agency research budget, agency grants, grants and foundations; in-kind support from your agency)
  - Look at other innovative funding opportunities that other states have used. [See TX and the CDC funding partnership here](#).
  - Identify grant writers (in agency or other)? If so, what is the application date? Expected award date. How does this impact the planning timeline?
  - If applying for grant funds, complete LWCF or other paperwork, and factor the grant process into the project timeline, allowing for at least +/- 3 months.
- Tribal engagement – reach out and inform/communicate; seek input and feedback early. Early engagement with other stakeholders and communities that have vested interests in outdoor recreation in your state is important.

### Step 3: Initiation – 1.5 – 2 years prior to due date

- **Form internal and external planning teams:**
  - Internal – Assemble an internal team of agency staff that will manage the project, oversee the consultant, coordinate with stakeholder groups, and be responsible for the completion of the SCORP.
    - Internal project kick-off meeting. Who will be part of the project team? What role will they play? Expectations?
  - External – Assemble a team of individuals and stakeholders to join the internal advisory group, who have relevant expertise and knowledge to meet and advise on the scope and needs of outdoor recreation, park management, conservation, wetland strategies, etc.
  - Communicate that the process is starting. If there are individuals/organizations who want to participate, give contact information for the SCORP POC. Send this information out to all identified partners and post on the webpage/site.
  - Hold a larger kick-off to the planning process
- **Establish project scope and objectives:** Utilize past SCORP data, research from other state SCORPs, and discussions from the statewide advisory group to define the boundaries and goals of the planning process, including establishing the vision and goals, stakeholder and public engagement, research and data gathering, feasibility of an economic impact study, implementation recommendations, etc.
  - Determine whether a consultant will be hired – work with your procurement and/or fiscal team to prepare RFP and plan accordingly – [See RFP Example and Timeline here](#). Since agencies have different requirements for RFP’s and RFQ’s, see Scopes of Work examples [here](#).

- **Funding Request:** Work with the National Park Service to apply for a planning grant that will be used to develop the SCORP. Planning grant funds can be used for state personnel costs, to hire a consultant to conduct the SCORP planning process, fund the data collection piece through various methods, including colleges and universities, conduct other studies or investigations that inform the SCORP, mapping and establishing digital platforms, or preparing the final document. The link to the [LWCF Manual, Chapter 2, Section C.5](#) can be found [here](#).
  - Identify matches for sources of funding and in-kind support
    - Examples of potential sources for additional funding for the project or for a planning grant match are outlined here.
- **Execute contract:** Whether hiring an outside consultant or doing in-house with agency planners and/or universities, etc. An executed contract or MOU signals the start of the planning project – the real work can begin!

#### Step 4: Research and Data

- **Gather existing data:** Collect relevant data related to the SCORP scope. Administer surveys and conduct public meetings to acquire additional data. Survey and Needs Assessment examples can be found here.
- **Conduct research:** Research relevant outdoor recreation and conservation topics and trends to inform the planning process.
- **Economic Impact Study:** Contract with a research entity to complete an updated economic impact study.
- **Analyze data:** Analyze all collected data and research results to identify key goals, issues, opportunities, and constraints that could be used to frame priorities for the SCORP.

#### Step 5: Stakeholder Engagement

- **Identify stakeholders:** Identify a multi-dimensional group of individuals or groups who have an interest in outdoor recreation and conservation in the state.
- **Develop an engagement plan:** Create a plan for engaging stakeholders throughout the planning process. Tribal engagement should be a part of this outreach.
- **Conduct outreach:** Reach out to stakeholders through various channels, such as public meetings, surveys, and virtual opportunities. Ensure engagement reaches across the state and represents the diversity of your state.

#### Step 6: Public Participation

- **Provide public notice:** Work with your marketing and communications office, and/or selected consultant team to announce the SCORP project to the public through required and appropriate channels.
- **Hold public meetings, forums, roundtable discussions, or focus groups:** Conduct public meetings to gather input and feedback from the community. Ensure engagement reaches across the state and represents what makes your state special.

- **Incorporate public comments:** The consultant team and advisory team will review and incorporate public comments related to the SCORP.
- **Reply to public comments:** Agency leadership will provide recommendations on responses to the public comments, and the consultant team will provide responses to those who made comments.

### Step 7: SCORP Development

- **Develop SCORP document:** Utilize data, research, and public feedback to create multiple goals and objectives that address the identified issues and opportunities of gaps between supply and demand.
- **Evaluate options:** Assess the potential benefits, costs, and risks associated with each goal and objective.
- **Select preferred goals and objectives:** The agency and the Governor will choose the goals and objectives that best meet the needs of outdoor recreation and conservation in the state and address stakeholder concerns.

### Step 8: SCORP Implementation

- **Develop implementation strategy:** The SCORP is not complete without an action plan or an implementation plan that ties the new goals and objectives to the project selection criteria outlined in the Open Project Selection Process (OPSP). Create a plan for carrying out the approved SCORP as part of the full plan.
- Key ingredients for a successful Action Program or Implementation Plan include:
  1. Recommendations and Goals
  2. Performance Measures
  3. Strategies and Action Steps
  4. Partners that are committed to implementation (State of NY SCORP has a great Partnership Implementation section on page 136 [here](#).)
  5. A Scorecard or Matrix for adequate tracking and evaluation
  6. Allocation of state, federal, and other creative funding sources for outdoor recreation projects and to capture the essence of the SCORP.
  7. Method of Implementation Chart from the State of Florida - [here](#).
- **Allocate resources:** The BOC will assign necessary resources, including staff, budget, and timeframes, to implement the SCORP.

### Step 9: Monitoring and Evaluation

- **Establish a monitoring/tracking system:** Develop a system to allow the agency to track the performance of the implemented plan. LWCF planning grants can be used to continuously fund ongoing SCORP support.
- **Evaluate outcomes yearly:** The agency will create a procedure to assess the effectiveness of the SCORP in achieving its objectives yearly. (**An Annual Scorecard** is a good example)

- **Make adjustments:** The agency will make necessary adjustments to the plan based on monitoring and evaluation results at the 5-year time frame. If needed, depending on the scope of the SCORP 5-year recertification, additional funding can be requested through a planning grant from the National Park Service to assist with 5-year recertification planning and implementation.

### Ongoing – Between Planning Phases

- Create and maintain a database of Recreation Providers
- Create and maintain a database of recreation clubs, individual recreationists, etc.
- Create and maintain a database of recreation stakeholders.
- Catalog procurement information in one shareable location for next effort (e.g., final ISAs, RFPs, Contracts, Scopes of Work, etc).
- Have drafts of communications (e.g., to partners, Directors, Governor's Office, NPS, the public) in one shareable location to serve as a model for the next effort.
- Do you need to translate any of the planning materials? (e.g., Spanish, etc). If so, what is the plan, vendor, etc? What pieces will be translated?)

*\*Modified from the TN Dept of Environment and Conservation, Bureau of Conservation, Division of Strategy and Support, BOC SOP Documents – with permission.*

*\*Modified from sections of the Arizona State Parks and Trails SCORP planning spreadsheet – with permission.*