

# Pleasant Hill Recreation and Park District Strategic Business Plan



**ADMINISTRATIVE DRAFT – ISSUED FOR REVIEW NOVEMBER 30, 2012**

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# Acknowledgments

## Pleasant Hill Recreation and Park District

### Board of Directors

Dennis Donaghu, Chairman  
Bobby Glover, Vice Chairman  
Sherry Sterrett, Secretary  
Sandra Bonato, Member  
Cecile Shepard, Member

### Executive Staff

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Mark Blair, Accounting Supervisor  
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### Consultants

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Gallagher & Associates  
Timothy Gallagher, Principal

### Special Acknowledgment

The Board of Directors would like to make a special acknowledgement and thank-you to all the volunteers of the District who provided their time and talents during the public input process of the Strategic Business Plan effort during the late summer and autumn of 2012.

## Executive Summary

Since the adoption of the Parks and Recreation Master Plan in 2003, Pleasant Hill Recreation and Park District has experienced significant changes including the effects of the 2008-2012 Great Recession and the passage of the \$28 million dollar Measure E in 2009. Since the passage of Measure E the District has moved forward with the construction of three new facilities, teen center, senior center, new community center and rehabilitation of Pleasant Oaks Park. The District has to date opened the Teen and Senior Center to better serve Pleasant Hill's residents. Pleasant Hill Recreation and Park District (District) has become more proactive in providing parks and recreation programs to the community.

During the late 1990's the state of California was facing severe budgetary issues and found itself in a serious deficit situation. To meet its obligations to fund education at specified levels under Proposition 98, the state enacted legislation that shifted partial financial responsibility for funding education to local government, including special districts such as the Pleasant Hill Recreation and Park District.

This was accomplished by the state instructing county auditors to shift the allocation of local property tax revenues from local government to "educational revenue augmentation funds" (ERAFs), directing that specified amounts of city, county and other local agency property taxes be deposited into these funds to support schools.

By fiscal 2012-13, the annual impact of the ERAF shift is a shortstopping of some \$6.8 billion in annual funds from cities, counties, special districts and the citizens those entities serve. For Pleasant Hill Recreation and Park District, the County Controller's Office for Contra Costa County estimates the amount of lost revenue to the District for fiscal year 2011-12 from ERAF is \$1,736,382.

In 2009 the District moved forward with a \$28 million dollar ballot measure (Measure E) for facility upgrades. The mail-in election took place during the summer of that year and required a 2/3 super majority vote for approval. The major projects in this bond measure include replacement of the Senior Center and the Community Center, building a new Teen Center and upgrading Pleasant Oaks Park. Also committed for the bond measure are restroom replacements at Pleasant Hill Park, Rogers-Smith Park and a new restroom at Brookwood Park. Measure E was overwhelmingly approved with 75.7% of the vote.

The year 2009 also featured the worst of the global economic decline which directly impacted the District with declining property values and thus a decline in available property tax revenue for the District.

In view of the service expansion and new trends, the District grasped the opportunity to update the 2003 Master Plan to address future park and recreation needs of the community but more importantly to address how the District can be financially sustainable. In the summer of 2012, the District began to embark on the development of a sustainable park and recreation plan, known as The Strategic Business

Plan. This strategic plan will lay out a road map to fund current District operations and guide the future development of park and recreation services; while leaving behind a healthy and sustainable park and recreation system for future residents.

## **Specific Recommendations Summary**

### **Recreational Service Goal Direction**

An overarching concept for the District is to continually improve the availability and effectiveness of recreational, athletic, educational, and park services that benefit the entire community. Beyond that, the District should work to adjust, develop, and provide programming that will meet some of the unique demographic changes that are occurring within the community.

### **Management Goal Direction**

During the development of this plan several issues rose to the top including, upgrading equipment and/or technology, identifying opportunities for the reorganization of employee duties to improve efficiencies and reduce overall employment costs, and training opportunities for staff and Board members.

### **Financial Goal Direction**

The District is faced with significant short-term and long-term financial difficulties. Short-term issues related to finding avenues within the existing funding and use levels to properly maintain facilities and programming level while operating three new facilities, Teen Center, Senior Center, and Community Center.

Long-term the District is faced with the need to develop adequate reserves, renovate currently closed facilities, provide for future needs by developing new park, recreation, and sports facilities, and monitor continuing State of California efforts to raid funds from other public agencies.

### **Environmental and Sustainability Goal Direction**

The concept of sustainability involves a commitment to environmental, economic, and social practices that enhance a community's quality of life and promote responsible management of resources. Most importantly, a commitment to sustainability requires us to think about the impact of our actions on future generations. Why should parks and recreation provider's care about sustainability practices and Sustainable Parks? Within the field of parks and recreation, a commitment to sustainable management practices provides an opportunity to address many of our most pressing challenges, such as reducing our carbon footprint, ensuring the design and construction of parks is balanced with long-term maintenance requirements, enhancing community living, and reducing consumption of resources.

## **Marketing Goal Direction**

Marketing and communications efforts can be improved by embracing the convenience and accessibility of all technology. Given the continued growth and reliance of non-print media it will be necessary to provide online services such as program registration, facility reservation, and online classes to reach today's market. The use of blogs, social networks, You Tube, and pod casting to communicate program information are becoming popular. The newer technologies are better sustainable marketing solutions over print, mail, and drive/delivery marketing and registration models. Embracing technology will place more demands on managers, as the public expects and wants information at a faster pace.

# Moving Forward—The Next Two to Ten Years

## Goals Direction and Situational Analysis

### Recreational Service Goal Direction

An overarching concept for the District is to continually improve the availability and effectiveness of recreational, athletic, educational, and park services that benefit the entire community. Beyond that, the District should work to adjust, develop, and provide programming that will meet some of the unique demographic changes that are occurring within the community.

The aging of the District's population could have significant implications in the planning of programs and new facilities. Generally, as a population ages they participate in a fewer and less diverse recreation activities. Youth, of which there is a declining population, participate in recreation activities more frequently than other age groups and generally favor recreation activities that are active, challenging, and competitive.

Complicating the above is the higher income levels generally found for the District resident as higher income levels are associated with higher recreation participation. In contrast, the District's population is also highly educated, professional, and spends significant time each day commuting. These factors could have the effect of limiting recreational activities to weekends.

### Management Goal Direction

During the development of this plan several issues rose to the top including, upgrading equipment and/or technology, Identifying opportunities for the reorganization of employee duties to improve efficiencies and reduce overall employment costs, and training opportunities for staff and Board members.

The quality and quantity of work employees can produce is dependent on the tools and materials with which they are provided. The District should evaluate their current software, hardware and telecommunications equipment to determine what needs to be upgraded, replaced or discarded. A review should be conducted on the effectiveness and security of your data storage and retrieval systems to ensure that operational, financial and personnel information, as well as client records, are not in jeopardy.

The District should produce a list of needs for training and development, career development, and organization development for both staff and Board members. This list should be developed in view of their importance to our organizational goals, realities, and constraints with consideration given to an evaluation of importance and urgency in view of our organizational needs and requirements. When developing training opportunities organizational factors to consider include cost effectiveness, employee growth, legal mandates, and benefits that will be derived from the customer.

Every effort should be made to establish clear operational management goals that not only impact but improve the running of the organization, where management skills, technology and resources can be utilized in the most efficient ways possible.

## Financial Goal Direction

The District is faced with significant short-term and long-term financial difficulties. Short-term issues related to finding avenues within the existing funding and use levels to properly maintain facilities and programming level while operating three new facilities, Teen Center, Senior Center, and Community Center.

Long-term the District is faced with the need to develop adequate reserves, renovate currently closed facilities, provide for future needs by developing new park, recreation, and sports facilities, and monitor continuing State of California efforts to raid funds from other public agencies.

To meet these demands the District will evaluate and use a number of routes, including but not limited to:

- Explore new and innovative funding methods for outdoor park and recreation facilities. These methods may include public/private partnerships, cost sharing among other governmental agencies, and voter approved initiatives.
- Increase revenue generating capabilities for recreation by continuing to update and improve programming and marketing efforts.
- Conduct an evaluation of current level of fees and charges with a goal to maximize but balance revenue generation and public benefits.
- Increase the capacity of “friends” or benevolence groups and other non-profit organizations to provide and support recreation facilities.
- Conduct an evaluation of current maintenance practices to explore routes of improved efficiencies, operations, and opportunity for volunteer programs.

## Environmental and Sustainability Goal Direction

The concept of sustainability involves a commitment to environmental, economic, and social practices that enhance a community’s quality of life and promote responsible management of resources. Most importantly, a commitment to sustainability requires us to think about the impact of our actions on future generations. Why should parks and recreation provider’s care about sustainability practices and Sustainable Parks? Within the field of parks and recreation, a commitment to sustainable management practices provides an opportunity to address many of our most pressing challenges, such as ensuring the design and construction of parks is balanced with long-term maintenance requirements, enhancing community living, and reducing consumption of resources.

Sustainable Parks are designed, constructed and operated to address issues facing the community and surrounding region, such as stormwater management or improving air quality by promoting alternative transportation, reducing motor vehicle trips, and even planting trees. New aesthetic forms emerge for

parks when based on sustainable development concepts, starting with initial consideration of the surrounding landscape around the park. Sustainable parks can significantly decrease water use by reducing irrigation needs through the use of rain gardens and recycled water. Sustainable (Green) buildings typically save up to 60% in annual energy costs when compared to conventional building designs. Building operational costs are also substantially lower. Studies have also shown substantial increases in employee productivity (2-16%) in sustainable Green buildings designed with careful consideration to natural lighting and improved air circulation.

Planning, designing, constructing, and operating Sustainable Parks often includes some of the following elements:

- Minimizing environmental impacts from the onset through sensitive siting of a park within the landscape and careful consideration of the various uses within the park boundaries
- Protecting and enhancing habitat areas
- Educating the public about the value of natural resource stewardship
- Incorporating rain water reuse, grey water for irrigation, efficient irrigation systems, etc.
- Recycling waste products and striving to limit waste as much as possible
- Minimizing pollution impacts resulting from park features and user activities
- Utilizing Green building techniques (e.g., solar power, natural lighting) to reduce energy costs
- Promoting alternative forms of transportation (e.g., greenways, bike trails, safe routes to schools)
- Reducing maintenance and operations costs
- Involving the public as partners, customers, volunteers, participants, stakeholders, etc.
- Encouraging partnerships with various organizations

## **Marketing Goal Direction**

Marketing and communications efforts can be improved by embracing the convenience and accessibility of all technology. Given the continued growth and reliance of non-print media it will be necessary to provide online services such as program registration, facility reservation, and online classes to reach today's market. The use of blogs, social networks You Tube, and pod casting to communicate program information are becoming popular. Embracing technology will place more demands on managers, as the public expects and wants information fast.

Drawing new customers to District programming is as critical as maintaining a high level of satisfaction and loyalty with your current base. Marketing objectives might include establishing and expanding positive relationships with local media, other public agencies, schools, and other regional service providers. Another objective would be to identify and scope out previously untapped consumers who could benefit from District programming. This would include the identification of who are aware District users to the other end of the range, unaware District non-users.

# Facilities and Business Plan

## Recreational Service Goals

### Short-term—2 Years

- Develop programming budgets for each new facility (Teen, Senior and Community Center), establish benchmarks for revenue generation and analyze additional investment needed to fully utilize each facility.
- Achieve an overall increase of 10% in revenue for recreational programming as a whole.
- Expand and improve marketing—(See Marketing Goals)
- Evaluate facility rentals numbers through 2012. With the opening of the new facilities establish a new baseline that results in an increase in rentals of 10% for the first full year of operation.
- Assess opportunities to expanded partnerships with adjacent cities to reduce duplication of programming.
- Assess current and potential cooperative arrangements with local non-profit organizations which could provide services to the general public. Include in the evaluation the utilization of District space by these organizations for meetings.
- Develop recreation management policies and evaluation criteria including:
  - Establish measurable outcomes for recreation as a whole and for individual programs;
  - Evaluate District's current programs, service, and outcomes;
  - Develop and implement systems to collect and examine use data for selected District services;
  - Evaluate the effectiveness of existing programs for youth;
  - Develop systems for making continual improvements in park and facility scheduling and registration.
- Evaluate opportunities to develop partnerships with the business community including but not limited to the rental of space for company picnics, group park improvement days, naming opportunities and development of special events to support local businesses.—See Management goals.

### Long-term—2-10 Years

- Evaluate and assess current and potential additional programming which could be achieved at the Pleasant Hill Middle School.
- Investigate a potential partnership with Mt. Diablo Health Care District, aimed at utilization of District facilities and programs to reduce obesity and improve health and fitness.
- Evaluate the opportunity to turn over the operation of Rogers Ranch to a non-profit or another public agency.
- Identify and evaluate financial resources needed to:
  - Rebuild Wheat Barn and operate and maintain Rogers Ranch;
  - Build a new Gymnasium;
  - Operate College Park Pool as a third aquatic center;
  - Renovate the Old School House and VFW building to be utilized as a small theater;

- Purchase and develop as a sports complex the county owned parcel adjacent to the Pleasant Hill Middle School.
- Evaluate options for utilization of the Old School House including selling the facility, JPA with local non-profit, or turning the facility over to another public agency.
- Develop a long-term management plan to handle emerging new sports such as lacrosse, ultimate frisbee and cricket. Consideration could be given to reallocation of fields, designation of new areas, or cooperative agreements with other public agencies.
- Reevaluate, reprioritize, or reconfirm fields available for sports leagues.
- Define role of District in preservation and operation of historical facilities.

## **Management Goals**

### **Short-term—2 Years**

- Evaluate opportunities to develop partnerships with the business community including but not limited to the rental of space for company picnics, group park improvement days, naming opportunities and development of special events to support local businesses.—See Recreational Services Goals
- Develop budgets for each of the three new facilities, Senior Center, Teen Center and Community Center, which are based on 100% usage. Investigate scenarios for each facility down to the 50% usage level.
- Develop a maximum budget for the full utilization of aquatic facilities.
- Explore opportunities to contract out on-going maintenance and operational duties including but not limited to facility maintenance, turf maintenance, etc.
- Complete the reorganization of staff with clearly defined duties.
- Communicate new job responsibilities with all District staff explaining the upcoming changes prior to the implementation of the reorganization.
- Identify opportunities for the reorganization of employee duties to improve efficiencies and reduce overall employment costs. Implement changes in 2013.
- Investigate and develop additional partnerships—See Recreational Services Goals.

### **Long-term—2-10 Years**

- Identify needed technological updates and related cost developing a plan for implementation of those updates.
- Increase opportunities for professional development and team learning for staff and board members including:
  - Creating a plan for legal, mandatory, professional development and technical skills training;
  - Evaluate current training opportunities and identify employee and District needs;
  - Ensure that training and growth are aligned with District’s vision, mission , and goals;
  - Provide clear information to staff about professional development and advancement opportunities;
  - Increase opportunities for cross-training across divisions.

## Financial Goals

### Short-term—2 Years

- Identify and evaluate financial resources needed to:
  - Rebuild Wheat Barn and operate and maintain Rogers Ranch;
  - Build a new Gymnasium;
  - Operate College Park Pool as a third aquatic center;
  - Renovate the Old School House and VFW building to be utilized as a small theater;
  - Purchase and develop as a sports complex the county owned parcel adjacent to the Pleasant Hill Middle School.
- Develop budgets for each of the three new facilities, Senior Center, Teen Center and Community Center, which are based on 100% usage. Investigate scenarios for each facility down to the 50% usage level.
- Evaluate the capital needs for on-going renovation or upgrades to existing facilities and establish a dollar level necessary to budget on an annual basis. Identify revenues to fund this account.
- Establish as Board policy the allocation of an unallocated reserve account equal to the lesser of \$500,000 or 10% of the operating budget. Establish a timeline for the District to dedicate funds to meet this level of reserve.
- Evaluate District owned properties, such as Chilpancingo Park, which could be sold to reduce on-going operational costs and establish a fund for the development of new facilities.
- Appraise the opportunities to have legislation introduced supporting the Districts efforts to have ERAF frozen at 41% with an annual decline of 1% over the next 16 years.
- Appraise the State's competitive efforts towards the District's historical tax base. Develop a plan with potential scenarios to counter the State's efforts.
- Evaluate and develop a timeline to fully fund the required \$1.3 million in FFE needed for the new facilities.
- Investigate the steps necessary to return the District back to a 2 year budget. Complete the process by 2014.
- Complete the restructuring of all debt services to make use of current low interest rates and reduced debt service payments.

### Long-term—2-10 Years

- Evaluate and identify steps which the District can take to improve credit rating.
- Continue to examine and appraise the historical nature of increased medical costs and develop a plan to handle future increases.
- Evaluate the opportunities for the Winslow Center including but not limited to non-profit operation, public/private partnership or selling part or all of the property.
- Examine and establish lifecycle maintenance plans for facilities, buildings, and park amenities. Identify the steps necessary to build this into daily operations and yearly capital improvement plans to maximize the value and useful life of these assets.

- Examine the opportunities, funds required, costs per parcel, and steps necessary to develop a ballot measure to modify Landscape and Lighting Districts by adding an inflator.
- Examine the opportunities, funds required, costs per parcel, and steps necessary to develop a ballot measure for 2017 or 2018 which could include:
  - Aquatic improvements;
  - New Gymnasium;
  - On-going funds for renovation and upgrades to existing facilities;
  - New sports park;
  - Improvements to existing District facilities such as Old School House and Rogers Ranch;
  - Development of a Theater with Mt. Diablo School District
- Establish Board approved revenue generation goals for each program within Recreational Services.
- Compare Fee Policies of other jurisdictions with the Districts and establish a new policy that supports Board established revenue generation goals for each program taking in consideration equity, cost recovery and consistency.

## **Environmental and Sustainability Goals**

### **Short-term—2 Years**

- Develop a Volunteer Park Adoption/maintenance program that includes certification and training for the volunteers. The program could include regular fix up/clean-up days and enlist the help of community organizations such as scouts, park users, sports clubs, business community, etc. to maintain and enhance various elements of the park system.
- Examine opportunities to improve maintenance operations including:
  - Development of a process to measure park maintenance success through established performance standards. Examples of what this could include are:
    - Established park maintenance standards and frequency rates;
    - Establish and track the cost per acre for each park;
    - Establish a minimum of training hours per year per employee;
    - Develop equipment replacement schedules which include funded depreciation of the equipment to ensure timely replacement.
- Evaluate and establish an Estimated Annual Water Use (EAWU) for various hydrozones such as turf, sports fields and shrub beds
- Evaluate current baseline for utility use, develop tracking system of all water, electric and fuel usage by park or facility site, and establish baseline goals that achieve a net reduction in utility usage.

### **Long-term—2-10 Years**

- Develop a Sustainable Performance System with responsibility for the program handled by a park staff member designated as a Conservation Coordinator. The performance system should include at a minimum:
  - Native Plant Policy—ecoregion;
  - Tracking of Utilities—Partnership with local utility companies;

- Recycling Program;
- Green Waste Composting;
- Demonstration Gardens;
- Use of Alternative Energy Sources;
- Integrated Pest Management Program;
- Habitat Development;
- Community Gardens;
- Public Education and Outreach;
- Stormwater retention;
- Human health, well-being and community values.
- Develop native plant policy that identifies plants endemic to the Mediterranean climate of California. Policy should dictate that 80% of new planting must be classified as Native.
- Develop drought tolerant plant policy that adopts appropriate plant material list by drought tolerant level (low, medium, high) and require that 100% meet medium level and 90% high levels.

## **Marketing Goals**

### **Short-term—2 Years**

- Complete a comprehensive marketing plan that gives consideration and identifies potential promotional strategies for each of the following:
  - Networking - go where your market is ;
  - Direct marketing - sales letters, brochures, flyers;
  - Advertising - print media, directories;
  - Training programs - to increase awareness;
  - Write articles, give advice, become known as an expert;
  - Direct/personal selling;
  - Publicity/press releases;
  - Trade shows, health/wellness fairs and similar events;
  - Web site.
- Establish 2013 benchmark for fundraising program with consideration given to allocating a part-time position to coordinate the fundraising efforts.
- Evaluate and identify current level of competition from other agencies/non-profits, with an evaluation and establishment of lines of business for the District.
- Develop a marketing plan for Aquatics aimed at increasing attendance during times the aquatic facilities have lower attendance numbers.
- Develop a Social Media marketing plan that includes web site improvements and increased online visibility based on establishing a brand for the District through a variety of social media sites including:
  - Facebook;
  - Twitter;
  - Blogs;
  - Events sites;
  - Video sites.

## **Long-term—2-10 Years**

- Conduct a demographic survey of users of programs and facilities to establish a clear picture of who uses specific programs and facilities.
- Conduct a district-wide survey to evaluate and establish users vs. non-users and willingness to pay for new facility development and on-going operations and maintenance.



## **MEMORANDUM**

TO: Board of Directors  
FROM: General Manager  
DATE: November 30, 2012  
RE: Presentation of the Business Strategic Plan by John Courtney and Tim Gallagher of RJM

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John Courtney and Tim Gallagher of RJM will present their initial findings to the Board of Directors on Thursday, December 6<sup>th</sup> at 7:00 PM. They will be making a PowerPoint presentation focusing on the District's future goals. Attached is the Executive Summary along with the Goals for the next 10 years. John Courtney indicated to me that this is not the final as he has titled it "Administrative Draft." John and Tim would like to make their presentation and hear other comments that the Board of Directors has regarding the report prior to them finalizing the District's Strategic Business Plan.