



**Strategic Plan &  
Service and Financial Sustainability Plan  
November 2013**

## Overview

The Strategic Plan and the Service and Financial Sustainability Plan outline goals, objectives and actions to help meet park, recreation and trails needs over the next 10 years as identified in the 2013 Comprehensive Plan. These plans incorporate information from the following documents and activities:

- Tualatin Hills Park & Recreation District Comprehensive Plan (2006)
- Tualatin Hills Park & Recreation District Comprehensive Plan Update (2013)
- Tualatin Hills Park & Recreation District Service and Financial Sustainability Analysis (2013)

# Strategic Plan

**Goal 1** - Provide quality neighborhood and community parks that are readily accessible to residents throughout the District's service area

## OBJECTIVES AND ACTION STEPS

### **Objective 1A**

In developing master or other plans for new and existing park facilities, engage and involve citizens, park district staff from all departments, and partnering agencies.

### **Objective 1B**

Work closely with the Beaverton School District and other partnering agencies to jointly acquire land and co-locate park and school facilities, where possible, particularly in newly developing areas.

#### **Actions:**

- *Coordinate with the Beaverton School District on a regular basis to identify future neighborhood park and recreation sites and school sites in newly developed areas.*
- *Communicate with the Beaverton School District to determine if school facilities in service gap areas have the capacity for greater community use.*
- *Identify potential park district recreational or community programs that could be accomplished within other agency facilities.*
- *Develop or enhance joint use and maintenance agreements to facilitate a greater level of shared use.*

### **Objective 1C**

Use strategies for addressing low-scoring/functioning GRASP® components in parks.

#### **Actions:**

- *Review apparent themes or trends in facilities to determine how to improve GRASP® scores.*
- *Develop the Parks Functional Plan.*

### **Objective 1D**

Use current baseline GRASP® analysis to guide future park development and land acquisition.

#### **Action:**

- *Develop approach to meet potential future needs for dog parks, or other special use facilities including partnerships and sponsorships.*

### **Objective 1E**

Address walkable level of service in areas where service is currently below the threshold and areas that are not currently served.

#### **Actions:**

- *Develop the Parks Functional Plan to address percent of district adequately served by facilities within walkable distance.*
- *Develop the Trails Functional Plan to address the number of different trailsheds versus a single interconnected system.*
- *Consider impact of arterial roads and state highways as potential barriers to park development.*

### **Objective 1F**

Consider design and development criteria by putting appropriate amenities in the right sized park.

#### **Action:**

- *Develop the Parks Functional Plan*

### **Objective 1G**

Address general improvement and acquisition recommendations.

#### **Actions:**

- *Continue to improve ADA access.*
- *Continue to improve access to neighborhood parks and other facilities according to the district's ADA Transition Plan.*

### **Objective 1H**

Consider design/development criteria in the development or redevelopment of parks.

#### **Action:**

- *New construction and/or renovation should follow green building practices or other applicable standards, Universal Design (ADA), and Crime Prevention through Environmental Design (CPTED).*

**Goal 2 - Provide quality sports and recreation facilities and programs for park district residents and workers of all ages, cultural backgrounds, abilities and income levels.**

## OBJECTIVES AND ACTION STEPS

### Objective 2A

Provide a variety of programs at recreation centers to address the needs of all user groups, including children, teens, adults, seniors, ethnic and minority residents, and persons with disabilities: provide programs and services that meet the needs of people of all incomes.

#### Action:

- *Continue to provide facility users with easy opportunities to comment on satisfaction with individual classes and instructors to ensure continued high quality programs and services.*

### Objective 2B

Ensure that access to park district facilities for people with disabilities is consistent with the Americans with Disabilities Act (ADA).

#### Action:

- *Develop program and services ADA Transition Plan.*

### Objective 2C

In developing new recreation centers, plan for multi-purpose recreation and aquatic centers that serve all generations and types of users and make more efficient use of resources. Use guidelines for development of such facilities identified in this plan.

#### Actions:

- *Redevelop or replace aquatic centers with new multi-purpose aquatic/recreation centers over the long-term, as needed.*
- *Re-purpose areas/create flexible space.*

### Objective 2D

Conduct a field capacity analysis for peak times.

#### Actions:

- *Develop a Sport Fields Functional Plan to determine the type, location and number of fields needed to meet peak capacity, including prioritization and allocation.*
- *Continue to partner with community groups, advisory committees, sports user groups and others to schedule use of recreational playing fields, aquatic and recreation centers and other park district facilities.*
- *Explore options to increase efficiency of scheduling and field use, including by providing technical assistance for scheduling activities.*
- *Continue to develop new synthetic turf fields and/or replace existing natural green fields with synthetic fields when it is found to be a cost-effective method of prolonging life and meeting overall long-term field needs, and/or addressing other park district goals and objectives. Work closely with the Beaverton School District in these efforts.*

**Objective 2E**

Explore opportunities for enterprise facilities or additional amenities.

**Action:**

- *Actively pursue enterprise fund facilities and perform appropriate due diligence studies to determine feasibility.*

**Objective 2F**

Address general improvement and acquisition recommendations.

**Actions:**

- *Update/freshen up well-loved, aging infrastructure of existing facilities.*
- *Continue to conduct an aging facility study on each indoor space to include useful life remaining in the physical building, and also improve functionality for its intended purpose.*
- *Continue to improve ADA access.*

**Goal 3 - Operate and maintain parks in an efficient, safe and cost effective manner, while maintaining high standards.**

## OBJECTIVES AND ACTION STEPS

### Objective 3A

Continue to improve the efficiency and cost effectiveness of maintenance operations, including reducing costs associated with the transportation of personnel and equipment.

#### Actions:

- *Pursue the possible joint development of maintenance yards with the school district, city and other governmental organizations to maximize resources while ensuring that such partnering does not compromise the geographic location requirements of such facilities for the district.*
- *Develop distinct levels of service for different types of park and recreation amenities to improve cost effectiveness and more accurately reflect the proper level of service needed for each facility.*
- *Institute a five to ten-year plan to automate appropriate irrigation and lighting systems.*

### Objective 3B

Use the most cost-effective combination of park district staff, volunteers, user groups, community groups, other jurisdictions and contractors to provide maintenance services.

#### Action:

- *Maximize volunteer hours worked for the park district.*

### Objective 3C

Base maintenance standards and practices for specific facilities on each site's design, intended level of use, and extent of active use amenities.

#### Actions:

- *Develop specific stand-alone maintenance plans for each facility (aquatic center, recreation center, or special use facility). Plans should address daily and long-term custodial and maintenance functions, as well as mechanical system and other operating system maintenance.*
- *Continue to use and enhance the park district's system of tracking maintenance expenditures for specific facilities.*

### Objective 3D

Conduct ongoing review of GIS data, specifically review and update GIS boundaries for individual sites, facilities and easements.

#### Actions:

- *Add all easement properties into the GIS data.*
- *Ensure that asset descriptions and GIS shape files accurately reflect the property owned/managed by the park district.*

**Objective 3E**

Complete inventory and updated Level of Service analysis.

**Action:**

- *Complete GRASP® analysis on properties with assumed scores to complete the full inventory of all assets, and update all mapping.*

**Objective 3F**

Consider design/development criteria.

**Actions:**

- *New construction and/or renovation should follow green building practices or other applicable standards, Universal Design (ADA), and Crime Prevention through Environmental Design (CPTED).*
- *Develop a set of restroom design criteria.*

**Objective 3G**

Address general improvements and acquisition recommendations

**Action:**

- *Consider enclosing port-o-lets in areas without enclosures.*

**Goal 4 - Acquire, conserve and enhance natural areas and open spaces within the district.**

**OBJECTIVES AND ACTION STEPS**

**Objective 4A**

Conserve and enhance park district natural areas by working cooperatively with other groups.

**Actions:**

- *Use policies and procedures outlined in the park district Natural Resource Functional Plan to guide development and maintenance of structures or amenities in natural areas.*
- *Remove and control non-native plants, including noxious weeds, in natural areas, where feasible and appropriate.*
- *Regularly review and coordinate maintenance protocols and activities among natural resource and maintenance personnel.*

**Objective 4B**

Develop an interconnected system of greenways and wildlife habitat.

**Action:**

- *Work with public agencies, nonprofit groups and others to identify and acquire or secure easements for natural areas.*

**Objective 4C**

Use park district facilities and programs, as well as partnerships with schools and other agencies to increase the public's understanding of natural processes, wildlife, and habitats.

**Objective 4D**

Manage natural areas to lessen human impacts and allow natural processes to continue, while providing safe access.

**Actions:**

- *Coordinate trails development and maintenance activities with natural resource management objectives and activities.*
- *Continue to work with utility/other agencies to manage rights-of-way for utilities within natural areas, including vegetation management, replanting and other activities to create healthy habitat.*

**Objective 4E**

Maintain man-made amenities or features in natural areas to meet educational and recreational needs while managing or limiting access and providing stewardship of the natural resource.

**Action:**

- *Use policies and procedures outlined in the park district Natural Resource Functional Plan to guide development and maintenance of structures or amenities in natural areas.*

**Objective 4F**

Allow for most natural processes to occur in natural areas or natural area elements of other park district facilities, consistent with direction provided in the park district's Natural Resource Functional Plan.

**Objective 4G**

Address general improvement and acquisition recommendations

**Action:**

- *Continue to look for opportunities to acquire natural resources and open spaces.*
- *Prepare Natural Resources Functional Plan*

**Goal 5 - Develop and maintain a core system of regional trails, complemented by an interconnected system of community and neighborhood trails, to provide a variety of recreational opportunities, such as walking, bicycling and jogging.**

## OBJECTIVES AND ACTION STEPS

### Objective 5A

Provide access to the trail system for people of all abilities, recognizing that not every individual trail will meet this threshold; link trails to a complementary system of on-road bicycle and pedestrian routes to improve access and connectivity.

### Objective 5B

Continue to link trails to parks, neighborhoods, community facilities such as libraries, civic and community centers, parks, schools, other athletic facilities and shopping areas.

#### Action:

- *Work with property owners to resolve trail encroachment issues in an expeditious manner.*
- *Work with neighbors, community groups and trail users and advocacy groups to schedule and conduct community events or projects along trails.*

### Objective 5C

Pursue a variety of funding sources to design, develop and maintain trails, including volunteer services, state and federal grants, private foundations, land trusts, service clubs, and individual donors.

#### Actions:

- *Regularly update, monitor and pursue regional, state and federal grant opportunities to fund acquisition and construction of trails.*
- *Use staff and volunteers to keep trails free of litter and obstructions.*

### Objective 5D

Update the Trails Plan to become a Trails Functional Plan that addresses connectivity of trailsheds to each other and to recreational opportunities. Trail connectivity also should address connecting people to trails through wayfinding, well placed trailheads, and digital and hard copy mapping. With a broad user base and multiple ownership and management entities, trails standards and development guidelines should be implemented.

#### Actions:

- *Ensure consistency with Metro's Regional Active Transportation Plan.*
- *Update trails inventory to identify system gaps and substandard trails.*
- *Investigate the feasibility of improving connectivity of isolated trail segments by various methods (e.g. temporary soft trails, directional signage, on-street trail routine markings).*
- *Regularly monitor the condition and security of existing trails through routine inspections.*

**Goal 6 - Provide value and efficient service delivery for taxpayers, patrons and others who help fund park district activities.**

## OBJECTIVES AND ACTION STEPS

### Objective 6A

Provide and maintain facilities in a flexible manner to continue to respond to changing needs and conditions within the District.

#### Actions:

- *Establish criteria and protocols for replacing major park and recreational facilities as an alternative to making major capital improvements, considering factors such as the cost of capital improvements, ongoing maintenance costs, age and condition of facility, ability of facility to meet current user demands, and other issues.*
- *Develop specific guidelines to determine which maintenance functions or activities should be considered for contract services.*

### Objective 6B

Continue to pursue partnerships in land acquisition, facility development, programming, marketing, maintenance and other activities with partnering service providers, including the cities of Beaverton, Hillsboro, Tigard and Portland; Beaverton School District; Portland Public School District; Washington County; Metro; Tualatin Valley Fire and Rescue; Tualatin Valley, West Slope and Raleigh Water Districts, Clean Water Services; Portland Community College; Washington County Cooperative Library Services; Tri-Met; the Oregon Department of Parks and Recreation; the Oregon Department of Transportation and others.

#### Action:

- *Identify and pursue opportunities to partner with private vendors in developing and managing park district facilities.*

### Objective 6C

Continue to ensure that revenues from the District's System Development Charges cover the cost of new facilities and land necessitated by new population growth and development.

#### Actions:

- *Update the park district's System Development Charge (SDC) rates and fees to reflect current levels of service, land acquisition and development costs, and updated capital improvement plans (CIPs). Regularly monitor and update SDC fees to reflect updated CPIs and other conditions.*
- *Work with developers to make sure land received in exchange for SDC credits is adequate to meet park district needs, goals and objectives.*

### Objective 6D

Ensure that funds will be available to adequately maintain and operate proposed new facilities before approving their construction.

### **Objective 6E**

Continue to attract, retain and train high quality employees.

#### **Actions:**

- *Continue to provide professional development and training opportunities for staff, including participation in professional organizations and conferences, in-house training and other, similar activities.*
- *Continue to monitor and adjust compensation and other personnel policies in relation to industry standards, as needed to maintain competitive standards.*

### **Objective 6F**

Continue to encourage and recognize the important role of program volunteers and other community groups in meeting District needs.

#### **Action:**

- *Continue to work with sports associations, other user groups and volunteers to cooperatively manage, maintain and improve park district activities (e.g. field scheduling, identification of natural and historic resources, etc.).*

**Goal 7 - Effectively communicate information about park district goals, policies, programs and facilities among District residents, customers, staff, District advisory committees the District Board, partnering agencies and other groups.**

## OBJECTIVES AND ACTION STEPS

### Objective 7A

Use standing park district advisory committees, CPOs, NACs and other community groups to review and solicit guidance on District policies, plans and projects.

#### Actions:

- *Complete work of Advisory Committee Task Force to separate fund raising (Friends' Groups) from board appointed advisory committees.*
- *Establish project or plan-specific advisory groups, task forces and ad-hoc committees to provide additional guidance on specific planning or development efforts.*

### Objective 7B

Regularly communicate with and provide opportunities for the general public to learn about and comment on District activities.

### Objective 7C

Work closely with partnering agencies and groups on plans and projects of mutual interest.

#### Action:

- *Work with partnering agencies to publicize information about park district programs and opportunities to market them via those organizations web sites, newsletters or other informational materials or tools.*

### Objective 7D

Provide timely and accurate information to the Board of Directors in a manner that allows them to make consistent, effective decisions on policy issues and plans.

#### Action:

- *Continue to provide annual goal outcome reports to the Board of Directors summarizing progress in meeting the Comprehensive Plan goals and objectives and implementing related strategies.*

### Objective 7E

Provide opportunities for all affected park district departments and staff to participate in the planning and development processes.

#### Actions:

- *Regularly update the Comprehensive Plan (every five to ten years) to ensure it continues to address the changing needs of the park district. Update sections of the document more frequently, with an amendment or other process to reflect the results of major policy or planning initiatives.*
- *Require a review of the Comprehensive Plan as part of each park district department's annual budgeting and work planning program.*

### **Objective 7F**

Work with ethnic and/or cultural advocacy or community groups to enhance communications about District programs, facilities and other opportunities to their constituencies.

#### **Action:**

- *Continue to work with ethnic group residents, cultural organizations and advocacy groups to identify, expand and use targeted methods for providing information about park and recreational opportunities that are desired by ethnic or minority residents (e.g. Spanish or other language newspapers, meetings or information provided through faith-based organization, etc.).*

### **Objective 7G**

Continue to regularly communicate with the general public through working with the media, including local and regional newspapers, radio and television stations.

### **Objective 7H**

Coordinate park district marketing efforts.

#### **Actions:**

- *Develop a district-wide marketing plan.*
- *Consider policy options regarding tracking of demographics for specific and strategic programs and initiatives.*
- *Continue to effectively market programs, facilities and volunteer opportunities to park district residents, distinct user groups and populations. Regularly conduct surveys and other efforts to assess demand and desires for programs to enhance marketing efforts.*
- *Establish consistent design and materials themes (e.g. brand) to ensure a relatively consistent look and feel to park district facilities.*
- *Continue to produce high-quality maps, brochures, programs and other informational materials; increase use of electronic media to inform and register patrons.*

**Goal 8 - Incorporate principles of environmental and financial sustainability into the design, operation, improvement, maintenance and funding of park district programs and facilities.**

## OBJECTIVES AND ACTION STEPS

### Objective 8A

Consider the environmental impacts of maintenance and operational activities and standards.

#### Actions:

- *Continue and expand the use of hybrid, electric, bio-diesel, or other low-emission vehicles by the park district.*
- *Promote reduced water consumption design guidelines or standards for park district facilities that encourage reduced water use; promote such practices through informational materials and interpretive displays associated with park district facilities.*
- *Promote on-site filtration, reuse of grey water for irrigation and other Best Management Practices or innovative storm water drainage practices, where feasible to reduce impacts of runoff on municipal storm drainage systems and the environment.*
- *Continue to develop specific park district facility maintenance management plans that incorporate sustainable practices.*
- *Continue to implement the park district's recycling program and provide opportunities to recycle waste created at park district facilities, where feasible.*

### Objective 8B

Provide and enhance opportunities for employees to reduce impacts on the natural environment (e.g., through use of alternative forms or transportation or energy use).

### Objective 8C

Consider design and development criteria in the development and redevelopment of sustainable facilities.

#### Action:

- *Where feasible, conserve energy and other natural resources by utilizing green building technologies and practices for all new park district facilities and major renovations to existing facilities, using green building practices or other applicable standards, Universal Design (ADA), and Crime Prevention through Environmental Design (CPTED).*
- *Continue to help protect water quality and reduce flood damage by working with partnering agencies to acquire and protect natural areas within 100-year floodplains and managing such areas to maximize impacts on and improve the function of those floodplains and floodways.*

### Objective 8D

Provide all services in accordance with the Service and Financial Sustainability Plan.

# Service and Financial Sustainability Plan

## Theme 1 – Policies and Procedures

The intent of this theme is to identify policies and procedures to revise or develop which allow staff to achieve tier target minimum (direct) cost recovery percentages, maximize revenue generation where appropriate to shift taxpayer investment/subsidy to those areas that are more foundational on the pyramid, and capitalize on effective and efficient functions, all within Board of Directors guidelines and with transparent consistency.

**This Theme encompasses Targets 1 through 8.**

### Target 1: Explore the possibility of expanding the self-sustaining enterprise fund.

#### **Strategy 1.a.**

THPRD will identify selective opportunities to implement enterprise funds.

#### **Action:**

- *Consider opportunities to convert self-sustaining programs and services (those that are revenue positive or expense neutral over direct costs) to an Enterprise Fund. For example, an adventure park or an indoor field house with batting cages, Parkour course, climbing wall, skatepark, etc.*

### Target 2: Establish a sinking fund for life cycle repair/replacement projects.

#### **Strategy 2.a.**

THPRD will fund the sinking fund utilizing the excess revenues from increasing overall District cost recovery.

#### **Action:**

- *Implement cost recovery as outlined in this document.*

### Target 3: Adopt the Target Tier Minimum Cost Recovery Percentage as the fiscal target for budget preparation, the basis for establishing fees, and public accountability.

#### **Strategy 3.a.**

THPRD will recommend to the Board of Directors formal acceptance of this plan (**Service and Financial Sustainability Plan**) as the foundation for THPRD's decision-making regarding cost recovery.

#### **Action:**

- *Board of Directors to formally accept the study and the recommended targets, strategies and action steps at a later date.*

#### **Target 4: Adopt the pricing strategies as the methodology for fee setting by THPRD.**

##### **Strategy 4.a.**

THPRD will recommend to the Board of Directors to authorize the District to set fees using the Pricing Strategies outlined in the Service Portfolio as the foundation for THPRD's decision-making, allowing staff to respond to market conditions, opportunities, and service demands in a timely manner, versus approval of every fee for the next year.

##### **Action:**

- *Board of Directors to formally accept the study and the recommended targets, strategies, and action steps at a later date.*

#### **Target 5: Revise Current Sponsorship Policy.**

##### **Strategy 5.a.**

THPRD will consider revising the current sponsorship policy for implementation. This comprehensive policy would provide a "menu" to potential donors or sponsors that could offer the sponsorship of the operations of a park/facility, trails, fields, special events, and/or programs provided at one of THPRD's sites. This effort can include the "adopting" of a facility or program.

##### **Actions:**

- *Management team to review and customize sample Sponsorship Policy provided by GreenPlay LLC.*
- *Recommend draft policy to the Board of Directors for approval process.*
- *Use final policy as basis for negotiated sponsorships of selected projects.*
- *Research using a consultant to identify sponsorship opportunities in the THPRD market.*

#### **Target 6: Implement a Partnership Policy.**

##### **Strategy 6.a.**

THPRD will formalize a partnership policy for implementation.

##### **Actions:**

- *Management team to review and customize sample Partnership Policy provided by GreenPlay LLC.*
- *Recommend draft policy to the Board of Directors for approval process.*
- *Use final policy as basis for negotiated partnerships for selected projects.*

#### **Target 7: Revise current Non-Resident Fee policy.**

##### **Strategy 7.a.**

THPRD will recommend to the Board of Directors the revised non-resident fee policy predicated on the following premises:

- 1) The District is tasked with serving District residents and property owners first.
- 2) Meeting the needs of adjacent non-residents and those who work within the District boundary, or who are visiting, is an ancillary and mutually beneficial service.

- 3) Monitored Facility Usage is not at or near capacity with resident usage, and non-residents help to ensure that classes, workshops, and clinics reach minimum or fill. Therefore, setting appropriate but non-restrictive, non-resident user fees and service rates preserves the benefit to the resident and property owner for their property tax investment, while encouraging participation by others.
- 4) Classes and services which are at or nearing capacity can assure resident priority participation through restricting registration access to residents first, then opening it up to non-residents if not filled.

**Action:**

- *Revise policy as required.*

**Target 8: Revise current Family Assistance Program.**

**Strategy 8.a.**

THPRD will recommend to the Board of Directors the revised Family Assistance policy predicated on the following premises:

- 1) The District is tasked with serving District residents and property owners with barrier-free access. Barrier-free access includes ability to pay constraints. THPRD will ensure that services are accessible for those who are socio-economically disadvantaged.
- 2) Focus will be on providing financial support for participation in those categories of service on the Mostly or Considerable Community Benefit levels of the Cost Recovery Pyramid – thus ensuring access for all to those services providing the greatest community benefit.
- 3) Ensure that Family Assistance may be used for daily admission to THPRD facilities or frequent user discount fee package, or to register for any THPRD operated or managed Tier 2 or 3 services except for rentals:
  - Monitored Facility Usage
  - Classes, Workshops, and Clinics – Beginning/Multi-Level
  - Classes, Workshops, and Clinics – Intermediate/Advanced
  - Leagues/Tournaments – Unrestricted
  - Preschool
  - Camps/Before and After School Care
  - Therapeutic/Adapted/Special Recreation
  - Social Services
  - Social Clubs
- 4) That non-residents are not eligible for the Family Assistance program.
- 5) Consider cessation of cash awards made directly to third party providers (youth sports associations, contract instructors, THPRD Associates or Affiliates, or alternative providers such as the YMCA or Boys and Girls Clubs, etc.).

**Action:**

- *Revise policy as required.*

## Theme 2 - Service Provision and Management

The intent of this theme is to avoid duplicative services in over-saturated markets which exhaust resources; identify and develop niche markets in response to service area needs; and advance THPRD's market position where services are financially sustainable.

*(Note: The following strategies were identified through a comprehensive staff Service Assessment in Fall of 2012 and Winter/Spring of 2013. The Service Assessment tool should be used regularly to align services with evolving community needs, financial and market conditions, etc. The Service Portfolio identifies all the recommended services provision strategies.)*

**This Theme encompasses Targets 9 through 12.**

### **Target 9: Implement provision strategies identified through the Service Assessment.**

#### **Strategy 9.a.**

THPRD will evaluate alternative provision strategies through market research for identified services. (See the accompanying Staff Resource Document for Service Portfolios identifying all the services recommended for collaborations or complementary development.)

Several services suggest complementary development because a number of, or one, significant alternative provider(s) exists which provide the service. THPRD may be in a strong market position to provide the service, yet it does not have financial capacity. "Complementary development" encourages planning efforts that lead to mutually compatible service development rather than duplication, broadening the reach of all providers. Although there may be perceived market saturation for the service due to the number of similar services of alternative providers, demand and need exists, justifying the service's continued place in the market.

#### **Action:**

- *Evaluate opportunities for complementary development for those services identified in the Service and Financial Sustainability Analysis.*

#### **Action not recommended:**

- *Playground and fields usage at Garden Home Recreation Center suggested Complementary Development, because there are other opportunities in the same service area; if there weren't, this Open Park Usage would become a "core service;" would not recommend for complementary development at this time, unless the amenities and equipment are in disrepair or poor condition with readily available options in the target market's service area.*

#### **Strategy 9.b.**

Several of the services at selected locations suggest collaboration, because the service can be enhanced or improved through the development of a collaborative effort as THPRD's current market position is weak. Collaborations (e.g., partnerships) with other service providers (internal or external) that minimize or eliminate duplication of services while most responsibly using THPRD's resources are recommended.

#### **Action:**

- *Evaluate opportunities for collaboration for those services identified in the Service and Financial Sustainability Analysis.*

**Strategy 9.c.**

THPRD will develop a systematic process for the divestment of identified services to mitigate resource loss. (See the accompanying Staff Resource Document for Service Portfolios identifying all the services to divest.) Divestment could mean cessation of a specific service at a specific location and trying something different, closing or re-purposing a facility or facility space, or elimination of a service all together.

Only a couple of services offered by the District suggest divestment as the only option, because THPRD has determined that it is in a weak market position with little or no opportunity to strengthen its position. Further, the service is deemed to be contrary to THPRD's interest in the responsible use of resources; therefore, THPRD is positioned to consider divestment of the service.

**Actions:**

- *Divest Teen-adult kickboxing at Conestoga Recreation and Aquatic Center.*
- *Divest NIA (fitness program) at the Elsie Stuhr Center.*

**Strategy 9.d.**

THPRD will develop a systematic process for either collaborating with others to continue these identified services or divesting to mitigate resource loss. (See the accompanying Staff Resource Document for Service Portfolios identifying all the services to collaborate or divest.)

Many services offered by the District suggest either collaboration or divestment, because THPRD has determined that it is in a weak market position with little or no opportunity to strengthen its position. Regardless of whether the service may or may not be deemed to have the financial capacity to be economically viable, it is probably contrary to THPRD's best interest to use its limited resources to continue offering these services; therefore, THPRD is positioned to consider either a collaboration or divestment of these services.

**Target 10: Explore a systematic approach to and strategies for advancing or affirming market position for identified services.**

**Strategy 10.a.**

THPRD will advance market position of identified services through increased marketing efforts. (See **Appendix G** for Service Portfolios identifying all the services to advance.)

**Actions:**

- *Capitalize on THPRD's strong market position for these services by increasing offerings as demand dictates.*
- *Advance market position of permitted services (alcohol, photo shoots, events by others), concession and vending, and merchandise in most (if not all) locations.*
- *Advance field rentals and facility rentals at most locations.*
- *Increase private and semi-private lessons at most locations, swim lessons, and professional services such as physical education swim classes with instruction at most (if not all) locations.*
- *Promote organized parties at most locations.*
- *Promote adult sports at the Athletic Center.*
- *Promote specialized activities and some community-wide events at most locations.*

- *Capitalize on Summer Camps and non-school day programs at several locations.*
- *Offer more introductory/multi-level aquatic classes at Beaverton Swim Center such as diving 1-4, synchronized swimming 1-6, water polo, and back-arthritis.*
- *Offer various introductory/multi-level and intermediate/advanced classes, workshops, and clinics at Recreation Centers throughout the District.*
- *Capitalize on indoor playground (CH).*

**Strategy 10.b.**

THPRD will affirm market position of identified services through program outcome planning and market research. (See the accompanying Staff Resource Document for Service Portfolios identifying all the services to affirm.)

At certain locations, specific programs have demand within the target market and service area, and alternative providers are also in the same market space. Strategic positioning and messaging, focusing on the differences or niche will be a key marketing strategy.

Some classes and programs are also provided by others in certain locations throughout the District.

**Actions:**

- *Ensure that services offered fill a strategic niche market.*
- *Use niche positioning and messaging as a marketing strategy.*

**Strategy 10.c.**

THPRD will consider strategies to deal with waiting lists on services which are at or near capacity and are determined to advance the market position.

**Actions:**

- *Consider summer package of multi-level learn to swim lessons to assist with aligning skill advancement with class scheduling.*
- *Consider determining advancement recommendations earlier in the session.*
- *Require patrons to pay the full class fee to register on waitlists or create a cancellation fee.*
- *Ensure that staff are monitoring registration, scheduling instructors for typical capacity regardless of level of instruction, and that adequate support staff is available to help manage high demand program registration needs at peak times.*

**Target 11: Continue to explore targeted menus of services that are specific to the unique needs of individual communities throughout the District (avoid a “one-size-fits-all” approach).**

**Strategy 11.a.**

THPRD will conduct a service assessment and review portfolio of services annually to ensure responsiveness to each unique service area and their socio-economic conditions.

**Action:**

- *Add as a function to management performance plans.*

**Strategy 11.b.**

THPRD will adopt a systematic approach to new program implementation and management (for instance, run a program three times, making adjustments as necessary, and then discontinue offering it if it is not successful).

**Actions:**

- *Monitor minimum registration.*
- *Make adjustments as necessary.*
- *Cancel and/or replace under-performing services.*

**Strategy 11.c.**

THPRD will manage its programs' lifecycles through monitoring registration, attendance figures, exit survey ratings and cost recovery goals on an ongoing and regular basis.

**Action:**

- *Watch for the warning signs of program saturation point, such as declining participation, and pursue revitalization efforts such as new instructor, new outcomes, title and description, and new day or time.*

**Target 12: Improve intra-division cooperation and labor management.**

**Strategy 12.a.**

THPRD will explore centralizing recreation and aquatics programs and move away from complete site based budget and management structure.

**Action:**

- *Improve efficiencies and collaborations, decrease intra-divisional competition, improve consistency in service delivery, and eliminate "silo-ed" thinking by moving away from site-based management for some programs and services.*

**Strategy 12.b.**

THPRD will enhance and deepen its understanding of true labor costs for services; this is especially valuable for decision-making regarding return on investments for certain programs, activities, and events (special events, fundraising events, etc.).

**Action:**

- *Conduct a time-in-motion/activity log.*

### Theme 3 – Cost Savings and Cost Avoidance Strategies

The intent of this theme is to identify practices and analysis methods for service planning and provision to consistently ensure the most cost effective use of resources.

**This Theme encompasses Targets 13 through 16.**

#### **Target 13: Continue to develop a consistent methodology and budget planning approach for service management.**

##### **Strategy 13.a.**

THPRD will ensure that all staff is using zero-based (cost-based or activity-based) budgeting principles to determine the **direct and indirect** cost to provide a service as the basis for the budget development process.

##### **Actions:**

- *Expand use of existing budgeting, project, and time management tools to track actual costs over the next year.*
- *Compare tracked actual costs against current direct costs assumptions and make adjustments as necessary.*
- *Use cost-based budgeting tools as the details for the next fiscal year budget preparation.*

#### **Target 14: Continue to use cost savings practices that align with the District’s vision and produce cost effective results.**

##### **Strategy 14.a.**

THPRD will review internal management practices and evaluate cost savings measures.

##### **Actions:**

- *Conduct internal process meetings to determine efficiencies, management styles, efficient uses of assets, and create recommendations to reduce costs and simplify processes, sharing approval/decision-making throughout THPRD.*
- *Managers to document recommended process changes and management strategies, which reduce costs.*

#### **Target 15: Continue to track and communicate cost of major maintenance.**

##### **Strategy 15.a.**

THPRD will continue to maintain a current rolling 10-year capital lifecycle repair and replacement list of the physical assets of THPRD.

##### **Actions:**

- *Managers will continue to update the lifecycle repair and replacement list annually.*
- *Discuss a consensus approach to capital budget requests and communicate the impact of the escalation costs of not being able to address the repair and replacement plan with Leadership Team.*

**Strategy 15.b.**

THPRD will continue to identify parks that have active community support and continue to implement an Adopt-A-Park/Adopt-A-Trail program to assist in ongoing maintenance efforts.

**Actions:**

- *Research best practices.*
- *Create a policy and procedures.*
- *Develop a list and schedule of tasks to be accomplished and whether or not the tasks are enhancements or are replacing current work being done as a labor cost savings measure.*
- *Account for the direct costs to manage this program.*
- *Market and promote the program.*

**Target 16: Identify and track the value of volunteers as an alternative revenue source and cost savings measure.**

**Strategy 16.a.**

THPRD will continue to track the use of volunteers that supplement critical service functions and include the value of this as an alternative funding source.

**Actions:**

- *Actively engage volunteers where appropriate as an alternative funding resource.*
- *Follow best management practices for volunteer programs.*
  - *Value the volunteer labor as outlined by the Independent Sector*  
[http://www.independentsector.org/volunteer\\_time](http://www.independentsector.org/volunteer_time).
- *Account for the value of the volunteers as alternative funding contributing to cost recovery if replacing the cost to provide the service, and account for the same value of the service on the expense side.*
- *Classify the value of volunteers when supplementing operations or providing an enhancement.*

## Theme 4 – Cost Recovery Alignment

The intent of this theme is to identify opportunities to increase direct cost recovery where possible and to begin the dialogue with those affected.

**This Theme encompasses Targets 17 and 18.**

**Target 17: Ensure long-term sustainability by focusing taxpayer funding on those services that produce the widest community benefit, using a cost recovery pyramid.**

### **Strategy 17.a.**

THPRD will increase cost recovery to meet target goals through recommended pricing strategies and/or use of alternative funding sources as appropriate to specific service through staff.

#### **Actions:**

- *Staff will evaluate appropriate pricing by conducting a market analysis using suggested comparative analysis of like facilities and services and submit it to Supervisors.*
- *Supervisors will determine if they can make services meet the recommended cost recovery goals by looking at costs, fee adjustments, and alignment with available alternative funding strategies.*
- *Supervisors will articulate a recommendation to divest some or all of the services in the event that cost recovery goals cannot be achieved but only after confirming that there will be no detrimental effect on other connected/linked programs.*
- *Managers will consider recommendation and forward to senior management for approval.*
- *Strive to have all categories of services on tiers 3, 4, and 5 at least break even as the primary goal; then strive to reach target tier minimums in aggregate on each tier; then strive to have each category reach the target tier minimum on each tier; then each service in each category on each tier reach the target tier minimum.*

### **Strategy 17.b.**

THPRD will monitor the amount of resource dedicated to social services; services that provide a social, wellness, or safety benefit that do not fit into other traditional park and recreation instructional, special event and/or athletics offerings (examples: tax preparation services, senior meal programs, flu shots, toenail and foot care, literacy, blood pressure clinic, AARP driving course, support groups, etc.).

These services have importance to the community and are providing considerable benefit to both the community and the individual. These services are generally provided through another agency using space in the facilities, and should be provided by THPRD as long as funding remains available through federal tax grants (for Head Start programs, Meals on Wheels and perhaps congregate meal sites), or should be provided or managed by another agency whose mission more closely aligns with these services.

#### **Action:**

- *Staff will closely monitor these expenditures as the current Federal Government sequester is predicted to impact funding for Meals on Wheels (and perhaps congregate meal sites).*

**Strategy 17.c.**

THPRD will review all independent contract agreements in relation to THPRD costs and adjust to match the category of service level on the pyramid annually.

**Actions:**

- *Educate current contract agreement holders on the Financial and Service Sustainability Plan, the results of the cost recovery goals, the service assessment and provision analysis.*
- *Discuss strategies to efficiently and effectively comply with the plan.*
- *Develop specific and measureable action steps for each contract holder including alternative funding strategies.*

**Strategy 17.d.**

THPRD will consider implementing additional peak/off-peak or prime/non-prime time, and seasonal demand pricing strategies.

**Actions:**

- *Develop fees based on cost/value of and demand for the experience.*
- *Develop marketing strategy and campaign.*
- *Additional discounts aimed at admission should not be applied.*

**Strategy 17.e.**

THPRD will consider implementing additional bulk purchase discounted frequent user pricing strategies for admissions or drop-in services.

**Actions:**

- *Develop an annual pass fee structure where a formula of use equals a discount (for instance: an annual pass equals 60 daily admissions, etc.).*
- *Consider different fees for different experiences (for instance: create an aquatics only pass for swimming or a recreation center only pass for fitness and gymnasium use, and an all-inclusive pass for the richer experience of having everything at one site, or admission to all sites).*
- *Consider automatic debiting for monthly passes.*

**Strategy 17.f.**

THPRD will consider scaling back the number of fitness classes that are included with the daily admissions or drop-in services to a basic level.

**Actions:**

- *Staff will evaluate the number of fitness classes included with admission by monitoring attendance over a typical month.*
- *Staff will recommend including a range of basic fitness classes as part of the admission package with specialty classes requiring additional registration.*

**Strategy 17.g.**

THPRD will consider phasing out discounted fees for select groups, and/or raising the age for senior discounts.

**Actions:**

- *Recommend if admission fees are discounted for various groups, that the discount is the same for youth, senior, disabled, and military and that the discount is the target cost recovery rate.*
- *Recommend if admission fees discounts are continued for select age groups, that the youth are under 18 years and the senior age follow Social Security and Medicare guidelines.*

- *Recommend that discounted fees only apply to drop-in admission, and that program, class, event, trip, or activity fees be based on cost of service provision and cost recovery goals.*
- *Recommend that barrier free access includes those with an ability-to-pay concern, and that the Family Assistance Program is the solution.*
- *Recommend that the Board of Directors fund strategic initiatives to target groups for specific outcomes (for instance: at risk youth afterschool program; low-income art program; older adult active lifestyle/healthy aging program; unrestricted unified sports league buddy program; etc.).*

**Strategy 17.h.**

THPRD will encourage non-resident participation to add to cost recovery.

**Actions:**

- *Staff to re-consider the residency buy-in as equal to the amount of annual property tax payment a resident would pay.*
- *Benefits of residency buy-in would be the ability to pay the resident rate for all classes, events, admission, passes, etc.*
- *Residents would still get priority registration for services that fill and have wait list, like aquatics classes.*
- *Consideration could be given to granting early registration for non-residents to services that don't typically fill.*
- *To encourage non-resident participation in classes, programs, admission, passes, etc. (which are not typically at capacity), use a resident and non-resident rate structure, typically 10-50% higher for non-residents depending on the direct cost of service provision and not as a punitive measure. Several services and facilities have service areas and target markets which extend outside of the District's boundaries.*

**Target 18: Review all Intergovernmental Agreements (IGAs), Memorandums of Understanding (MOUs), Rentals, and Tenant Leases to reflect cost of service provision and value received.**

**Strategy 18.a.**

THPRD will annually review all Intergovernmental Agreements (IGAs), Memorandums of Understanding (MOUs), rentals, and long-term Tenant Lease agreements to ensure compliance with cost recovery goals in relation to the direct cost to provide the service (the value) and the category of service level on the cost recovery pyramid.

**Actions:**

- *Educate current IGA, MOU, rental, and Tenant Lease holders regarding the Financial and Service Sustainability Plan, the cost recovery goals, the service assessment, and the provision analysis.*
- *Develop specific and measureable action steps for each IGA, MOU, and rental and Tenant Lease holders including alternative funding strategies.*
- *Review IGA with Beaverton School District. Field use fees are very commonly used by park and recreation agencies to help with cost recovery for these services. The District is not alone in charging them.*
- *Review and confirm who is an affiliate and formalize the criteria and process to become one.*
- *Review all affiliate rentals with THPRD aquatic clubs, THPRD sports clubs, Foundations/Advisory Committees/Friends Groups, West Portland Boxing, Meals on Wheels, etc., to assure that cost recovery goals are addressed.*

**Strategy 18.b.**

THPRD will consider optional provision strategies and locations for Meals on Wheels.

**Action:**

- *Move Meals on Wheels from the Elsie Stuhr Center to a church. Meals on Wheels funding may be affected by the Federal Government sequester.*

## Theme 5 – Revenue Enhancement

The intent of this theme is to identify new sources of revenues, including alternative funding ideas, and explore their future potential to increase or contribute to THPRD’s overall financial sustainability.

**This Theme encompasses Targets 19 through 22.**

### **Target 19: Explore alternative funding sources that strategically align with targeted services.**

#### **Strategy 19.a.**

THPRD will identify several (3 to 5) ideas per budget cycle from the Alternative Parks and Recreation Operations and Capital Development Funding Sources section of the Service and Financial Sustainability Analysis and formulate a work team to explore the pros and cons, and potential outcomes for consideration to implement through Managers.

##### **Action:**

- *Assign a team of staff to select and pursue alternative funding ideas on an annual basis.*

#### **Strategy 19.b.**

THPRD will pursue alternative funding for efficiency measures to reduce the costs to the taxpayer of operations, maintenance, and safety over the next several years.

##### **Actions:**

- *Research efficiency grants to analyze investing in and converting to green practices.*
- *Research return on investment (ROI) amortization schedules for investing in and converting to green practices.*

#### **Strategy 19.c.**

THPRD will expand alternative funding for strategic initiatives through grants for new and existing capital projects.

##### **Actions:**

- *Actively seek new grant opportunities for healthy and active living initiatives.*
- *Pursue grants for trail development such as Safe Routes to Schools.*
- *Continue to pursue grants for cultural and natural resource projects.*

#### **Strategy 19.d.**

THPRD will continue seeking alternative funding sources for programs and operations.

##### **Action:**

- *Explore alternative funding sources for ongoing programs and operations.*

### **Target 20: Improve effectiveness of Friends’ Groups and Advisory Committees for appropriate fundraising efforts.**

#### **Strategy 20.a.**

THPRD will continue to align Friends’ groups with the District Vision, Mission, and Values to ensure that fundraising efforts support District needs.

**Actions:**

- *Review revenue sources for the Friends' Groups and Advisory Committees. Many current efforts are dedicating revenue positive services that the District should be managing to improve its cost recovery (like merchandise for resale and vending revenues), and are using it for Friends' Groups or Advisory Committees projects.*
- *Review all by-laws for these groups and distinguish the difference between a fundraising body, an advisory committee, and a policy board.*
- *Staff liaisons will work with "Friends" Groups to revitalize them or work with community members to create new groups to support THPRD programs and facilities.*
- *Encourage community members to become members as fundraisers with necessary skills (such as grant writing, community or business connections, philanthropy, etc.).*
- *Align fundraising activities to primarily meet the priority goals and critical needs of the District; secondarily member driven initiatives.*
- *Develop fundraising goals based on program and facility objectives or specific initiatives and programs.*
- *Assist these groups in other fundraising activities that the District cannot employ, like 501(c)(3) pass through grants, fund raising events, capital campaigns, etc.*

**Strategy 20.b.**

THPRD will engage Advisory Committees to advise staff on interest area specific services.

**Actions:**

- *Review all by-laws for these groups and distinguish the difference between a fundraising body, an advisory committee, and a policy board.*
- *Staff liaisons will work with Advisory Committees to revitalize them or work with community members to create new groups to support THPRD programs and facilities.*
- *Encourage community members to become members of existing interest groups as advisors.*
- *Create new groups in areas with interested community members.*

**Target 21: Explore the opportunities for and use of Sponsorships through naming rights.**

**Strategy 21.a.**

THPRD will develop a list of potential park and facility sites and amenities to consider for naming rights and costs.

**Actions:**

- *Develop a policy regarding appropriate naming criteria and protocol.*
- *Develop the list of opportunities including historic sites.*
- *Develop fees and timeframes for naming rights (annual, in perpetuity, etc.).*
- *Develop sponsorship packages to bundle opportunities and market to major businesses such as hospitals, insurance companies, sports organizations, and related for-profit businesses.*
- *Market this option to corporations (larger facilities and parks), and individuals (benches, rooms, and equipment, etc.).*

## Target 22: Increase targeted marketing and outreach efforts.

### Strategy 22.a.

THPRD will increase marketing and promotional opportunities funding.

#### Actions:

- *THPRD will create a District-wide marketing plan.*
- *THPRD will create a style guide and branding as part of marketing plan.*

### Strategy 22.b.

THPRD will expand the use of email blasts to increase promotion of upcoming opportunities for program registration and special events.

#### Action:

- *Increase the number of email addresses receiving THPRD email distribution by collecting them on registration forms.*

### Strategy 22.c.

THPRD will add an electronic code to all marketing and promotional materials.

#### Action:

- *Research the use of matrix bar codes or augmented reality technology to provide people with a new way to view/experience your park or facility (through their mobile devices).*

### Strategy 22.d.

THPRD will consider a reduction in printing of the voluminous activities guide, in favor of more strategic marketing efforts.

#### Actions:

- *Make activities guide available as an online resource only (like a college curriculum catalog).*
- *Spend printing budget on more targeted marketing.*
- *Get information regarding THPRD in Welcome Wagon kits.*
- *Outreach to short-term (more transient) District residents.*

### Strategy 22.e.

THPRD will consider creating non-prime time program packages to reach those available during the hours of 9:00am to 4:00pm weekdays and selectively marketing to the target audience/market segment.

#### Action:

- *Create an annual program like “Active Adults” which includes admission to selected facilities for working out with a variety of options (weight room, cardiovascular equipment, lap swimming, selective classes, etc.) plus sessions with a personal trainer when starting, and periodic check-in points during the year. Package could also include social activities and could be paid for by or applied to a SilverSneakers program.*

## Theme 6 – Future Growth

The intent of this theme is to assist THPRD in its planning efforts to proactively respond to the needs of a diverse and growing community.

**This Theme encompasses Targets 23 through 25.**

### Target 23: Explore new services using the Service Assessment.

#### **Strategy 23.a.**

THPRD will use Service Assessment to determine THPRD's position in the market relative to service fit, economic viability, or dependence on taxpayer investment, strength or weakness in the market, and other similar available providers before implementation of a particular service.

#### **Action:**

- *On an annual basis, staff will review the service portfolio and use the Service Assessment to evaluate market position and provision strategies.*

### Target 24: Provide a variety of community outreach strategies.

#### **Strategy 24.a.**

THPRD will continue to provide ongoing opportunities for community input through a variety of outreach efforts.

#### **Actions:**

- *Continue to participate in stakeholder and planning group meetings, etc.*
- *Conduct regional community forums, at least annually.*

#### **Strategy 24.b.**

THPRD will keep the community input process current and reflective of changing demographics, interests, and economic conditions.

#### **Action:**

- *Plan for conducting a District-wide or target planning area statistically-valid community survey every five years.*

### Target 25: Pursue collaborations.

#### **Strategy 25.a.**

THPRD will continue collaborations and discussions with other jurisdictions.

#### **Action:**

- *Using the results of the Service Assessment for existing services, as well as analyzing market position and public providers for new services, staff will recommend services for collaborative consideration on an annual basis.*

#### **Strategy 25.b.**

THPRD will continue collaborations and discussions with other agencies.

#### **Action:**

- *Using the results of the Service Assessment for existing services, as well as analyzing market position and other non-profit and private providers for new services, recommend services for collaborative consideration on an annual basis.*

**Strategy 25.c.**

THPRD will continue collaborations and discussions with the Beaverton School District.

**Actions:**

- *Using the results of the Service Assessment for existing services, as well as analyzing market position and schools as providers for new services, recommend services for collaborative consideration on an annual basis.*
- *Discuss additional use of schools sites for afterschool and weekend programming.*