



C I T Y G A T E
A S S O C I A T E S

COMPREHENSIVE PARKS AND RECREATION MASTER PLANNING PROJECT



TRUCKEE-DONNER
RECREATION & PARK DISTRICT

FEBRUARY 2, 2026

 C I T Y G A T E
A S S O C I A T E S

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EXECUTIVE SUMMARY

INTRODUCTION

Citygate Associates, LLC. (Citygate) was engaged as part of a consultant team led by Design Workshop, Inc., (Design Workshop) to support the Truckee-Donner Recreation & Park District (the District, or TDRPD) in developing a Comprehensive Parks and Recreation Master Plan. This plan serves as a strategic roadmap to enhance park and recreation services for TDRPD's approximately 18,000 residents across 200 square miles in Nevada and Placer Counties, California.

Citygate's team of parks, recreation, financial, and human resources professionals evaluated the District's financial operations and policies, staffing and organizational structure, operational practices and technology use, recreation programs and partnerships, and its broader service delivery role. This effort supported Design Workshop's professional expertise in landscape architecture and park planning, demographic analysis, and community engagement. Together, our collaborative approach ensures a data-driven, community-focused strategy to address the District's challenges and opportunities. This executive summary outlines Citygate's key findings and recommendations across financial health, programs and services, partnerships, staffing, policies, and systems. It provides realistic, attainable and data-driven solutions to implement the District's Comprehensive Recreation and Park Master Plan, and thus sets the stage for the District's future sustainable growth and improved service delivery to its residents.

Extensive community and stakeholder engagement informed the analysis, including reviewing planning documents and prior studies, reviewing the ETC Institute statistically valid survey, benchmarking against similar agencies, conducting 27 interviews which included 36 individuals, participating in two focus groups, and participating in three site tours of District facilities.

FINANCIAL OVERVIEW

The District is fiscally strong, supported by sound management practices and an AA enhanced credit rating (with purchase of bond insurance) and an A under-lying (uninsured) credit rating by Standard & Poor's in its last debt issue. The District exhibits a robust financial position, with total assets of \$48.6 million and General Fund reserves of \$6.7 million, representing 47 percent of annual expenditures—well above the Government Finance Officers Association's (GFOA) recommended 17 percent minimum. However, the appropriate level of reserves depends on the various risk conditions of the agency, such as facilities/infrastructure/equipment age and condition, special projects, and potential liabilities. It benefits from profitable operations, like the Ponderosa golf course, and has earned a reputation as a prudent steward of public resources. However, structural inequities—particularly in Placer County property tax allocation—and limited flexibility in fees and taxes constrain its ability to fund long-term capital, maintenance, and program needs.

Despite this strength, funding for capital improvements, facility operations and maintenance, recreation programs, and special event services falls short without an infusion of sustainable resources. The 2015 Facility Condition Assessment (FCA), now 10 years old, estimated \$6 million for improvements, exceeding current resources. A potential opportunity is investigating revenue sharing from Placer County, or an added parcel tax.

The most recent statistically valid 2025 resident survey, completed by ETC Institute, showed the following:

- ◆ 63 percent support or were neutral for property tax increases
- ◆ 51 percent of the 63 percent favored a \$75 annual parcel tax to bridge the funding gap

In addition, current financial management operations, while adequate, rely heavily on manual processes. The Financial Edge system is underutilized, long-term forecasting is infrequent, and fiscal policies could better align with best practices. Technology investments and more formal IT policies are needed to improve efficiency and consistency across departments.

Debt capacity remains significant, but new obligations for Comprehensive Master Plan projects will require identifying reliable revenue streams. Realistic and obtainable opportunities exist to strengthen resource development; pursue joint purchasing and grant partnerships; and formalize, track, and manage existing contractual and partnership agreements to support funding needs and community priorities.

PROGRAMS AND SERVICES OVERVIEW

The District delivers a wide array of programs—aquatics, youth and adult sports, some senior activities, arts and cultural enrichment, and special events—achieving 76 percent resident participation and 95 percent satisfaction per the 2025 ETC Institute survey. This is an enviable position for the District and exceeds the national trend in participation and satisfaction ratings.

The District is perceived by the community as the primary, year-round provider of more affordable parks and recreation services in the community, supported by high-quality facilities and dedicated and passionate staff. Community members value the District's diverse programs and flagship facilities; however, some assets show signs of wear and increasing maintenance needs.

Challenges include a shortage of indoor, temperature-controlled facilities, limited athletic field capacity for the short season use, and gaps in programming for parents with children, middle-school youth, senior adults, Spanish-speaking residents, and patrons with disabilities. Scholarship demand has increased, reflecting affordability concerns for some residents.

Programs are largely developed informally by staff and patron suggestions rather than through structured, data-driven planning. Community-wide surveys are rare, and while staff are creative

and committed to provide excellent service, program gaps remain due to lack of resources and facilities.

Participant scholarship requests rose from 121 in FY 22/23 to 142 in FY 23/24, signaling growing demand and requests are likely to outpace budgeted funds for FY 24/25. The lack of indoor programming space further limits year-round offerings, especially during winter and wildfire-related poor air quality days. Design Workshop's community engagement and program analysis pinpoint these gaps, while Citygate's operational insights recommend targeted investments to enhance service delivery and protect long-term capital investments through increased maintenance funding.

PARTNERSHIPS, AGREEMENTS, AND CONTRACTS OVERVIEW

The District benefits from strong partnerships with local governments, nonprofits, and private entities, which help deliver programs, share facilities, and support the community. However, opportunities remain to deepen collaborations—particularly with Placer and Nevada counties, the Town of Truckee, North Lake Tahoe Boys & Girls Club, and Tahoe-Truckee Unified School District (TTUSD), and others—to optimize resources and demonstrate shared purpose to the community.

Management of agreements and contracts lacks a centralized management system, which poses risks in compliance, lack of consistency in oversight, and inefficiencies. The longstanding Joint Use Agreement (JUA) with TTUSD, while valuable, does not fully reflect current operational realities, facilities, and mutual needs, and has expired with a conditional renewal awaiting the results and recommendations of the Comprehensive Master Plan adoption. The Town of Truckee's Inclusion, Diversity, Equity and Accessibility (IDEA) initiative represents another avenue to enhance equity and accessibility by leveraging existing resources.

STAFFING AND ORGANIZATIONAL OVERVIEW

The District's dedicated staff are a key strength, but growing community needs and evolving expectations require investments in staffing, training, and organizational development.

The Parks Division faces significant deferred maintenance backlogs and needs clearer job distinctions, advancement pathways, and sufficient staff to keep pace with expanding facilities. A key challenge is the identified understaffing in the Parks Division which has resulted in deferred maintenance totaling over 7,000 hours of maintenance annually (3,667 hours in FY 23/24; 3,873.5 hours in FY 22/23). This deferred maintenance has also been confirmed by the comments received in the 2025 ETC Institute survey, which identified addressing maintenance issues as a high priority.

The Recreation Division has grown effectively but needs greater supervisory support in certain functional areas, Therapeutic Recreation expertise, and recruitment and retention of nighttime

workers and childcare staff. The Administration Division is more stable following recent restructuring, but professional development and inclusivity initiatives can be enhanced.

Training tracking practices are inconsistently applied in the District, and compensation, particularly for part-time benefited employees, could be more competitive. In addition, the General Manager's salary is 15.08 percent below the median of comparable agencies.

Based on the Board's Strategic Plan Objectives, other staffing resource deficiencies included need for dedicated, qualified staff focused on capital improvement, park acquisition implementation projects, and resource development and grant writing. Citygate's staffing analysis highlights these gaps, recommending additional hires and competitive salary adjustments to support operational goals.

Finally, clearer connection between staff activities and the Board's Strategic Plan Objectives is also needed via a Performance Management System.

POLICIES, PRACTICES, AND SYSTEMS OVERVIEW

The District maintains many sound internal policies and systems but has opportunities to improve clarity, organization, and alignment with best practices.

Financial policies include several functional policies; however, additional policies would strengthen the District's operational practices and oversight (e.g., cash handling, non-resident fees, etc.).

Personnel policies are comprehensive and publicly accessible but have gaps and outdated sections, and they lack clear categorization and documented review dates. Recruitment processes could better connect staffing requests to Strategic Plan Objectives.

Technology exhibits strengths, such as use of recreation program and facility reservation system integration—such as CivicRec adoption—however, needed improvements were identified with and the underutilization of financial systems (e.g., Financial Edge ERP), a lack of automation (e.g., payroll automation in Parks Operation), and outdated servers. A formal IT policy is needed a well.

Communications are robust and well-branded, with effective use of the Annual Report, Activity Guide, social media outlets, and partner networks. However, some website navigation and content—especially for non-English speakers—could continue to improve, and contractor instructor outreach and recruitment could be more visible.

These operational gaps are straightforward and can be rectified to better position the District for greater efficiency, transparency, support of decision making, and effective resource allocation. Citygate's systems expertise identifies these issues to support the District's continuous improvement practices.

CONCLUSION

The 2025 Comprehensive Parks and Recreation Master Plan offers TDRPD a clear path to address financial constraints, construct new facilities, expand programs, strengthen partnerships, optimize staffing, and modernize systems. By implementing the recommendations in this report, the District can build on its strong fiscal foundation, align revenues with service demands, and enhance operational efficiency.

Modernizing internal policies, improving technology systems, and strengthening communications will help the District better serve its staff, community, and partners—ensuring transparency, accessibility, and alignment with evolving needs and expectations.

Investing in its workforce, fostering partnerships, and demonstrating collaboration and trust among stakeholders will further position the District as a trusted leader and responsible steward of public resources. This collaborative effort positions TDRPD into the future as a sustainable, leading provider of parks and recreation services and facilities in the region, delivering high-quality, inclusive services while advancing the Board's Strategic Plan Objectives.

SECTION 1—INTRODUCTION

1.1 PROJECT OVERVIEW

Citygate Associates, LLC (Citygate) was selected as a member of a consultant team, led by Design Workshop, Inc., (Design Workshop) as prime consultant to provide professional services to the Truckee-Donner Recreation & Park District (the District, or TDRPD) located in Truckee, California. The purpose of the project is to develop a Comprehensive Parks and Recreation Master Plan (Plan) for TDRPD.

1.1.1 Report Methodology, Scope of Work, and Approach

Citygate and Design Workshop developed a project approach that integrated the District's project requirements as identified in the District's request for proposal. Citygate:

- ◆ Reviewed finances of the District's operations; evaluated funding methods and possible funding alternatives; analyzed financial policies and procedures, legislative actions, and statutes related to financial resources; evaluated the capital improvement program plan and maintenance projects related to funding strategies; performed a high-level review of the information technology systems used; and recommended improvements.
- ◆ Reviewed existing recreation programs and services the District offers; evaluated the District's existing partnership and contractual agreements with others providing services and/or facilities, including the Tahoe-Truckee Unified School District (TTUSD) agreement; considered recommendations regarding future programs and services based on population and demographic data provided by Design Workshop; reviewed and provided recommendations regarding private recreation providers; reviewed and provided recommendations regarding potential partnerships and collaborations.
- ◆ Reviewed and assessed current staffing levels and organizational structure, job classifications, workloads, future staffing needs, employee training, and human resource policies and procedures.
- ◆ Explored the community in which the District operates by consulting the applicable District, County, and Town planning documents, prior studies, and plans; examined the comparable agencies of Ashland, OR, Breckenridge, CO, Mammoth Lakes, CA, and Bend, OR, as recommended by the District; examined the external scientific survey report prepared by ETC, Inc.; and examined the demographic, trends, park

inventory data, and level of service projections prepared by Design Workshop related to Citygate's applicable scope of work items.

- ◆ Conducted 27 interviews with a total of 36 individual contacts with District employees and executive management, Town of Truckee leadership, District Board and Foundation representatives, non-profit organizations' executives, TTUSD leadership, Nevada and Placer County staff, and Board and Truckee Recreation and Parks Foundation members; participated in two on-site focus groups with eight individuals representing seven of the District's non-profit "Affiliate" youth and adult athletic organizations; attended one guided on-site facility tour, one non-hosted District facility site tour, and conducted numerous follow-up phone conversations with identified stakeholders and other agency representatives to gain a better understanding of the District's operations, organization, and opportunities.

1.2 HISTORICAL AND GEOGRAPHICAL CONTEXT

The District, formed in 1962 for the beneficial purpose of providing public park and recreation services to its residents, has evolved into a mature organization. Although the breadth and scope of its activities have grown, its core functions and mission remain to provide parks and recreation services and facilities to the residents who live within District boundaries. The District's boundaries encompass approximately 200 square miles, and it serves a population of approximately 18,000 residents.¹ The District is located in northern California, with a service area including parts of two counties, Nevada and Placer, and also serving the residents and visitors who reside in or visit the Town of Truckee, which was incorporated in 1993. Being the most populated community closest to the two largest metropolitan cities in Northern Nevada, Reno and Sparks, its proximity and ease of access off of the Interstate 80 transportation corridor exposes the District to an even greater population base that may enjoy its services, special events, and recreational facilities. In addition, smaller residential communities to the west, north, and south all are within convenient driving distance to access the District's facilities and programs.

The District is governed by an elected, at-large five-member board with staggered four-year terms who hire the District's General Manager to administer District operations based on the Board's policy direction. The General Manager is responsible to hire both full-time and part-time the employees. The Board meets monthly and has developed its *2020–2025 Strategic Plan Objectives*² to guide the District's activities.

¹ James Marta & Company LLP Independent Auditor's Report -FY 2024
<https://www.tdrpd.org/DocumentCenter/View/3118/Final-Audit-FY-2024?bidId=>

² 2020-2025 Truckee-Donner Recreation & Park District Strategic Plan Objectives
<https://www.tdrpd.org/DocumentCenter/View/905/Strategic-Plan-Objectives?bidId=>

SECTION 2—FINANCIAL ANALYSIS

2.1 FINANCIAL OVERVIEW

The financial operations of the TDRPD are administered by three key personnel in the Accounting Section supported by five staff in the Administration and Parks Divisions. Citygate interviewed three District staff as well as the staff of the Town of Truckee, including the Town Manager, the Administrative Services Director, the Nevada County and Placer County Auditor Controller, Planning Department staff, and the staff of the Local Agency Formation Commission (LAFCO) of California. Citygate also reviewed numerous financial documents and conducted other external research.

The District operates on an October–September fiscal year and provides full fiscal administrative services in house to support the District.

2.1.1 Financial Activity for Operations

District operations are accounted for in three funds: the General Fund, the Mitigation Fund, and the Quimby Act Fund. According to the FY 24/25 budget document, approximately 99 percent of the District's financial activity is concentrated in the General Fund.

As of FY 23/24, District assets totaled approximately \$48.6 million with total liabilities of approximately \$17.7 million, the District had a net position of approximately \$30.9 million.

2.1.2 General Fund

The following table reflects the District's historical General Fund operating fiscal activity over the past five fiscal years.

Table 1—TDRPD General Fund Financial Activity (Fiscal Year October 1 – September 30)

Fiscal Component	FY 20/21 Actual	FY 21/22 Actual	FY 22/23 Actual	FY 23/24 Actual	FY 24/25 Budget
Total Operating Revenues	\$9,945,964	\$12,903,331	\$16,405,742	\$14,831,032	\$15,880,727
Total Operating Expenses	\$9,475,377	\$12,029,407	\$16,332,838	\$14,185,879	\$16,051,747
Total Operating Surplus/(Loss)	\$470,587	\$873,924	\$72,904	\$645,153	\$(171,020)
Committed and Unassigned Fund Balance Reserve	\$5,203,227	\$6,124,180	\$6,173,204	\$6,679,375	\$6,508,355
Percentage of Expenditures	54.9%	50.9%	37.8%	47.1%	40.5%
Unrestricted Cash	\$5,023,893	\$6,048,494	\$7,364,154	\$7,724,905	\$7,553,885

The District's overall financial activity has been positive over the past four years. The decrease in operating surplus in FY 22/23 resulted from increased capital outlay of approximately \$3.6 million as compared to an average of approximately \$1.5 million in prior years. The District's available fund balance reserve as of FY 23/24 was approximately \$6.7 million, or about 47 percent of General Fund expenditures. This exceeds the District's minimum fund balance reserve policy and illustrates the District's sound financial management. The Government Finance Officers Association's (GFOA) recommend a minimum of two months, or 17 percent of annual expenditures, be reserved, but the appropriate amount depends on the potential risk conditions of the agency.³

Revenues

Property taxes and District service fees make up the majority (approximately \$14.1 million or 89 percent) of the District's FY 24/25 General Fund budget. The District receives approximately 2.74 percent of the Nevada County County-wide general tax levy in addition to an \$8 parcel tax. The District also receives an \$8 parcel tax from the annexed parcels within Placer County, but none of the Placer County County-wide general tax levy—the reason for this is explained later in this report. Total property tax revenue is estimated to be approximately \$8.1 million for FY 24/25. This is approximately 3.4 percent higher than last year. The District also participates in the Teeter Plan for both counties, which ensures that levied revenues are received regardless of property owner pay patterns. The Teeter Plan (first enacted in 1949) provides California counties with an optional alternative method for allocating delinquent property tax revenues. The Teeter Plan allows counties to finance property tax receipts for local agencies by borrowing money to advance cash to each taxing jurisdiction in an amount equal to the current year's delinquent property taxes.⁴ However, under the Teeter Plan, the District foregoes penalties and interest collected by the County which result from late or nonpayment by the property owner. This is a common practice among many agencies and is done to help level spikes and dips in agency property tax revenue budgeting and collection. Citygate concurs with this District financial practice to ensure more consistent revenue collection.

The District anticipates fees and charges for services to total approximately \$6 million, or 5.6 percent higher than the prior year.

The remaining revenues consist of items such as grants, donations, interest earnings, mitigation fees (approximately \$207,000 in separate fund budget). These other sources in the General Fund are expected to increase to approximately \$1.74 million in FY 24/25, which is approximately 36 percent higher than the prior year, due primarily to the expectation of a \$1 million grant from the State for the Donner Boat Ramp improvements.

³ <https://www.gfoa.org/materials/fund-balance-guidelines-for-the-general-fund>

⁴ https://en.wikipedia.org/wiki/Teeter_Plan

Expenditures

Employee services for FY 24/25, at approximately \$8.8 million, makeup approximately 55 percent of the General Fund budget. This is followed by approximately \$4 million for other operating expenditures, \$1.7 million for capital expenditures, and \$1.5 million for debt service. FY 24/25 General Fund expenditures are anticipated to be approximately 13 percent higher than the prior year, primarily due to anticipated increase in employee's services costs of approximately 6.6 percent and additional capital outlay of \$1 million grant from the State for the Donner Boat Ramp improvements.

2.1.3 Fees and Charges

General Fees

The District's charge for service fees represents the second largest revenue source for District operations after property taxes. The District reviews fees annually to determine adjustments needed to maintain applicable cost recovery levels, as established by the District's pricing policy. Staff informed Citygate that the current fee levels are appropriate when compared to comparable agencies. Citygate agrees with this position based on a limited review of other agencies. The District's annual review of the Fee Schedule is considered best practice and should be continued consistent with the District's Pricing Policy guidelines.

Citygate reviewed the District's 2019 Pricing Policy and found it comprehensive and understandable by an average individual who is not familiar with technical financial terms. It includes an explanation of the practice of cost recovery and the District's approach to pricing based on its cost recovery goals. This is best practice and Citygate commends the District for having done this work six years ago. There is no evidence that it has been reviewed or revised since and it is recommended that the District review and update it to stay current with the many changes that have occurred since 2019. Citygate consulted the National Recreation and Park Association (NRPA) 2024 Agency Performance Review in its review.⁵

Mitigation/Impact Fees for Park Improvements

The District charges mitigation type fees related to parks infrastructure in the form of mitigation (AB 1600) and Quimby Act fees.

AB 1600 mitigation fees are charged to new residential development for estimated recreation/parks impacts, except for projects with under five parcels. These fees cannot be used for maintenance costs. There are also monitoring and reporting requirements per State law. This revenue stream is very volatile and depends solely on development activity. The District estimates that it will receive

⁵ *Cost Recovery and Financial Performance- 2024 NRPA Agency Performance Review*
<https://www.nrpa.org/siteassets/research/2024-agency-performance-review.pdf>

approximately \$280,000 for FY 24/25. The District adjusted the fees for inflation in July 2025, which is a best practice.

Quimby Act fees are charged for park/recreation acquisition of unimproved land but cannot be collected for commercial/multi-family or subdivision projects with under five parcels. The fee is based on unimproved land value and also cannot be used for maintenance costs. This source, like the AB 1600 mitigation fees, is very volatile due it being based on development. The District estimates that it will receive approximately \$40,000 for FY 24/25.

These fees can be increased but, as with general service fees, a balance must be struck between revenue enhancement and encouraging residential development for housing. The policy decision to be made by the District is to determine what percentage of new park facility development should be borne by private developers versus subsidized by the existing District residents. A Nexus Study should be completed every two to three years to provide relevant and up-to-date data for the District to assist in making this policy decision.

2.1.4 Financial Policies and Procedures

The District has numerous written policies covering all aspects of District fiscal operations. The various policies are part of a Policy Manual and are located on the District's website. Policies are generally well written and up to date; however, there are several policies that do not appear to have been reviewed for several years. Citygate recommends updating these outdated policies to ensure consistency and applicability. If they have been reviewed, the date of review should be noted. In addition, the readability of the Policy Manual can be improved by categorizing/organizing them by subject matter. For example, they can be grouped by human resources/staff, board, financial, organizational/administration, scholarships, facility use, etc.

The District does not have a centralized purchasing division, which is not unusual for an agency of its size. The internal controls of the purchasing process seem adequate; however, this statement is based solely on what Citygate was told by staff and not any independent on-site validation. This is also the case for other areas discussed, such as accounts payable, and to a lesser extent, cash handling. Other related operational policies or procedures related to participant refunds, program waivers or reduced fees, cash handling and daily receipts reconciliation, etc., should be reviewed and improved to conform with best practice. It is recommended that policies and guidelines be updated to provide better guidance and standards for staff and the public regarding these routine and daily financial operations. In addition, a policy discussion should occur regarding exploring enacting a non-resident fee for those who access the District's services and facilities. The District somewhat addresses this with Policy #305 and through some of its program literature; however, it is not a consistent practice, and there is no written, Board-approved, District-wide policy regarding non-resident fees. There is rationale to evaluate this revenue opportunity as District residents are subsidizing non-resident participants through their property taxes and parcel assessments.

Grant opportunities are explored by each applicable Department head, but the Finance Division is involved during the process. According to staff, most of the grants have been reimbursement grants, so activity is carefully monitored to address any potential cash flow issues that may arise. Management of grants and donations related to facility improvements are addressed in Section 2.2.4—Pay-As-You-Go Options.

2.1.5 Financial Activity for Capital Improvements and Capital Maintenance Projects

Based on the current review, there are significant future capital improvements needed to meet the long-term strategic goals of the District. This is excluding the \$5,560,948 of capital maintenance and equipment replacement and maintenance needs identified in the District's Facility Condition Assessment (FCA) dated September 2015. Based on Citygate's review of the fiscal condition of the District, addressing the capital needs in the desired time frame will not be possible without some form of debt financing.

2.1.6 Statistically Valid Resident Survey Results

As a part of this Comprehensive Master Plan process, a scientifically valid resident survey was conducted by ETC Institute in 2015 to gain resident feedback regarding potential support to help fund strategic goals and capital improvement needs. Residents were asked if they would be willing to pay an extra property tax assessment to address the District's capital improvements and, if so, how much would they be willing to financially support. Based on the survey results, approximately 63 percent either agreed or were neutral to paying extra. The extra amount they would be willing to pay, annually, is as follows.

- ◆ \$1 to \$24: 14 percent
- ◆ \$25 to \$49: 21 percent
- ◆ \$50 to \$74: 14 percent
- ◆ \$75 to \$99: 18 percent
- ◆ \$100+: 33 percent

District residents within Nevada County currently contribute a portion (approximately 2.74 percent) of their 1 percent general County-wide property tax levy in addition to an \$8-per-year parcel tax to support parks and recreation services provided by the District. District residents in Placer County only pay an \$8 annual parcel tax, the rationale of which is discussed in the following subsection. Various funding scenarios based on these survey results are discussed later in this section.

2.1.7 Other General Observations

Property Tax General Levy

None of the 1 percent property tax collected by Placer County is currently shared with the District; only the aforementioned parcel tax is. According to District staff, Nevada County and Placer County Auditor Controller staffs, and Nevada County and Placer County LAFCO staffs, the following is the rationale for the District not receiving any of the 1 percent general property tax levy from Placer County.

According to involved District staff, the early annexation process that amended the District boundary in June 1989 considered several factors, including district benefit, efficiency, and resident feedback to determine the number of Placer County parcels included within the District boundary. Ultimately, 12 square miles of Placer County parcels contiguous to the existing District boundary were included as a part of a sphere of influence amendment and annexation proposal received by Nevada County LAFCO. According to Placer County, no recreational services were provided through the Placer County budget for these parcels because residents of the proposed annexation area were paying non-resident fees to the District for recreational services. Consequently, according to Revenue and Taxation Code 99.1 (a)(2) and Placer County Resolution 80-142, Placer County reasons that since there is no transfer of service costs, the District is not entitled to a transfer of Placer County's general tax levy. The annexation documents, included as Appendices A through D, include the rationale used by Placer County. This argument is logical if in fact the District did not assume service costs that were previously funded by Placer County.

Citygate was informed that the District did not—and has not—reviewed the cost of service being provided to Placer County residents to compare to the funds received from Placer County residents to ensure that Placer County residents are not being subsidized by Nevada County residents. Additionally, Citygate was informed that former District staff continued to pursue potential revenue sharing opportunities with Placer County over the years post annexation, with the last being approximately 10 years ago, but these attempts have consistently been denied. Citygate recommends that the District perform this cost-of-service analysis to determine if a subsidy exists and, if so, use this as point of negotiation to revisit the need for a portion of the Placer County general property tax levy. Analyzing and identifying the number of existing residents who currently use the District services that reside within the identified Placer County area should be completed as a part of the analysis and be used as support for continued negotiations with Placer County relating to revenue sharing options.

Mitigation Fees

No mitigation fees are shared with the District from Placer County for growth approved by the County that impact District service provision costs. Placer County staff did not share the rationale for not automatically sharing park dedication or other recreation and parks mitigation fees with the

District; it is merely stated as a policy. According to Placer County staff, the District can apply for a portion of the funds collected for parks projects within the annexed area, but approval is solely the responsibility of the Placer County Parks Commission. Citygate believes that this opportunity should be revisited and negotiated to obtain an automatic portion of the mitigation fees collected in the annexed area of Placer County or allow the mitigation fees to be collected directly by the District, as is the case in Nevada County.

2.2 FUNDING MECHANISMS FOR PARK DISTRICT CAPITAL IMPROVEMENTS

The Comprehensive Master Plan has identified significant future capital improvements needed over the next 10 years to meet strategic priorities. There are two commonly used mechanisms to meet these strategic priorities—pay-as-you-go or debt financing. The specifics of each improvement, such as safety considerations, amount, funding availability, desired timing of completion, etc., will dictate which one mechanism or combination of mechanisms will work the best. The following is a discussion of each of these mechanisms.

2.2.1 Pay-As-You-Go

Under the “pay-as-you-go” mechanism, funds are saved over a period of time and the improvement is funded through the cash that has been set aside in reserves, or other cash sources such as grants, donations, sponsorships, endowments, etc. Although used because it minimizes the cost of the improvement because there are no interest or other debt issuances costs that would be required if the improvements were financed, this mechanism requires a commitment to setting aside funds over a specified period of time that meets the completion goals for the capital improvement. In addition, due to inflation and unpredictable economic conditions, and based on even conservative financial assumptions, the cost of construction has substantially increased in recent years, resulting in an erosion of any funds that may be set aside for future capital expenditures. This can be challenging given changing economic conditions of the District as well as the unpredictability of grant availability/acceptance, and availability of private donations. As of FY 23/24, the District had approximately \$4.6 million of its approximately \$7 million General Fund reserve that could be considered available for capital improvements. Approximately \$3 million has been committed as an operating reserve to guard against economic and other fiscal emergencies, which is very prudent and a best practice. Consequently, the District has very little set-aside funds to address capital improvement strategic priorities.

2.2.2 Debt Financing

If capital improvements, including large capital replacement projects as identified in the 2015 Facility Conditions Assessment, are urgent (safety concerns), have sooner desired completion dates, or are a significant cost, agencies typically choose the debt financing mechanism. Under this mechanism, the amount of funding that is available for capital improvements depends on the amount of steady and predictable revenue stream that can be leveraged through the issuance of

bonds or support of a loan. This way, the District would have proceeds up front to complete capital improvement now and use the revenue stream identified to repay the applicable annual debt service. Proceeds of the leverage will depend on the structure of the debt, including the strength of revenue stream that will be used to repay the debt, the type of debt financing, market conditions at time of debt issuance, and the financial strength of issuing agency, to name a few. For example, using a simplified amortization assumption, a revenue stream of \$100,000, assuming a 4.5 percent interest rate over a 20-year term, net of cost of issuance and debt reserve requirements, would generate proceeds of approximately \$1.2 million. As previously stated, however, the actual amount of net proceeds will depend on several factors; this example is only provided based on high-level assumptions. A discussion of potential debt issuance structures is presented later in this section. The District has used debt financing in the past and currently has approximately \$15.2 million of outstanding financing debt as of September 30, 2024.

2.2.3 Ad Valorem Property Tax, Parcel Tax, and Special Assessment Tax

A funding source that could be used to support both the pay-as-you-go and debt financing options is an increase in the ad valorem property tax assessment, or an increase in the parcel tax assessment. Based on information received for Nevada County and Placer County, the assessed values of the areas related to the District for FY 24/25 were approximately \$10.6 billion and approximately \$5.7 billion respectively, for a total of approximately \$16.3 billion.

Any ad valorem tax increase would result from District voter approved issuance of general obligation bonds. For example, assuming a general obligation bond issue for \$19 million, an estimated ad valorem increase applied to the assessed value of .01 percent (one hundredth of one percent) would be required. In addition, other factors to be considered is the bond structure that would be needed to support the estimated annual debt service of approximately \$1.6 million. Based on the FY 24/25 assessed value amount discussed previously, approximately \$1.06 million would come from Nevada County residents and approximately \$570,000 would come from applicable Placer County residents, annually, depending on the calculation methodologies used by the respective counties. Assuming a high-level base calculation, a property with an assessed value of \$100,000 would pay an extra assessment of approximately \$10 per year. These funds could be used for debt service for capital improvement throughout the District, as opposed to the Quimby Act and mitigation fee revenues that have restricted growth impact related funding uses. A two-thirds voter approval is required for this funding source.

Another potential funding source that would support both pay-as-you-go and debt financing options is an increase in the parcel tax. The parcel tax is a flat amount assessed to each parcel regardless of assessed value. According to the information received from the Auditor Controller's Offices of Nevada County and Placer County and based on the budgeted amount of revenue anticipated from the \$8 parcel tax, the number of parcels within the District for FY 24/25 totaled approximately 17,680 and approximately 2,300, respectively. The number of parcels was

calculated based on the existing budgeted revenue received divided by the existing \$8 parcel tax therefore, the resulting parcel numbers considers any non-taxable parcels within the calculation. The actual number of parcels may vary based on upon timing of the assessment and changes in the District boundaries.

The following table reflects various assumptions for a parcel tax based on the statistically valid survey results, illustrating the estimated net proceeds to the District, depending upon the amount assessed per parcel. According to discussions with Nevada County LAFCO, no LAFCO involvement is required for an increase in the parcel tax. A two-thirds voter approval is required for this funding source.

Table 2—Parcel Tax Scenarios

County	Parcels (FY 24/25)	Annual Parcel Tax Scenarios (annual amounts)			
		\$25.00	\$50.00	\$75.00	\$100.00
Nevada	17,680	\$442,000	\$884,000	\$1,326,000	\$1,768,000
Placer	2,300	\$57,500	\$115,000	\$172,500	\$230,000
Total Parcel Tax	19,980	\$499,500	\$999,000	\$1,498,500	\$1,998,000

Another source is a special assessment tax. Included in these types of sources are Mello Roos taxes. Taxes for these types of special districts can be levied based on any reasonable value, such as land value, square footage, special benefit received, etc. The levy, however, cannot be based on ad valorem valuation. Establishment of these districts do require time and effort to create and identify the appropriate levy levels more so than the ad valorem and flat parcel tax options. A two-thirds voter approval is required for this funding source.

2.2.4 Pay-As-You-Go Options

District Reserves

Reserves are typically used as a set-aside to address unforeseen fiscal emergencies or upcoming requirements. Although available for the capital improvements and other expenses, use of reserves with no plan for replenishment can weaken the financial strength of the agency. The use of reserves for capital improvements should consider factors such as how the reserves will be replenished and whether the capital improvements generate additional revenue or save costs to improve overall agency operations.

Grants

Grants are typically used as a method to supplement or leverage existing funding abilities of agencies for a variety of capital and service costs. In the case of some grants, however, supplanting

sources are strictly prohibited. The District has periodically received grants, but not on a consistent basis. The State of California has developed a grant portal to assist agencies in identifying potential grant opportunities.⁶ The District has a decentralized approach to applying for and managing grants, with no one District position responsible to research grants, apply, and manage the process. The District has an opportunity to be more strategic in its efforts to identify and apply for grants and donations and cultivate strong partnerships.

An example of a California State grant opportunity is:

- ◆ The Office of Grants and Local Services (OGALS) addresses California's diverse recreational, cultural, and historical resource needs by developing grant programs, administering funds, offering technical assistance, building partnerships, and providing leadership through quality customer service. The funding has established indoor and outdoor recreation in every corner of the State, built trails, acquired and restored sensitive habitat, built natural and cultural interpretative facilities, and fostered outdoor natural experiences for thousands of children, youth, and families. More than 7,400 California parks have been created or improved through OGALS' grant programs.⁷

In addition, Federal grant opportunities can be found at the Federal grant website. Although some of the funding has become more restricted and less available beginning in 2025, the District should investigate its options.⁸

Some examples of Federal recreation/parks grants include:

- ◆ Infrastructure Investment and Jobs Act: This Federal funding source approved in 2022 will be allocated to tribal nations, states, counties, and cities over the next 10 years to fund improvements including and not limited to, roads, bridges, ecosystem restoration and mitigation, water infrastructure, pedestrian safety, trails, and Safe Routes to Schools projects.⁹
- ◆ National Parks and Recreation Association: The national non-profit organization is dedicated to ensuring that all Americans have access to parks and recreation for health, conservation, and social equity. The organization periodically offers grants and serves as a clearinghouse of grant funding opportunities.

⁶ <https://www.grants.ca.gov/>

⁷ https://www.parks.ca.gov/?page_id=30068

⁸ <https://www.grants.gov/search-grants>

⁹ Infrastructure Investment and Jobs Act – <https://www.whitehouse.gov/build/>

- ◆ Trust for Public Lands: A national non-profit organization that works to connect Americans to the benefits and joys of the outdoors. It provides grants and is a clearinghouse of vital information to support the mission of parks and recreation.

Donations/Fundraising

According to data provided by the District, the District has had some success with its donation and fundraising efforts. In FY 23/24, approximately \$420,000 was collected from donations and approximately \$207,000 is budgeted in FY 24/25. According to District staff, these collections are generated through a fairly regular set of donors for programs such as the Fourth of July and Summer Music Series programs. These fundraising efforts help to leverage existing resources to support popular events and programs. The most successful fundraising efforts are found by creating a strategic District-wide program that is supported by dedicated and qualified staff who focus on fundraising and partnership activities. This intentional approach will help generate revenue to fund less popular and obvious needs, such as maintenance, operations, and special equipment funding. The District should consider developing a program such as a Giving Catalog to increase potential donation revenues.

This funding source should not be relied upon to fund ongoing operating expenses, such as staffing and other fixed costs; however, it is a good resource for one-time expenses, special events, scholarships, or favored community programs.

Public/Private Partnerships

There are several special districts and municipal agencies within District boundaries that could be approached to identify potential partnerships related to service provision and capital improvements. The District has already entered into several, including the Truckee Sanitary District (TSD), the Tahoe-Truckee Sanitation Agency, TTUSD, and the Nevada County Library. This exploration should be expanded to include not only special districts but also cities and counties in the area to benefit from economies of scale to reduce and/or share costs and improve overall services levels to residents. This topic is further explored in Section 4—Partnerships, Agreements, and Contract Review.

2.2.5 Debt Financing Options

Debt Service Revenue Streams

A steady and relatively stable revenue stream is required as collateral to issue debt. Revenue streams, such as ad valorem and parcel tax levies, are strong sources to leverage. However, several factors determine the amount of leverage, including the financial strength of the issuing agency. The District currently has about \$15.2 million of outstanding debt as of September 30, 2024, consisting of certificates of participation and lease financing that are due in 2036 and 2040,

respectively. The District's credit rating from Standard and Poor's is an underlying rating of A, which is a good rating that the District should be able to maintain in light of its strong financial condition. There are several types of bonds that could be considered by the District to address capital improvement needs. Tax-exempt debt, such as general obligation and limited obligation bonds, certificates of participation, etc., have lower interest rates, which allow a high leverage point and more proceeds. These types of tax-exempt financing do have certain issue, use, and monitoring requirements which must be met. Taxable debt, such as revenue bonds, has a higher interest rate, which equates to a lower leverage point and less proceeds, but issue, use, and monitoring requirements are generally less stringent than tax-exempt debt.

There are also multiple structures of debt issuance, including the single-issuer structure, where the District issues debt alone supported by one or more revenue streams, such as property taxes, fees, or a general fund pledge; or where the District is part of a pool of issuers to take advantage of potential cost of issuance savings and interest savings due to economies of scale. Examples of these types of structures are Mello-Roos (can be joint venture or individual agency), Marks Roos bonds, the State Ibanc program, and public/private partnerships. Another type of debt structure is a loan from a private bank, which is referred to as private placement debt.

If the District chooses debt issuance, Citygate recommends contracting with a financial advisor experienced in debt financing and current market conditions to help develop the most advantageous financial planning and debt issuance structure. Citygate has been informed that the District has joined the Government Financial Services Joint Powers Authority (GFSJPA) as of June 2025 to provide the services recommended, which Citygate concurs is an appropriate action.

Debt Financing Proceeds Evaluation

Leveraging property tax revenue streams is by far the most stable source to obtain the most debt proceeds to address capital improvement and capital maintenance needs and is quicker than using the pay-as-you-go method.

Assessed Value Scenario

According to State law, one exception to the property tax assessment limits of one percent of assessed value is an extra assessment that is approved by a two-thirds majority of the voters of the District to support debt service for the acquisition or improvement of real property.¹⁰ Assuming the District used this option and won approval from the voters of the District to issue approximately \$19 million of general obligation bonds, it would add an estimated .01 percent additional ad valorem levy on assessed values. This bond amount would generate approximately \$1.6 million annually based on the FY 24/25 assessed values. This amount could change due to property appreciation and new construction, but for the purposes of this discussion, the \$1.6 million is assumed to remain flat. Assuming that this revenue stream is leveraged through the issuance of a

¹⁰ <https://law.justia.com/constitution/california/article-xiii-a/section-1/>

limited tax general obligation bond or some other tax-exempt debt instrument with a 20-year term and a 4.5 percent interest rate, the District could receive approximately \$19 million in bond proceeds, excluding debt service reserve set aside and issuance costs. The actual amount of proceeds available for project use will depend on the structure of the debt financing and market conditions and fiscal strength of the District at the time of issuance.

Parcel Tax Scenario

State of California law also requires two-thirds voter approval for a parcel tax levied by special districts. Under this scenario, various revenue stream levels are assumed based on the resident survey results previously discussed. As is the case with the District's existing \$8 parcel tax, a flat amount per parcel would be levied annually to generate the revenue stream, as opposed to the assessed value of the parcel. The following table is based on the statistically valid survey results.

Table 3—Estimated Debt Based on Parcel Tax Scenarios

		Annual Parcel Tax Scenarios (annual amounts)			
Component	Parcels (FY 24/25)	\$25.00	\$50.00	\$75.00	\$100.00
Total Parcel Tax	19,980	\$499,500	\$999,000	\$1,498,500	\$1,998,000
Estimated Net Debt Proceeds*		\$5,896,975	\$11,793,195	\$17,689,793	\$23,586,390

*Assumptions: 20-year term at 4.5 percent interest rate; one-year annual debt service set aside from proceeds to fund debt service reserve; 1.5 percent of proceeds for cost of issuance.

Based on FY 24/25 parcel counts of approximately 19,980, the result would be an annual revenue stream ranging from approximately \$500,000 to approximately \$2 million. Assuming the debt structure outlined, net bond proceeds would range from approximately \$5.9 million to approximately \$23.6 million.

Having a uniform, flat assessment levy is less complex than an ad valorem levy, and a \$75 parcel tax assessment would generate almost as much as the ad valorum levy.

Additionally, per the survey results of those who responded to the funding question, 63 percent replied either "strongly agree," "agree," or "neutral" that they would be willing to pay an extra tax assessment to support District capital improvement debt service. Similarly, when the same respondents were asked what level of assessment they would support, 51 percent replied they would be willing to pay at least \$75 annually to support debt to support additional capital improvements. This survey information is helpful to gauge the level of voter interest in spring 2025 during the Comprehensive Master Plan development; however, a successful voter approved measure in the future is dependent upon many factors, such as the economic climate at the time of the election, the voters' level of education regarding the requested funding measure, the amount

of community support for such a measure, and the purpose and focus of the funding measure that is presented to the voters for consideration. Citygate recommends establishing an exploration committee to investigate the next steps to place a ballot measure before the voters for a \$75 annual parcel tax to support desired capital improvements or capital maintenance projects. Citygate believes that the parcel tax option is less complicated and the more flexible option.

2.2.6 Funding Matrix

The following table provides a summary of the potential capital improvement funding alternatives in the form of a matrix identifying sources, potential funding, eligible uses, advantages, and disadvantages. The matrix is not intended to present all possible options; however, it provides realistic options for the District's consideration.

Table 4—Funding Matrix

Potential Revenue Source	Uses	Recurring	Leverageable	Estimated Annual Amount	Estimated Debt Proceeds*	Advantages	Disadvantages	Notes
General Obligation Bonds supported by Property Tax – Ad valorem	Can be used for debt service on District capital acquisition and improvements.	Y	Y	Net proceeds available for capital projects depends on several factors including voter approved authorization, assessed value, market conditions, bonding capacity at time of issuance, etc.	\$19,000,000 is assumed for discussion	General obligation bonds would be repaid from property taxes levied for the specific purpose of the bonds issued and are not an obligation of the District's general budget.	Requires a 2/3 rd voter approval.	General obligation bond rates are determined by the debt service of the authorized bonds and the assessed value of the parcels in the District.
Parcel Tax	Can be used for any District general purpose as specified in the ballot language.	Y	Y	Amount can vary based on determined levy rate. Assumption is approximately \$1.5 million.	\$17,700,000	Stable source: can be leveraged to provide funding for capital projects that are needed quickly; can be used for any general District purpose.	Requires a 2/3 rd voter approval.	District parcels are approximately 17,680 and 2,300 in Nevada and Placer counties, respectively. The selected rate is \$75 per parcel based on the mid-range of the resident survey results. Tends to be less complex and more flexible than ad valorem property tax.
Special Tax/Mello Roos	Can be used for any District general purpose as specified in the ballot language.	Y	Y	Amount can vary based on determined levy rate.	Unknown	Stable source: can be leveraged to provide funding for capital projects that are needed quickly; can be used for any general District purpose.	Requires a 2/3 rd voter approval.	Levy can be based on any reasonable valuation except for ad valorem. Establishment of the District and determination of levy valuation basis will require time and effort not required with ad valorem or parcel tax options.
Grants	Restricted to purpose identified in the grant.	N	N	Amount can vary based on nature of the grant.	N/A	Provides revenue sources to address immediate capital needs without increasing taxes or fees.	Grant award processes can be timely and unpredictable, and are typically short term. This can make them insufficient to cover larger capital needs.	-

Truckee-Donner Recreation & Park District
 Comprehensive Parks and Recreation Master Plan

Potential Revenue Source	Uses	Recurring	Leverageable	Estimated Annual Amount	Estimated Debt Proceeds*	Advantages	Disadvantages	Notes
District Reserves	Can be used for any District general purpose.	N	N	Varies.	N/A	Readily available.	Could adversely impact fiscal strength of District to guard against unforeseen emergencies; could adversely impact the District credit rating and increase borrowing costs.	Per the Districts FY 23/24 ACFR, available reserves totaled approximately \$6.7 million, which is a relatively strong position to guard against potential fiscal emergencies, and is needed to support the District's current underlying bond rating of A.
General Fees	Can be used for any District general purpose.	Y	N	Varies.	N/A	Existing revenue stream that is somewhat stable.	Currently collected to cover the cost of providing services and will fluctuate as service demands change. No real extra monies available to support large capital needs in the near term.	District general fees are the second largest source of General Fund revenues but are charged based on current cost of service as opposed to future capital costs.
Mitigation Fees	Restricted to land and facilities associated with new development.	N	N	Varies.	N/A	Existing revenue source.	Only collected from new development which makes this source very volatile.	The District collects AB1600 and Quimby Act mitigation fees but only collected on new developments' estimated impact on recreation/parks capital needs.
Partnerships	Restricted to nature of partnership.	Maybe	Maybe	Varies.	Varies.	Helps to address capital needs more quickly through a shared cost responsibility.	Requires significant negotiations and analysis to ensure benefit equity among the partners and may impact District control.	-

* 20-year term; 4.5 percent rate; excludes reserves and cost of issuance.

2.3 INFRASTRUCTURE, FACILITIES, AND EQUIPMENT MAINTENANCE

Maintenance and replacement costs related to capital infrastructure, facilities, and equipment must also be considered in developing a successful and stable capital program. Identifying funding to construct new capital improvements is a best practice; however, these improvements will depreciate and will need to be repaired or replaced, as will items such as rolling stock and other equipment. It is best practice to have a policy to create reserves for these repair and replacement needs. According to the District's FY 23/24 ACFR, approximately \$800,000 in reserves that is dedicated to facilities and equipment replacement has been identified. These levels meet the District's reserve policy requirements.

2.4 FINANCIAL FINDINGS AND RECOMMENDATIONS

2.4.1 Findings

Finding #1: The District's fiscal year is from October to September.

Finding #2: Based on fiscal activity over the last four fiscal years, the District is in a strong fiscal position as a result of its fiscal practices, as indicated by its underlying bond credit rating of A from Standard and Poor's and FY 23/24 General Fund reserves.

Finding #3: Based on the empirical feedback received through the numerous community and agency interviews, the District is perceived as being fiscally prudent with its resources and has sufficient funds to provide services.

Finding #4: When the District annexed a portion of Placer County in the early 1990s to provide recreation and parks services, it did not receive a portion of the one percent general property tax levy, or any other compensation from Placer County, because Placer County stated the District was already providing and collecting for services from Placer County residents through non-resident fees.

Finding #5: Nevada County, which is also part of the District, allocates approximately 2.74 percent of the general property tax levy to the District to help reimburse recreation and parks costs that the District assumed.

Finding #6: According to tax year 2024, the assessed value for the 18 tax-rate areas located within District boundaries in Placer County totaled approximately \$5.7 billion, which would generate approximately \$570,000 in .01 percent general tax levy.

Finding #7: Nevada and Placer counties collect and allocate the \$8 parcel tax on District parcels that are within County boundaries, which is estimated to generate \$141,444 and \$18,374, respectively for FY 24/25.

Finding #8: The District uses the Financial Edge Enterprise Resource Planning (ERP) system but currently only utilizes the general ledger and accounts payable modules, resulting in an underutilization of the system, which is inefficient.

Finding #9: Several different systems are used for the various other functions of the District, most of which currently interface with the Financial Edge ERP system; however, budgeting is handled via manual Excel spreadsheets prepared by staff.

Finding #10: The Parks Division's payroll is not using automated time entry for timesheet recording, as are the remainder of the District's divisions and sections.

Finding #11: No formal IT policy exists to ensure consistency and compatibility of hardware and software.

Finding #12: Fiscal policies that do exist are adequately written and generally up to date but could be improved to meet GFOA best practice.

Finding #13: There is a District-wide Policy Manual posted on the District's website; its readability can be improved by categorizing/organizing it by subject matter.

Finding #14: Per Section IV of the District's debt management policy, outstanding debt must meet three criteria.

- a. Direct debt must not exceed 1.5 percent of District assessed value, as determined by the Nevada County Assessor.
- b. All debt, including overlapping debt, must not exceed 6 percent of District assessed value, as determined by the Nevada County Assessor.
- c. Annual debt service must not exceed 20 percent of budget expenditures in the General Fund and the Debt Service Fund in the year the debt is issued.

Finding #15: Per Nevada County, the District's assessed value for FY 24/25 was approximately \$10.6 billion; this results in the following limitations for debt.

- a. Maximum direct debt: approximately \$159 million.
- b. Maximum total debt, including overlapping debt: approximately \$636 million.
- c. Maximum annual debt service: approximately \$3.2 million as of the current budget.

Finding #16: According to Town of Truckee staff, there is no remaining sales tax / transaction tax capacity due to the passage of Measure D in the November 2024 general election.

Finding #17: There have been discussions about forming an informal email group of fiscal staff professionals employed within Nevada County, but it has not happened due to lack of availability.

Finding #18: According to staff, fees and charges are updated annually according to the pricing and cost recovery policy, and there is minimal capacity for increases in this area that would not have an adverse impact on activity. There is no formal non-resident fee policy included in the Pricing Policy.

Finding #19: Long range fiscal forecasts are not consistently updated.

Finding #20: There seems to be at least some willingness with the multiple governmental and quasi-governmental agencies providing services within the greater Truckee community to collaborate on identifying mutually beneficial projects on which to work.

Finding #21: The golf course is run by District staff at a profit.

Finding #22: Based on its current fiscal condition, the District will not be able to support additional debt to fund project improvements, which may be identified in the Comprehensive Master Plan, without identifying additional sustainable revenue sources.

Finding #23: The District's resource development effort is decentralized, and the District can be more strategic in implementing the Comprehensive Master Plan.

Finding #24: The District formally executed a Joint Powers Authority (JPA) agreement in June 2025 which will formalize working with other jurisdictions to identify funding for mutually beneficial projects based on the Comprehensive Master Plan priorities. This is a best practice and can help build taxpayers' support by showing evidence of working together for mutual benefit.

2.4.2 Recommendations

Recommendation #1: Revise the debt management policy to include the assessed value of Placer County parcels in addition to those in Nevada County, which would provide added debt capacity, if needed.

Recommendation #2: Determine the cost to provide recreation and parks services to the 18 tax-rate areas in Placer County located within the District. Once determined, compare the cost to the amount of property-tax-related revenue received by Placer County for the applicable tax-rate areas to calculate the net cost difference to ensure costs are covered by existing parcel tax and applicable fees.

Recommendation #3: Based on finalization of the 2025 Comprehensive Master Plan projects and Board-approved project timing, explore the following to identify the potential to support pay-as-you-go and annual debt service to fund applicable projects.

- a. Explore a ballot measure to increase the parcel tax by \$75 per year to support debt service payments for capital improvements; retain the current \$8 per year for a total of \$83 per parcel per year.
- b. Work with the Truckee Recreation & Parks Foundation to develop a donations marketing strategy/plan to assist in one-time capital improvement or maintenance needs based on Comprehensive Master Plan priorities.
- c. Continue to work with other jurisdictions to identify mutually beneficial projects in which funding contribution or cost-share could gain from economies of scale.
- d. Explore joint bid agreements with other local jurisdictions to secure greater efficiencies and savings in purchasing supplies and materials. Examples include, fertilizer, printer paper, janitorial supplies, etc.
- e. Work with other jurisdictions to jointly apply for grants for mutually beneficial projects.

Recommendation #4: Once funding has been identified, work with a financial advisor, an investment bank, and bond counsel to structure a debt issuance plan to address project funding shortfalls within the constraints of the District's debt management policy.

Recommendation #5: Long-term (at least five years) financial forecasting should be updated at least twice per year to be consistent with best practice.

Recommendation #6: The District's 2015 FCA needs to be updated based on the results of this Comprehensive Master Plan process and District staff's assessments to assure that the reserve funds are sufficient to address the existing and future capital replacement needs.

Recommendation #7: Continue toward establishing a fiscal group among the various jurisdictions within Nevada and Placer counties to share ideas impacting the mutual service areas.

Recommendation #8: Explore utilizing the Financial Edge system to the maximum extent possible, especially in the area of budgeting. The current process of using Excel can lead to increased human error, inefficiencies, and inaccuracies, which can diminish user confidence in the budget process. Using a more formal budget module also provides a more consistent and informative product to assist in user understanding.

Recommendation #9: A policy discussion should occur regarding potentially enacting a non-resident fee for those who access the District's services and facilities who are not District residents; further analyze the financial support that residents provide for non-District users.

Recommendation #10: Create a Resource Development program to focus on grants, donations, and partnership cultivation and management. Support the effort by budgeting a Full-Time Equivalent (FTE) employee, classified as a Resource Development/Grant Coordinator, to develop and oversee the program, working in cooperation with the District's creative marketing program for promotion collateral. This position would work directly with the General Manager and support negotiations, perform research, and assist in the implementation of the adopted Comprehensive Master Plan directives.

Recommendation #11: Review and revise the 2019 Pricing Policy to stay current with the many economic and service changes that have occurred since it was created.

Recommendation #12: Revise the budget document format to be more consistent with California Society of Municipal Finance Officers (CSMFO) and GFOA best practice format to improve readability and document flow. Examples include including section discussions of functions, including descriptions, comparative budget amounts, performance measures, achievements, and goals. Revise fiscal policies to more align with best practice as recommended by GFOA.

Recommendation #13: Review rental agreements for the potential to either increase rents or rent/sell other available property.

SECTION 3—PROGRAMS AND SERVICES ASSESSMENT

3.1 OVERVIEW

Citygate completed a summary assessment of the District's existing recreation programs and services, evaluating the types and breadth of programs offered to the community, the demographic profile of the District residents who have opportunity to use the services, the community priorities for recreation programs and services, and opportunities to enhance services. The District has developed an enviable cadre of services and programs, led by professional, well-trained staff.

The following findings and recommendations were developed based on the information obtained from the ETC Institute statistically valid survey data, District documents, external research, and empirical data gleaned from the one-on-one interviews, focus groups, and site tours. The analysis was guided by the team's knowledge from similar and relevant agency reviews and best practices in providing government services.

3.2 STRATEGIC DIRECTION

The Board's strategic leadership has provided policy direction for the District, its staff, and the many stakeholders it has engaged to support service provision, programs, and facilities. Ongoing operational policy guidance is provided by the Board through its monthly public meetings and annual retreat engagement.

3.2.1 Strategic Plans of 2014–2019 and 2020–2025

The District engaged in a comprehensive strategic planning session in 2013, working with the community at large, its stakeholders, District staff, and the District Board of Directors. Facilitated by the consulting firm Fresh Tracks Consulting, a Strategic Plan was completed that created the District's mission, vision, and values and outlined the six Strategic Focus Areas that provide the framework for the District's priorities, including recreation programs and services, through the *Implementing Responsive Programming* objective. These guiding principles continue to provide the policy "roadmap" for the organization with the Board's current update of the Strategic Plan Objectives dated 2020–2025.

Mission

- ◆ Inspiring Creative Active Lives for a Healthy Mountain Community

Values

- ◆ Fiscally Responsible
- ◆ Community Focused

- ◆ Innovative
- ◆ Collaborative
- ◆ Visionary
- ◆ Professional

Strategic Focus Areas

The six Strategic Focus Areas include:

- ◆ Nurturing Partnerships
- ◆ Caring for Our Facilities and Parks
- ◆ Implementing Responsive Programming
- ◆ Building Awareness and Loyalty
- ◆ Organizational Excellence
- ◆ Financial Health

3.3 RECREATION PROGRAMS AND SERVICES PROFILE

Based on the Board's policy direction, the District has evolved its program service delivery into a well-defined, community- and facility-based recreation service model, with services provided primarily at its owned or co-owned and managed facilities as well as joint-use facilities with the TTUSD. The District is centered in Truckee, which is considered a mountain resort community. Due to the survey-verified demographic profile, the District residents include a wide-range of economically and, increasingly, ethnically diverse demographic groups. Based on this data, the District has an opportunity and responsibility to offer programs and services to all ranges of the economic scale and ethnic populations.

The District has refined its community programs to include aquatics, preschool and school-aged care, arts/culture and enrichment programs, summer camps, entry-level adult and youth sports, targeted seasonal hosted or co-hosted community-wide special events, and senior adult programs. The District provides year-around activities with a focus on providing services and opportunities that are financially accessible to the most participants. It offers a scholarship program which is capped at a certain budgetary amount annually.

The Board's 2020–2025 Strategic Focus Area guiding these services is Responsive Programming.

Responsive Programming: Creating & growing programs based on community awareness of what District offers.

1. Establish criteria for investing in new programs & eliminate old or non-relevant programs.
2. Expand programming to be inclusive of all Truckee demographic groups.
3. Expand outdoor winter recreation.

Table 5—Existing Core Recreation Programs and Activities

Target Audience	Program Activities
Youth Sports	Ages 5-18: includes basketball, girls' softball, ice hockey, lacrosse, flag football, golf, sports camps, triathlon, track, downhill skiing, and sailing
Adult Sports	Ages 19 and above: includes softball, basketball, volleyball, disc golf, golf, tennis, soccer, indoor soccer, rock climbing, pickleball, ping pong, bocce ball, women and men's ice hockey, broomball
Golden Programs	Ages 55+: the Golden Meet & Greet social, pickleball, enrichment programs, fitness classes
Teen Programs	Ages 12-19: dances, classes, trips, sports, camps
Preschool & Afterschool	Ages 5-12: recreation programs, camps, trips
Family Programs	All ages: concerts and special events
Aquatic Programs	All ages: swim lessons for children in Truckee through the schools, private lessons, special events, lap swimming, recreation swimming, exercise and scuba classes, birthday parties
Adult/Youth Theater & Dance	All ages: theater acting and dance expression and instruction
Special Needs Population	All ages: ceramics, exercise, water aerobics.
Specialized Classes (contract instructors)	All ages: exercise classes, art, crafts, ceramics, music, investment, life coaching, dance, acting, yoga, martial arts, foreign language, wellness, puppy & dog training, gardening, ice skating lessons

3.3.1 Statistically Valid Survey Results Review

Citygate reviewed the results of the 2025 ETC Institute survey in relationship to District residents' preferences and satisfaction with its recreation programs and services. The results and tables found in this section were derived from the summary report dated May 2025.¹¹

¹¹ Truckee-Donner Recreation & Park District 2025 Strategic Plan Resident Survey – ETC Institute-May 2025

Participation/Satisfaction Rating

Based on the report, 76 percent of residents indicated that they or someone in their household have participated in a recreation program offered by the District in the past year. Of those that participated, 95 percent rated the overall quality of recreation programs as “excellent” or “good.” This data illustrates an excellent performance measurement of the awareness, participation rate, and satisfaction of District residents. This is a commendable outcome for the District’s efforts.

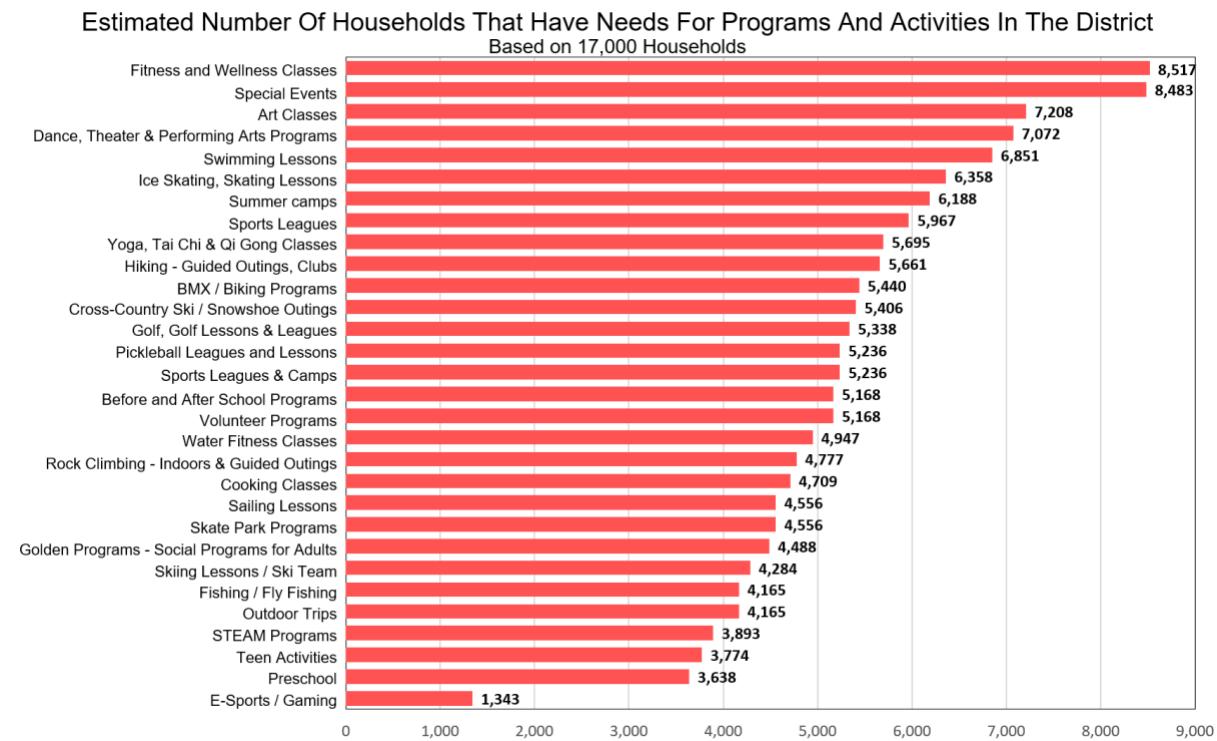
Unmet Program Needs and Priority

The scientific survey process methodically revealed the respondents’ current participation in District recreation programs, identification of need for different programs, and requested prioritization of certain program services. This data helps to identify the community’s unmet needs and gives the District guidance on where to focus its resources to meet these unmet needs.

Respondents were queried about their relative need for a selection of 30 different programs. As the following figure shows, the top three programs that have an unmet need are:

1. Fitness and Wellness Classes
2. Special Events
3. Art Classes

Figure 1—Estimated Number of Households That Have Needs for Programs and Activities in the District

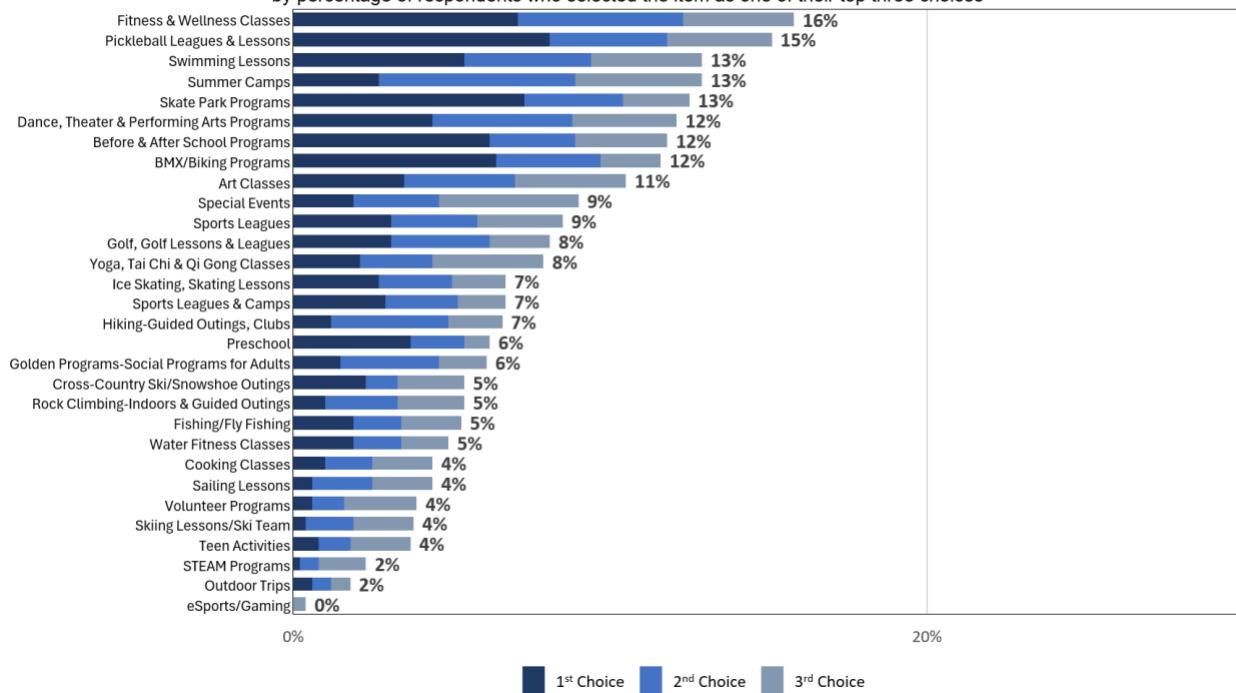


Respondents were then asked to identify the relative importance that they placed on each of the 30 programs and activities. Based on the sum of the respondents' top four ranked choices, the following figure shows the top three programs that ranked most important are:

1. Fitness and Wellness Classes
2. Pickleball Leagues and Lessons
3. Swimming Lessons*

Figure 2—Relative Importance of Programs and Activities

Q9. Which THREE Programs/Activities From The List In Question 8 Are MOST IMPORTANT To Your Household?
 by percentage of respondents who selected the item as one of their top three choices



* Note: Summer Camps and Skate Park programs rank with almost equal importance as the third choice ranking of Swimming Lessons

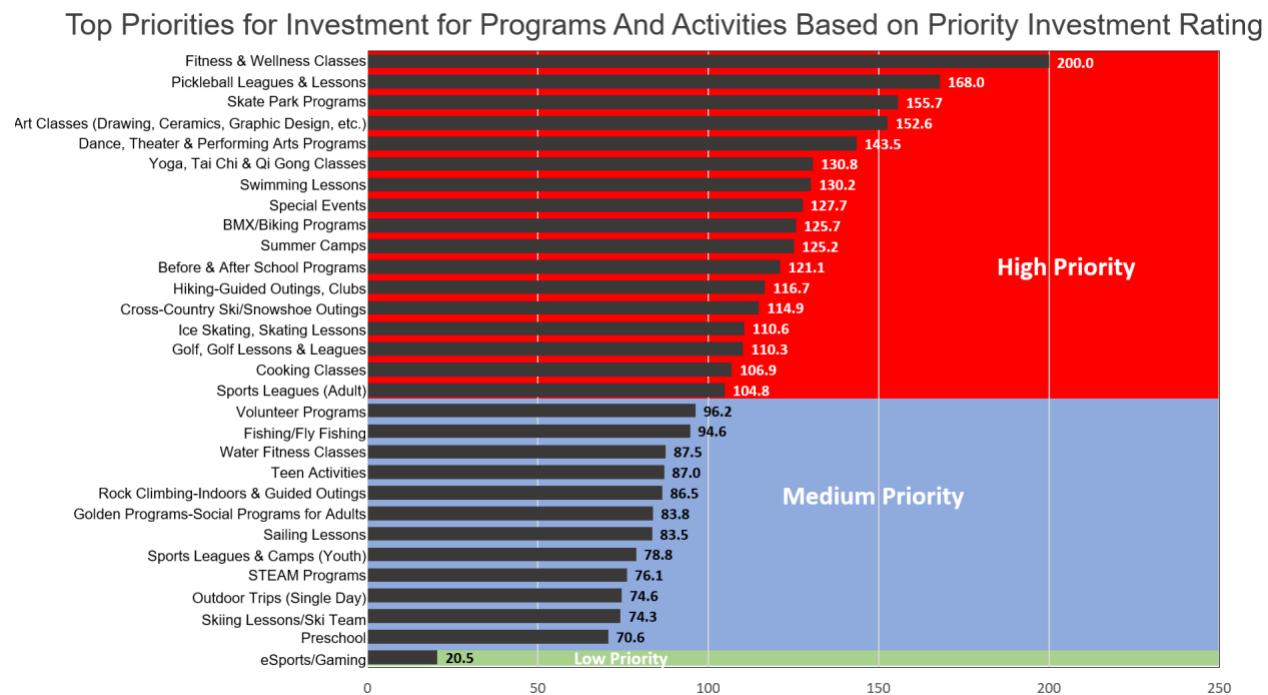
Finally, the ETC Institute compared the unmet need with the priority and created a metric for the District to help determine where to invest its resources and efforts. The Priority Investment Rating (PIR) equally weighs (1) the importance that residents place on facilities and (2) how many residents have unmet needs for the program.

The following figure identifies the results of that analysis and the order of priority for the 30 different programs and activities.

The top three programs that ranked the highest priority are:

1. Fitness and Wellness Classes
2. Pickleball Leagues and Lessons
3. Skate Park Programs

Figure 3—Top Priorities for Investment for Programs and Activities Based on Priority Investment Rating



Other national and regional potential recreation trend data was collected and consulted through the Comprehensive Master Plan process using *Esri Business Analyst Sports + Leisure Market Data Forecasts*.

3.3.2 Private Recreation Providers

Truckee has numerous private recreation providers that offer a variety of related facilities and services. Many require private, exclusive paid memberships to use their services or facilities. The following is not an exhaustive list; however, it provides a current snapshot of existing recreation providers who serve a certain segment of the community. Private providers are subject to uncertain and seasonal economic conditions and may not remain in business over the long term. Conversely, as new trends drive demand, new businesses are started to meet the market demands and can be privately funded and supported by membership and user fees.

There may exist an opportunity for the District to develop/negotiate a collaborative relationship with these providers to support program delivery through a business service agreement—potentially offering services at District facilities, engaging them in sponsorship opportunities for District events and programs, and potentially sharing a customer base to provide seamless service and program delivery to the community.

Table 6—Private Recreation Providers

Type of Services	Name of Company
Fitness/Personal Training	High Altitude Fitness, CrossFit Truckee & Tahoe Power Lab, Sierra Athlete, Camp 1 Fitness, Performance Training Center
Water Sports/Beach	Tahoe Donner Beach Club Marina, Donner Lake Water Sports, Cook eFoiling, Dirt Gypsy Adventures
Recreation Center/Pool/ Event Space	Northstar Recreation Center; Martis Camp's Family Barn, Tahoe Donner Trout Creek Recreation Center
Bike Tours	Tahoe Mountain Guides , Bike Truckee, Le Grand Adventure Tours, Dirt Gypsy Adventures, Ronnie's Battleborn Prodigies
Golfing	Old Greenwood Golf Course
Winter Sports	Tahoe Mountain Guides, Ski Butlers Ski Rental, Snowplay, Le Grand Adventure Tours
Yoga/Healing Arts	GyöHarmony-Sound & Healing Arts, Wild Harmony Health, Be Active Yoga Truckee
Recreation Equipment Rental/Sales	Adrenaline Connection, Trail Kitchens, Truckee River Bikes, Black Tie Adventure Rentals

3.4 PROGRAMS AND SERVICES FINDINGS AND RECOMMENDATIONS

3.4.1 Findings

Finding #25: The District is seen by the community as the primary year-round park and recreation provider for the community. There are other numerous private recreation providers that provide year-around recreation offerings and charge market rate for the services; however, the District is considered the principal, more-affordable parks and recreation program and facility provider, offering the widest range of services to the most individuals.

Finding #26: The District is perceived as developing and managing high-quality recreation facilities. For example, the Steve Randall Community Recreation Center and the Truckee Community Pool, Truckee River Regional Park, Ponderosa Golf Course, Donner Boat Ramp and Public Piers, and Riverview Sports Park.

Finding #27: There is intense competition for facilities—such as the TTUSD field house, basketball courts at Truckee Elementary, and TDRPD field space—due to the short season for field sports (both adults and youth). In addition, there is a need for more all-weather surfacing on the athletic field spaces.

Finding #28: Some of the facilities are in a deteriorating condition and need significant maintenance or rehabilitation. The Truckee River Regional Park playground, West End Beach facilities at Donner Lake, and the Donner Lake Boat Ramp are three examples.

Finding #29: There could be better communication between the youth and adult athletic non-profit user groups and the District regarding planned maintenance schedules of field spaces and the field scheduling process.

Finding #30: The Recreation Division is professionally managed and hires professional, qualified, and passionate staff who desire to provide high-quality services and are considered part of the fabric of the community.

Finding #31: Longevity of staff is beneficial to knowing the community, having an established network, and having gained the trust of the community members. This aids in retention of customers.

Finding #32: The District provides availability, accommodations, and support for patrons with disabilities who wish to access its programs and facilities, such as at the Truckee Community Pool; however, there is an opportunity for the District to enhance its service delivery in this area.

Finding #33: The variety and number of program and activity options for senior adults age 55 or older are lacking. Based on demographic data, the average age of residents is anticipated to increase between 2025 and 2045.

Finding #34: The introduction of new programs by the District is more “organically” formed with ideas suggested by staff, patrons, or potential contract instructors. The District infrequently performs statistically valid community-wide surveys to assess satisfaction with and community preference for its existing or new programs.

Finding #35: The District has become more forward-thinking and strategic in the past two to three years, and the decision to undertake the Comprehensive Master Plan update is an illustration of this change.

Finding #36: The programs offered by the District are positive for working parents.

Finding #37: The District periodically offers new programs to stay relevant to market needs.

Finding #38: The District is perceived by some organizations in the community as primarily a “pay-to-play” service model and the price to participate or use facilities has increased during the past three to five years, which is a barrier to some residents/users; the District has reached elasticity in the demand/pricing curve for some facilities and programs that have “priced out” locals from participating (for example, West End Beach rentals).

Finding #39: Requests for scholarships have increased from 121 in FY 22/23 to 142 in FY 23/24 and, in the current FY24/25 there is a waitlist for scholarships with the anticipation that the budgeted funding will be fully expended prior to the fiscal year’s end. Community feedback was received that there is an increased need to offer financial assistance to middle class customers as it is expensive to live in Truckee. Some middle-class families also need financial assistance as they do not qualify for financial assistance based on the Federally based low-income criteria.

Finding #40: District facilities are open to other agencies’ user groups, such as non-governmental organizations, TTUSD, Achieve Tahoe, KidZone, etc. The fee to use the District’s facilities is negotiated independently with each group, with the goal of providing low- or no-cost access or arranging a trade for services or facilities that benefit the District.

Finding #41: Empirical community feedback received identified a need for programs for “tweens” (youth that are of middle-school age) and more programs during the winter months for youth, which leads to the need for more indoor space.

Finding #42: Spanish speaking customers accessing District services is increasing. In addition, the need for affordable programs, services, special events and facility user fees is also increasing, based on community feedback and the increased requests for scholarships.

Finding #43: More year-round, indoor, temperature-controlled programming space is needed to accommodate winter athletics training and practice, skill-building clinics, and recreation programs for all age groups. In addition, the need for this space has become evident with the increase in poor air quality days due to wildland fire smoke. The lack of indoor space is a limiting factor in expanding the District’s programming.

3.4.2 Recommendations

Recommendation #14: Prepare a written Recreation Program Plan for each program the District offers to be more strategic in how it meets the Board's objectives and program goals; define the target audience, pricing/cost recovery goals, expected program duration, and how they will be marketed. This action would also meet the Board's Strategic Plan Objectives of *Establish criteria for investing in new programs & eliminate old or non-relevant programs.*¹²

Recommendation #15: Enhance the service level and implementation of Spanish speaking programs and services, working with the local non-profits for assistance, feedback, and support to create and execute the programs and services. This action would meet the Board's Strategic Plan Objectives to *Expand programming to be inclusive of all Truckee demographic groups* and the District's 2023–2026 Marketing Plan direction to *Increase Spanish language commitment through translation documents and in-person communication.*

Recommendation #16: Develop a Recreation Program Plan targeting more focused senior adult programming, to the 55+ age group, including active recreation programming and potential regional trips to places of interest. Consider executing a specialized survey of the senior adult community for ideas and to recruit potential contract instructors. This action would also meet the Board's Strategic Plan Objectives to *Expand programming to be inclusive of all Truckee demographic groups.*

Recommendation #17: Based on the ETC Institute survey results and reinforced with the empirical data through the community engagement process, there is a need for more programs at the Truckee Community Pool, especially in the morning at less scheduled days/times and after 7:00 pm. For example, the District should consider working with the Tahoe Forest Hospital or other healthcare providers to identify potential for partnership in the rehabilitation and wellness services arena. In addition, although once tried and not continued, Movie Nights at the pool should be market tested again to target groups who may be interested in this programming.

¹² Consult Appendix I—Recreation Program Proposal as example.

Recommendation #18: Develop a Recreation Program Plan targeting programs for “tweens” (youth that are of middle-school age), expanding the current high-quality youth programs. This action would meet the Board’s Strategic Plan Objectives to *Expand programming to be inclusive of all Truckee demographic groups.*

Recommendation #19: Develop a Recreation Program Plan targeting the patrons with special needs, utilizing what the District is already providing to individuals with disabilities, by establishing a dedicated Inclusion and Adaptive program. An Inclusion and Adaptive Recreation Policy should be developed. Accomplish this by working with District partners, such as Achieve Tahoe, TTUSD, Elevation Truckee, High Fives, Special Olympics, Little Peacock, and the Tahoe Ability Program organizations. This action would meet the Board’s Strategic Plan Objectives to *Expand programming to be inclusive of all Truckee demographic groups.*¹³

Recommendation #20: To maintain affordability to the greatest number of residents, especially those with lower incomes, increase the annual budget scholarship allocation to accommodate all who may require financial assistance. In addition, collaborate with the Town of Truckee Inclusion, Diversity, Equity and Accessibility (IDEA) Program Director, the Sierra Community House, Sierra Nevada Children’s Services, and other relevant collaborators to expand the outreach and accessibility to the District’s programs with the Latino and Spanish speaking community as well as those with low and middle incomes.¹⁴

Recommendation #21: Prioritize the development of a year-round, indoor, temperature-controlled programming space working with multiple partners to fund and manage the facility.

¹³ Consult NRPA resources of Guidelines and Policy in Appendix F.

¹⁴ Consult NRPA resources for Diversity, Equity and Inclusion in Parks and Recreation in Appendix E.

Recommendation #22: Convene and facilitate two annual meetings, preseason and postseason, with the key “Affiliate” youth and adult athletic non-profit user groups and the District staff who maintain and schedule the fields. This will improve communication and help to prevent user/District conflicts during the season. In addition, it will build mutual trust and support to achieve greater efficiencies in field and facility management. Develop a fillable PDF athletic field rental application for ease of applicant use and staff review.¹⁵

¹⁵ Consult City of Bothell, WA Formal Use Field Request: <https://www.bothellwa.gov/FormCenter/Parks-and-Recreation-Forms-17/Formal-Use-Field-Request-253>

SECTION 4—PARTNERSHIPS, AGREEMENTS, AND CONTRACT REVIEW

4.1 OVERVIEW

Since the inception of the District 63 years ago, the District has developed, grown, and thrived on its partnerships and alliances. Through the years, the District leadership leveraged the District's resources by working with the community to provide labor, materials, and services. The District has enjoyed a caring and involved volunteer base that has helped to build, construct, manage, and maintain parks and recreation facilities.

The District has matured as an organization and is now poised to meet the existing and future demands on its facilities, its aging infrastructure, and the internal organization growth needed to support the park and recreation expansion needs desired by the community. In addition, private recreation providers who are engaged in service delivery through business service or contractor instructor contracts will help to bolster the District's service delivery options.

4.2 PARTNERSHIPS, AGREEMENTS, AND CONTRACT FINDINGS AND RECOMMENDATIONS

4.2.1 Findings

Finding #44: There are several governmental agencies, non-governmental organizations, and for-profit organizations that are located within the District's sphere of influence that can support the District's efforts to provide services and facilities. The District has worked, and is working, with many of them to expand their land base, develop and provide facilities for the community, and support programming services. For example, these include the Tahoe-Truckee Sanitation Agency, TSD, the Truckee-Tahoe Airport District, and the TTUSD, along with many others.

Finding #45: There is competition for taxpayer and donor dollars with the Nevada County Library initiative and the Town of Truckee, who have or are proposing to place measures on the ballot over the next two to four years to fund facilities. In addition, there are other nonprofit initiatives seeking donor funds (for example, the Rocker Skatepark and the KidZone Museum for children).

Finding #46: There are 19 special districts in the area, and there is a community perception that there are disjointed efforts between governmental agencies to provide services, no focused efforts to work together, and perceived silos of service delivery. By exhibiting collaboration on a mutually beneficial community project, taxpayers are more likely to support a ballot measure for funding park and recreation improvements.

Finding #47: The Town of Truckee and the District periodically work together for special events. However, there is potential for other opportunities to work together on joint projects as the current leadership values collaboration.

Finding #48: There is an expressed interest from Placer County to collaborate on jointly acquiring and constructing park and recreation facilities which would meet mutual goals.

Finding #49: The District employs a variety of agreement formats to implement services, including the Business Service Provider Agreement, Contract Services Agreement, Concessionaire Agreement, Partnership Agreement, Facility Use Agreement, Memorandum of Understanding, Land Lease Agreement, and a Joint Use Agreement (JUA) template.

Finding #50: The internal tracking and monitoring system for agreements/contracts/leases is inconsistent; consistency is needed to ensure compliance and efficient management of the business and partnership agreements throughout the contract/agreement/lease lifecycle.

Finding #51: The TTUSD provides K-12 education to Truckee and the Lake Tahoe area with six schools in Truckee. These consist of two elementary schools, one elementary-middle school, one middle school, and two high schools, including Truckee High School. Their primary goal is to provide education to District residents, and their average annual enrollment is approximately 4,200 students. The District offers services at Glenshire Elementary School Park, Truckee Elementary, Donner Trail Elementary, Alder Creek Middle School, and Truckee High School.

Finding #52: It is difficult to secure some TTUSD facilities as the reservation process is decentralized; not all individual school management personnel are knowledgeable of the agreement and do not always abide by the JUA terms executed by both districts. In addition, staff turnover in the TTUSD has caused difficulties in the reservation process.

Finding #53: The current JUA, executed in April 2020 between the District and TTUSD, expired in May 2025, and both parties agreed to extend the term until the Comprehensive Master Plan process is completed. At that time, the District has expressed a desire to update the terms of the existing agreement. The two Districts do not routinely meet to discuss the agreement.

Finding #54: The TTUSD has recently completed its Facility Master Plan¹⁶ and there is an Athletic Sports Complex development envisioned in the plan.

¹⁶ <https://www.ttusd.org/departments/facilities-maintenance-operations/facilities-master-plan-2024>

Finding #55: The TTUSD opened the rehabilitated field house (previously a pool) in December 2024. There is great community demand for it and, based on the JUA with the District, TDRPD is to receive priority use of it after TTUSD use. It has been a point of contention in the community as the demand for indoor space is so great. The issues have been mostly resolved; however, conflicts have periodically arisen since opening.

Finding #56: There is a focused IDEA program and ongoing initiative staffed and managed by the Town of Truckee to ensure that the Town's services, programs, and information are accessible to all community members. This program is not regulatory but advisory, and the District does not have to comply with the Action Plan that is being developed by the Town of Truckee.

4.2.2 Recommendations

Recommendation #23: The Comprehensive Master Planning effort has revealed additional opportunities to accomplish mutual goals that are untapped to date. These include potential cooperative projects with Placer County Parks, Trails and Open Space; Nevada County Recreation and Facilities; the Town of Truckee; the Tahoe Forest Hospital; and TTUSD. Upon adoption of the Comprehensive Master Plan and identification of the District priorities, these agencies should be approached to fully explore collaborating on mutually beneficial projects.

Recommendation #24: The responsibility for organizing, tracking, and monitoring all the District's agreements/contracts/leases should be fully centralized in the District; consider purchasing a software package to provide higher-level management and oversight of the business activity, including compliance with terms, renegotiation process, expiration dates, provision of insurance documents, etc. All District properties occupied by others should have a current agreement to occupy, including at Truckee River Regional Park.

Recommendation #25: The TTUSD/District JUA agreement needs to be updated to reflect current operational conditions on behalf of both parties; reflect the District Board's priorities for partnership engagement; negotiate joint use cost share agreements regarding use, maintenance, janitorial or other maintenance expenses; articulate goals and intent to collaborate on potential joint capital project initiatives to meet mutual goals; reconfirm joint use facility commitments; and reestablish desired channels and frequency of communications. Once the new agreement is renegotiated, it is recommended that the District and TTUSD meet at least once annually to discuss the progress of the JUA, to resolve issues, and highlight changes in operations with the District and TTUSD.

Recommendation #26: Consult with the IDEA Program Manager with the Town of Truckee to explore opportunities to work together to ensure that the District's services, programs, and information are accessible to all community members.

Recommendation #27: Modify and enhance the existing Policy #240 Partnership and Recognition. Add language regarding intent, accomplishing the District goals of establishing mutual partnerships, the type of partnership, financial goals, the specific areas they can be utilized in the District, and frequency of review and renewal.

SECTION 5—STAFFING AND ORGANIZATIONAL REVIEW

5.1 OVERVIEW

This section provides a review of the District's core service functions, current organizational structure and staffing, workloads, a high-level review of the job classifications, and a sampling of salary and benefits compared to comparable agencies, and recommendations regarding future staffing needs.

5.1.1 Core Service Functions

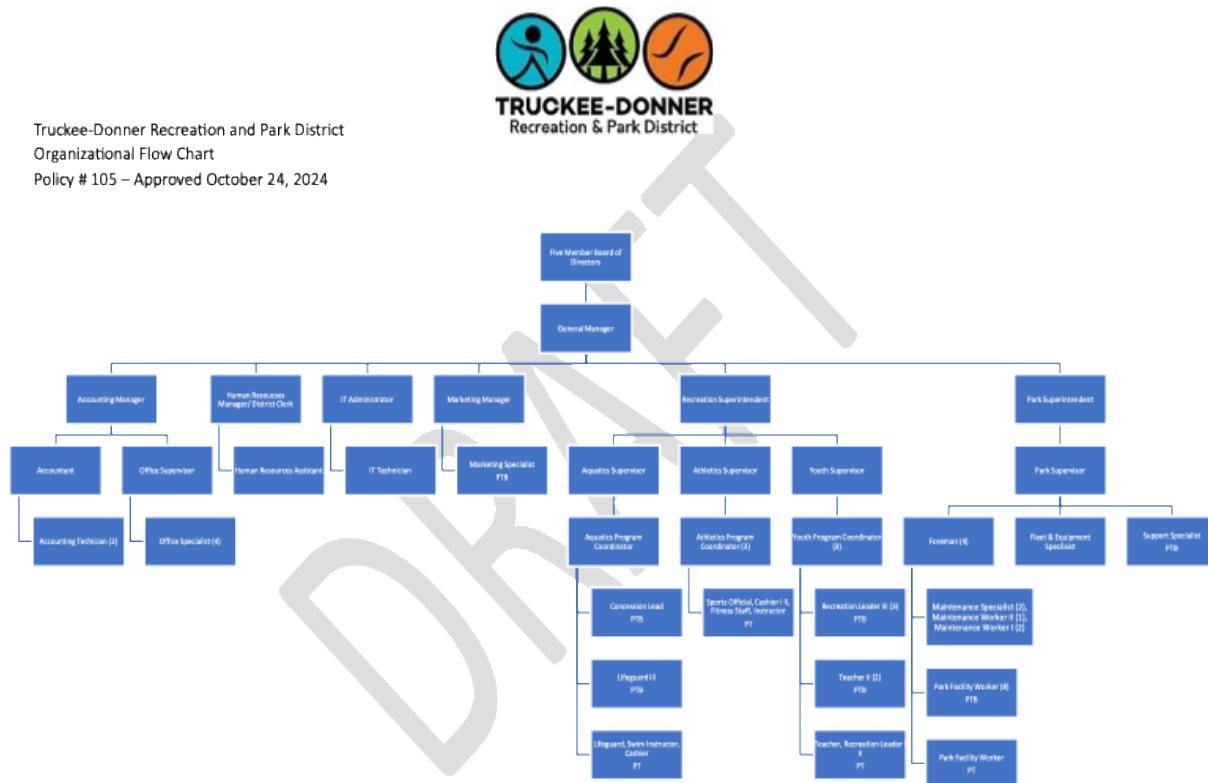
Based on the information received from the interview process and document review, the District staff understand the District's primary mission is to provide park and recreation services to the public. The Board's adopted Strategic Plan Objectives document, dated 2020–2025, offers the policy direction or "how to" accomplish this mission. The District does not use a performance-based management tying the Board's policy direction to employees' performance outcomes.

5.1.2 Staffing Review and Analysis

The Human Resources function is led by the Human Resources Manager / District Clerk and is staffed with one Human Resources Administrative Assistant. According to the Independent Auditor's Report dated March 18, 2025, the District had 36 full-time employees, 18 part-time employees, and 149 part-time seasonal employees as of September 30, 2024.⁵ The District's primary functions are organized into three divisions: Administration, Recreation, and Park Operations. According to the Auditor's Report, the General Manager has six direct reports.

⁵ James Marta & Company LLP Independent Auditor's Report FT 2024 & 2023
<https://www.tdrpd.org/DocumentCenter/View/3118/Final-Audit-FY-2024?bidId=>

Table 7—Truckee Donner Recreation & Park District Organization Chart



5.2 STRUCTURE AND STAFFING LEVELS

The District is sufficiently staffed at the current service level to perform the existing programming and services, with the exception of the noted deficiencies in this subsection, and most notably in the Parks Operation and Recreation functions. Future expansion of programs, services, added facilities, or enhanced service levels will require additional staffing or contract service engagements.

5.3 PARKS DIVISION FINDINGS AND RECOMMENDATIONS

5.3.1 Findings

Finding #57: The Parks Division is headed by the Parks Superintendent with a subordinate Parks Supervisor. The Parks Supervisor has a staff of four Foreman, two Specialists, one Maintenance Worker II, and two Maintenance Worker I. The Division is augmented with eight Park Facility Workers, which are part-time benefited positions and supplemented with as-needed part-time Park Facility Workers.

Finding #58: The Parks Division is well-structured, with a variety of job classifications delineating the different job functions and minimum qualifications. The classification specification and performance evaluation are shown on the same document. The document lists the tasks, the requisite knowledge, skills, abilities, physical requirements, and amount of time during the workday performing identified physical activities.

Finding #59: The classification specifications do not list characteristics that distinguish the classification from those immediately above and/or below that specific classification. It is difficult to assess how, for example, a Maintenance Worker I advances to a Maintenance Worker II position.

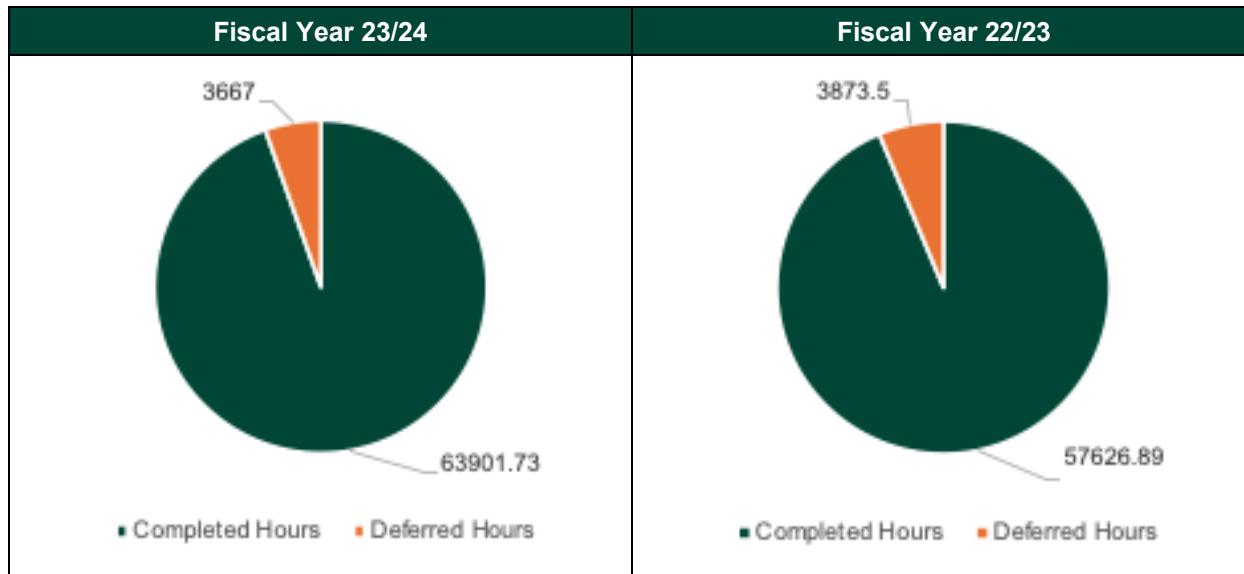
Finding #60: The Parks Division uses Facility Dude maintenance management software for recording maintenance, work orders, and hours worked to complete tasks. This is a best practice and ensures the work hours are tracked and maintenance activities can be managed in a strategic and systematic manner, especially with the high and low seasonal nature of the Division's maintenance responsibilities.

Finding #61: Based on the evaluation of the summary documents provided by Division staff related to planned and unplanned required maintenance activities, the Division is understaffed and averaged 3,770 staff hours of deferred maintenance in each of the past two fiscal years. This has resulted in and accumulation of over 7,000 hours of planned maintenance which is not being accomplished and is compounding annually. These planned, but unworked maintenance activities exclude unanticipated special activities (e.g., fireworks' defensible space, bike park construction/maintenance).

This assertion is verified by the statistically valid survey. The respondents stated their highest support for increasing the level of maintenance of District facilities and parks and indicated improving maintenance levels as their number one choice of improvements to the District's park system.

The following table shows a summary of the work not accomplished.

Table 8—Work not Accomplished



Deferred maintenance hours per fiscal year are shown in the following table.

Table 9—Deferred Maintenance Hours per Fiscal Year

Category	FY 23/24	FY 22/23
General Grounds	10.00	0.00
General Maintenance	2.00	2.00
Planned Maintenance	3,578.00	3,525.00
Rec/Admin Request	37.00	44.00
Routine Planned Maintenance	40.00	302.50
Total Deferred Maintenance Hours	3,667.00	3,873.50

5.3.2 Recommendations

Recommendation #28: Add all distinguishing characteristics to each classification specification so they clearly identify how the classification is unique from the classifications directly above and below.

Recommendation #29: Consider flexibly staffing Parks Facility Worker, Maintenance Worker I, and Maintenance Worker II classifications. As regular (permanent) employees demonstrate proficiency in their duties coupled with the requisite knowledge, skills, and abilities, the District may move the employee to the next, higher flexibility-staff classification without the requirement of a recruitment.

Recommendation #30: Include the budget evaluation and funding of additional parks operations employees whenever expanding any new parks and recreational activity requiring maintenance and operations staff support.

Recommendation #31: Consider adding two Maintenance Worker I/II positions in the FY 25/26 budget.

5.4 RECREATION DIVISION FINDINGS AND RECOMMENDATIONS

5.4.1 Findings

Finding #62: The Athletics program recently underwent a reorganization of its positions, which has been beneficial to service delivery and has improved employee morale.

Finding #63: The Aquatics program has a void in on-site supervisory management of West End Beach during the summer months, which results in reduced customer service and lack of efficiency in the issues that arise during the seasonal operations.

Finding #64: The Department has grown in its breadth and depth of programs and services that it needs to either hire or “train up” at least one Recreation Division employee who is fully certified in Therapeutic Recreation. Some District staff have acquired specific training and certifications; however, due to potential liability in not fully serving the patrons with developmental or physical disabilities, a fully certified, experienced staff should be included in the short-term future hiring plans. Reliance only on occasional support from the Achieve Tahoe organization and others is not sufficient to meet the District’s needs. This is an area for potential enhanced services.

Finding #65: The Childcare program is valued by the community based on participation and community feedback received through the Comprehensive Master Plan process. The District has had difficulty in recruiting, hiring, and retaining consistent staff due to the pay structure and certification issues.

5.4.2 Recommendations

Recommendation #32: Recruit and hire one FTE Aquatic Program Coordinator to assist with the seasonal on-site supervisory management of West End Beach and provide secondary support to the Aquatics Program Coordinator at the Truckee Community Pool as a result of proposed expanded programming needs.

Recommendation #33: Recruit and hire one 1 FTE Recreation Coordinator to support the Athletics program. This position should be responsible to create, administer, and grow programs to expand the service level to District residents, especially the specific targeted underserved residents as identified in this report.

Recommendation #34: Recruit and hire one FTE Recreation Leader III who possesses a Therapeutic Recreation education, certification, and training credentials to support the youth and adult recreation program service delivery. This position may need to be converted to a Program Coordinator as the program responsibilities and roles expand.

Recommendation #35: Consider modifying the pay/benefit/certification structure and practices of the Childcare program.

5.5 ADMINISTRATION DIVISION FINDINGS AND RECOMMENDATIONS

5.5.1 Findings

Finding #66: The Administration function has experienced inefficiency with employee turnover over the past two years, due in part to a reliance on non-benefited, part-time employees. The Division has restructured and now has four benefited employees, which has resolved the turnover issue.

Finding #67: The Division staff have employees that are bilingual in Spanish/English, which is a best practice, and supports the Comprehensive Master Plan research that highlights the growing number of patrons whose first language is Spanish.

Finding #68: The Human Resources function is led by the Human Resources Manager / District Clerk and staffed with one Human Resources Administrative Assistant (HRAA).

5.5.2 Recommendations

Recommendation #36: Consider developing an action plan so that the HRAA can develop complex human resources technical knowledge and skillsets, and potential training and certification by the national Society for Human Resource Management (SHRM). This will provide a career ladder for the position to professionally advance to a Human Resources Analyst. This may provide day-to-day relief to the Human Resources Manager / District Clerk for activities requiring more technical human resources knowledge and abilities and also provides some expert support when the Manager is on vacation or otherwise away from the office.

Recommendation #37: Continue to maintain front-line staff and interpreters available for Spanish speaking customers. Consult with the Town of Truckee IDEA Program Director for support and guidance regarding the outreach and communication efforts to the District's growing Spanish speaking community.

5.6 DISTRICT-WIDE TRAINING AND EMPLOYEE DEVELOPMENT

5.6.1 Findings

Finding #69: There is no defined employee policy on training clarifying who is eligible for what training and identifying the tracking and renewal compliance of required employee certifications and licenses. District Policies #213 and #408 are related to Meetings and Conference and Training Education referencing staff and Board training procedures and processes.

Finding #70: There is a disparity between part-time benefited and full-time employees in the Childcare program that prevent qualified and timely recruitments and inhibits program service delivery.

Finding #71: There is a need for more deliberate and consistent certification training options (required by the State of California), and a plan developed and funded annually for the Childcare program to successfully recruit and retain part-time employees, many of whom are teachers. The childcare program is extremely successful and is a needed service in the community; having consistent, well-trained staff will reduce employee stress and attract more customers to the program.

Finding #72: There is a Board directive in the 2020–2025 Strategic Plan Objectives to invest in employees through training and licensure, with a focus on management and technology skills.

Finding #73: Human Resources and Parks and Recreation divisions each sponsor trainings for employees. These trainings include safe work practices, mandated regulatory topics (e.g., harassment avoidance, bloodborne pathogens), and skill development. Trainings are not always recorded in a timely manner in Department records or forwarded to Human Resources for centralized and individual employee recordkeeping.

Finding #74: The District uses the software program, Training Tracker, which is a best practice to utilize technology for tracking employee training requirements; however, the program is used inconsistently throughout all divisions and employees are not fully aware that it is available and how to access it to self-monitor their training requirements and opportunities.

Finding #75: The District offers lifeguard and life safety training to other agencies' staff and non-profits; this helps to build collaboration, potentially assists with District recruitment, and provides a service to the community.

5.6.2 Recommendations

Recommendation #38: Develop a formal training policy outlining the District's expectations of employees for training in their job classification; defining the District's role in financially supporting training; outlining eligibility criteria for the employees; and defining the roles of the employees, supervisors, and managers in supporting a culture of continuous learning in the organization.

Recommendation #39: Maintain the centralized record of employee training for all employees in the *Training Tracker* application, with records updated within two to four weeks of training completion. Train all employees how to use the program so employees can self-manage their training and certification requirements in concert with their supervisors.

Recommendation #40: Consider purchasing a training software platform that includes both the administrative functions (documenting trainings assigned and completed, generating reports) and training content (i.e., online training classes).

Recommendation #41: Develop a funded training program for the part-time Childcare program employees to become certified (required by the State of California), thus attracting qualified staff; advertise through the TTUSD and District website to recruit and retain staff and therefore provide stability to the services provided to the customers using the program.

Recommendation #42: Provide training for all staff, at least once annually, on how to serve people with disabilities. Contract with qualified staff from Achieve Tahoe or the TTUSD to achieve this goal.

5.7 DISTRICT-WIDE RECRUITMENT AND RETENTION

5.7.1 Findings

Finding #76: The District conducts open, competitive recruitments for all positions. Recruitments result in hirings, although the District is finding that a larger geographic area is needed for a satisfactory recruitment pool.

Finding #77: Prospective employees complete a fillable PDF employment application or submit a resume. The District's recruitments are not shown on governmentjobs.com.

Finding #78: District staff believe that area housing costs are a contributor for the need to recruit applicants from the Reno area. Internal employees (whether temporary or regular in job status) tend to be successful in these open, competitive recruitments for regular or promotional job opportunities.

Finding #79: The District reports that retention of nighttime workers, such as custodial staff, is challenging. Nighttime workers are needed for some activities to avoid operational disruptions of daytime recreation and pool activities.

Finding #80: Full-time, part-time, and seasonal employees are offered different discounts on District programs based on full-time or part-time status as an added employment benefit; perks include pool passes, reduced facility rentals, free passes, and discounts on recreation and exercise equipment. There is a written Policy #233 that outlines the benefits for the different employee statuses.

Finding #81: The District is aware of inequity between part-time and full-time employees' benefit packages, which affects recruitment and retention of employees; it is expensive to address the inequity.

Finding #82: There is no apparent succession plan for the District. The benefit of a succession plan is that it ensures a smooth transition in leadership and key positions for planned retirements and unplanned vacancies. It is a strategic personnel practice to help maintain stability in a dynamic work environment.

5.7.2 Recommendations

Recommendation #43: Consider a swing/graveyard shift differential for parks employees with assigned work hours in the late evening.

Recommendation #44: Consider using the flexibly staffed classifications to reclassify, without recruitment, full-time or part-time benefited employees to the next higher level.

Recommendation #45: Explore online advertising formats, such as governmentjobs.com, to broaden the District's applicant pool and provide an easy format to apply for employment.

Recommendation #46: Consider using professional employment recruitment services to gain a broader audience for hiring difficult-to-fill positions.

Recommendation #47: Prepare a succession plan working with the executive team and District staff.

5.8 DISTRICT-WIDE SALARY AND BENEFITS EVALUATION OVERVIEW

Citygate was asked to review benchmark classifications with District requested agencies, including Bend, Oregon Park and Recreation District; the City of Breckenridge, Colorado; the City of Mammoth Lakes, California; and the City of Ashland, Oregon. Citygate conducted a summary, snapshot review of a representative sample of some of the District's positions' salary and benefits. The District recently completed a more detailed salary and compensation survey to gauge competitiveness with the private sector.

The District classifies employees as full-time, part-time benefited, part-time and seasonal, or contract (Policy Manual, Policy #201, Classification of Employees). Full-time employees work 2,080 hours per year. Part-time benefited (PTB) employees may work a maximum of 2,000 hours per year (or approximately 96 percent FTE). Part-time / seasonal employees are limited to 28 hours per week and a maximum of 1,500 hours per year.

PTB employees are not proportional to full-time employees, as shown in the following table.

Table 10—District Employee Benefits by Pay Status

Benefit Component	Full-Time	Part-Time Benefited
Yearly Hours	2,080	2,000
Medical, Dental, Vision	100% for EE; Dep H at 85%; Dep D, V at 75%	100% for EE;
HSA	\$2,000/year (no Dep); \$4,000 year w/Dep	\$1,000/year
Vacation	First 2 year 80 hours After 2 nd year 120 hours After 7 th year 136 hours After 10 th year 160 hours	80 hours General Leave
Holidays	12	None
Money Purchase Plan	Eligible upon hire	Eligible starting January after 1,000 hours in prior year
Social Security or PARS	Social Security	PARS EE paid (Temps also in PARS)

Surveyed salary classifications include the following.

Parks Superintendent	Recreation Superintendent	General Manager
Parks Supervisor	Recreation Supervisor	HR Manager*
Maintenance Worker II	Program Coordinator	District Clerk*

* The District's Human Resources Manager / District Clerk classification was surveyed as both Human Resources Manager and District Clerk as it was unlikely that the comparable agencies would include both functions into a single classification. The survey of District Clerk should be given lesser weight, if any weight is given, as the human resources functions are undervalued in this comparison with city/town/district clerk functions.

The following classifications have a salary which is greater than the median of the other comparable agencies: Parks Superintendent, Parks Supervisor, Maintenance Worker II, Recreation Superintendent, Recreation Supervisor, Program Coordinator, and Human Resources Manager/District Clerk.

The classification with a salary less than the median of the other comparable agencies is the General Manager.

Drawing finite conclusions regarding this salary review is cautioned due to:

1. The comparable data is not a large enough collection of salaries to draw final and meaningful conclusion on whether the District's pay is or is not competitive. Having too few matches can provide a skewed result if one comparable agency's data is significantly different than the other agencies.

2. The comparable matches are geographically diverse and may be beyond the District's recruitment geographic area, with the closest of the comparable matches located three hours driving time away. As an overview analysis, the Cost of Living Index was not applied to the listed wage rates.
3. Even with these few comparable comparisons, the District should further examine and consider salary adjustments for the General Manager position, as having wages significantly less than comparable agencies may result in unfavorable employee retention and difficulties in hiring (recruitment) for a future vacancy. The character and nature of the mountain resort communities chosen as comparable could attract desired candidates.

Table 11—Park Supervisor

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	Park Supervisor	\$9,545.47
City of Ashland, OR	Parks Maint./Sports Field Supervisor	\$7,410.12
Bend, OR Park & Recreation District	Parks Services Supervisor	\$7,598.79
City of Breckenridge, CO	Parks Supervisor	\$7,626.67
City of Mammoth Lakes, CA	[no match]	
Median (excludes TDRPD)		\$7,598.79
\$ above TDRPD		-\$1,946.68
% above TDRPD		-20.39%

Table 12—Maintenance Worker II

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	Maintenance Worker II	\$6,974.93
City of Ashland, OR	Facilities Maintenance Worker	\$5,796.08
Bend, OR Park & Recreation District	Park Maintenance Worker II	\$4,908.71
City of Breckenridge, CO	Senior Parks Operator	\$6,694.13
City of Mammoth Lakes, CA	Parks Maintenance Worker	\$5,870.42
Median (excludes TDRPD)		\$5,833.25
\$ above TDRPD		-\$1,141.68
% above TDRPD		-16.37%

Table 13—Recreation Superintendent

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	Recreation Superintendent	\$12,561.47
City of Ashland, OR	Recreation Superintendent	\$9,319.11
Bend, OR Park & Recreation District	Recreation Services Director	\$14,701.85
City of Breckenridge, CO	Assistant Director of Recreation	\$14,166.67
City of Mammoth Lakes, CA	Outdoor Recreation Manager	\$10,768.33
Median (excludes TDRPD)		\$12,467.50
\$ above TDRPD		-\$93.97
% above TDRPD		-0.75%

Table 14—Recreation Supervisor

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	Recreation Supervisor I	\$8,826.13
City of Ashland, OR	Recreation Manager	\$6,938.98
Bend, OR Park & Recreation District	Recreation Supervisor I	\$6,926.27
City of Breckenridge, CO	Recreation Program Manager	\$10,666.67
City of Mammoth Lakes, CA	Recreation Supervisor	\$6,780.92
Median (excludes TDRPD)		\$6,932.63
\$ above TDRPD		-\$1,893.51
% above TDRPD		-21.45%

Table 15—General Manager

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	General Manager	\$15,596.53
City of Ashland, OR	City Manager	\$16,906.06
Bend, OR Park & Recreation District	Executive Director	\$18,827.50
City of Breckenridge, CO	Town Manager	\$21,437.42
City of Mammoth Lakes, CA	Town Manager	\$17,947.99
Median (excludes TDRPD)		\$18,387.74
\$ above TDRPD		\$2,791.21
% above TDRPD		17.90%

Table 16—Human Resources Manager/District Clerk

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	HR Manager/District Clerk	\$12,077.87
City of Ashland, OR	Director of Human Resources	\$13,925.21
Bend, OR Park & Recreation District	Human Resources Business Partner	\$8,550.37
City of Breckenridge, CO	Human Resources Manager	\$10,666.67
City of Mammoth Lakes, CA	Human Resources Manager	\$11,214.00
Median (excludes TDRPD)		\$10,940.33
\$ above TDRPD		-\$1,137.54
% above TDRPD		-9.42%

Table 17—Human Resources Manager/District Clerk

Agency	Class Title	Top
Truckee-Donner Recreation & Park District	HR Manager/District Clerk	\$12,077.87
City of Ashland, OR	City Recorder	[not available]
Bend, OR Park & Recreation District	Assistant to Exec Dir & Board of Directors	\$8,550.37
City of Breckenridge, CO	Town Clerk	\$8,166.67
City of Mammoth Lakes, CA	Town Clerk/Records Manager	\$10,043.25
Median (excludes TDRPD)		\$8,550.37
\$ above TDRPD		-\$3,527.50
% above TDRPD		-29.21%

5.9 SALARY AND BENEFITS FINDINGS AND RECOMMENDATIONS

5.9.1 Findings

The identified findings for the subsection are the tables illustrating the comparable agency salary data.

5.9.2 Recommendations

Recommendation #48: Continue to conduct periodic salary surveys using the District's historical private sector comparative employers and data to maintain awareness regarding how compensation packages may affect the success of the District to recruit and retain qualified employees.

Recommendation #49: As PTB employees tend to remain employed with the District and have a lower turnover rate, consider amending the Money Purchase Plan's eligibility to match that of the full-time employees. From a budgetary cost, there is likely minimal to no additional cost in amending eligibility as PTB employees leaving District employment likely are participating in the Money Purchase Plan and there is no additional budgeted cost if the newly hired employee had the same eligibility as a full-time employee.

Recommendation #50: Continue to assess and amend, within fiscal prudence, amendments to the PTB benefits schedule.

Recommendation #51: Consider inclusion of additional comparable agencies, giving weight to those cities or special districts which are geographically closer to the District and, thus, within a reasonable commute radius for prospective employees. Apply applicable Cost of Living Index factors to wage rates, as needed to reflect geographic economic differences.

5.10 GENERAL ORGANIZATION MANAGEMENT AND STRATEGIC DIRECTION FINDINGS AND RECOMMENDATIONS

5.10.1 Findings

Finding #83: The community organizations involved with providing recreation services, many of the District staff, Town staff, School District staff, non-governmental organizations, and governmental agencies have not seen nor are they aware of the District's mission, vision, goals, and Strategic Plan Objectives.

Finding #84: Historically, the District has not employed a structured performance management system with KPIs tying employee performance and activities to the Board's Strategic Plan Objectives. The District does track several varied performance measures for the Truckee Community Pool and programming. The recent change in executive leadership has supported the implementation of best practices in the District.

Finding #85: There is some lack of inter-divisional clarity between some of the staff of the divisions and programs related to functions, staffing needs, and how they relate to the overall District mission, vision, and goals.

Finding #86: The divisions provide periodic updates to the Board regarding staff activities and service delivery, and the District publishes its Annual Report on its website. The monthly reports to the Board include written updates on workplan activities and have valuable metrics and statistics regarding staff activities.

Finding #87: There is a lack of dedicated staffing to accomplish the specific functions identified in the Board's 2020–2025 Strategic Plan Objectives in the following areas:

- a. Park acquisition and development; land acquisition identification / negotiations / lease agreements. The District Board adopted the TRRP Master Action Plan in 2020, and the responsibility to implement the significant number of projects is shared by the Parks Superintendent and the General Manager. This approach has had mixed performance success in completing the projects due to the already existing workload of the two positions, lack of available funding, and needed focus on other position-related priorities. With the adoption of the 2025 Comprehensive Master Plan recommendations, there will be added need for a focused position(s) to manage projects and initiatives.
- b. Grants and resource development including identification, application, monitoring, and compliance, partnership development, and contract administration.

5.10.2 Recommendations

Recommendation #52: Implement a District-wide, targeted Performance Management effort to directly link the Strategic Plan Objectives to employees' workplans, activities, and functions utilizing the existing compiled data. The advantages in tying employee workplans directly to the Boards Strategic Plan Objectives include illustrating to potential grantors the professional focused efforts of District resources, providing accountability to District residents regarding use of their tax dollars, and measuring the accomplishments of staff, thus helping to improve employee morale and clarify job responsibilities. In addition, it will prepare the District to successfully achieve professional accreditation via the Commission for Accreditation of Parks and Recreation Agency (CAPRA) by the NRPA should the District choose to accomplish this in the future.¹⁷

¹⁷ A summary report of national database key performance indicators is included in the NRPA *Special Park District National Database Report* in Appendix J. Also consult other resources such as [OpenGov](#), California Special Districts Association(CSDA), National Special Districts Association(NSDA), and California Association of Recreation & Park Districts(CARPD) for examples.

Recommendation #53: Annually, the District should share the Board's Strategic Plan Objectives with the leadership of all partnerships, local governmental agencies, non-profit organizations, the school district, and key stakeholders. This will assist the community in understanding the focus and goals of the District and it will create an opportunity to jointly work on mutually beneficial projects.

Recommendation #54: The District should recruit/hire an FTE Park Planner / Landscape Architect classification employee to focus solely on implementing/managing the District's CIP program, including existing unfinished capital improvement projects.

SECTION 6—POLICIES, PRACTICES, AND SYSTEMS

6.1 POLICIES FINDINGS AND RECOMMENDATIONS

Citygate reviewed the District's Policy Manual and its financial and personnel policies. Financial policies and procedures are addressed in Section 2—Financial Analysis.

6.1.1 Findings

Finding #88: There are approximately 40 personnel policies incorporated in the Policy Manual. There are some key personnel policies absent related to recruitments, salary upon classification changes (such as promotion, demotion, or reclassification), health and welfare benefits (such as medical, dental, vision, life, and disability insurances), workers' compensation (memorializing State requirements and any enhancements to those minimums), temporary modified duty assignments (such as length of such temporary work assignments), and working out of classification (such as extended vacation relief for a higher-level position).

Finding #89: Some of the preemployment policies are nine years old with no notation of recent review or update.

Finding #90: The District has an onsite, turn-key system for performing background checks prior to hiring, which is best practice.

Finding #91: All District policies are found on the District's main webpage and are not categorized as either internally or externally focused, which would be beneficial.

Finding #92: New positions require Board approval, but there is no formal process/personnel requisition form to make requests which outline the pertinent data supporting the need for the added personnel and how it will accomplish the Board's Strategic Plan Objectives, which would be approved through the annual budget process.

6.1.2 Recommendations

Recommendation #55: Ensure that all human resources / personnel policies are recorded within the Policy Manual. Review the policy topics for any gaps.

Recommendation #56: Consider reorganizing the Policy Manual, which is published on the website, by adding “chapters” or “divisions” such that Board-related, human resources, and/or financial policies, etc., are grouped together. This would improve the readability of the Policy Manual by categorizing/organizing them by subject matter.

Recommendation #57: If a policy has been reviewed or updated, a notation of the date of the review should be added to the policy header to inform the reader of its review status. In addition, this review process should be included in the Performance Management System procedures to ensure that it is completed on a regular basis.

6.2 USE OF INFORMATION TECHNOLOGY FINDINGS AND RECOMMENDATIONS

This high-level analysis was completed with the information revealed through staff and stakeholder interviews. No on-site inspections of the IT system were completed by Citygate. Conclusions were determined using best practice and professional experience and familiarity using technology in the government setting.

6.2.1 Findings

Finding #93: Most of the Tahoe/Truckee governmental agencies have converted to Civic Plus software, which has made it more seamless for residents/users to rent facilities and register for programs, and for staff to manage the requests. Staff still have to use an Excel spreadsheet to manage some processes, which is a duplication.

Finding #94: No formal process exists to request hardware/software, requests are usually handled during the annual budgetary process, mid-year requests are handled informally, and IT staff are responsive when Department staff request assistance. The District uses a more top-down process to determine technology needs, and there is a need for more current technology in the field to support staff efficiency.

Finding #95: The District uses the following information technology systems for its fiscal operations:

- a. Financial Edge – General Accounting and Finance
- b. ADP – Payroll
- c. CivicRec – Recreation Activity Management (The District converted to Civic Plus in March 2022 from the Active Net software program)
- d. GolfNow – Golf Activity Management
- e. Excel and Word – Budget Document and Administration

Finding #96: The District is currently only using the General Ledger and Accounts Payable modules of the Financial Edge Software system. This requires other fiscal processes to be handled manually or with other inefficient software. This has caused backlogs and other inefficiencies. A maximum functioning financial system for all is crucial to effective decision-making, management of District operations, and credible and reliable reports for the District Board. As an example, Citygate was informed that all employees, with the exception of the employees of the Parks Division, use automated time entry. It is uncertain why the Parks Division would not automate this function like the remainder of the District's divisions, which would help improve overall efficiency of the process. It is important that all divisions of the District follow the same administrative policies and procedures to ensure consistency and maximize overall District productivity.

Finding #97: District staff is currently working on five-year capital expenditure analysis to move to CIS cloud-based systems to improve efficiency, flexibility, and collaboration.

6.2.2 Recommendations

Recommendation #58: Conduct a thorough evaluation of the security of the District's IT systems, its use, internal and external access portals, and hardening of IT systems, as needed. Contract with an outside IT expert to accomplish the goal in a timely manner.

Recommendation #59: Develop a robust IT policy to prevent lone purchasing and help ensure efficient and consistent IT operations. Having an IT policy is a best practice to ensure system and processes security.

Recommendation #60: Complete a thorough evaluation of the District's servers that are six years old (with maintenance contracts that are expiring), and budget sufficient funding to acquire and install new servers within the next three to five years.

Recommendation #61: Develop an easy technology requisition system to help staff request technology needs and support the budget process to review and budget for the identified needs. This system can be created to help District staff understand the larger IT system while improve their work technology.

Recommendation #62: Fully automate the e-payroll process and require all divisions within the District to follow the same policies and procedures.

6.3 COMMUNICATIONS METHODOLOGY FINDINGS AND RECOMMENDATIONS

Citygate provided a high-level review of the primary communication methods employed by the District.

6.3.1 Findings

Finding #98: The yearly published *Annual Report* is the primary public information tool used to explain the District's performance, revenue generation, and allocation of funds. There is some lack of clarity in the community about the District's revenue generation capacity, its allocation of resources, and the availability of funding for projects.

Finding #99: The District has a robust and sophisticated marketing effort to brand its activities, market its programs, and serve and inform its existing and potential customers of District information and relevant data.

Finding #100: The District has a well-defined 2023–2026 Marketing Plan that guides the District's outreach and communication to its residents, participants, and other stakeholders regarding its programming, services, and facilities. It contains a wealth of information to guide staff in its execution of the Board directives to provide high quality, accessible, innovative, and sustainable programs and services. In addition, staff update the Board on a regular basis related to the marketing report with the results of staff outreach efforts.

Finding #101: The District is well positioned with the key social media channels. In addition, the District has a well-established presence on most of the local partner agency websites, including the Truckee Chamber and tourism websites (e.g., Tahoe.com, Truckee-Travel-Guide.com).

Finding #102: There is a strong District “brand” awareness; the community knows who the District is, what the District does, and that it is the “biggest game in town” related to parks and recreation.

Finding #103: The Activity Guide can be found as a menu option under the “Register Online” tab on the District homepage, which is offered in English. It has an option to translate into Spanish or other languages through Google Translate; however, it may be difficult to accomplish if the user is not technically knowledgeable regarding how to navigate the website.

6.3.2 Recommendations

Recommendation #63: The District can benefit by negotiating the placement of a link to the District's webpage on the websites of the Town of Truckee, Placer and Nevada County, and other partners with whom the District works with on a regular basis. This will improve the already well-established presence the District enjoys with other local partner agencies and ultimately better serve the taxpayers who seek services.

Recommendation #64: The District has a robust website, with current links and an inviting home page. It is recommended that the "History" section on the home page be updated to be current to 2025. Conversely, due to the rich experiences in the development of the District during its 60+ year history, a summary of the District's formation and growth would be valuable information for the community. This is a best practice in the industry.

Recommendation #65: Modify the home page and the link to the Activity Guide for Spanish or other non-English speaking customers. Simplify the navigation methods to make it easier to locate the programs and registration link. Consult the Town of Truckee IDEA Program Manager for guidance in serving the Latino and Spanish speaking community.

Recommendation #66: Modify and enhance the financial reporting section of the Annual Report, published on the website, to better illustrate the District's Strategic Plan Objectives and how the District's resources are allocated.

Recommendation #67: Advertise to attract interested contractor instructors in a more conspicuous location in the Activity Guide and on the website to secure desired recreation services and programming expertise.

APPENDIX A

LAFCO ANNEXATION #1 OF THE TRUCKEE-DONNER RECREATION & PARK DISTRICT

RESOLUTION 90-02
OF THE LOCAL AGENCY FORMATION COMMISSION
OF NEVADA COUNTY, CALIFORNIA,
MAKING DETERMINATION AND APPROVING
THE SPHERE OF INFLUENCE AMENDMENT AND ANNEXATION #1
TO THE TRUCKEE-DONNER RECREATION & PARK DISTRICT

WHEREAS, an application for a Sphere of Influence Amendment and Annexation #1 from the Truckee-Donner Recreation & Park District was filed with the Executive Officer of the Local Agency Formation Commission of Nevada County, California. Said application complied with all the requirements of law and this commission, and,

WHEREAS, the proceedings for this annexation will be governed by the Cortese-Knox Reorganization Act, Section 5600 et seq. of the Government Code; and,

WHEREAS, at the time and in the manner provided by law, the Executive Officer gave notice of the date, time, and place of hearings by this commission upon said application; and,

WHEREAS, the Executive Officer has reviewed the application and has prepared a report including his recommendations thereon within the time required by law and has furnished copies of said report to this commission and to all other persons required by law to receive it; and,

WHEREAS, this commission has heard all interested parties desiring to be heard and considered the application and report by the Executive Officer and all other relevant evidence and information presented at said hearing.

NOW THEREFORE, the Local Agency Formation Commission of Nevada County, California, does hereby determine, resolve, and order the following:

1. That the short form designation be Truckee-Donner Recreation & Park District Sphere of Influence Amendment & Annexation #1.
2. That the Conducting Authority be The Truckee-Donner Recreation & Park District.
3. That the area be determined to be inhabited.
4. That the Negative Declaration, as adopted by Nevada County LAFCO be approved with the finding that this project will not have a significant effect on the environment and a Notice of Determination be posted.
5. That there will be no exchange of tax revenue in connection with this annexation.

RESOLUTION 90-02
NEVADA COUNTY LAFCO

TDRPD Sphere Change & Annex. #1

PAGE 2

6. That, at such time as the Tahoe city incorporation issue is approved by the voters, the Truckee-Donner Recreation & Park District pursue negotiations with the new city for recreation services.
7. That the Truckee-Donner Recreation & Park District shall initiate proceedings in compliance with the LAFCO resolution.

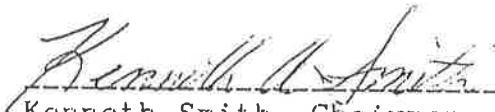
The foregoing resolution was duly passed at a regular meeting of the Local Agency Formation Commission of Nevada County held on April 19, 1989, by the following roll call vote:

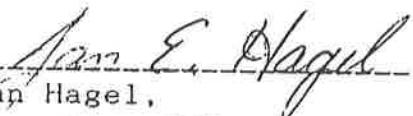
AYES: Callaghan
McAdams
Sweet
Tassone
Weir
Zanone
Chairman Smith

NOES: None

ABSTAINS: None

Signed and approved by me after its passage this Nineteenth day of April, 1990.


Kenneth Smith, Chairman
Nevada County LAFCO


Jan E. Hagel,
Executive Officer
Nevada County LAFCO

COPIES SENT TO:

TDRPD 5-25-90
Michael Sullivan 5-25-90

49148

APPENDIX B

LAFCO STAFF REPORT REGARDING ANNEXATION



FILE:

LOCAL AGENCY FORMATION COMMISSION

P.O. BOX 6100

NEVADA CITY, CALIFORNIA 95959

Telephone: 916-265-6767

RECEIVED

11 April 1990

APR 16 1990

Commissioners
TAHOE CITY
Local Agency Formation Commission
P.O. Box 6100
Nevada City, California 95959

To	Action	Info
DA		1
SS		2
KR		
BL		
SC		
JB		
DIR		
FILE		3

Re: TRUCKEE-DONNER RECREATION & PARK DISTRICT (TDRPD)
SPHERE OF INFLUENCE AMENDMENT AND ANNEXATION #1

Dear Commissioners:

Following is the staff report on the subject reorganization:

APPLICATION:

The subject application has been accepted for filing and application fees have been received for both the Sphere of Influence Amendment and the Annexation procedures. This application was filed by Steve Randall, General Manager, Truckee-Donner Recreation & Park District.

AUTHORITY:

The proceedings shall be governed by the Cortese-Knox Reorganization Act, Section 56000 et seq of the Government Code. A Negative Declaration has been prepared for this proposal. This Negative Declaration is attached and becomes a part hereof.

HISTORY:

This annexation proposal contains approximately 12 square miles of Placer County parcels, contiguous to Nevada County and the current TDRPD boundaries. All or part of the following subdivisions are included in this annexation: Martis Woods Estates - Ponderosa Palisades - Ponderosa Ranchos - Sierra Meadows - South Shore Donner Lake.

The purpose of this annexation is to permit the residents of the proposed annexation area access to district parks and recreational programs at district resident prices. Residents of the effected areas are currently being charged non-resident fees. This annexation will increase the size of the district which may allow an increase the dollar amount of future grants awarded to the district. There will be no additional parcel charges attached to the effected parcels.

This annexation proposal is due, in part, to requests made by area residents to annex into the district. The residents currently participate in many of the programs offered by the district and utilize the facilities anyway, paying the non-resident fee. The nearest alternative recreation facilities offered the residents is 15 miles away.

Nevada County LAFCO Executive Officer brought this annexation proposal to commission for the first time at the June 15, 1989 meeting with a recommendation to transfer jurisdiction to Placer County. Placer County LAFCO had expressed concern regarding this annexation since some parcels are located within the Sphere of Influence of the proposed Tahoe City Incorporation. Placer County LAFCO indicated that they would prefer to handle this proposal, but would accept whatever decision Nevada County LAFCO preferred. This recommendation to transfer was denied by Nevada County LAFCO.

Placer County LAFCO then requested that the TDP RD defer the annexation application until the Tahoe City Incorporation issue had been finalized. The district would not agree to that since no formal proposal for incorporation had been filed at that time.

A copy of a letter written to Ruthe McKee by Tahoe City P.U.D. was received by Nevada County LAFCO. This letter addressed the issue of overlapping services. Portions of the annexation territory are within the service boundaries of the P.U.D. which has the mandate to provide recreational facilities but does not offer any recreational services to this area at this time.

Letters were received by Nevada County LAFCO from Ruth McKee, Placer County LAFCO Assistant Executive Officer; Don Lunsford, Placer County Executive Officer; and Placer County LAFCO Executive Officer. All letters had requested that any action by Nevada County LAFCO be postponed until the issue of the incorporation was resolved. Mr. Thomas McMahon, Placer County LAFCO Executive Officer, had requested a transfer of jurisdiction in his letter dated December 15, 1989.

11 APRIL 1990

LAFCO STAFF REPORT

TDRPD SPHERE CHANGE & ANNEX

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Therefore, at the request of Placer County "to have jurisdiction over territory within its own boundaries", the subject of a change of jurisdiction was brought before Nevada County LAFCO once again at the January 18, 1990, meeting. No motion to transfer jurisdiction was made and Nevada County LAFCO Chairman directed the executive Officer to proceed with annexation process.

A public hearing was held on February 15, 1990, to consider the Sphere of Influence Amendment and the Annexation. David Antonucci, General Manager of the Tahoe City Public Utility District, was present and voiced opposition to the proposal, referring to overlapping boundaries of like services districts. (See the highlighted area of the map.) Mr. Antonucci distributed copies of a letter he sent to the executive officer. This letter claimed the possibility of duplication of taxation for recreational services. It went on to state that the P.U.D. plans to construct a regional recreation complex in the future. The Tahoe City P.U.D. does include parks and recreation services as a function of the district. However, there are no park and recreation facilities available to the people of the overlapping area now or in the very near future other than the possibility of a bike trail.

LAFCO legal counsel advised that the Categorical Exemption from CEQA did not apply to this proposal and a Negative Declaration be prepared for this proposal. Therefore, the public hearing should be continued until such time as a Negative Declaration has been properly prepared and noticed.

Notices of the preparation of a Negative Declaration and of this public hearing have been noticed in the Grass Valley Union Newspaper and the Truckee based Sierra Sun Newspaper. Notices have also been posted in the Truckee Library and the Nevada County Government Building in Truckee. The notices posted in the buildings included a list of all parcel numbers affected by the proposal.

The TDRPD has held two public hearings on this annexation proposal and has received only positive comments.

A memo, dated 7 August 1989, from the Placer County Registrar of Voters calculated that there are 122 registered voters within the proposal area.

BOUNDARIES:

See attached map with legal description.

ASSESSED VALUE AND PROPERTY TAX APPORTIONMENT:

Placer County Auditor has not replied to Nevada County LAFCO's request for the assessed value of the annexation territory.

The TDRPD received notice from Placer County Executive Officer that "there will be no exchange of property revenues associated with this proposal, pursuant to Placer County Resolution 80-142 which states that in the case of an annexation resulting in a district providing a new service not previously provided (by Placer County) in the annexed area, there is no exchange of existing (base) property tax revenues."

ENDORSEMENT OF PROCEEDINGS:

There are 794 parcels included in the proposal. A total of 7 letters of opposition and 2 letters of approval to this proposal.

APPENDIX:

1. Negative Declaration

RECOMMENDATIONS, DETERMINATIONS, & FINDINGS:

It is recommended that the TRUCKEE-DONNER RECREATION & PARK DISTRICT SPHERE OF INFLUENCE AMENDMENT AND ANNEXATION #1 be approved subject to the following conditions:

1. That the short form designation be Truckee-Donner Recreation and Park District Sphere of Influence Amendment and Annexation #1.
2. That the Truckee-Donner Recreation and Park District be Conducting Authority.
3. That the Area is found to be inhabited.
4. That the Negative Declaration, as prepared by LAFCO staff, be approved with the finding that this project will not have significant effect on the environment.
5. That there is no exchange of tax revenue associated with this annexation.

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LAFCO STAFF REPORT
TDRPD SPHERE CHANGE & ANNEX
PAGE 5

6. That, at such time as the Tahoe City Incorporation issue is approved by the voters, the Truckee-Donner Recreation and Park District pursue negotiations with the new city for recreation services.
8. That the Truckee-Donner Recreation and Park District initiate proceedings in compliance with the LAFCO resolution.

Respectfully Submitted

Jan E. Hagel
Executive Officer

Attachment

APPENDIX C

PLACER COUNTY PROPERTY TAX LETTER



COUNTY OF PLACER

BOARD MEMBERS

ROBERT P. MAHAN District 1	GEORGE BELAND District 3
ALEX FERREIRA District 2	SUSAN HOGG District 4
MIKE FLUTY District 5	

OFFICE OF COUNTY EXECUTIVE

DONALD LUNSFORD, County Executive Officer

175 FULWEILER AVENUE, RM. 205 / AUBURN, CALIFORNIA 95603
TELEPHONE: 916/889-4030 • 916/889-4032

November 20, 1989

2951 TG62 RECEIVED

Mr. Steve Randall
General Manager
Truckee-Donner Recreation and Park District
P.O. Box 1087
Truckee, CA 95734

NOV 29 1989

Truckee-Donner Recreation
and Park District

Subject: Sharing of Property Tax Revenues and Park Dedication Fees
Attributable to Proposed Annexation in Placer County by
Your District

Dear Mr. Randall:

I am writing in response to your October letter on the above subject.

First of all, with respect to property tax sharing, I am sorry you seem to feel you were bounced back and forth between Myron Blom of my staff and the County-Auditor at the time of your previous inquiries. However, what I am about to relate is precisely what Mr. Blom told you by telephone several months ago. Briefly, applicable state law and relevant county policies and procedures are as follows:

1. Pursuant to Revenue and Taxation Code Section 99 (b)(5), and notwithstanding Section 99.1 (a)(3), the Placer County Board of Supervisors negotiates property tax exchanges for special districts in this county. That is incorporated into county policy by means of Resolution 80-142, a copy of which is attached.

2. However, pursuant to Section 99.1 (a)(2) and Resolution 80-142, in the case of an annexation resulting in a district providing a new service not previously provided in the annexed area, there is no exchange of existing (base) property tax revenues. Since that is in fact the situation with your proposed annexation, there would be no negotiations for exchange of existing property tax revenues and no such exchange would take place.

3. Nevertheless, pursuant to Section 99.1 (a)(2), the district would begin to share a portion of future years' property tax increments from the annexed area. Again, however, that share is not negotiable and never has been in any special district annexation in this county. Rather, that increment share is calculated according to a formula prescribed by the State Controller and used by the County Auditor, a formula which I do not

Mr. Steve Randall
General Manager
Truckee-Donner Recreation and Park District

November 20, 1989
Page 2

pretend to understand. Therefore, if, for example, you wished to determine how much your district's share of the increment might be in the first year after the annexation, I would refer you to the County Auditor for assistance, just as Mr. Blom did.

4. To sum it all up, there would be no property tax exchange negotiations, as such, for your proposed annexation. However, to satisfy the provisions of Section 99.6, after Nevada County LAFCO informs us it has approved the annexation we would send a form letter back to them stating that property tax negotiations are complete. A sample of the letter we use is attached for your reference.

You also inquired about park dedication fees. Such fees collected from within the annexed area would be retained by Placer County. Nevertheless, your district would be entitled to apply to the County Parks Commission to obtain a portion of those monies for parks projects within the area. I would emphasize, however, that recommendations on any expenditures from those monies would remain with the Placer County Parks Commission, and the monies could be spent elsewhere in the Tahoe area as needed. They would not automatically go to your district.

Having said all the foregoing, I should advise you that Placer County has requested that Nevada County LAFCO take no action on your annexation request for the time being. That is because there likely will be a ballot issue in November, 1990 proposing to incorporate all of Placer County east of the Sierra summit, including the area you wish to annex. Should the incorporation proposal succeed, we feel it would be appropriate for the new city rather than the county to then decide how to provide recreation services to the areas in question. In other words, the current annexation request may be premature.

I hope the preceding adequately addresses all of your concerns.

Sincerely,

COUNTY OF PLACER



Donald G. Lunsford
County Executive Officer

DGL:lp

attachments

cc: Kimbuck Williams, Jr., Auditor-Controller

1
2 Before the Board of Supervisors
3 County of Placer, State of California

4 In the matter of: A RESOLUTION RELATING TO Resol. No: 80-142
5 EXCHANGE OF PROPERTY TAX REVENUES IN
6 JURISDICTIONAL CHANGES INVOLVING
7 SPECIAL DISTRICTS. Ord. No:
8
9 Min. Bk: 47 Pg.

10 First Reading:

11 The following RESOLUTION was duly passed by the Board of Supervisors
12 of the County of Placer at a regular meeting held MARCH 18, 1980
13 by the following vote on roll call:

14 Ayes: MAHAN, FERREIRA, LEE, HENRY, COOK

15 Noes: NONE

16 Absent: NONE

17 Signed and approved by me after its passage.

18 Attest:

19 Clerk of said Board

20 *Phyllis Harris*

21 *Wesley A. Cook*
22 Chairman, Board of Supervisors

23 WHEREAS, Section 99 of the Revenue and Taxation Code provides
24 that no jurisdictional change pending before the Local Agency
25 Formation Commission shall become effective until each local agency
26 whose service areas or service responsibilities would be altered
27 by such jurisdictional change agrees, by resolution, to accept the
28 negotiated exchange of property tax revenues; and

29 WHEREAS, Section 99(b) of the Revenue and Taxation Code
30 requires the County Auditor-Controller to impound all revenue
31 from the annual property tax increment attributable to the ter-
32 ritory involved in the jurisdictional change until he or she
33 receives notice that such agreement has been negotiated; and

34 WHEREAS, Section 99(b) of the Revenue and Taxation Code
35 provides that, in jurisdictional changes involving one or more
36 special districts, the Board of Supervisors shall, on behalf of
37 the district or districts, negotiate any exchange of property tax

1 revenues, and therefore shall be the only agency required to adopt
2 the necessary resolution; and

3 WHEREAS, the Board of Supervisors has adopted policy guide-
4 lines governing the exchange of property tax revenues for all
5 pending and future jurisdictional changes involving special
6 districts, which policy guidelines are incorporated herein by
7 reference and attached hereto as EXHIBIT "A".

8 NOW, THEREFORE, BE IT HEREBY RESOLVED as to all pending and
9 future jurisdictional changes involving special districts:

10 1. Definitions

11 (a) "Property tax revenues" shall mean "base
12 property tax revenues."

13 (b) "Base property tax revenues" shall mean
14 property tax revenues accruing to each
15 affected agency in the fiscal year im-
16 mediately preceding the respective tax
17 year (the tax year in which property tax
18 revenues are apportioned pursuant to
19 this Resolution), including the amount
20 of state reimbursement for the home-
21 owner's and business inventory exemptions.

22 2. This Resolution, including the policy guidelines
23 incorporated herein and attached hereto, shall con-
24 stitute the Agreement and Resolution required by
25 Section 99 of the Revenue and Taxation Code.

26 3. The County Administrative Officer shall, according
27 to the policy guidelines, determine for each juris-
28 dictional change the amount of property tax revenues
29 to be exchanged, if any, and shall notify the af-
30 fected district or districts of his findings.

31 4. The County Administrative Officer shall immediately
32 notify the Auditor-Controller and the LAFCO Executive
33 Officer of his findings, in order to effect the speedy
34 completion of all jurisdictional changes.

Policy Guidelines for Exchange of Property Tax Revenues
in Jurisdictional Changes Involving Special Districts

1. All annexations which occurred during the period of January 1, 1978, through July 24, 1979, will be considered as completed and there will be no negotiations or exchange of property tax revenues.

Reasoning: AB 419 has validated all such annexations. Furthermore, all involved agencies have established and balanced their 1979-80 operating budgets based on current revenues, and any annexations conducted in that period were based on existing law (SB 154) which precluded such transfers.

2. In all annexations which do not involve an exchange of service responsibilities among affected agencies, there will be no negotiations or exchange of property tax revenues.

Reasoning: If agencies currently providing services in an area proposed for annexation are not giving up any service responsibilities, they should not give up any existing property tax revenues. Otherwise, they would be required to provide the same level of services with fewer revenues.

3. Even in cases where there is an exchange of service responsibilities, when property tax revenues in an area proposed for annexation have not previously funded the service or services to be funded by the annexing jurisdiction, there will be no negotiations or exchange of property tax revenues.

Reasoning: Services previously provided by another jurisdiction and funded by sources other than property taxes, such as fees or assessments, should continue to be funded by such revenues. Furthermore, since such services were not previously funded by property tax revenues, they also should not share in the property tax increment for that area.

4. In jurisdictional changes involving a detachment from one special district and annexation by another, with the second district to provide all services formerly provided by the

first, all property tax revenues formerly received by the first district from the affected territory shall be apportioned to the annexing district.

Reasoning: If a district no longer provides property tax-funded services to an area, it should no longer derive property tax revenues from that area.

5. In jurisdictional changes involving the County and a special district, with the affected area having a market valuation of less than \$100,000, there will be no negotiations or exchange of property tax revenues.

Reasoning: The cost of staff time in negotiations will usually be greater than the amount of property tax revenues to be exchanged.

6. In all annexations of greater than \$100,000 Market Value involving special districts or the County and a special district, the County will negotiate an exchange of property tax revenues with the special district(s) if there is an exchange of service responsibilities.
7. In jurisdictional changes involving districts not funded by property taxes, or an exchange of services not funded by property taxes, there will be no negotiations.

Reasoning: There are no property taxes which can be exchanged.

MEMORANDUM

OFFICE OF THE
COUNTY EXECUTIVE
COUNTY OF PLACER

To: Tom McMahan, LAFCO Executive Officer Date November 1, 1989
From: Evon Basque, Assistant County Auditor-Controller
Myron Blom, Supervising Administrative Analyst *MB*
Subject: Completion of Special District Annexation Proceedings

Pursuant to Resolution No. 80-142, passed by the Board of Supervisors on March 18, 1980, negotiations for the exchange of property tax revenues involving the following special district annexations are now complete. Therefore, LAFCO can now file a certification of completion on all annexations listed below, and the Auditor-Controller's office will not have to impound any of the tax increment attributable to these annexations.

Also, pursuant to the policies established in Resolution No. 80-142, there will be no exchange of base property tax revenues in these annexations.

<u>File No.</u>	<u>Special District</u>	<u>Annexation Title</u>
89-10	Meadow Vista Water District	Marino

cc: Jurisdictional Change File
Ruthe McKee

DOC:JURISFORM, p.16

APPENDIX D

TRUCKEE-DONNER RECREATION & PARK DISTRICT LETTER REGARDING TAX AGREEMENT

TRUCKEE-DONNER RECREATION AND PARK DISTRICT

10046 Church Street
P.O. Box 1087, Truckee, California 95734

Telephone
(916) 587-3587

November 30, 1989

Steve Randall
General Manager

File #1189074
Annexation Proceedings

Jan Hagel, Executive Officer
Nevada County Local Agency Formation Commission
Post Office Box 6100
Nevada City, CA 95959-6100

Dear Jan:

Your letter dated July 20, 1989 stated that in order for Truckee-Donner Recreation and Park District to proceed with its annexation proposal tax negotiations with Placer County had to be completed.

I have received a letter from Placer County which states that no property tax exchange will take place. After Nevada County LAFCO approves the annexation proposal and informs Placer County they will send a letter stating that property tax negotiations are complete. A copy of the letter from Placer County is enclosed with this letter that outlines their procedures for tax negotiations.

Since tax negotiations are completed, as far as Placer County is concerned, the Truckee-Donner Recreation and Park District would like Nevada County LAFCO to proceed with our annexation proposal.

Thank you for your attention to this matter.

Sincerely,



Steve Randall
General Manager

SR:gr

Enclosure

APPENDIX E

DIVERSITY, EQUITY, AND INCLUSION IN PARKS AND RECREATION BY THE NRPA



DIVERSITY, EQUITY AND INCLUSION IN PARKS AND RECREATION



NATIONAL RECREATION
AND PARK ASSOCIATION



A person wears a butterfly costume at
a park in Denton, Texas.

Photo courtesy of Denton Parks and
Recreation



A young boy participates in an adaptive climbing program hosted by Glenwood Springs (Colorado) Parks and Recreation.

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PHOTO COURTESY OF JOE VAN WYK, CITY OF GLENWOOD SPRINGS PARKS AND RECREATION

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INTRODUCTION

PHOTO COURTESY OF CITY OF MESA PARKS, RECREATION AND COMMUNITY FACILITIES



Participants enthusiastically partake in a cheer performance

Quality parks and recreation is essential to individual and community health, well-being and resilience. At the National Recreation and Park Association (NRPA), it is our mission to help build vibrant and thriving communities by supporting park and recreation professionals in meeting their emerging and future challenges.

One challenge — and strength — within most communities is difference: in race, ethnicity, gender identity, religion, socio-economic status, age, language, or physical or mental abilities and skills. Differences “meet” on the playground; park and recreation professionals operate at the intersection of those differences.

Since 2013, Equity — previously referred to as “social equity” — has been one of NRPA’s Three Pillars: Health and Wellness, Equity and Conservation. These three areas of focus have moved the park and recreation field from communicating “what we do” to focusing on the impact we have. This includes NRPA centering equity in all of its work.

Conversations, learning opportunities and research have been integral parts of NRPA’s focus. The 2021 *Diversity, Equity and Inclusion in Parks and Recreation Report* highlighted findings

from a national survey of park and recreation leaders that informed NRPA’s strategy in supporting professionals in the field as they work to enhance the quality of life for all people. The question is: What has been the impact of NRPA’s work so far?

In April 2023, the NRPA Research team surveyed park and recreation leaders to gain a better understanding of their agencies’ efforts surrounding diversity, equity and inclusion (DEI) practices. The 20-question survey, a follow-up to the 2021 study, took inventory of park and recreation agency DEI activities, the professional development opportunities provided to agency staff and volunteers, and the challenges organizations face in their efforts to promote DEI practices. The survey’s 294 responses from park and recreation leaders across the United States are the basis for this report.

INFOGRAPHIC: DIVERSITY, EQUITY AND INCLUSION SURVEY KEY FINDINGS

Nearly 2 in 3 park and recreation agencies have established formal diversity, equity and inclusion activities or plan to establish them in the immediate future.



92 percent of park and recreation agencies offer diversity, equity and inclusion education and resources to their staff.



6 in 7 park and recreation leaders agree that park and recreation inequity is a problem nationally.



Agencies' diversity, equity and inclusion staff leaders include directors, senior leadership, dedicated staff, human resources employees and program staff.



KEY FINDINGS

PHOTO COURTESY OF DREAMSTIME.COM/MATHAYWARD



A group of happy kids play outside.

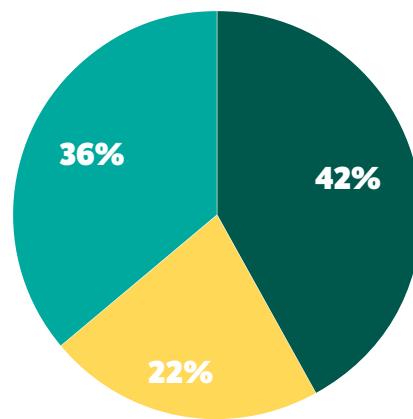
Forty-two percent of park and recreation agencies currently have formal diversity, equity and inclusion (DEI) programs, an eight-percentage-point increase from 2021. Another 22 percent of park and recreation leaders anticipate that their agencies will establish formal DEI activities within the next year. The remaining 36 percent of survey respondents report that their agencies do not have plans to launch formal DEI initiatives in the immediate future.

Formal DEI programs are more common at park and recreation agencies that serve highly populated communities. Sixty-six percent of respondents from agencies serving communities of at least 100,000 residents report that their organizations have established formal DEI activities, with another 18 percent

of respondents indicating that their agencies will be launching formal DEI activities within the next year. One-third of agencies serving jurisdictions of fewer than 50,000 people currently have formal DEI programs, with another 23 percent expecting to establish such programs in the immediate future.

Nearly 2 in 3 Park and Recreation Agencies Have, or Plan to Have in the Immediate Future, Established Formal Diversity, Equity and Inclusion (DEI) Activities

(Percentage Distribution of Agencies)



- Currently has established formal DEI activities
- Does not currently have established formal DEI activities, but plans to do so within the next year
- Does not currently have established formal DEI activities and has no immediate plans to do so

Staff, rather than external third parties, lead most park and recreation agencies' DEI activities, with agency leaders typically guiding the work. Nearly half of all agencies rely on key members of their management teams. These staff leaders fall within four major categories:

- Senior leadership (assistant director, superintendent, deputy director)
- Human resources (HR)/Administration (HR administrator, HR director, director of business/finance services)
- Program staff (recreation and sports specialists/managers/supervisors/therapeutic recreation specialist)

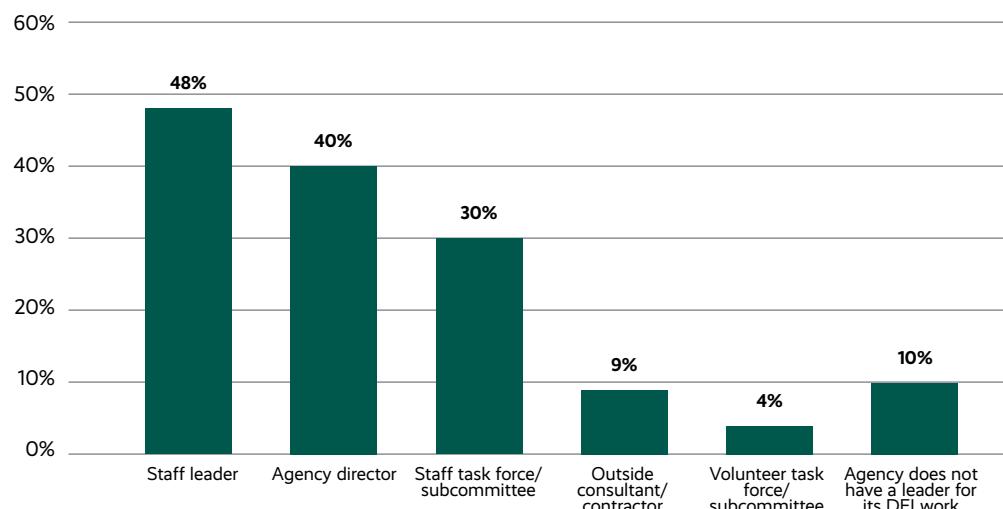
- Dedicated DEI/equity staff (Chief equity officer, DEI supervisor/manager/coordinator, director of equity and inclusion)

Four in 10 agency directors oversee their current (or will oversee any future) formal DEI activities. At 30 percent of agencies, a staff task force and/or subcommittee play an important role in DEI activities.

Agencies are less likely to use non-staff resources to lead their DEI activities. For example, less than 10 percent of agencies use an external consultant or contractor to lead their DEI activities, while a mere four percent have a volunteer task force or subcommittee.

Park and Recreation Leaders Oversee Their Agencies' Diversity, Equity and Inclusion (DEI) Activities

(Percent of Agencies That Currently Have Established DEI Activities or Will Be Establishing DEI Activities Within a Year)



Virtually every park and recreation agency across the nation has activities and policies that promote DEI outcomes. This includes just less than half (46 percent of survey respondents) of park and recreation agencies that have an expressed commitment to DEI in their foundational documents — including vision and mission statements and strategic plans.

More common are efforts that ensure a diverse and inclusive workforce at a particular agency. Seventy-four percent of survey respondents indicate that their agencies have instituted hiring practices and policies to promote a more diverse workforce.

Many park and recreation agencies also provide DEI-related education and professional development opportunities for their staff and volunteers. These offerings include:

- Staff education/skill development (at 56 percent of agencies)
- Volunteer education/skill development (49 percent)

Agencies also have established DEI practices that shape how they interact with their communities, including:

- Community engagement policies (cited by 43 percent of respondents)

- Intentional outreach to underserved communities for feedback and input (41 percent)
- Recreation programming policies (39 percent)
- Volunteer recruitment practices and policies (34 percent)
- Contracting/Procurement requirements (e.g., minority or women business enterprise programs) (33 percent)

Other DEI-focused practices found at many park and recreation agencies include:

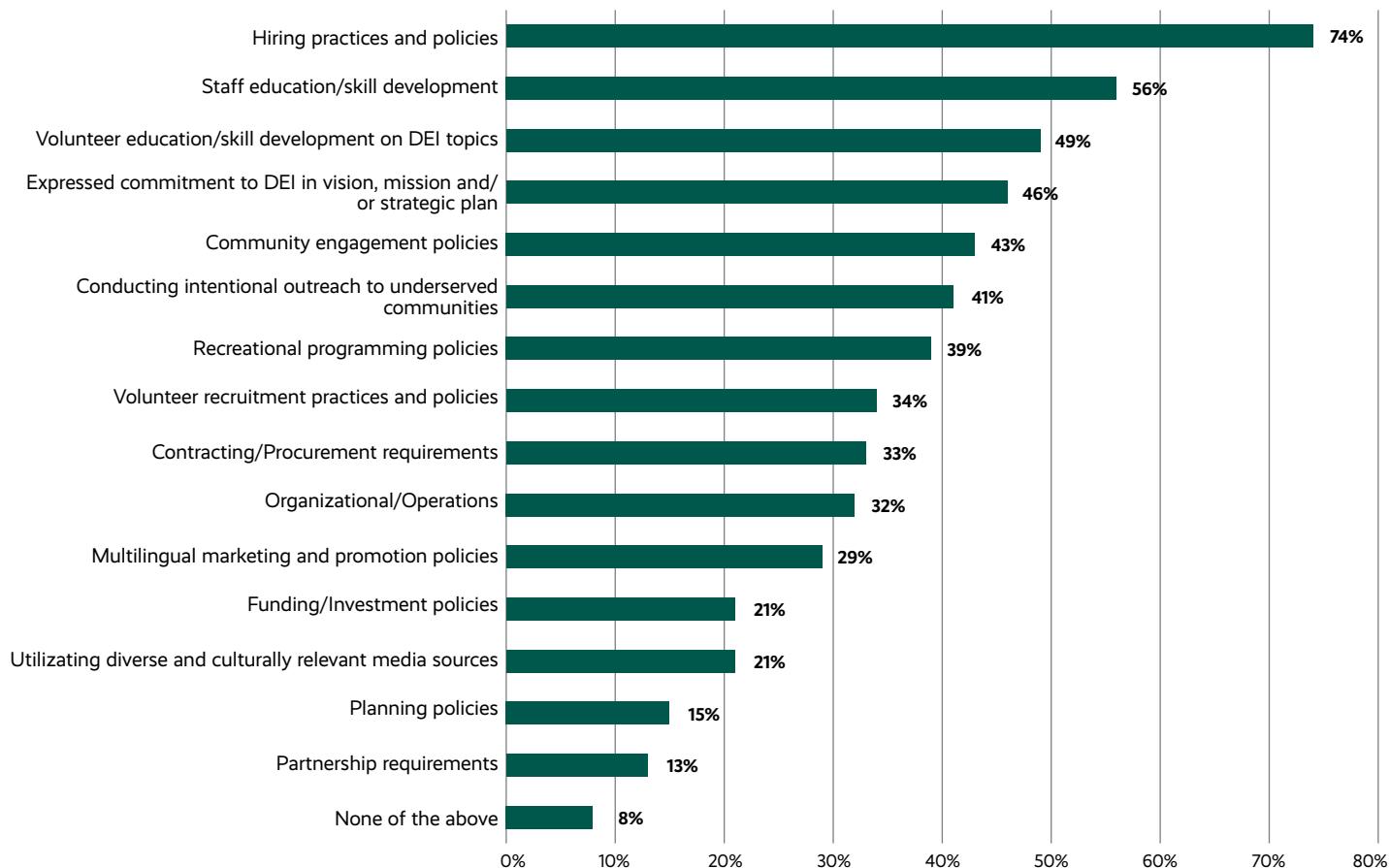
- Policies for providing marketing materials and promotions in multiple languages (cited by 29 percent of respondents)
- Funding/Investment policies (21 percent)
- Utilizing diverse and culturally relevant media sources for marketing (21 percent)
- Planning policies (e.g., land acquisition, zoning, transportation) (15 percent)
- Partnership requirements (e.g., commitment to DEI) (13 percent)

Agencies serving jurisdictions of 100,000 or more residents are much more likely than those serving smaller populations (less than 50,000 residents) to have policies and practices associated with:

- Hiring (79 percent in larger populations compared to 61 percent in smaller populations)
- Expressed commitment to DEI in foundational documents (63 percent compared to 32 percent)
- Offering staff education/skill development (62 percent compared to 38 percent)
- Providing education/skill development on DEI topics for professional staff and volunteers (62 percent compared to 43 percent)
- Community engagement (57 percent compared to 22 percent)
- Recreational programming (47 percent compared to 32 percent)

9 in 10 Park and Recreation Agencies Have Activities and Policies That Promote Diversity, Equity and Inclusion (DEI)

(Percent of Agencies)



Park and recreation leaders continue to face significant challenges in promoting diversity and establishing inclusionary and equitable practices at their agencies. Nine in 10 leaders overall and 95 percent of leaders serving populations of at least 100,000 report that they face challenges in promoting their DEI practices and goals. Nearly three in five park and recreation leaders report difficulty in developing staff capacity and competency around DEI. Making sure that agency staffing reflects the community that the agency serves is another obstacle. Forty-one percent of agency leaders report difficulty in recruiting candidates for park and recreation jobs who reflect the communities they serve.

Fostering greater community engagement remains an area for improvement for many park and recreation agencies. Forty-three percent of survey respondents indicate that they are seeking ways to build trust with the communities their agencies serve. Further, efforts that ensure all members of their communities have access to and enjoy their parks, facilities and programming is a challenge at 39 percent of agencies.

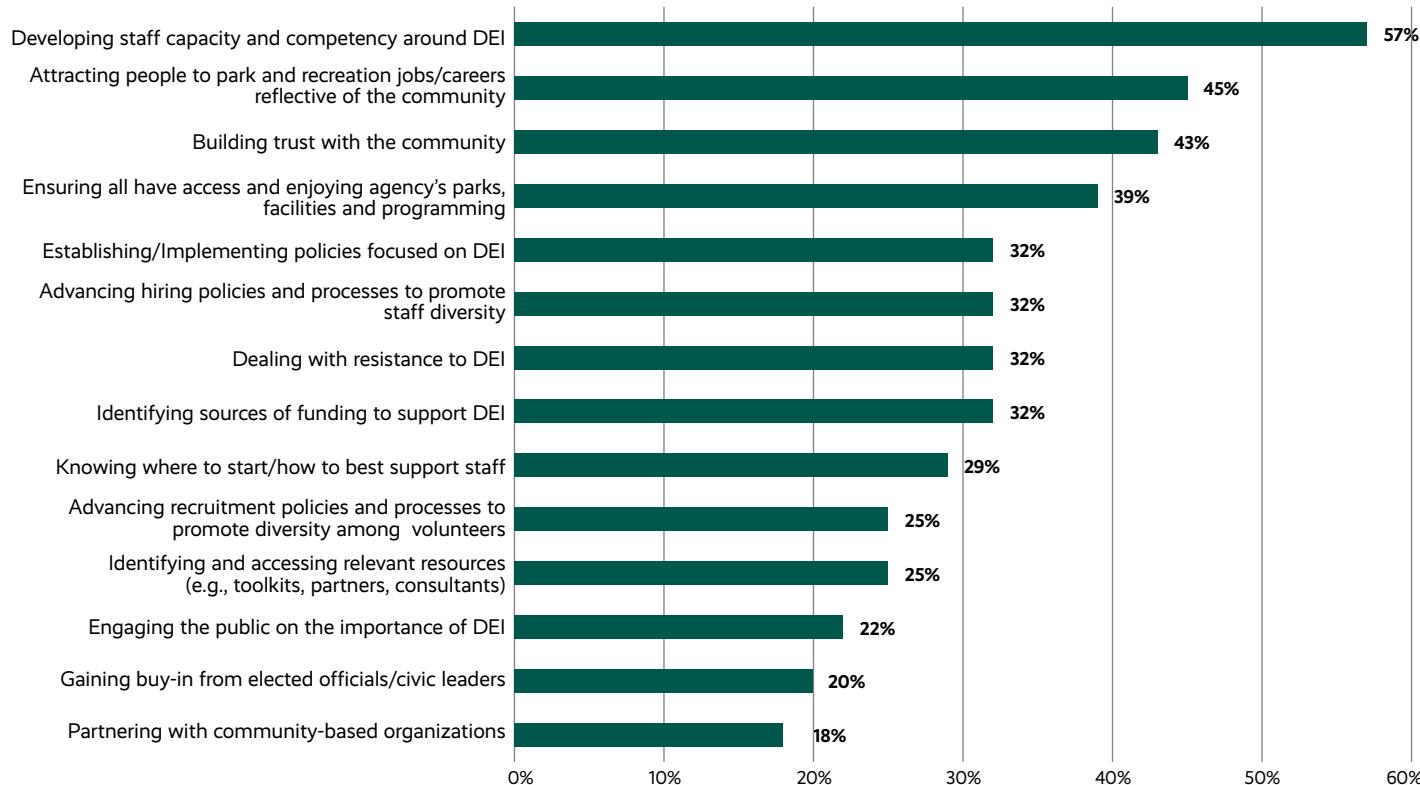
Park and recreation agency leaders cite additional challenges

their agencies face in efforts to promote diversity and establish inclusionary and equitable practices, including:

- Identifying sources of funding to support DEI (cited by 32 percent of respondents)
- Establishing/Implementing policies focused on DEI (32 percent)
- Dealing with resistance to DEI (32 percent)
- Advancing hiring policies and processes to promote staff diversity (32 percent)
- Knowing where to start/how to best support staff (29 percent)
- Advancing recruitment policies and processes to promote diversity among agency volunteers (25 percent)
- Identifying and accessing relevant resources (25 percent)
- Engaging the public on the importance of DEI (22 percent)
- Gaining buy-in from elected officials/civic leaders (20 percent)
- Partnering with community-based organizations (18 percent)

9 in 10 Park and Recreation Leaders Face Challenges in Their Efforts to Promote Diversity, Equity and Inclusion (DEI) Practices

(Percent of Agencies That Currently Have DEI Activities or Will Be Establishing DEI Activities Within a Year)



A formal equity assessment (or audit) is a systematic process that reviews an organization's policies and practices, and can identify, target and redress disparate outcomes that are based on various demographic characteristics, such as race, ethnicity, gender or income. The resulting recommendations usually are documented as measurable goals or outcomes that guide departmental and organizational changes. An informal assessment usually involves a review process of policies and practices but does not focus on the entire organization. It most likely looks at a smaller subsection or function of the organization, such as hiring policies or youth sports practices.

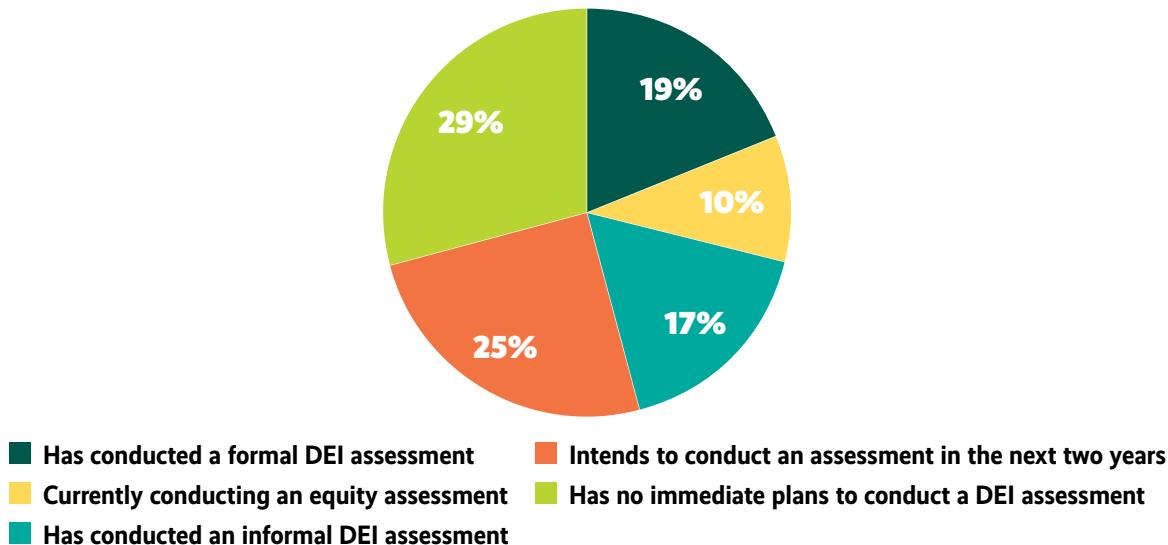
While a majority of park and recreation agencies have not conducted any formal equity assessment, a significant share has done so. Nineteen percent of park and recreation leaders indicate that their agencies have conducted a formal equity assessment within the past five years, with another 10 percent reporting that their organizations currently are conducting such an assessment. Seventeen percent of agencies have undertaken an informal DEI assessment within the past five

years. Looking to the future, 25 percent of park and recreation leaders plan to conduct an equity assessment within the next two years. Twenty-nine percent of agencies have neither conducted an equity assessment nor plan to do so in the near future.

Agencies that serve more populous jurisdictions are more likely than other agencies to have conducted some sort of DEI assessment. Twenty-eight percent of agencies that serve a population of at least 100,000 people have conducted a formal DEI assessment within the past five years, while another 22 percent have conducted an informal DEI assessment. In comparison, only 12 percent of agencies serving jurisdictions of less than 50,000 people have conducted a formal DEI assessment, while 14 percent have done an informal assessment. Twenty-two percent of agencies that serve at least 100,000 or more residents and 42 percent of agencies that serve less than 50,000 residents are currently conducting or anticipate conducting a DEI assessment in the next two years.

7 in 10 Park and Recreation Agencies Have Conducted or Plan to Conduct an Equity Assessment Within the Next Two Years

(Percent of Agencies That Currently Have DEI Activities or Will Be Establishing DEI Activities Within a Year)



More than nine in 10 park and recreation agencies offer their staff education, training and resources that promote DEI. In 2021, the percentage of agencies doing the same was 79 percent. Topics covered in agencies' DEI education offerings include:

- Implicit bias
- Adaptive and inclusive programming
- Gender identity
- Hiring practices
- Cultural awareness
- Marketing and outreach to all

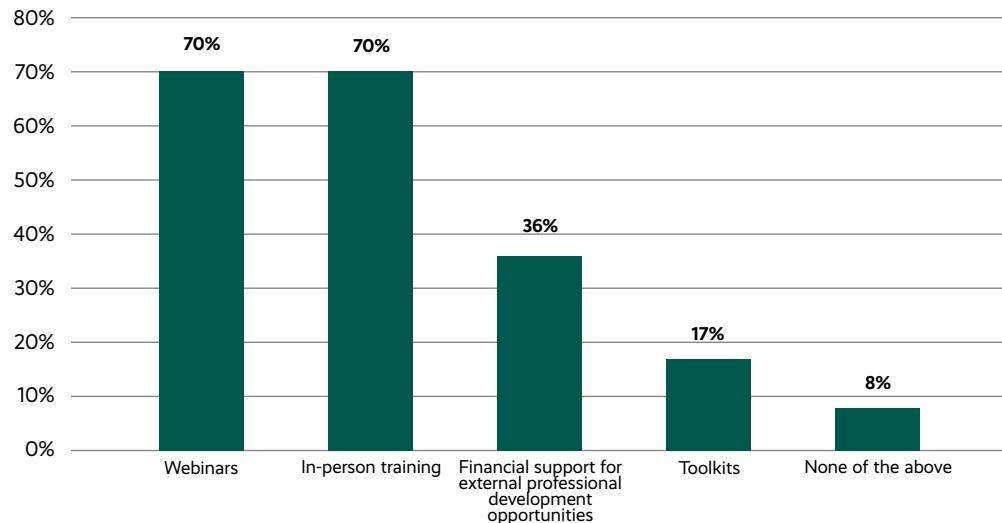
The most common delivery methods for staff DEI education are webinars and in-person training, each of which is offered by 70 percent of agencies. Slightly more than a third of agencies provide staff with financial support (e.g., tuition, travel reimbursement) to participate in external professional development activities. Agencies serving large jurisdictions (100,000 or more people) are more likely than those serving smaller populations (less than 50,000 people) to make the following available to their staff:

- Webinars (72 percent compared to 58 percent)
- In-person training (75 percent compared to 63 percent)
- Financial support for external professional development opportunities (40 percent compared to 33 percent)



Ninety-Two Percent of Park and Recreation Agencies Offer Diversity, Equity and Inclusion (DEI) Education and Resources to Staff

(Percent of Agencies That Currently Have DEI Activities or Will Be Establishing DEI Activities Within a Year)



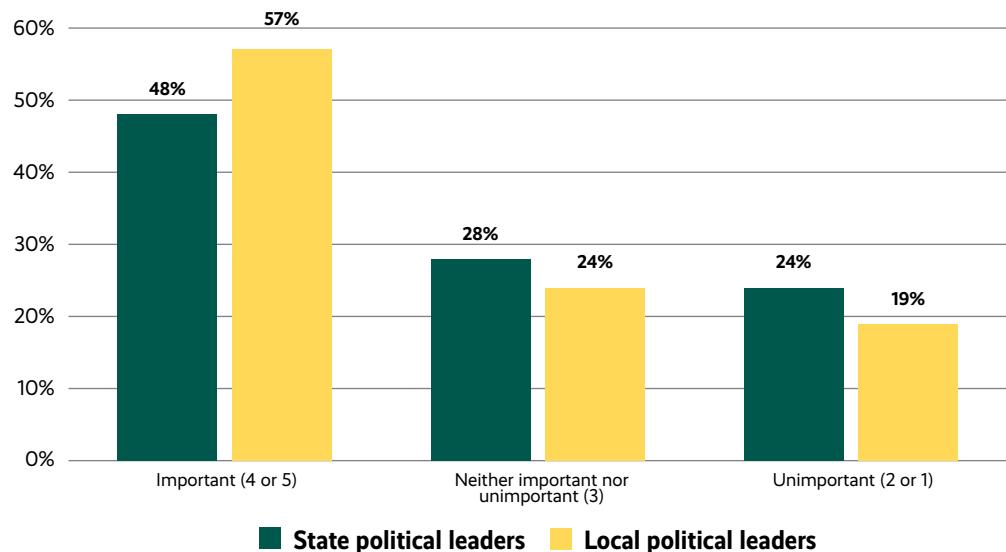
A majority of park and recreation professionals indicate that their local political leaders view DEI in parks and recreation as important. Fifty-seven percent of survey respondents report that DEI in parks and recreation is important to their local jurisdictions' political leaders (e.g., mayors, city managers, county executives, council members), while 19 percent indicate that such efforts are unimportant to local leaders. Sixty-one percent of leaders from agencies serving populations of 100,000 or more report that their local jurisdictions' leaders place a high level of importance on DEI in parks and recreation compared to 48 percent of respondents from those agencies serving smaller jurisdictions (less than 50,000). Conversely, more than a third of agencies serving jurisdictions of less than 50,000 residents note that diversity, equity and inclusion in parks and recreation is of low importance to their local jurisdictions' leaders. Eleven percent of

agencies serving populations of at least 100,000 report that DEI in parks and recreation is of low importance to their local jurisdictions' leaders.

A smaller share of agency leaders agree that their state-level political leaders (e.g., governors, state legislators) place a high degree of importance on DEI in parks and recreation compared to their local leaders. Forty-eight percent of survey respondents report that DEI in parks and recreation is important to their states' political leaders, while 24 percent indicate that such efforts are unimportant to state leaders. Sixty-two percent of leaders from agencies serving smaller jurisdictions (less than 50,000 people) indicate that their states' leaders place a high level of importance on DEI in parks and recreation compared to 52 percent of respondents from larger agencies (population of at least 100,000).

Park and Recreation Leaders Report Support for Diversity, Equity and Inclusion (DEI) Activities by Local and State Political Leaders

(Percentage Distribution of Five-Point Scale Rating)

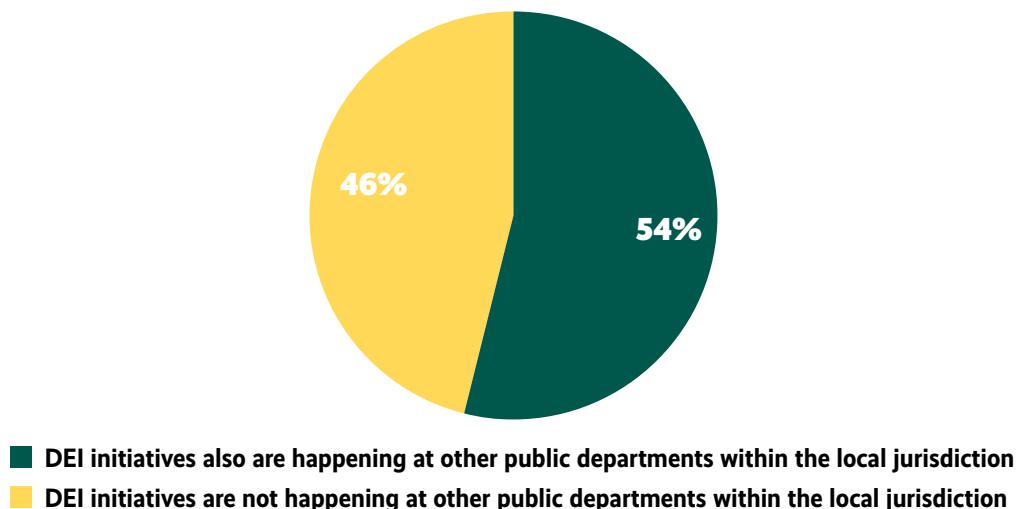


Slightly more than half of park and recreation leaders (54 percent) note that DEI efforts take place not only in their agencies but also throughout their local government. Seven in 10 respondents from agencies serving populations of at least 100,000 report that other local government departments have

established DEI activities compared to 30 percent of respondents from agencies serving jurisdictions of less than 50,000 people. In most of the cases, DEI efforts span across all jurisdiction agencies and departments with leadership coming from a mayor's, county executive's or city manager's office.

In Many Communities, Diversity, Equity and Inclusion (DEI) Initiatives Span Across All Government Departments Beyond Parks and Recreation

(Percentage Distribution of Respondents)



Park and recreation leaders hold their agencies accountable for their DEI initiatives and use metrics that measure and track progress toward their goals. Approximately half of agencies take the following actions regarding race, ethnicity, gender, disability and income level:

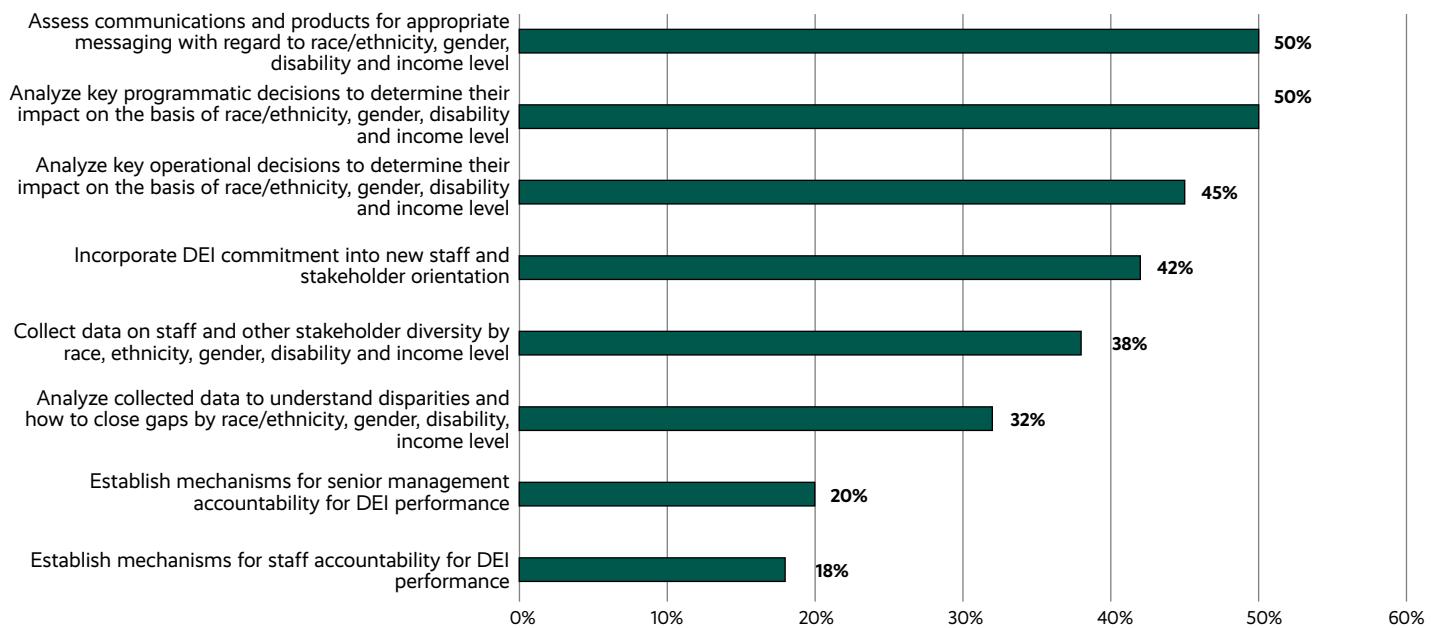
- Assess communications and products for appropriate messaging (cited by 50 percent of respondents)
- Analyze key programmatic decisions to determine their impact (50 percent)
- Analyze key operational decisions to determine their impact (45 percent)

Many agencies hold the staff and key stakeholders accountable for DEI efforts through:

- Incorporating DEI commitment into new staff and stakeholder orientation (cited by 42 percent of respondents)
- Collecting data on staff and other stakeholder (e.g., partners, vendors, community) diversity by race, ethnicity, gender, disability and income level (38 percent)
- Analyzing collected data to understand disparities and how to close gaps by race/ethnicity, gender, disability, income level (32 percent)
- Establishing mechanisms for senior management accountability for DEI performance (20 percent)
- Establishing mechanisms for staff accountability for DEI performance (18 percent)

Park and Recreation Agencies Hold Themselves Accountable for Their Diversity, Equity and Inclusion (DEI) Initiatives

(Percent of Agencies With Established DEI Activities)



The United States has developed a robust infrastructure of local, state and national parks and recreation spaces, including the establishment of the National Park Service and programs focused on urban parks (e.g., the “City Beautiful” movement). Parks are essential infrastructure, adding beauty, clean water and clean air, as well as places for exploration, recreation, socialization and peace. However, historical and contemporary land-use policies have shaped access to these spaces in an inequitable fashion — in ways that continue to make it easier

for some, and much harder for others, to experience and benefit from parks, recreation and open spaces. NRPA survey data finds that more than 100 million people — 29 percent of the U.S. population — lack walkable access to the benefits parks and recreation provides.

Park and recreation leaders agree that inequitable provision of park and recreation infrastructure, amenities and programming by race is a problem in the United States. Six in seven

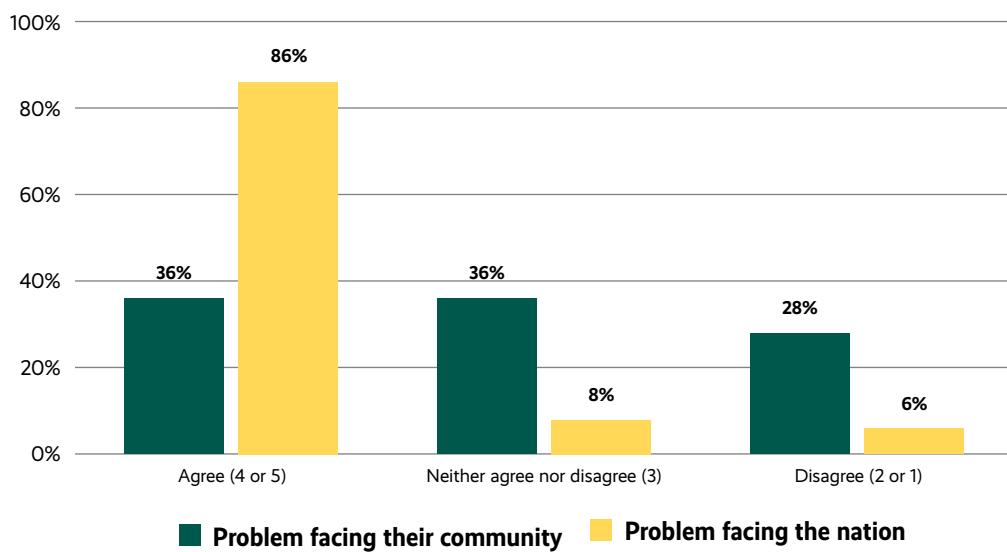
survey respondents note that park and recreation inequity is a nationwide problem. Fifty-seven percent strongly agree that inequity is a national problem, with another 28 percent rating this issue a “4” on the five-point scale. This sentiment is consistent regardless of agency size or location.

The same park and recreation leaders, however, are less likely to characterize access to park and recreation services and amenities as inequitable in their local communities. Just more than one-third of park and recreation leaders agree that park and recreation inequity is a problem in their communities, rating this as a “4” or “5” on a five-point scale. Twenty-eight percent of survey respondents disagree with the assertion that the delivery of park and recreation services and amenities is inequitable, while 36 percent neither agree nor disagree with the sentiment.

Park access is defined as just and fair quantity, proximity and connections to quality parks, green spaces and recreation facilities, as well as programming that is safe, inclusive, culturally relevant and welcoming to everyone.

Park and Recreation Leaders Agree That Inequitable Provision of Park and Recreation Infrastructure, Amenities and Programming By Race Is a Problem; They Are More Optimistic About Their Own Communities

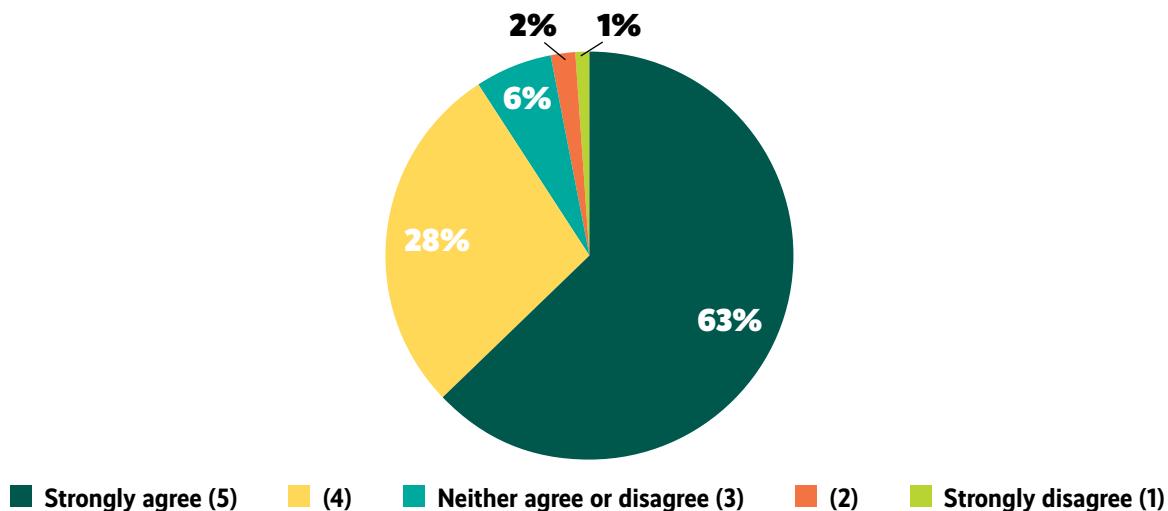
(Percentage Distribution of Five-Point Scale Rating)



Regardless of whether or not they see inequity in their localities, an overwhelming majority of park and recreation leaders want the profession to address the inequitable delivery of park and recreation infrastructure, amenities and programming. More than nine in 10 survey respondents agree that address-

ing inequity in parks and recreation is an important mission for those in their field. Sixty-two percent of leaders strongly agree with this mission, rating it a “5” on a five-point scale. Only three percent of survey respondents disagree that the park and recreation profession should address inequities.

Park and Recreation Leaders Agree It Is Important to Address Park and Recreation Inequities (Percentage Distribution of Respondents)

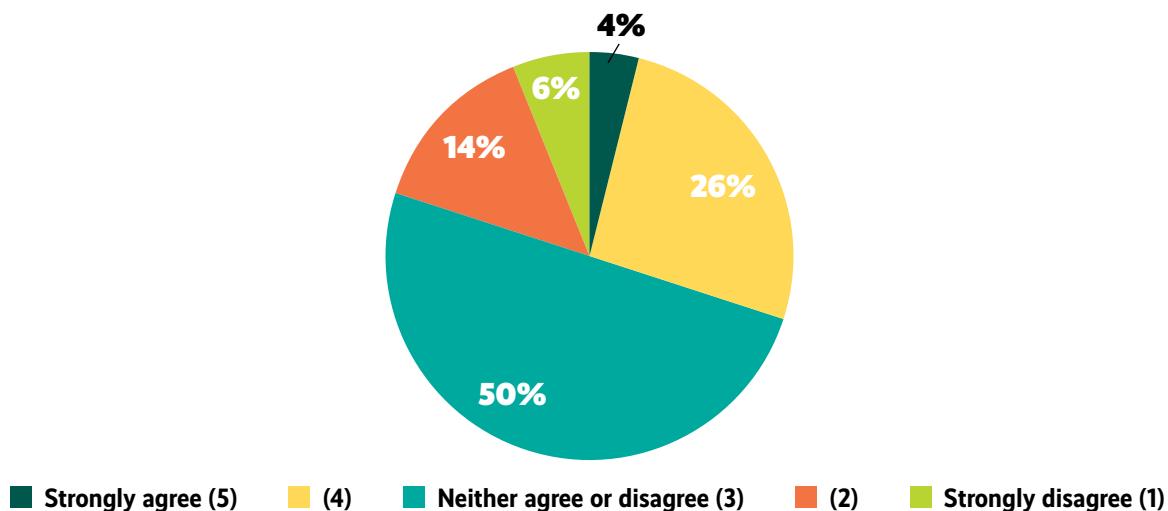


Most park and recreation leaders believe that their profession is not adequately addressing park and recreation inequities. Thirty percent of survey respondents agree that the pace at which parks and recreation is addressing inequity is appropriate, with only four percent strongly agreeing with the statement. Twenty percent of park and recreation leaders do not agree that the field is sufficiently addressing inequities, while half of survey

respondents neither agree nor disagree with the statement. Respondents from park and recreation agencies serving less than 50,000 residents are more likely to agree that the pace at which the field of parks and recreation is addressing inequity is appropriate than are their peers at agencies serving populations of at least 100,000 people (48 percent versus 25 percent, respectively).

Most Park and Recreation Leaders Say the Park and Recreation Field Should Do More to Address Inequities

(Percentage Distribution of Respondents Based on Their Agreement on Whether the Pace at Which the Field Addresses Inequity Is Appropriate)



CONCLUSION



A group of people gather with Vernon Township Recreation and Community Affairs in a park in Vernon Township, New Jersey.

PHOTO COURTESY OF VERNON TOWNSHIP RECREATION AND COMMUNITY AFFAIRS

This study's key findings mirror those of our 2021 report. Still, there are two notable new findings. First, a third of park and recreation leaders call out "dealing with resistance to DEI [diversity, equity and inclusion]" as a challenge that they and their agencies face in their efforts to promote diversity and establish inclusionary and equitable practices. Second, an overwhelming majority of survey respondents agree that inequitable provision of park and recreation infrastructure, amenities and programming by race is a national problem (facing their community and facing the nation), but "only" one-third sees it as a problem facing their own communities.

Both findings suggest there are education and communication opportunities for the profession, the public and NRPA to better understand and address equity gaps at the local, state and national levels. NRPA survey data of the U.S. public find that there is strong support for equitable access to parks and recreation, and that support spans demographic and political groupings. The question is: What are the next steps to take to achieve this crucial goal? The answer starts with park and recreation leaders focusing on their ability to affect their local communities.

This report builds on the 2021 study to provide a better understanding of the current state of DEI work across the field, the professionals who lead the work, and highlights the

opportunities for NRPA to continue to support its members. The conclusions from the 2021 report illustrated four themes: targeted support for smaller agencies, building member capacity and competency in DEI, best practices and peer networks, and trusted resources. Using these same themes, here are some key takeaways from the 2023 survey results.

Targeted Support for Smaller Agencies

Smaller agencies continue to face challenges in initiating and implementing DEI practices. In 2021, three in five agencies serving populations of at least 100,000 had established formal DEI activities, with only a quarter of agencies serving less than 50,000 people having done the same. In 2023, smaller

agencies are less likely to have conducted a formal or informal assessment, and to have established policies and practices that address or advance diversity, equity and inclusion — the difference increasing slightly since 2021.

Building Member Capacity and Competency in DEI

As in the 2021 survey, agency leaders report that the most common DEI activities and/or policies in 2023 center around hiring practices and policies and education/skill development for staff and volunteers. At the same time, nearly three in five park and recreation leaders report significant challenges in providing staff and volunteers with consistent opportunities to learn. Specific challenges noted are:

- The lack of funding for multilingual tools and resources
- Difficulty creating partnerships with underrepresented communities/community engagement
- Knowing where to start (especially for small agencies)
- Hiring staff who reflect the community/Knowing what to do when staff does not reflect community
- Dealing with resistance to DEI

Best Practices and Peer Networks

Two of our most-valued member benefits — networking and sharing of best practices — are reflected in the survey results, with leaders asking about what others are doing across the field.

- “As a practitioner, I would like to see materials on best practices for creating equity in access and opportunity.”
- “NRPA provides a lot of tools and resources currently... [that may] outpace the progress of the average park and recreation agency. I think a sliding scale of resources for those in the beginning stages versus those that are more advanced would be appropriate. Not that the work isn’t needed, but agencies may be dismayed or turned off if they feel they have to take drastic steps to ‘catch up’ and thus may make no change at all. Baby steps are better than no steps at all.”

Leaders don’t just want to hear about best practices; they also want to engage with peers and get assistance on how to implement those practices.

Trusted Resources

Similar to 2021, this year’s survey results highlight the various policies and programs already in place; agency leadership offer or support in-person and online training on topics, such as implicit bias, adaptive and inclusive programming, gender identity and cultural awareness. When asked what type of

support or assistance from NRPA would be valuable, the most common requests were:

- Toolkits, webinars, training (including conference sessions)
- Sample policies
- Information on how to start the conversation, (e.g., simple actions and where to start; especially when your community is not diverse)

The themes that emerged in 2021 (and remain salient in 2023) provided a foundation for the strategy of how NRPA supports diversity, equity and inclusion in the field. The approach that resulted, Equity in Practice (EiP), redefined how park and recreation professionals can advance equity. Through EiP, NRPA offers several different opportunities for members to engage in equity work that is specific to the needs of the industry, guided by the themes.



PHOTO COURTESY OF COSUMNES CSD PARKS & RECREATION DEPARTMENT, ELK GROVE, CALIFORNIA

A young girl plays with crafts in Elk Grove, California.

EiP Talks and Clinics (smaller agency support; building member capacity and competency in DEI): A one-stop-shop of live and on-demand sessions presented by subject matter experts in the field, sharing their experience and what is working around DEI in their agencies and communities.

DEI Leaders and State Affiliate DEI Network (best practices and peer networking): Bimonthly calls and NRPA Connect groups facilitate peer learning, connection and support; DEI Leaders and State Affiliate DEI Network (NRPA login needed).

EiP Certificate (building member capacity and competency in DEI): A “train the trainer,” 12-week learning opportunity, designed specifically for park and recreation professionals, focused on skill-building and practice (think: What does this look like in my work?), culminating with a completed equity action plan. With the completion of the three certificates, agencies will have the option of taking the curriculum home to use for all staff (full- and part-time) and community partners.

EiP Resource Library (trusted resources): These curated resources support individual and group learning. These include toolkits, podcasts, articles and books.

The results from this survey give more guidance to refine NRPA’s support for DEI efforts and to inform this next phase — developing resources that meet agencies where they are. As is evident in various responses to the current survey, agency leaders recognize that they are in different places on the DEI spectrum — some having established DEI programs and policies, some departments having just started this work, and some looking for where to start. Park and recreation professionals should have resources that re-

flect those different places. To answer that need, NRPA will provide additional EiP resources that support those who are at the beginning and middle stages of their DEI work. Specifically:

- Creating “How Tos,” brief toolkits that focus on implementation and inclusion in common programs (think inclusive event naming, starting a DEI committee, inclusive swim attire and policies, etc.)
- Expanding the resource library and creating better filters/search capabilities so members can search based on where they are
- Pairing down of the EiP certificate curriculum for easier access and use
- Creating a bank of stories from the field highlighting what’s working and best practices, where members share examples of the work they are doing, focusing on simple ideas and changes that created improved outcomes

“We work so others can play” is the essence of what park and recreation professionals do. The majority of work to advance DEI within the field is led by agency staff — recreation specialists, program managers, HR departments — either as individuals or as members of a DEI committee. At NRPA, part of centering equity is progress over perfection, which is a good reminder that:

- All staff, regardless of title, have some power for creating change when they focus on their “sphere of influence.” What is yours?
- Informal assessments are just as useful as formal equity assessments. What’s an easy win? What do you have decision-making power over? Who can you work with to support change?
- Starting small and being consistent is better than doing nothing at all.



ACKNOWLEDGEMENTS

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ABOUT NRPA

The National Recreation and Park Association (NRPA) is the leading not-for-profit organization dedicated to building strong, vibrant and resilient communities through the power of parks and recreation. With more than 60,000 members, NRPA advances this vision by investing in and championing the work of park and recreation professionals and advocates — the catalysts for positive change in service of equity, climate-readiness, and overall health and well-being.

NRPA brings strength to our message by partnering with like-minded organizations, including those in the federal government, nonprofits and commercial enterprises. Funded through dues, grants, registrations and charitable contributions, NRPA produces research, education and policy initiatives for our members that ultimately enrich the communities they serve.

NRPA places immense importance on research and data to raise the status of parks and recreation. We conduct research with two goals: First, NRPA creates and analyzes data to help park and recreation agencies make optimal decisions on operations, programming and spending. Second, NRPA develops data and insights that support park and recreation professionals making the case for greater and more stable funding to policymakers, key stakeholders, the media and the general public.

The NRPA Research team works closely with internal subject matter experts, respected industry consultants and the academic community to develop its reports and data resources. Learn more about NRPA research reports and resources at nrpa.org/Research.



NATIONAL RECREATION
AND PARK ASSOCIATION

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APPENDIX F

GUIDELINES FOR DEVELOPING AN INCLUSION POLICY BY THE NRPA



PARKS FOR INCLUSION

GUIDELINES FOR DEVELOPING AN INCLUSION POLICY



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INTRODUCTION

True to the very philosophy of public parks and recreation is the idea that all people – no matter where they come from, what they look like, the neighborhood they live in or how they identify – have access to quality programs, facilities, places and spaces that make their lives and communities great. Local park and recreation agencies work diligently to make this vision a reality in communities across the country, working to ensure that all people have access to the health, environmental, social and cultural benefits parks and recreation provides.

As local park and recreation agencies work to create healthy, connected and resilient communities, it's imperative that facilities, spaces and places look, feel and are open, welcoming and engaging to all community members. Although many agencies strive for this, it can be challenging to know exactly what a truly inclusive space looks like to the entire community. It can be equally as challenging to have a vision for communitywide inclusion, while lacking the resources to make it a reality. Creating and adopting a formal inclusion policy is a great way to ensure that your park and recreation facilities, programs and activities are accessible, welcoming and inclusive.



WHY DOES INCLUSION MATTER?

NRPA's Parks for Inclusion initiative aims to ensure that everyone has access to the benefits of parks and recreation, with an emphasis on reaching those historically marginalized through practices and policies that limit access to health opportunities, including racial and ethnic minorities (people of color), those with a physical or cognitive disability, those who identify as part of the LGBTQ+ community, and new Americans (refugees and immigrants).

It's become clear that these historically marginalized individuals face significant health, environmental and economic disparities in relation to the social determinants of health. The availability and quality of these determinants – housing, jobs, educational opportunities, healthcare, access to healthy food and safe and environmentally resilient places to recreate – impacts quality of life and life expectancy. Park and recreation agencies have the power and the responsibility to create welcoming and inclusive spaces that promote positive health outcomes physically, socially and mentally and connect people to our natural habitats, with an emphasis on reaching our most vulnerable populations and community members.

EQUITY + INCLUSION = A VIBRANT COMMUNITY

While universal inclusion may be the goal for your park and recreation agency, it's also important to recognize how inclusion and equity are connected and how they impact a community.

EQUITY: When we talk about equity, we're talking about encouraging behaviors, systems or policies to ensure fair and just treatment of all community members, regardless of race, background, ability, income, or beliefs. We know that one size does not fit all and that every individual starts on a different playing field. Creating opportunities that meet individuals where they are and address their unique needs is key to ensuring that all members of society are entitled to the same positive health outcomes. A community that prioritizes equity works to ensure that all community members HAVE access to what they need to be successful, and that resources are distributed based on need.

INCLUSION: Inclusion efforts aim to build a culture of belonging by actively inviting the contribution and participation of all people. We believe every person's voice adds value and creating environments in which all people can gain access to facilities and participate in programs where they feel safe, welcome, and respected creates balance, growth and opportunity in the community. A community that prioritizes inclusion works to ensure that all community members FEEL that they can access what they need to be successful.

A community built on equity and inclusion is strong, diverse and vibrant. Together, equity and inclusion break down barriers, close gaps and meet the needs of all constituents to ensure positive outcomes across the community.

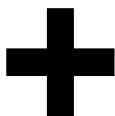
NRPA'S VISION FOR EQUITY AND INCLUSION

EQUITY

A community that prioritizes equity works to ensure that all community members have access to what they need to be successful.

INCLUSION

A community that prioritizes inclusion works to ensure that all community members feel that they can access what they need to be successful.



The result of equity and inclusion working together is a vibrant community, strong in its efforts to create environments in which everyone feels welcome, safe and respected.

To achieve inclusion in parks and recreation, a great first step is to recognize differences as unique, rather than reach for one definition of “success.” Our differences are not the obstacles, rather, a lack of knowing how to approach differences to ensure everyone succeeds is the obstacle. NRPA operates on the statement that equity is giving everyone what they need to be successful, while equality is treating everyone the same, regardless of their abilities.

WHAT IS EXCLUSION?

While the focus of this guide is inclusion, it's important to recognize what exclusion can look like. So often, in doing what we think is best, we don't realize we're missing a critical opportunity to provide an inclusive environment. Some examples of exclusive behavior when designing an inclusive environment include:

- **Communication**, including using small print or no large-print versions of written material and not offering Braille or materials capable of working with screen readers. Other examples include a lack of closed captioning in videos and oral communications without an interpreter (like American Sign Language) or not providing materials in multiple languages.
- **Community Engagement**, such as not providing adequate opportunities for people from different backgrounds to bring their voice to the table, share concerns and express their unique needs during planning processes or community meetings.
- **Physical**, meaning structural obstacles like a lack of ramps, doorways that cannot accommodate wheelchairs, reception desks that are too high for a seated person to be seen, gendered restrooms or locker rooms (male and female, rather than single occupancy or gender neutral), inadequate facilities in low-income communities, etc.
- **Programmatic**, such as a lack of culturally sensitive program times (such as women-only pool hours), lack of accessible equipment, lack of staff knowledge regarding participants with disability, failure to communicate directly with participants about needs.
- **Social**, including not employing those with differing abilities, stereotyping, stigma, prejudice and discrimination, a lack of cultural events, etc.
- **Transportation**, including a lack of accessible transportation provided by the agency or a lack of accessible parking spaces.



WHAT IS A POLICY AND WHY IS IT IMPORTANT?

A policy is a written document that outlines an agency's dedication to a topic and that helps to ensure community inclusion. A well-documented and comprehensive policy:

- Provides guidance about how to achieve goals, strategies and objectives
- Sets clear expectations and rules for staff and community members (e.g., community members enrolling in programs with clear policies know what they are signing up for, what is allowable and unallowable, etc.)
- Provides a framework for clear and consistent action and reaction (e.g., when responding to a complaint, policies ensure that communication will be relayed consistently)
- Sets rules and guidelines for decision making in routine situations that may arise at park and recreation facilities or within programs (e.g., during extreme weather events, programs may be canceled according to policy)
- Holds organizations accountable for their decisions and actions
- Supports sustainability and long-term change (e.g., staff turnover can be common in the park and recreation field, having policies in place ensure that work will continue to be prioritized and remain of high quality)

The purpose of this guide is to provide your agency with best practices, real-life examples and steps to help you implement an inclusion policy and create sustainable changes across your agency.

Even if your park and recreation agency already has existing policies around inclusion, there is always room for evaluation, growth, expansion and customization based on learning about the changing climate of your community, and its unique needs, challenges and strengths.

TARGET AUDIENCES

While some guidelines, like the Americans with Disabilities Act, have laid the foundation for formal policy creation, the most impactful inclusion policies go above and beyond these legalities to address and meet the needs of those most vulnerable community members. NRPA's Parks for Inclusion initiative focuses on four historically marginalized groups:

- Racial and ethnic minorities
- Those with physical and cognitive disabilities
- The LGBTQ+ community
- New Americans, or refugees and immigrants

Research and data show that these groups face higher health and economic disparities, lack access to healthy and safe environments and are most in need of advocates and support systems in communities across the country. While these groups are explicitly recognized through NRPA's Parks for Inclusion initiative, your agency's inclusion policy should address the most vulnerable populations in your community, acknowledging all local, state and federal guidelines for protected classes. In order to ensure that all voices are represented in your inclusion policy, it's critical to have a strong community engagement strategy.



RACIAL AND ETHNIC MINORITY INCLUSION

In the United States, significant health disparities exist between Caucasians and people of color, who more commonly face obstacles to health and quality of life, such as poverty, lack of access to good jobs with fair pay, quality education, housing and healthcare. Systemic practices and policies that unfairly discriminate against people of color have contributed to poorer economic and health outcomes for racial and ethnic minorities. People of color are more likely to have chronic diseases, such as obesity, cardiovascular disease, diabetes and poorer mental health, and more likely to live in neighborhoods affected by crime, violence and incarceration.

Parks have the power to address these disparities and create more equitable systems by ensuring that all community members have access to the benefits of parks and recreation. Agencies can support racial and ethnic minorities by conducting a community needs and equity assessment (see below) to identify areas most in need of additional resources and investment and creating a plan to abolish practices that are unjust.



SAMPLE LANGUAGE FOR RACIAL AND ETHNIC MINORITY INCLUSION POLICY

The City of Burlington Diversity & Equity Strategic Plan seeks to eradicate institutional and structural racism and ethnic-based discrimination within the City of Burlington. The Plan's mission to institutionalize inclusion, equity and justice for all is intentionally broad and far-reaching, and at times seems impossible to attain. The legacy of overt racism and ethnic-based discrimination in our country restricts opportunities for people of color and immigrant and refugee migrants. This legacy also obscures from view the economic benefits of a more multiracial and multiethnic Vermont and the multicultural marketplace beyond our state borders.

Essential for success is the need for Departments to work together in conjunction with partners, particularly historically marginalized communities. Meaningful community engagement encompasses residents from historically marginalized communities who see themselves – and are seen as – full partners in the decision-making, program-planning, and policy-making processes that impact their lives in significant and sustained ways.

Equitable public-sector policy and service delivery are first steps toward developing the tools City employees need to make Burlington a place where all community citizens can achieve, participate, and thrive. Engaged citizens enjoy the benefits of a prosperous and sustainable economy and enhanced quality of life.

RECOMMENDATIONS:

- Launch a structured, concerted, internal listening initiative of one month in length whereby the ideas, successes, and challenges of City personnel around diversity, inclusion, and equity related to race and ethnicity may be heard safely and built upon.
- Train senior leadership on the concepts and practical applications of diversity, inclusion, and equity related to race and ethnicity in the promotion and delivery of City services.
- Adjust the function and responsibilities of the Public Engagement Specialist to focus on civic engagement capacity building for constituents of diverse backgrounds, incorporating the grassroots support of AmeriCorps members serving the City.
- Create a “cheat sheet” outlining key programs and compliment and complaint processes, such that all City employees with public contact become conversant in these programs and processes. Delivery of this document would be made at a formal meeting with the nuances of the program and processes explained.
- Broaden Core Team membership to include individuals outside of City government. The Core Team should include the Mayor, Chief-Of-Staff, Chief Administrative Officer (CAO), City Attorney, Human Resources Director, and three persons of color. Non-City employees would be compensated for time spent on the Core Team.
- Explore restructuring the relationship between the community and economic development office (CEDO), its multiple sub departments, and City government.
- Examine the effectiveness and efficacy of the “dual allegiance” system of governance within some Departments.
- Accord the Mayor the power to directly appoint and supervise the Superintendent of the Burlington School District. The magnitude and complexity of this recommendation merits further comment.

Source: City of Burlington, Vermont, Diversity & Equity Strategic Plan

PHYSICAL AND COGNITIVE DISABILITY INCLUSION

The role of parks and recreation for those with disabilities and their caregivers is crucial. Research has shown that those with physical and cognitive disabilities have significantly higher prevalence rates for most chronic diseases, including cardiovascular disease, diabetes, asthma, high blood pressure and high cholesterol, as well increased chances of stroke and arthritis. People with disabilities also consistently report higher rates of obesity and smoking, and a lack of physical activity and outdoor connection.

Local agencies can support inclusion and equity for those with disabilities by:

- Ensuring accessibility to parks, recreation centers, swimming pools, nature trails and other facilities.
- Offering resources and support not typically available to those with cognitive disabilities.
- Designing inclusive programming for those with physical and cognitive disabilities.

Engagement of those with physical and cognitive disabilities and their caregivers is a critical component of the planning process to understand unique needs and ensure that all community members have equitable opportunities to participate in activities and utilize public facilities.

SAMPLE LANGUAGE FOR PHYSICAL AND COGNITIVE DISABILITY INCLUSION POLICY

The Town of Coventry Parks and Recreation Department provides inclusion services and programs that allow persons with and without disabilities to recreate together in environments that are safe, fun and respectful.

Inclusion is the process of including all persons, regardless of their ethnic origin, socio-economic level, color, language or abilities. Inclusion is a synthesis of many different movements, including educational reform, civil rights, human potential, family supports and deinstitutionalization. Inclusion is not a legal term and does not appear in state or federal law or regulation, but federal legislation and Supreme Court rulings do support and regulate the concept of inclusion.

Inclusion is possible and sustainable in the recreation field when the key players work collaboratively in program design, implementation and evaluation. It is imperative for general recreation professionals and therapeutic recreation specialists to collaborate in providing the necessary services and supports for the inclusion process to be successful.

Supports and adaptation required for inclusion vary depending upon the individual needs and abilities of the person. Both the types and levels of support will be based on these variables. Some persons may require 1:1 staff support throughout the program while others might require a specific behavioral support program in order to be successful. Sign language interpreters, accessible van transportation, modified equipment, ramps, specially trained program instructors, adaptive devices and equipment are some of the supports that may be necessary. Merely bringing persons together with various abilities does not ensure that the inclusion process will be successful. Careful planning, program implementation, training, support and evaluation are all required for the inclusion process.

Inclusion is a place, program, event or an activity where everyone belongs, everyone is accepted, everyone supports their fellow peers and in return their peers and other members of the community support them. Inclusion is a process where everyone benefits.

Inclusive recreation happens when persons, with and without disabilities, are included on an equal basis in a program, event or activity of their choice. It also means creating an environment that allows social interaction between individuals with and without disabilities.

Source: Town of Coventry, Connecticut, Parks & Recreation Department



LGBTQ+ INCLUSION

In the LGBTQ+ community, research shows that lack of physical and social activity opportunities contributes to health disparities linked to social stigma, discrimination and denial of civil and human rights. Social discrimination against the LGBTQ+ community has been associated with high rates of psychiatric disorders, substance abuse and suicide. LGBTQ+ youth are 2 to 3 times more likely to attempt suicide, and lesbians and bisexual females are more likely to be overweight or obese. Additionally, a recent study also shows more teenagers are identifying themselves with nontraditional gender labels, such as transgender or gender-fluid, and those same teens are reporting significantly poorer health, including mental health, than their peers. Despite these challenges, park and recreation agencies are well-suited to offer programming that promotes positive social experiences, builds self-confidence and creates a network of support.

Park and recreation agencies can meet the needs of the local LGBTQ+ community by:

- Creating welcoming and inclusive facilities and programs that provide safety and comfort to the LGBTQ+ community.
- Considering all types of interactions and uses of park and recreation facilities when working with LGBTQ+ people, from changing rooms and restrooms, to addressing patrons with proper pronouns, program registration materials, etc.
- Designing programming that supports and engages LGBTQ+ individuals to create a more inclusive and welcoming agency.

SAMPLE LANGUAGE FOR LGBTQ+ INCLUSION POLICY

The City of Portland is committed to providing a safe and inclusive workplace for all employees, to creating spaces which are welcoming to all visitors and to treating all people with respect and dignity. All users, including but not limited to parents with children, people with personal attendants and individuals regardless of their gender identity or gender expression, benefit when they have access to restrooms of their choosing, including both gender-specific and all-user restrooms. This policy describes the requirement for designating Single-Occupant Restrooms in City-controlled facilities as All-User Restrooms. The policy also describes the requirements for incorporating All-User Restroom design into all newly constructed or substantially renovated City-controlled facilities in order to provide safe, equitable, healthy and convenient restroom for all users. The policy further directs bureaus to assess the feasibility of providing All-User Restrooms in all City-controlled facilities, including potentially converting existing Multi-Occupant Restrooms into All-User Restrooms.

Source: *City of Portland, Oregon, Facilities and Property Management*

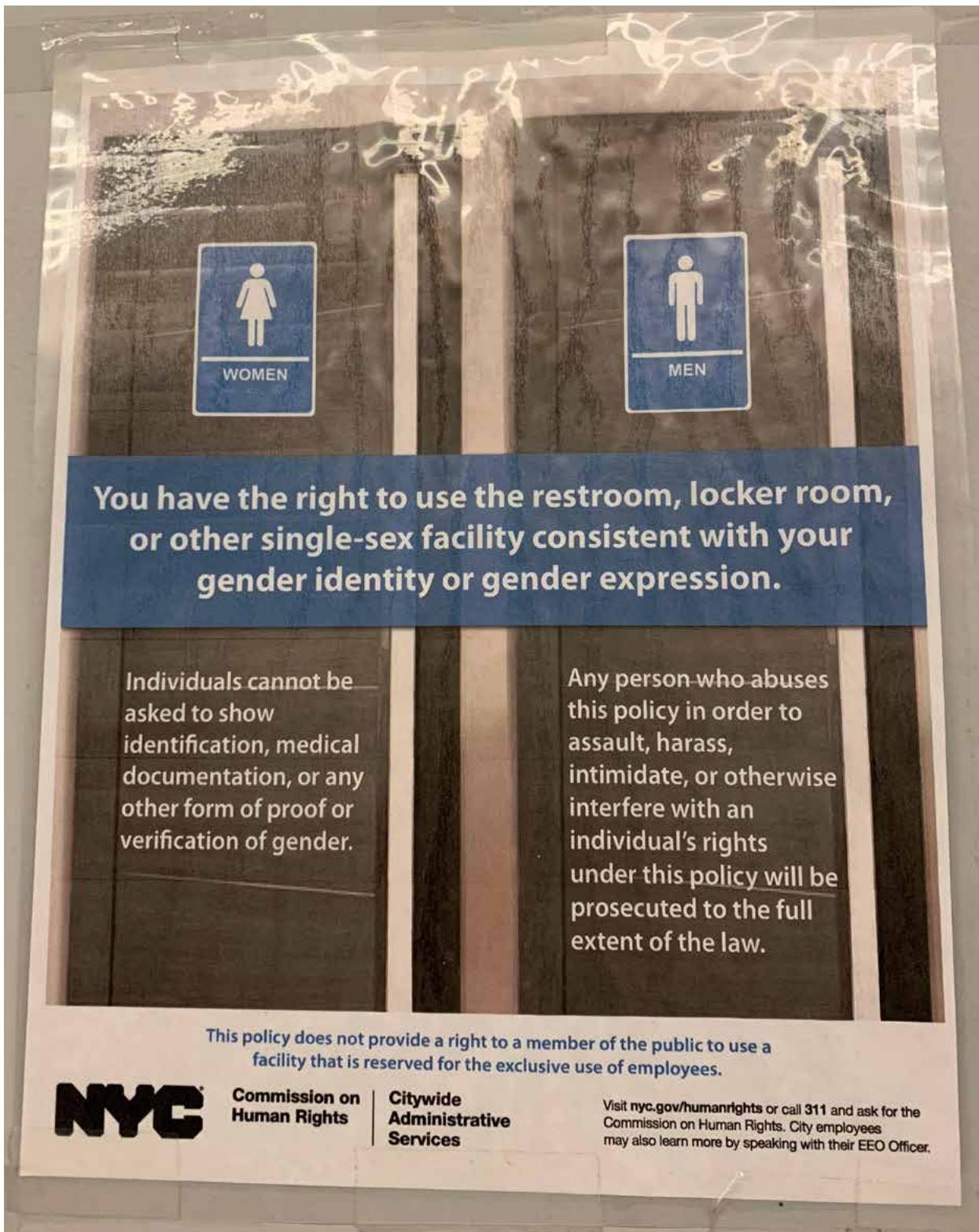


Photo Credit: Gertrude Ederle Recreation Center, New York City Department of Parks & Recreation.

NEW AMERICAN INCLUSION

For the new American community, immigrants and refugees report experiencing intense feelings of loss after leaving their native country and may even go through a period of cultural bereavement and distress. In addition, refugees and immigrants face barriers around job opportunities, housing, healthcare and language, making it difficult to acclimate to a new culture and life.

Park and recreation agencies can help relieve some of this stress through programming and providing opportunities for social engagement and hands-on learning experiences with community members from diverse backgrounds. These opportunities can help to increase self-esteem and create a sense of belonging and community. Programming also creates an increased understanding of a new language and culture, and acceptance of cultural diversity in the whole community. Agencies should also consider language barriers and make the necessary accommodations when promoting programming and services offered, conducting community engagement activities and planning improvement projects.

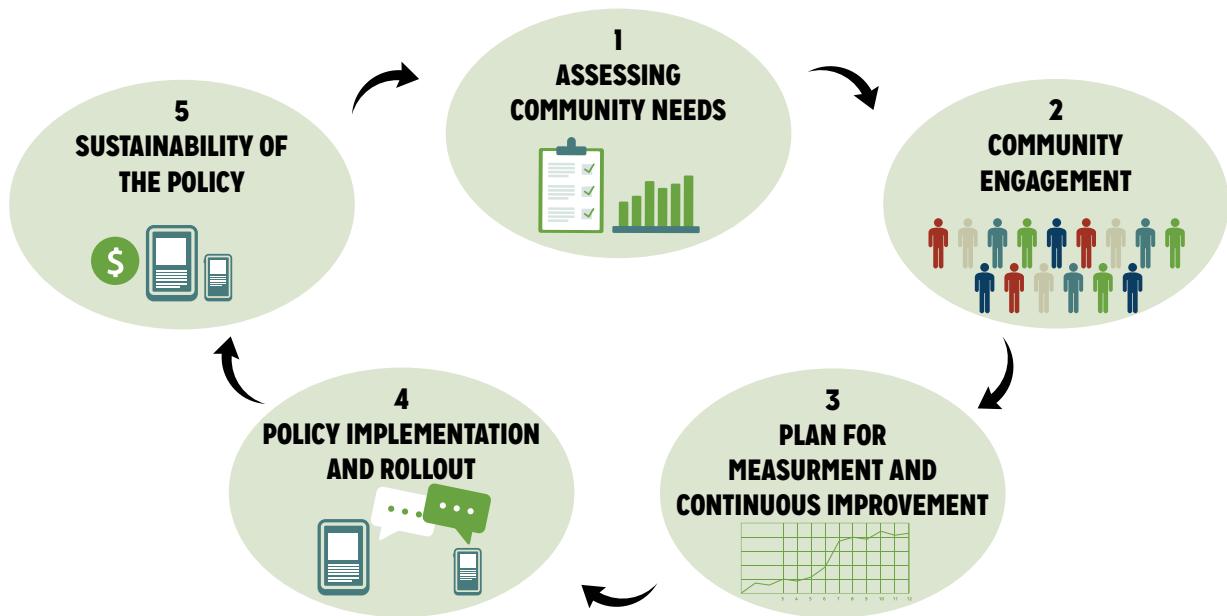
SAMPLE LANGUAGE FOR NEW AMERICAN INCLUSION POLICY

Seattle is home to a diverse and unique immigrant community. While programs engaging immigrant communities, refugee populations, and others that have been historically underrepresented have been successful, there is currently no dedicated funding for new recreation opportunities in underserved communities. Through a strategic policy plan, the city and park and recreation department work to ensure that programs are accessible, welcoming and equitably utilized by communities of color and immigrant and refugee populations by developing partnerships that include race and social justice as fundamental to their operations and business practices. The goal of increased access to recreation opportunities for historically underrepresented communities strengthens the overall plan.

Source: Seattle, Washington, Park District Investment Initiatives 2015



BEST PRACTICES FOR DEVELOPING AN INCLUSION POLICY



ASSESSING COMMUNITY NEEDS – WHAT SHOULD YOUR POLICY ADDRESS?

Every community is unique. While NRPA's efforts are focused on providing resources and health and wellness opportunities for four target populations, your agency's plan may choose to focus on other historically marginalized groups or target audiences based on the need you see within your community. Assess your community's needs by analyzing data on poverty levels, food access, chronic disease rates, availability and accessibility of park and recreation facilities and programs, language preferences/linguistic isolation, environmental factors/environmental justice concerns, age (very old and very young individuals), crime and violence, historical injustices and oppressive policies, and economic mobility, which are all important considerations when identifying targets. Helpful data sources include:

- [U.S. Census Data](#)
- [CDC Health Indicator Data](#)
- [The Social Vulnerability Index](#)
- [500 Cities Data](#)
- [EPA Environmental Justice Screening and Mapping Tool](#)
- Your Community's Local Public Health Department Data

Evaluating how (and how much) your agency invests in neighborhoods, plans new projects and creates relationships with partners is also critical, as these can often be influenced by people in positions of power. As you build your policy, keep your target audiences top of mind, and craft language that supports their individual needs.

UNIVERSAL DESIGN AND PRINCIPLES

For park agencies especially, assessing your community's needs also helps to inform universal design features in your park and recreation facilities. Universal design is the design of an environment so that it can be accessed, understood and used to the greatest extent possible by all people regardless of their age, background or ability. By considering the diverse needs and abilities of all throughout the design process, universal design creates environments that meet peoples' needs.

In 1997, a set of [seven principles](#) were designed to inform universal design:

Principle 1: Equitable Use: The design is useful and marketable to people with diverse abilities.

Principle 2: Flexibility in Use: The design accommodates a wide range of individual preferences and abilities.

Principle 3: Simple and Intuitive Use: Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level.

Principle 4: Perceptible Information: The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities.

Principle 5: Tolerance for Error: The design minimizes hazards and the adverse consequences of accidental or unintended actions.

Principle 6: Low Physical Effort: The design can be used efficiently and comfortably and with a minimum of fatigue.

Principle 7: Size and Space for Approach and Use: Appropriate size and space is provided for approach, reach, manipulation and use, regardless of user's body size, posture or mobility.

These principles, in addition to the policy language, can help to guide your planning process, ensuring that all community members have equitable access to your park and recreation facility.

COMMUNITY ENGAGEMENT - WHO SHOULD BE INVOLVED IN THE PROCESS?

When developing your policy document, consider how to engage the whole community, and how to ensure that everyone has a voice and the opportunity to be represented. Encouraging community buy-in and support will lead to a smooth and consistent implementation. Engage key stakeholders, representatives from target audiences and partners from the public and private sectors by:

- Surveying a diverse set of community representatives about needs, challenges and wants. Gaining a better understanding of what the community expects from its local park and recreation agency is a key component of developing any policy. Consider meeting community members where they are to ensure all voices are heard, conducting focus groups, having a public feedback period or incentivizing constituents to attend meetings.
- Organizing a kickoff meeting for staff and key community members who represent multiple levels of interest. Key community members can include directors of service organizations, faith-based leaders, educators and community members who can speak first-hand to the importance of inclusive policies. Including representatives from target audiences is a crucial part of creating an achievable and sustainable inclusion policy. A great way to do this is to utilize NRPA's Community Engagement Guide for best practices and strategies to facilitate successful community outreach and engagement.
- Allowing the group to provide continuous feedback and to stay engaged throughout the inclusion policy process by reviewing drafts, asking questions and communicating openly. After feedback has been received, complete a final draft of the policy that will be adopted and shared with the organization and community.

You should only create your inclusion policy after the group of staff and community members has met and those individuals have had a chance to voice their ideas. For more information and tips on implementing an effective community engagement strategy, utilize NRPA's Community Engagement Guide, released in spring 2019.

SAMPLE COMMUNITY ENGAGEMENT PROCESS

As the first step, the City (Eugene, OR) solicited feedback from employees, community members, and an outside diversity consultant to assess successes, barriers, and opportunities. Based on the information provided, the City adopted a vision that recognizes diversity and equity as the cornerstone of excellence in effective public service. The feedback confirmed both a commitment to diversity and equity and a need for a more strategic and coordinated program to better align the City's mission and vision with its work.

Source: City of Eugene, Oregon, Diversity and Equity Strategic Plan 2009-2014

CREATE A PLAN FOR MEASUREMENT AND CONTINUOUS IMPROVEMENT

With any program, policy or new initiative, agencies should strive to continuously improve to better serve their communities. To measure your policy's effectiveness and ensure successful implementation, you should solicit regular feedback from staff, community members and partners. Identify what economic, health and social indicators your agency will monitor to measure progress. Establish a realistic and attainable timeline for meeting your goals and determine how you'll evaluate your progress. Determine how you will acknowledge and celebrate successes, and how you'll adjust if you fall short of expectations. Consider reporting on your work to the public – sharing results periodically holds your agency accountable in working toward your goals. Examples of inclusion indicators are as follows:

- Programs that reflect the reality that all participate in different ways.
- Agency leaders and staff participate in training to address the needs of all community members to assure beneficial access to facilities and programs.
- Agency staff is seen as integral members of the community in roles regarding needs-based support.
- There is ongoing self-evaluation to monitor progress toward an inclusive environment that benefits the whole community.
- A sense of community building and culture, demonstrating that inclusive facilities are ones where everyone is accepted and believes they belong. One way to create community in parks and recreation is to have “ice-breaker” activities that facilitate the community getting to know each other. Agencies that help all members feel connected are part of a culture that embraces diversity and difference.

POLICY INTEGRATION AND ROLLOUT

The implementation and rollout of the policy are equally as important as the specific language used in it. You will need to ensure that all levels of leadership and staff are made aware of the new inclusion policy and understand the reason behind such policies. Demonstrating that the development of the policy involved key stakeholders, community members and diverse voices is important so that staff and community members can be assured that the policy has buy-in.

A key to successfully implementing an inclusion policy across your agency is to remain consistent with surrounding messaging. Although having a strong policy of any kind that can stand on its own is important, it is also vital to the implementation of the policy that the language is supportive in other areas of your organizational materials. There are several ways to ensure agency materials remain consistent, including reviewing documents or manuals that outline responsibilities,

core competencies or agency mission and values, focusing on a standard theme of inclusion or equity. Strategies to consider for effective integration include:

- Set up training sessions for staff, as they will be impacted by this policy. Communicate not only what the policy is, but also the “why” and “how.” Talk about why the policy is being adopted and provide training on how sites will implement the policy. Include strong rationale in all programmatic onboarding and staff training materials and provide time for discussion among participants and staff.
- Share the new policy and what it means for your agency with all community members. Consider sharing this inclusion policy to community boards or committees outside of your department. Consider including information in a newsletter, on a bulletin board, in your local newspaper or on your local radio station. Share what the policy is, the process of creating it, the goals identified and why it’s important to the community.
- Stay positive as you get started. Expect to receive some push back but stay focused on the long-term vision of your policy and your agency’s leadership role in your community’s inclusion movement.

ENSURING THE SUSTAINABILITY OF YOUR INCLUSION POLICY

In addition to creating a formal policy of your agency’s inclusion efforts, it’s important to take steps to ensure that policy will be sustained over time. Agency’s should consider establishing and maintaining an organizational and environmental infrastructure that supports the long-term implementation of the policy, including developing a system for management, oversight, implementation, communication and monitoring of the policy and its established goals and objectives.

Furthermore, agencies should consider funding implications, including costs incurred through staff training and onboarding, infrastructure improvements, community engagement events, evaluation and metrics tracking, and communications expenses. They should develop an annual budget that accompanies the inclusion policy and any associated costs.

KEY COMPONENTS OF AN INCLUSION POLICY

INTRODUCTION TO THE POLICY

Having a clear introduction to your agency's inclusion policy will provide relevant context to your audiences. By outlining how this inclusion policy connects to the National Recreation and Park Association's Parks for Inclusion initiative, it also sets the tone that this work is part of something bigger and backed by strong leadership. Use the introductory section as an opportunity to educate readers and build their support for this work. Staff and the community will become familiar with the rationale behind your inclusion policy and be able to speak to your agency's role in creating a more inclusive and equitable park and recreation system throughout the community.

SAMPLE POLICY INTRODUCTION LANGUAGE

The City of Lake Oswego believes that including all people in the fabric of society strengthens community, strengthens individuals and enhances quality of life. Persons with disabilities should have a continuum of choices, opportunities and services provided in the community. The City of Lake Oswego will promote inclusion and opportunities for choice to enhance the quality of life for its residents, including persons with disabilities.

Source: *City of Lake Oswego, Oregon, Parks & Recreation*



GOALS AND STRATEGIES

Defining the specific goal or goals you are striving to achieve through the implementation of your inclusion policy will help to guide the language used throughout the rest of the policy. Once the goals or desired outcomes are defined, strategies to support success of the goals can also be outlined. Sample language can be as follows: "In the case of X issue, these strategies can be implemented."

SAMPLE GOALS AND STRATEGY LANGUAGE

Goal: Agency Inclusion – Cultivate a culture that encourages participation, community collaboration, flexibility and fairness to enable individuals to excel to their full health and wellness potential.

Strategy: Cultivate a supportive, welcoming, inclusive and fair recreation environment through:

- Encouraging and expanding employee use of wellness programs already in place
- Expanding the new employee orientation process to provide for additional inclusion training and development
- Developing a community outreach campaign to target marginalized groups, inviting them to participate in programs
- Establishing a centralized budget for all reasonable accommodations
- Continuing support of regular meetings between community affinity groups, and conducting focus groups to collect feedback on issues regarding inclusion



ACKNOWLEDGE STAFF DIVERSITY, TRAINING, ORGANIZATIONAL AND ENVIRONMENTAL SUPPORTS

Within your policy, outline how your agency will educate and train staff about the importance of creating welcoming, safe and inclusive facilities, spaces and programs. Take into consideration the populations your agency serves and different situations that may arise in your community (trauma, bullying, violence, etc.) – where does your staff need additional support to successfully meet your goals and communicate your message? Invest adequate time not only in educating staff about the policy and the process of creating it, but also in explaining the reasoning behind it. Equip and empower staff with the tools needed to have conversations with one another, with community members and with participants.

In addition to training and fostering an environment of understanding across the organization, agencies should aim to hire staff that's representative of the community served, especially target populations. Staff reflecting the culture and diversity of the community is an effective way to build trust and strengthen relationships with vulnerable populations.

In addition, identify the organizational and environmental supports needed to effectively implement policies that promote inclusion across the community. Is funding needed to support training? Are materials needed to create physical changes to the environment that promote inclusion? Use the policy guide as an opportunity to share how your agency is making organizational and environmental changes to promote inclusion.



ADDITIONAL RESOURCES

POLICY TEMPLATE

To assist local park and recreation agencies with the development of a formal inclusion policy, NRPA has created a policy template. The template contains sample language and guidance around the critical components that should be incorporated into an inclusion policy including an introduction, goal setting, staff training and supports needed, and measurement and tracking. Use the template as a guide as you develop your own unique inclusion policy.

To download a copy of this editable policy template, visit www.nrpa.org/ParksForInclusion



PARKS FOR INCLUSION VISION STAND

This vision stand is designed to focus on the strengths your agency and programs bring the community, and how you can leverage partnerships to create program sustainability and an inclusive environment.

To download a copy of this editable vision stand document, visit www.nrpa.org/ParksForInclusion



NEXT STEPS

Inclusion policies can and should be ever-changing documents to reflect the changing demographics in communities over time and the growing collection of resources and supporting documents for inclusive practices. NRPA's Parks for Inclusion resource database is a great place to stay in touch with inclusive practices and information. Check it out at www.nrpa.org/ParksForInclusion. Among numerous other resources, you'll find one-page documents, each focusing on target marginalized audiences, as well as the *9 Guidelines for Disability Inclusion in Parks and Recreation*, a guide to creating inclusive environments for those with physical and cognitive disabilities. You'll also find resources to help staff model tolerance, deal with empathy and respond to incidents of bias within programs or facilities.

GLOSSARY

NRPA provides these definitions for historically marginalized audiences, including those with physical or cognitive disabilities, the LGBTQ+ community, racial and ethnic minorities, and new Americans (refugees and immigrants).

- Individuals with a disability include those with:
 - Hearing difficulty (e.g., deaf or having serious difficulty hearing [DEAR])
 - Vision difficulty (e.g., blind or having serious difficulty seeing, even when wearing glasses [DEYE])
 - Cognitive difficulty (e.g., because of a physical, mental or emotional problem, having difficulty remember, concentrating or making decisions [DREM])
 - Ambulatory difficulty (e.g., having serious difficulty walking or climbing stairs [DPHY])
 - Self-care difficulty (e.g., having difficulty bathing or dressing [DDRS])
 - Independent living difficulty (e.g., because of a physical, mental or emotional problem, having difficulty doing errands alone, such as visiting a doctor's office or shopping [DOUT])
- New Americans include immigrants, refugees and/or noncitizens living in America
- LGBTQ community (Lesbian, Gay, Bisexual, Transgender, Queer), defined as:
 - Lesbian: A woman who is attracted to other women.
 - Gay: A man who is attracted to other men.
 - Bisexual: An individual who is attracted to both genders.
 - Trans: An umbrella term that seeks to incorporate individuals whose gender identities do not match their biological sex, for example, someone who is born male-bodied and identifies as a woman.
 - Queer or Questioning: Individuals who experience fluidity in their experience of sexuality or gender and, therefore, do not identify strictly as LGB or T. The term 'Queer' can also include those who do not identify as either gender.
- Racial/Ethnic communities, as defined by the U.S. Census Bureau, are composed of several different race categories – black, American Indian, Asian, Pacific Islander, other, and two or more races. Hispanics are also considered a minority, although Hispanic or Latino, is defined by the U.S. Census Bureau as an ethnicity rather than as a race. Other considerations include religious communities, such as Muslim, that practice cultural traditions based around gender.





NRPA National Recreation
and Park Association

Because everyone deserves a great park

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WWW.NRPA.ORG/PARKSFORINCLUSION

APPENDIX G

INCLUSION POLICY TEMPLATE BY THE NRPA



PARKS FOR INCLUSION

Inclusion Policy Template

Use this template as a blueprint for creating your agency's inclusion policy. To use the template, replace yellow highlighted text with information specific to your agency. Make sure yellow highlight and brackets are removed from final document. You should delete this cover page before finalizing your policy. For help completing this template, please refer to the Parks for Inclusion Guidelines for Developing an Inclusion Policy at www.nrpa.org/parksforinclusion



[Policy Name]

Introduction

[AGENCY NAME] is committed to creating and promoting inclusion across all public spaces, places, facilities and programs that the department manages. Through the [POLICY NAME] and supporting practices, we aim to ensure that everyone has access to the benefits of quality parks and recreation, including [INSERT TARGET AUDIENCES--those who have been historically marginalized, including those with a physical or cognitive disability, the LGBTQ community, racial and ethnic minorities, and new Americans, or refugees and immigrants].

[AGENCY NAME] defines inclusion [INSERT DEFINITION OF INCLUSION--as the process of including all persons, regardless of their ethnic origin, socioeconomic level, color, language or abilities].

Policy Goals

[POLICY NAME] outlines [AGENCY NAME] approach to ensuring inclusive environments and equitable opportunities for all community members in local parks and recreation.

This policy ensures that:

- Community members utilizing our facilities, programs and services have equitable and appropriate access to programs and services, regardless of ability, race, age, sexual orientation, gender identity, religion or country of origin.
- Site staff, community partners and stakeholders engage in the support of all community members and promote inclusive behaviors in park and recreation facilities and in public spaces throughout the community.
- [AGENCY NAME] establishes and maintains an organizational infrastructure for management, oversight, implementation, communication about and monitoring of the policy and its established goals and objectives.
- [AGENCY NAME] will continuously measure and improve inclusive practices.
- [INSERT OTHER GOALS]

This policy applies to all community members, staff, and sites in [AGENCY NAME].

Staff Training

[AGENCY NAME] staff will regularly participate in trainings grounded in effective training models using evidence-based content. Training will be comprehensive (covers multiple topics), based on credible research and delivered by qualified personnel. All new staff members will be quickly oriented to inclusive policies and practices.

[INSERT TRAINING PLAN AND TRAINING PARTNERS]

Organizational Support

[AGENCY NAME] and staff will put in place organizational supports that create a social environment (including positive relationships among staff, youth, families and community) that encourages all to be inclusive. This includes:

Staff

Demonstrating an attitude of inclusion, including nondiscriminatory language and actions

Determining and addressing any potential unintended outcomes of activities, programs or parks to ensure that they do not limit participation or cause worse outcomes based on ability, age, sexual orientation, identity, religion or country of origin

Providing educational materials about inclusion to all constituents at community events

Sharing and discussing practices during community meetings

Agency

Developing an advisory group and/or community network of groups that support inclusive behaviors in the community

Assessing agency hiring practices to ensure staff is representative of the diverse community and is an equal-opportunity employer

Communications

Providing positive messages about diversity and inclusion through written and verbal messaging, posters, pictures and books.

[INSERT OTHER ORGANIZATIONAL SUPPORTS]

Environmental Support

[AGENCY NAME] will establish environmental supports and practices that promote inclusion for all community members. Examples of environmental supports include:

- Program adaptation for inclusion, depending on the individual needs and abilities of participants
- One-on-one trained staff support throughout the program
- Language interpretation, including but not limited to:
- Sign language interpreters
- Braille
- Language translation services
- Audio/visual support
- Large-print signage
- Accessible transportation
- Built environment enhancements, including modified equipment and ramps
- Gender-neutral restrooms and changing rooms
- Culturally sensitive program hours (i.e., women-only pool hours);
- Signage and additional facility enhancements (artwork, murals, etc.) that promote diversity and inclusion
- **[INSERT OTHER ENVIRONMENTAL SUPPORTS]**

Continuous Measurement and Improvement

[AGENCY NAME] will work to continuously improve our equity and inclusion efforts, measuring the effectiveness of this policy through staff and community qualitative and quantitative feedback through meetings, community engagement events, public forums, surveys; and monitoring economic and health indicators. [AGENCY NAME] will establish a communications plan for reporting on progress [INSERT PLAN AND TIMELINE FOR PUBLIC REPORTING].

[AGENCY NAME] will monitor the following indicators to track progress of inclusive efforts:

- Does our agency communicate a vision that values the participation of all people as members of the community?
- Does our agency's improvement plan include inclusive practices with action steps to support implementation?
- Is there adequate, regularly scheduled, ongoing planning time for agency staff to collaborate on inclusive programs and events?
- Does our agency engage the whole community by providing multiple opportunities and modes for participating?
- Are there professional development opportunities for staff regarding inclusive strategies and supports?
- Are community members from targeted populations engaged in programming, utilizing facilities and taking part in future planning conversations?

Long-term indicators:

- Are there improvements in health (physical, social, mental) outcomes across targeted populations?
- [LIST OTHER INDICATORS]

Policy Development

[AGENCY NAME] developed this inclusive policy with the input, engagement and support of key community stakeholders and representatives, including:

- [LIST STAKEHOLDERS]

Resources

[AGENCY NAME] recognizes that this document is an ever-growing resource and aims to keep it updated on a [TIMELINE] basis. For more on inclusion and equity, we encourage staff and community members to visit [AGENCY WEBSITE] or the National Recreation and Park Association's Parks for Inclusion website, www.nrpa.org/ParksForInclusion.

Glossary

[AGENCY NAME] provides these definitions for historically marginalized audiences, including those with physical or cognitive disabilities, the LGBTQ+ community, racial and ethnic minorities, and new Americans (refugees and immigrants).

Individuals with a disability include those with:

- Hearing difficulty (e.g., deaf or having serious difficulty hearing [DEAR])
- Vision difficulty (e.g., blind or having serious difficulty seeing, even when wearing glasses [DEYE])
- Cognitive difficulty (e.g., because of a physical, mental or emotional problem, having difficulty remember, concentrating or making decisions [DREM])
- Ambulatory difficulty (e.g., having serious difficulty walking or climbing stairs [DPHY])
- Self-care difficulty (e.g., having difficulty bathing or dressing [DDRS])
- Independent living difficulty (e.g., because of a physical, mental or emotional problem, having difficulty doing errands alone, such as visiting a doctor's office or shopping [DOUT])
- New Americans include immigrants, refugees and/or noncitizens living in America

LGBTQ community (Lesbian, Gay, Bisexual, Transgender, Queer), defined as:

- Lesbian: A woman who is attracted to other women.
- Gay: A man who is attracted to other men.
- Bisexual: An individual who is attracted to both genders.
- Trans: An umbrella term that seeks to incorporate individuals whose gender identities do not match their biological sex, for example, someone who is born male-bodied and identifies as a woman.
- Queer or Questioning: Individuals who experience fluidity in their experience of sexuality or gender and, therefore, do not identify strictly as LGB or T. The term 'Queer' can also include those who do not identify as either gender.

Racial/Ethnic communities, as defined by the U.S. Census Bureau, are composed of several different race categories — black, American Indian, Asian, Pacific Islander, other, and two or more races.

Hispanics are also considered a minority, although Hispanic or Latino, is defined by the U.S. Census Bureau as an ethnicity rather than as a race. Other considerations include religious communities, such as Muslim, that practice cultural traditions based around gender.

APPENDIX H

SAMPLE JOB DESCRIPTIONS



PROJECT MANAGER

DEFINITION AND PURPOSE: Under the general direction of the District Administrator, the Project Manager provides professional planning, design and development of projects in connection with parks, recreation areas and District facilities. The Project Manager also provides plan review and contract/project management.

ESSENTIAL JOB FUNCTIONS:

Responsibilities and duties include, but are not limited to the following:

- Provides services as a project manager on approved projects
- Inspects or directs inspection of developed projects
- Negotiates, administers contracts and acts as a liaison with consulting project architects, engineers and contractors
- Participates in the preparation of environmental documents, including working with environmental consultants and District staff
- Reviews plans and construction documents for conformance with project objectives in construction, maintenance and cost limitations
- Prepares documents and administers public bid process for projects of different sizes and scopes
- Provide recommendations and technical advice to the District Administrator and department managers
- Assists in the District's preparation of its annual budget, including C.I.P. estimates and operations and management
- On an as required basis, assist with or write grants
- Coordinates and cooperates with Facilities and Grounds Manager in providing staff needed with special projects
- Responsible for attending all meetings associated with this position, including evening board meetings. Preparation of charts, maps and plans for presentations at these meetings
- Prepares and develops plans, construction documents and cost estimates for the development or improvement of parks, recreational facilities and District buildings
- Coordinates and directs surveying, mapping and other data collection

NON-ESSENTIAL JOB FUNCTIONS:

- Knowledge of Auto CAD preferred
- Other duties as assigned

KNOWLEDGE, SKILLS AND ABILITIES

Innovation and creativity; have knowledge of the following: theories, principles and practices common to landscape architecture at parks and community centers; principles and practices common to project management for California Public Agencies, including plan review, negotiations, inspections, working with CEQA, State, City, County and ADA regulations, public contract law concepts; knowledge of or proficiency in Auto CAD preferred, strong communication skills, both orally and in writing; analyze and resolve unusual situations through application of District policy; meet the public in situations requiring diplomacy and tact; establish and maintain cooperative working relationships with District employees, contractors, user groups, volunteers and the general public; ability to work with the District Board of Directors.



EDUCATION REQUIREMENTS AND QUALIFYING EXPERIENCES

Graduation from an accredited four-year college or university with a degree in Landscape Architecture, Urban Planning or related field; five years full-time experience in community, military, or collegiate parks management or community development, with a minimum of three years as a Project Manager or Park Planner; or an equivalent combination of education and experience.

License or certificate:

Registered Landscape Architect preferred.

Must possess and maintain a valid California C driver's license and a satisfactory driving record based upon specific program needs.

Position requires fingerprint and background check per Section 5164 of the Public Resource Code. Conviction of certain criminal offenses may prohibit employment.

WORK ENVIRONMENT

Position requires sitting, standing, walking, reaching, twisting, turning, kneeling, bending, stooping, squatting and making repetitive hand movements in the performance of daily duties, occasionally on uneven terrain. The position also requires both near and far vision when reviewing plans, documents, inspecting work and operating a computer. The need to lift, carry and push tools, equipment and supplies weighing up to 50 pounds is sometimes required. The position requires working in both an indoor, temperature-controlled office environment and in outdoor environments in all weather conditions including wet, hot and cold and be exposed to heavy dust, pollen, sun and rain. The noise level of the indoor setting is usually quiet. The noise level of the outdoor setting can be loud, especially when working around construction and maintenance equipment.

Position requires both day and evening hours, and may include weekend shifts.

COMPENSATION: Salaried exempt non-union position for full-time; hourly non-exempt non-union position for part-time.

Wage rate range

\$45.50 - \$61.07

Auburn Area Recreation and Park District is an Equal Opportunity Employer.



East Bay Regional Park District

Landscape Architect

CLASS CODE LARC

SALARY \$73.55 - \$83.21 Hourly

\$11,951.88 - \$13,521.63 Monthly

BARGAINING UNIT AFSCME Local 2428 REVISION DATE April 16, 2013

GENERAL FUNCTION

Under direction, to design, manage and effect the construction of capital improvement projects; to meet the District's goals and the environmental and recreational needs of the region.

ESSENTIAL FUNCTIONS

- Develops schedules and assigns tasks for varied projects
- Including detailed design, project review, permit acquisition, bid administration and construction periods
- Performs detailed site analysis and field reconnaissance
- Prepares and supervises the preparation of base maps, plans, specifications, bid documents and cost estimates for the construction of park and recreation areas and facilities
- Research files, books, documents and maps
- Analyzes and records data on computer and base maps
- Coordinates, schedules and conducts input and focus group meetings
- Develops project program and selects design alternatives
- Ensures compliance with Land Use Plans and environmental documentation
- Initiates, negotiates, supervises and monitors consultant contracts

- Obtains required approvals and permits and ensures all projects follow required procedural and review processes
- Prepares and presents final presentation plans and graphic media to District staff, Board members, other agencies and to the public
- Manages project budgets including monitoring costs
- Maintains organized and detailed records of projects
- Writes reports and correspondence
- Utilizes detailed computer software packages in the execution of projects
- Initiates change orders
- Clarifies design intentions during construction
- Selects architectural finishes and prepares finish schedules
- Provides project supervision
- Technical support as required.

MINIMUM QUALIFICATIONS

Education: Bachelor's degree from an accredited college or university with major work in Landscape Architecture; and

Experience: Five years of experience in the field of Landscape Architecture, which must include the preparation of bid documents, site planning and design experience

License: A valid license to practice Landscape Architecture from the Department of Consumer Affairs in the State of California.

KNOWLEDGE, SKILLS AND ABILITIES

- Knowledge of the principles of landscape architecture and related design disciplines.
- Knowledge of the planning and environmental review processes.

- Knowledge of standard construction methodology.
- Basic knowledge of surveying.
- Knowledge of and skill to utilize technical resources.
- Knowledge and skill in the principles and practices of effective supervision.
- Skill to communicate effectively, both orally and in writing.
- Effective presentation and public speaking skills.
- Good organization and leadership skills.
- Ability to assign resources effectively and delegate to team members
- Ability to encourage and motivate team members.
- Ability to prioritize, solve problems, resolve conflicts.
- Ability to maintain and update professional skills
- Including keeping current with new trends and techniques in landscape architecture and design and related computer software.
- Ability to establish and maintain positive and cooperative working relationships with those contacted in the course of work at all levels
- Including a culturally diverse general public, with a focus on quality service to internal staff and external customers and park users

CONDITIONS OF EMPLOYMENT

- A valid California driver's license is a condition of initial and continued employment in this classification.
- Must possess and maintain current State mandated certifications, licenses and credentials as required to fulfill duties and satisfy regulatory mandates for this classification.

- Current certification requirements include: Qualified Storm Water Pollution Prevention Plan Developer (QSD) certificate. The Storm Water Pollution Prevention Plan Developer (QSD) certificate must be obtained prior to completion of probation.
- May be required to attend public hearings and other meetings which may be scheduled outside of normal work hours.

ADDITIONAL INFORMATION

REPORTS TO: Design Manager

SUPERVISES: May direct the work of various classifications on a project by project basis.

The East Bay Regional Park District is an Equal Opportunity Employer that values and respects a diverse workforce and community. It is committed to promoting an equitable and inclusive workspace that is welcoming to all. Applicants from all backgrounds and life experiences are encouraged to apply. All qualified applicants will receive consideration for employment.

HISTORICAL INFORMATION

Employment Category: AFSCME, Local 2428

Adopted by Board: January, 1978, Resolution #: 1978-1-25

Revision Approved by General Manager: December 18, 2003

Salary Revised per Joint Equity Committee Effective 1/1/04

Revision Approved by General Manager: September 28, 2011

Department: Administration

Position: Grants Administrator

Job Description:

Responsible for identifying grant opportunities, preparing grant applications, securing grants of all types, and assisting in the management of approved grants in specified functional and program areas. Work is performed under the supervision and direction of an administrative supervisor.

An employee in this class is responsible for researching and identifying grant opportunities, preparing grant applications and the management of approved grants within city departments. This position will also be assigned special projects by the administrative staff. Work requires independent judgment to determine courses of action, ability to develop and articulate presentations of facts and support conclusions and recommendations. Supervision is received from a professional superior who evaluates work through review of completed projects.

This is professional work of a specialized nature which involves problem solving and decision making. Independent judgment is exercised in performing duties which include identifying, developing and coordinating intergovernmental resources available to the City in the form of grants; systematic investigation and research of community and City needs; determination and recommendation of programs which are fundable; securing of grants for selected programs; and monitoring the administration of such programs.

Duties and Responsibilities:

Conducts research to identify, apply for, administer, supervise, coordinate and monitor federal, state, and local grants or loans in accordance with applicable standards, regulations, and guidelines.

Interacts with federal, state, and local agencies to ensure that grant projects comply with program guidelines for expenditure, funding, and accountability.

Investigates, researches and analyzes legislation relating to federal, state and local grant programs;

Obtains access to new legislation relating to current and future programs;

Works in close conjunction with City department directors to determine programs which could be funded through grants;

Prepares grant applications and proposals for submittal; including writing, reviewing, and editing grant applications and proposals;

Coordinates and participates in city and other governmental meetings related to grant needs and applications.

Prepares monthly reports on funded and non-funded project status.

Maintains and verifies payment records, reviews invoices and records receipts.

Coordinates with engineers and contractors to ensure timely completion of grants/loans.

Assists in setting short and long-range goals for the department relating to financial and informational data processing needs and technology

Provides answers to inquiries from the general public, department administrators, City employees, or other individuals requesting assistance;
Performs related duties as required.

Minimum Qualifications:

Bachelor's degree in Public or Business administration, preferably with some responsible experience in obtaining grants, administration of grants, or in an appropriate area of specialization.

OR

An equivalent combination of training and experience which provides the required knowledge, skills and abilities.

AND

Possession of a valid Texas driver's license.

Knowledge, Skills and Abilities:

Knowledge of the principles and practices of public and business administration;

Knowledge of the organization, functions and activities of the various sectors of the City, and those of other governmental agencies;

Knowledge of basic accounting principles and procedures;

Knowledge of research techniques and the sources and availability of current information;

Knowledge of municipal accounting, financing, auditing and expenditure control systems and procedures;

Ability to initiate and install administrative programs and procedures and to evaluate their effectiveness;

Ability to prepare meaningful and informative special and regular financial and statistical reports;

Ability to exercise sound judgment in analyzing facts and arriving at conclusions;

Ability to establish and maintain effective working relationships with fellow employees and the general public;

Ability to follow complex oral and written instructions;

Ability to express one's self effectively orally and in writing.

The City of Robstown offers a comprehensive benefits package to all regular full-time employees including vacation, holiday, and sick leave as well as medical, dental, vision, and life insurance.



JOB DESCRIPTION

Job Title:	Grants Administrator
Classification:	Full-time, Salary, Exempt
Department:	Development
Reports To:	Vice President of Development
Compensation:	Starting salary between \$65,000-\$75,000/comprehensive benefits package
Work Setting:	In-person

About The Concilio

The Concilio is dedicated to building stronger communities and unlocking opportunities for Latino families in North Texas. Founded in 1981, we empower Latino communities through education, health, and economic development initiatives. Our cultural competency and grassroots service model have allowed us to serve over 250,000 individuals, fulfilling our mission to create equity and opportunity for every family.

Culture and Values

We are committed to creating a positive and professional work environment where employees can thrive and reach their full potential. Our core values of humility, innovation, integrity, accountability, and optimism guide everything we do.

Job Summary

The Grants Administrator is responsible for overseeing a diverse portfolio of awards and managing the entire grant lifecycle. This role involves identifying funding opportunities, writing grant proposals, managing budgets, ensuring compliance, and tracking project progress. The ideal candidate is organized, a strong communicator, and experienced in grant management and financial oversight.

Key Responsibilities

1. Strategy and Planning

- Research and identify new funding opportunities from Texas-based and national funders.
- Develop and submit grant proposals, LOIs, and application materials for The Concilio's programs.
- Track and manage grant expenditures and performance, ensuring timely reporting.
- Collaborate with Development and Program staff to identify needs and cultivate relationships with funders.
- Maintaining the Organization's Boilerplate document to reflect the organization's current state of operations.

2. Pre- and Post-Award Administration

- Manage all stages of the grant lifecycle: proposal development, budget creation, contract implementation, award set-up, invoicing, payment applications, reporting, and close-out.
- Ensure detailed budgets account for all project costs, working closely with finance and administrative staff.

3. Compliance and Documentation

- Review and ensure compliance with all contract and Memorandum of Understanding (MOU) requirements.
- Maintain adherence to both funder and organizational guidelines throughout the lifecycle of grants.

4. Award Planning and Execution

- Lead kick-off meetings for awarded grants to align stakeholders and set expectations.
- Coordinate implementation and monitor compliance with internal teams and external partners.

5. Reporting and Communication

- Prepare and submit progress reports to funders, including financial updates and project milestones.
- Maintain positive relationships with grantmakers and stakeholders through clear, transparent communication.

6. Data and Impact Analysis

- Track and analyze key performance indicators (KPIs) for grant-funded projects to evaluate their effectiveness.
- Use insights to refine budgets, reporting, and overall grant strategies.

7. Other Duties

- Support events, marketing campaigns, and general administrative duties as part of the development team.

Qualifications

- 3+ years of experience in grant writing, administration, and financial reporting, with a proven track record of success.
- Excellent written and verbal communication skills.
- Strong technical knowledge of grant funding strategies and processes (foundation, corporate, and government).
- Expertise in grant compliance and best practices.
- Proficiency in budgeting, data analysis, and tracking deliverables.
- Exceptional organizational skills and attention to detail.

Skills and Competencies

- Strong interpersonal and communication skills to collaborate with internal teams and external funders.
- Ability to manage multiple projects simultaneously and meet deadlines.
- Proficiency in grant management systems, data reporting, and project management software.
- Problem-solving and analytical skills to navigate complex grant requirements.

Compensation

Salary is competitive and commensurate with experience.

To Apply: Please complete this [Grants Administrator Application](#), and submit your resume according to the instructions provided at the end of the form. Please submit your application by January 27, 2025, to be considered for the position.

At The Concilio, it is our priority to cultivate a diverse and inclusive workplace. We are committed as individuals, as an organization, and as fellow humans, to advocate for and support our employees, our members, and our communities. We are proud to be an equal opportunity employer, and we do not discriminate based on sex, race, color, creed, national origin, marital status, age, religion, sexual orientation, gender identity, gender expression, veteran status, or disability.

Connect with us: theconcilio.org | [Instagram](#) | [Facebook](#)



Class Specification

Class Title: Parks Planner

GENERAL DESCRIPTION OF CLASS

The purpose of the class is to manage and administer the department's capital improvement plan projects, as well as planning for the future of the parks system through long-range master planning efforts. Duties are performed under the limited supervision of the Director, who provides guidance through periodic consultations and discussions.

TYPICAL TASKS

The tasks listed below are representative of the time spent working in this class. Management may assign additional tasks related to the class as necessary.

- Administers the department's capital improvement plan; assists staff in the identification and prioritization of park and recreation improvement projects and prepares costs estimates used to determine funding requirements. Manages department capital projects; serves as the lead on project administration including issuing requests for proposals for professional services, bid processes, contract administration, project inspection and project documentation and closeout.
- Reviews plans and specifications for new park and recreation facilities and improvements; ensures that specifications comply with all policies and meets all regulatory requirements. Manages the Park Master Plan Policy; ensures consistent application of the policy by working with various firms and interest groups in the preparation and amendments of master plans.
- Serves as the department representative on subdivision reviews, providing long term park planning and development guidance. Conducts organizational studies, investigations, and operational studies; recommends modifications to parks and facilities maintenance, repair, and construction programs, policies, and procedures as appropriate.
- Facilitates public meetings regarding park master plans and their development; organizes and attends public meetings to gauge interest and support for parks and recreation planning and development proposals. Manages the Park Master Plan Policy; ensures consistent application of the policy by working with various firms and interest groups in the preparation and amendments of master plans. Serves as department representative on subdivision reviews, providing long term park planning and development guidance.
- Assists in acquisition of park and open space lands. Assists in the management of parks-related capital improvement projects from conception to completion. Responds to public inquiries regarding park and open space projects.
- Assists the Director in planning, managing and directing the Parks, Recreation and Leisure Services Department.



Class Specification

- Establishes and maintains effective working relationships with City employees, officials, and representatives from local, state and Federal agencies.
- Demonstrates regular and punctual attendance.
- Performs other related duties as required.

GENERAL STANDARDS

Data Involvement	Gather, organize, analyze, examine, or evaluate data or information and may prescribe action based on these data or information.
Interpersonal/People Involvement	Provides information, guidance, or assistance to people which directly facilitates task accomplishment; may give instructions or assignments to helpers or assistants.
Asset Responsibility	Requires some responsibility for achieving minor economies and/or preventing minor losses through the handling of or accounting for materials, supplies or small amounts of money.
Mathematical	Uses addition and subtraction, multiplication and division, and/or and calculate ratios, rates and percentages.
Communications	Reads journals, manuals and professional publications; speaks informally to groups of co-workers, staff in other organizational agencies, general public, and people in other organizations and presents training; composes original reports, training and other written materials, using proper language, punctuation, grammar and style.
Judgment	Decision-making is a significant part of the job, affecting a large segment of the organization and the general public; works in a dynamic environment, responsible to assist in developing policies and practices.
Complexity of Work	Performs coordinating work involving guidelines and rules, with constant problem solving; requires continuous, close attention for accurate results or frequent exposure to unusual pressures.
Impact of Errors	The impact of errors is moderately serious – affects work unit and may affect other units or citizens.
Physical Demands	Performs light to medium work that involves walking or standing virtually all of the time and also involves exerting between 20 and 50 pounds of force on a regular and recurring basis or considerable skill, adeptness and speed in the use of the fingers, hands or limbs in tasks involving close tolerances or limits of accuracy.
Equipment Usage	Develops and implements long-range capital plans and programs to support the goals and objective of the organization.
Unavoidable Hazards	None.
Safety of Others	Requires some responsibility for safety and health of others and/or for occasional enforcement of the standards of public safety or health.

EDUCATION, EXPERIENCE AND ADDITIONAL REQUIREMENTS



Class Specification

Education and Experience	<ul style="list-style-type: none">Requires a Bachelor's Degree from an accredited college or university in Parks and Recreation Administration, Landscape Architecture, Urban/Regional Planning or a related field.Requires a minimum of five (5) years of progressively responsible experience in urban planning, landscape architecture and management.American Institute of Certified Planners (AICP), Arborist or Horticulturalist certifications, and Certified Park and Recreation Professional (CPRP) certifications preferred.A combination of education and experience may be considered for this position.
Certifications, Licenses, and Other Qualifiers	<ul style="list-style-type: none">Must possess a valid driver's license and must have and maintain a satisfactory driving record based on the City of Hampton's criteria.Must successfully pass a background check related to this position prior to any offer of employment or promotion.
Additional Requirements	<ul style="list-style-type: none">May require working beyond a standard 40-hour work week to include evenings and weekends.Requires extensive contact with, and must have the ability to establish and maintain effective working relationships with a variety of professional and public interest groups, the public, City departments, and various local agencies.The incumbent may be considered "essential personnel" during city emergency situations, or at the direction of the City Manager or designee which may include long hours and unusual schedules.

AMERICANS WITH DISABILITIES ACT (ADA) REQUIREMENTS

The ADA requires the City of Hampton provide reasonable accommodations to qualified individuals with disabilities. Prospective and current employees may discuss job accommodations with management.

This is a class specification and not an individualized position description. A class specification defines the general character and scope of duties and responsibilities of all positions in a job classification, but it is not intended to describe and does not necessarily list the essential functions for a given position in a classification.

The City of Hampton is an equal opportunity employer.

CITY OF BELLINGHAM

JOB DESCRIPTION

JOB TITLE: **Park Planning and Development Coordinator**

UNION:231

SG:5

CS:N

DEPARTMENT: **Parks and Recreation – Development Division**

FLSA:N

EE04CODE:PR

JOB SUMMARY:

Performs professional and administrative work in coordinating and implementing the City's Park, Recreation and Open Space Plan. Works with citizens and staff in recommending projects for acquisition, development, or capital maintenance. Performs a broad range of functions to complete assigned projects including property analysis, negotiating easements, private development review, project management, grant writing, community outreach, park and open space planning and maintaining inventory of park and open space lands and facilities.

SUPERVISORY RELATIONSHIPS:

Reports to the Design and Development Manager. Works under general supervision and the guidance of Departmental, City, State and Federal policies, procedures and regulations. Coordinates and supervises work of consultants, extra labor employees, volunteers and student interns. Coordinates with Parks Operations Division, Public Works and Planning Department. Serves as staff liaison to City Greenway Advisory Committee.

ESSENTIAL FUNCTIONS OF THE JOB:

1. Lead responsibility for the research, preparation, presentation and monitoring of the department's grant program including complex and technical Federal and State grant applications.
2. Serves as a team leader for, or personally carries out special surveys and studies, projects or reports; serves on special task forces and committees; makes recommendations on administrative or operational policies, procedures and systems, and prepares reports, policies, procedures, and other written material.
3. Assists in the selection and administration of consultant contracts. Coordinates requests for proposals, consultant selection processes, and monitors contracts, expenditures and consultant performance.
4. Assists in land acquisition including identification of parcels for acquisition and acquisitions negotiations. This includes coordination with property owners, property acquisition staff, city attorney, city advisory boards, city council, appraisers, title company, consultants, and granting agencies.
5. Prepares a variety of budgets, program plans, contract documents, financial and narrative reports including those related to greenway levy expenses.
6. Manages the cost control process related to project funding and grant awards; provides

status reports; monitors use of project funds; approves expenditures; coordinates project and grant reimbursement; supervises consultant/contractor/vendor/staff payments.

7. Coordinates inter-departmental efforts relating to park improvement plans and projects; represents department interests in inter-departmental forums; interacts with City departments.
8. Reviews and coordinates projects submitted by other City departments, government agencies and private sector for impact on existing and proposed City parks and open space system.
9. Assists in the development and implementation of Park, Recreation, and Open Space Plan and Capital Improvements Program.
10. Organizes graphic and written materials to be used in presentations to the City Council, community interest groups, clients, boards and commissions, City staff and agency representatives.
11. Serves as staff liaison and coordinates the activities of the Greenways Advisory Committee including preparation of the agenda, record keeping, correspondence, reports, and other administrative duties as needed.
12. Assists with park development projects including involvement in design, bidding and construction phases; works with consultants during the design phase to insure implementation of comprehensive plan goals, budgetary or grant requirements.
13. As assigned, serves as staff liaison and/or participant at meetings concerning projects or proposals; explains or negotiates needed changes on issues involving significant public policy, organizational, or legal liability.

ADDITIONAL WORK PERFORMED:

1. Performs other related work of a similar nature or level.

PERFORMANCE REQUIREMENTS (Knowledge, Skills, and Abilities):**Knowledge of:**

- Working knowledge of park, open space and trail planning, construction, maintenance and management techniques and procedures.
- Working knowledge of Federal, State and local agency laws, rules, regulations and programs relating to land acquisition and development, resource conservation and environmental policy.
- A working knowledge of grant application preparation and processing requirements, including preparation of specifications, proposal descriptions, graphics, and related documents.
- Principles, methods, and legal requirements of contract preparation, negotiation, and administration.

Skills in:

- Excellent skills in report preparation and writing.

- Time management and supervisory skills.
- Project research, analysis, planning, mapping, coordination and implementation.

Ability to:

- Communicate effectively in writing and through graphic and visual media.
- Maintain effective working relationships with co-workers and a diversity of boards, committees, public agencies and private interest groups.
- Communicate orally using courtesy, tact, and good judgment and make effective public presentations.
- Efficiently utilize spreadsheets, word processing, and other computer software applications to accomplish work assignments.
- Maintain consistent and punctual attendance
- Ability and willingness to demonstrate the Public Service Competencies of Service Orientation, Results Orientation, and Teamwork and Cooperation.
- Physical ability to perform the essential functions of the job, including:
 - Frequently operate a computer and read a computer screen or typewritten page;
 - Correctible visual acuity and manual dexterity sufficient to operate a motor vehicle;
 - Effectively communicate in person and by telephone;
 - Move between work sites, including traversing uneven terrain on undeveloped land and project development sites;
 - Occasionally transport objects up to fifty (50) pounds.

WORKING ENVIRONMENT:

Work is performed primarily in an office setting with extensive work at a computer workstation as well as in public meeting facilities. Significant time is spent in parkland, undeveloped land parcels, and on project construction/development sites in all weather conditions.

EXPERIENCE AND TRAINING REQUIREMENTS:

- Bachelor's Degree in Parks and Recreation, Planning, Public Administration, or related field required.
- Four years of planning or related experience required.
- Experience in park/landscape design, urban design, land acquisition, comprehensive plan development or project management preferred.
- Geographic Information Systems (GIS) skills and experience preferred.
- Supervisory experience preferred.
- An equivalent combination of education and experience sufficient to provide the applicant with the knowledge, skills and ability to successfully perform the essential functions of the job will be considered.

NECESSARY SPECIAL REQUIREMENTS:

- Valid Washington State driver's license and good driving record. Applicant must submit a three-year driving abstract prior to hire.
- Employment contingent upon passing a criminal convictions check, child and adult abuse records check and local background check.

PREPARED BY: BE/KH
11/93

REVIEWED BY: _____
Leslie Bryson
Parks and Recreation Director

REVISED BY: LB/BB
8/95
N. Oliver
A. Sullivan
7/17

APPENDIX I

RECREATION PROGRAM PROPOSAL



PROGRAM PROPOSAL

Program Title *

Program Area/Activity Category *

Please Select

This category should match what is in Active.

Participant Skill Level (all three apply if there is no specific level) *

- Beginner
- Intermediate
- Advance

Gender Specific *

- Male
- Female
- Non-specific

Demographics Category (choose all that apply) *

- Preschool (Ages 5 & Under)
- Elementary (Ages 6 - 11)
- Pre-Teen & Teen (Ages 12 - 18)
- Adult (Ages 18 - 54)
- Senior (Ages 55 & up)
- Family

Target Market - Other Information

Describe who the program is intended for other than the demographics above. Consider outreach, special needs, or other relevant factors.

Program Dates/ Duration

Provide start and end dates, or ongoing schedule, for the program.

Location

Program Purpose & Benefits *

Clearly state the purpose of the program. Why is this program being proposed? What is its mission? This can be used in the program description in Active. Also include a detailed description of the program format, including how it will run. For example, weekly classes, day-long events, or seasonal programs.

Program Delivery Model *

Please Select

Program Delivery Model; Continued *

Please Select

Specific Activities

Outline the activities that will be part of the program. This could include things like sports, fitness classes, arts and crafts, educational workshops, nature walks, etc.

Staffing

List the number and roles of staff needed to run the program, such as instructors, event coordinators, support staff, volunteers, etc.

Minimum Participants *

e.g., 23

Maximum Participants *

e.g., 23

Projected Direct Expenditures *

Expenditure	Anticipated Cost	Budget Code
<input type="text"/>	<input type="text"/>	<input type="text"/>

+ Add Row

Projected Indirect Expenditures (not to be included in the total i.e. staffing) *

Expenditure	Anticipated Cost
<input type="text"/>	<input type="text"/>

+ Add Row

Total Expenses

\$0.00

This will populate from the information in the Direct Expenditures Anticipated Costs

Suggested Fee to cover 80% of revenue

0

(Total Expenditures * 80% / Maximum Participants)

Suggested Fee to cover 100% of revenue

0

(Total Expenditures * 80% / Maximum Participants)

Suggested Fee to cover 125% of revenue

0

(Total Expenditures * 125% / Maximum Participants)

Recommended Program Fee *

Based on the calculations above, what is the recommended program fee?

Partnerships, Collaborations & Other Revenue Sources

Identify any community groups, organizations, or businesses that will be involved or could benefit from the program, such as schools, nonprofits, or local businesses. Also, list potential or confirmed sources of revenue: i.e. sponsorships, grants, or donations. Do not include program fees.

Marketing Needed *

- Social Media
- Constant Contact
- Banner
- Other
- Kannapolis Matters
- Peach Jar
- Flyers

Other Marketing Details

Outline how you plan to advertise and promote the program. Include methods such as flyers, social media, email campaigns, community partnerships, etc.

Key Performance Indicators

Identify measurable indicators that will help you assess participants. This might include: # of participants, enrolled, participation, satisfaction, or completion rates.

Evaluation Plan *

Describe how tracking, feedback forms, or any other metrics you include in the evaluation, such as participant surveys, might help you assess participants.

File Upload

Drag and drop files here

Include any additional documents such as detailed budget sheets, marketing materials, or letters of support.

Name *

First Name Last Name

Email *

example@example.com

For Admin Use Only: Wrap-up Set *

Yes

No

Save

Submit

APPENDIX J

NRPA SPECIAL PARK DISTRICT NATIONAL DATABASE REPORT



Special Park District National Database Report



PRORAGIS, short for Park and Recreation Operating Ratio and Geographic Information System, is NRPA's cutting-edge, online management tool, designed for public park and recreation agencies—and FREE to all members of NRPA. PRORAGIS is a replacement for the NRPA standards that have guided land acquisition and development for the past 45 years. This data is much more accurate because you can compare standards with departments in your state or region and the data that is reported comprises actual numbers rather than a more generic national average. However PRORAGIS is multi-dimensional. It also provides assistance with the following typical park and recreation functions:

- Benchmark survey of peers;
- Master planning of parks;
- Comprehensive jurisdiction planning;
- Strategic planning;
- Business and revenue-generation planning;
- Marketing of facilities, programs and tourist attractions;
- Justification and defense of departmental budgets.

The PRORAGIS database gives us differing data pictures depending on the variables we choose. This means that in the future we expect to do some oversampling of PRORAGIS data to explore selected topics in more detail. These topics might include program operating data, fees and charges; and salary studies. However, as we are building the database the profiles from jurisdictional types are interesting to identify differences between each type.

The profiles in aggregate show the similarities and differences between the jurisdiction types. As the number of profiles increase it is likely that the overall character of the jurisdiction type will become more pronounced. The first group we studied was the County Departments, which we looked at in January. Some of you that are special agencies, but represent a county may find yourself in both categories.

This report focuses on profiles that have been submitted by Special Districts (35), Regional or Metro Authorities (4) and Independent Districts (7). There were actually more Profiles on the server than the 46 used for data. Many of them did not have key data points completed and thus could not be included in the aggregation.

As more agencies complete PRORAGIS profiles, the database for these groups will become more accurate and more useful to the members. It is probably not surprising that most of these agencies are located in Illinois. The following chart shows the distribution by state. If a state is not listed there were no profiles available from that state.

Jurisdiction State	Number
IL	23
CO	5
CA	3
GA	2
MI	2
OH	2
OR	2
KS	1
MD	1
MN	1
PA	1
TX	1
UT	1
WI	1

Your Jurisdiction

Regardless of how similar a department may seem to be for benchmarking or best practices analysis, you want to ensure that the target jurisdiction is a match to yours. Factors such as density, age ranges, population, finances, poverty, and growth rates, among others, are indicators of a similar jurisdiction's suitability as a candidate for benchmarking studies. In addition to the medians and averages the display of upper and lower quartiles shows how distributed the data may be. For example, the operating budgets in the jurisdiction data table below vary by 1,000% and the population varies by about 500%.

Are the jurisdictions of similar size? What about the wealth of residents or the budgetary expenditures? All of these factors can be important in assessing a suitable benchmarking partner.

Jurisdiction Data Category	Median	Average	Lower Quartile	Upper Quartile
Square mileage that your incorporated jurisdiction serves	60	316	12	396
Jurisdiction Total Operating Budget	\$8,400,000	\$16,311,028	\$2,550,514	\$20,342,504
Jurisdiction Capital Budget	\$1,568,405	\$6,688,155	\$379,125	\$5,201,053
Jurisdiction per Capita Income	\$41,865	\$43,612	\$33,053	\$56,744
Jurisdiction Median Household Income	\$60,426	\$71,288	\$54,437	\$99,000
Jurisdiction Population	52,000	135,590	26,319	121,778

Other Jurisdiction Data Sets of Value

PRORAGIS has many values as a database designed for comparative analysis. There are a number of different data sets that may seem strange, but they are included because they enable users to judge what characteristics they are looking for in a benchmark or best practices study. For example, the demography table below is intended to give you a sense of the characteristics of a potential benchmark agency. The PRORAGIS reporting process allows you to view individual responses in side-by-side columns. This table shows the aggregated results of selected demographic groups. You will note that as an aggregate of agencies, the numbers eventually start to look like the national percentage for each group. For your benchmark study you may want to ensure that benchmark partners have a distribution of groups that are similar to those of your jurisdiction.

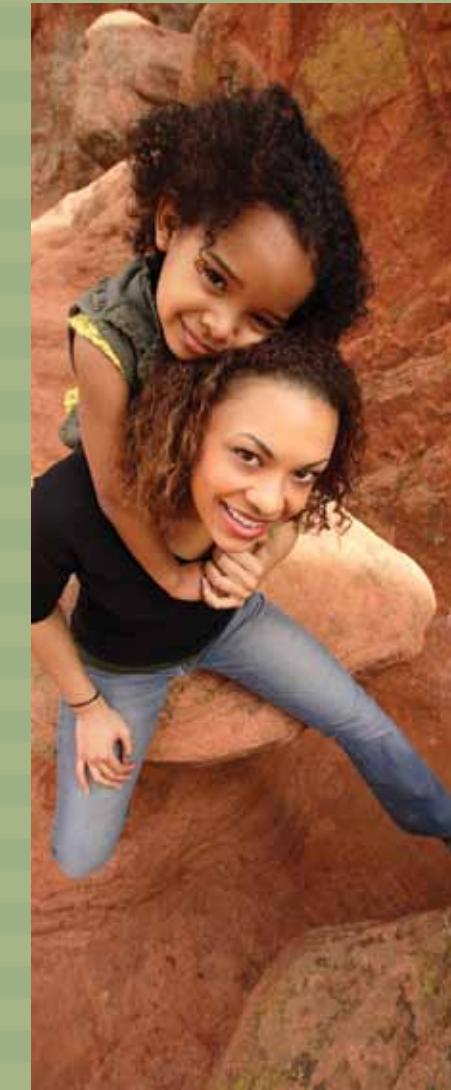
Jurisdiction Ethnic Distribution	Median	Average	Lower Quartile	Upper Quartile
White/Caucasian	77.10%	75.25%	66.70%	89.50%
Black/African American	4.15%	8.63%	1.08%	11.95%
American Indian/Alaska Native	0.30%	0.37%	0.13%	0.40%
Asian	3.09%	4.56%	1.50%	5.25%
Native Hawaiian/Pacific Islander	0.07%	0.45%	0.00%	0.10%
Hispanic or Latino (any race) or Spanish Origin	6.90%	10.85%	4.14%	13.00%
Other	1.55%	1.87%	0.65%	2.98%

*Note: These numbers may not add to 100% because they are compilations of all the agencies.
These numbers are provided from the Census "Quick Facts" Tables from the U.S. Bureau of Census.*

For example, Cleveland, Ohio and El Paso, Texas are both among the poorest cities in the nation. They are also reasonably similar in population. Yet Cleveland is 53% African American and 10% Hispanic, while El Paso is over 80% Hispanic and less than 4% African American.

Age data, economics and jurisdiction growth rates all influence the way a department within a jurisdiction will operate. Excessively young or old jurisdictions face differing challenges. These differences buttress the argument that all departments are unique.

Category	Median	Average	Lower Quartile	Upper Quartile
Percentage of jurisdiction population that is younger than 18 years of age	24.70%	24.86%	23.00%	26.70%
Percentage of jurisdiction population that is older than 65 years of age	11.40%	13.01%	9.43%	15.00%
Percentage of jurisdiction population that is below the poverty line	7.95%	10.85%	3.95%	12.00%
Jurisdiction population growth rate 2000-2010	4.90%	11.29%	0.50%	15.80%

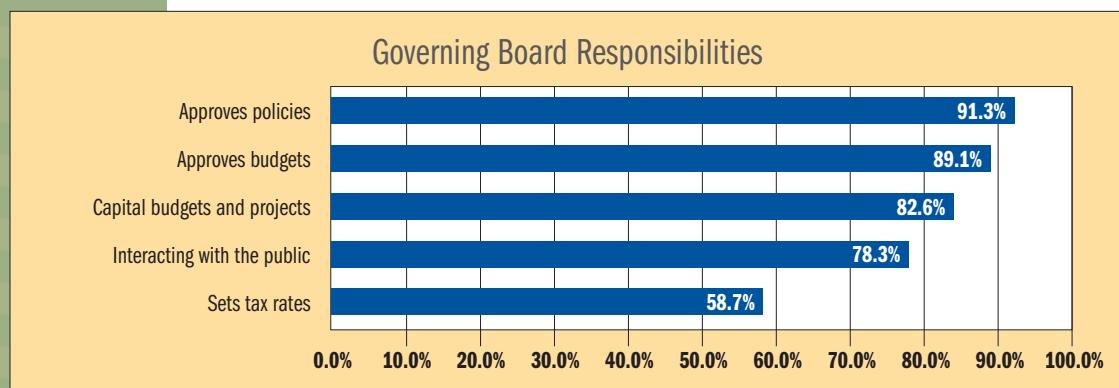


Your Department

Benchmark data does not select winners and losers. If you are looking at six jurisdictions that are similar in many aspects they will have differences in operating ratios. But, that does not mean that one is better than the other, just different. By ensuring that the jurisdictions are similar and that the department structure and functions are similar you can reduce the variation in the results. Your responsibility is to explain any differences. The following data points help to both find similar agencies and may provide an understanding for how they differ from you.

Boards and Commissions

Of the 44 respondents answering the question on boards and commissions, 12 indicated that their board was appointed by elected officials and 32 indicated that board members were elected. The respondents indicated that 39 of the boards were independent. The table below shows the functions typically performed by governing boards. This may be valuable for assessing the function of the board or commission for a department.

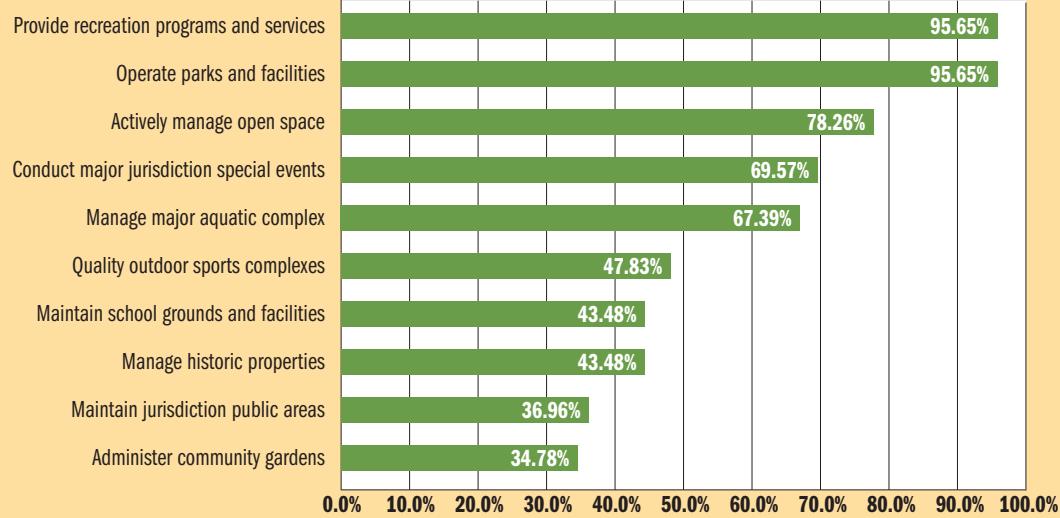


Department Responsibilities

Department responsibilities clearly show the different generic responsibilities of departments that may differ from your operation. For example, if you maintain school grounds you will most likely seek to compare yourself to other departments that do as well. However, if you are a southern department snow plowing may change the number of permanent staff for departments with staff who can be productive through the winter.

The table following addresses the primary functions that departments are responsible for carrying out. That is, 96.65% of agencies indicated they were responsible for operating and maintaining the parks and facilities. This implies that 3.35% of the respondents outsourced the work to another department or a private contractor. For responsibilities such as administering community gardens (34.78%), it can mean that either there is no community garden program or it is administered by another department.

Department Responsibilities





Specific Questions on Operations

Throughout the PRORAGIS profile there are a number of questions that reflect the level of resources that a department has available and the types of activities for which they are responsible. Besides questions of functions performed such as maintenance of street trees or snowplowing and similar there are questions like the one reflected in the following table, which indicates the aggregate number of departments that have access to Computer-aided Maintenance Management Systems (CMMS). CMMS are used to manage buildings, grounds, and equipment (vehicles, trailers, mowers etc.) maintenance, cost history, work schedules, asset and risk management, service levels and even maintenance activity travel routes. As you know, travel is the number one enemy of productivity.

While the aggregated data on its own is of little value, if you are seeking to purchase a CMMS system, from the myriad of possible systems, you can do a side-by-side search and determine who has one, and survey them for recommendations. From the aggregate below we know that there are more without CMMS than with it.

IT Capability	Percent
Does your department have an Activity Registration/Recreation Program and Membership Management System?	86.96%
Does your department have a Computer-aided Maintenance Management System (CMMS)	28.16%
Does your department have Automated Administrative Systems?	67.39%

Department Programs

Programs are an obvious area of comparison and are often responsible for more than 40% of your earned revenue. Ensuring that any benchmark partner has the desired emphasis on programming is important. These aggregated totals imply a widely diverse method for counting attendance if nothing else.

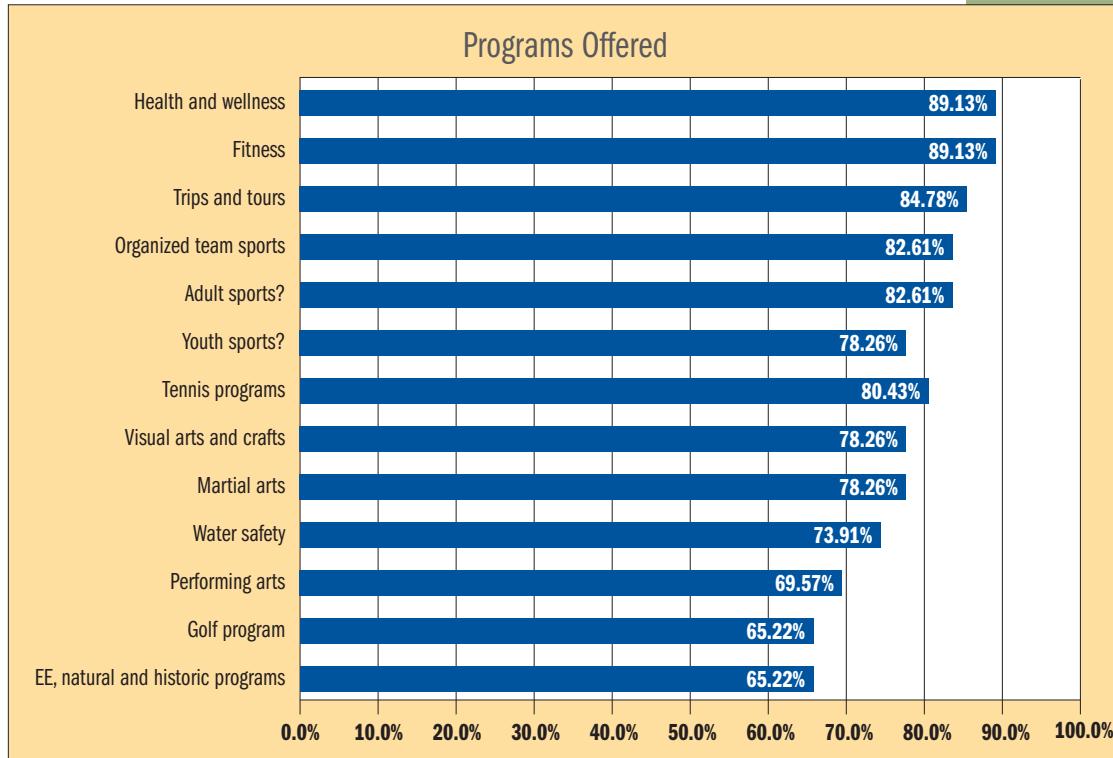
Category	Median	Average	Lower Quartile	Upper Quartile
What is your total annual number of participants attending programs, classes and small events?	28,716	581,967	5,411	387,646

Determining Magnitude and Calculating Operating Ratios

Scattered throughout the profile are questions that serve two functions. First, they provide magnitude information such as the table above on attendance. This data, like other data points, can be used in side-by-side analysis to determine suitable benchmark partners. You can see the rather large range of responses by noting the huge variation from the median to the average. You would want to be sure that your potential partner's attendance is the same general magnitude as yours, or at least uses the same process for compiling attendance numbers..

The second use for this data is as a factor in calculating varied ratios. This might include visitors per FTE, operating cost per visitor, revenue per visitor, and similar.

The following chart indicates the kinds of programming that are offered by respondents. This is obviously a selected representation of the types of programs.



Other factors that influence the selection of similar departments include such items as resident/non-resident fees. Of the 35 respondents represented here, 76.09% of them have non-resident fees.

Questions Relating to Possible Grants and Sponsorships

Within PRORAGIS, there are also a number of questions that relate to potential grants and sponsorships to which NRPA may have access. Over the last two years NRPA has held a grant from Wal-Mart and distributed \$50,000 each year to 15 agencies to increase the number of meals provided for summer programs and before and/or after-school care. By knowing that you offer these types of services, your department can be considered for participation in similar grants when available. Healthy foods and activities related to obesity and chronic health issues have funding available, which NRPA can access because they represent a national grass-roots membership. Numerous other questions are geared in a similar way to take advantage of funding and partnership opportunities. The following table shows participation in some of the more “fundable” services provided by departments.





Programs Offered as Percent of Respondents	
Summer Camp	84.78%
Weeks of Camp	9.88
Campers per week	285.91
Provide meals or snacks at camp	30.43%
Before and After School	65.22%
Before School Program	8.70%
After School Program	17.39%
Preschool	58.70%
Full Daycare	13.04%
Specific Teen programs	84.78%
Senior Programs	80.43%
If yes, does your department provide meals for seniors?	13.04%
Programs for people with disabilities	69.57%
If yes, does your department make accommodation for inclusion in activities?	67.39%
If yes, do you conduct Individual Assessments of clients with significant disabilities?	39.13%
Do you provide program opportunities for people with significant disabilities?	63.04%
Community gardens	36.96%
If yes, does your department rent or permit spaces for gardens?	28.26%
Major Special Events	39.13%

Financial and Budget Data

Financial data like program data can be used for magnitude and ratio development. The total operating expenditures figure contains all of the expenditures assigned to you for the fiscal year. Note that some jurisdictions may retain certain benefits as jurisdiction-wide and not assign them to your department. Make sure you are comparing all expense categories.

Department data	Median	Average	Lower Quartile	Upper Quartile
What are your department's TOTAL operating expenditures for your fiscal year?	\$ 8,396,309	\$18,815,777	\$ 2,056,245	\$ 20,006,878

Sub-level Analysis

The PRORAGIS profile also allows you to look at some of the data from a different perspective. The following table shows a different way to analyze operating expenses. In this chart the capital expenditures are for products or services paid for from the operating fund rather than the capital funded projects. By studying the distribution of the expenses for personnel, operations and capital you can get a sense of whether or not your operations are balanced.

What percentage of your total operating expenditures is in the following categories?
(Percentages must add to 100%)

Category	Median	Average	Lower Quartile	Upper Quartile
Personnel Services (expenditures for all salaries, wages and benefits)	62%	59%	49%	70%
Operations (expenditures for all functions of the Department)	34%	36%	26%	44%
Capital (expenditures for capital equipment, capital projects and debt services paid from the operating funds)	2%	5%	0%	5%
Other, please describe:	0%	3%	0%	0%

Although it is not clearly shown in this table, most departments have a higher percentage of operating expenses for personnel than for the other categories. Generally, the more resource-intensive a department is, the higher the percentage of dollars for operations. For example, if you look at a golf course operation the personnel cost may typically be around 45%, the operating costs another 45% and the capital 10%. Program-focused departments tend to have higher personnel expenses. This may be changing as agencies contract for program services and move the dollars from personnel to operations.

Department Revenue

The total operating expenses generally includes either prior year actual revenue or estimated revenue for the coming fiscal year. The following table indicates the general percentages of those earned revenues as a portion of the total. These numbers are commonly referred to as cost recovery rates.

Of The Total Operating Expenditures,
What Percentage Comes from Agency Fees and Charges
(Earned Income)

Category	Median	Average	Lower Quartile	Upper Quartile
Agency fees and charges	36.00%	36.07%	22.00%	50.13%

In the current economy, revenue can be a major benefit as it reduces the cost of services to the residents at-large in favor of payment by users of the services. While this has limitations for serving residents equitably, revenue is not going away any time soon. The numbers below for revenue do not include any tax sources such as levies. It focuses on earned income as shown in the next table.

Category	Median	Average	Lower Quartile	Upper Quartile
What is your department's TOTAL non-tax Revenues for your fiscal year?	\$ 3,022,671	\$ 13,769,011	\$ 740,248	\$ 7,202,476



The following table indicates the source of the earned revenue for the respondents. As mentioned previously, the largest sum usually comes from programs and classes fees and charges. This data can be very helpful for seeking best practices or ways and means of increasing your revenues.



What percentage of your annual non-tax revenues came from the following sources?
(Percentages must add to 100%)

Category	Median	Average	Lower Quartile	Upper Quartile
Facility entry fees/ memberships	17.00%	19.00%	6.90%	32.64%
Programs and class fees and charges	27.00%	28.50%	16.80%	56.50%
Facility Rentals	3.15%	3.30%	2.00%	5.25%
Facility, property or ROW leases	0.05%	0.10%	0.00%	1.40%
Concessions, resale items	2.41%	2.81%	1.00%	4.85%
Sale of real property	0.00%	0.00%	0.00%	0.09%

Trend Data

Another focus of some of the PRORAGIS questions is to start building trend data. While the table below gives information about Capital Fund Budgets it is also intended to serve as a baseline for future trend data. At the earliest, a trend pattern requires three years' data to have some validity.

Another element is what we would call "Big Picture Credibility". The second question in the table below, "What is your department's amount of renovation need?" addresses the total maintenance deficit for parks and recreation at the state and local levels. A study in Canada, estimated the total maintenance deficit for parks and cultural facilities in Canada's municipalities to be \$42.0 billion dollars. That would imply a US maintenance deficit in excess of \$300 billion. With only 28 respondents to this question and a total of \$195 million, that is an average of \$7.0 million. If all of the 46 departments were averaging the \$7.0 million in maintenance deficit this group would account for over \$330 million in maintenance deficit.

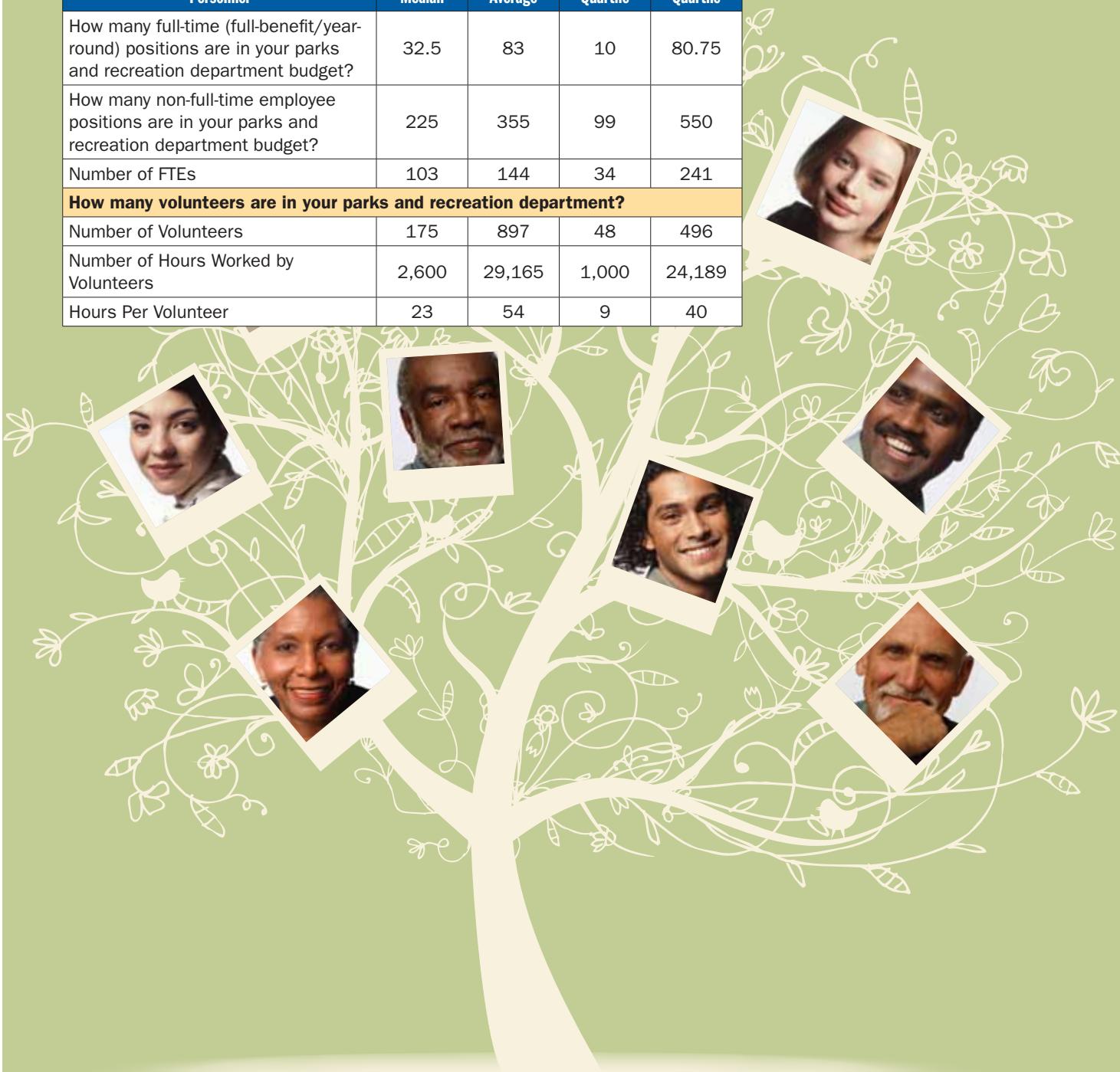
Consider also the same 28 departments indicated that new lands and facilities are needed or that existing structures have reached the point where they are no longer salvageable and must be replaced. That shows an average of almost \$4.0 million in new capital funding needs.

Capital Budget	Median	Average	25% Quartile	75% Quartile	Total All Respondents
What is your department's total capital budget?	\$975,900	\$6,763,261	\$308,000	\$3,253,917	\$236,714,141
What is your department's amount of renovation need?	\$1,084,803	\$6,957,587	\$306,764	\$5,000,000	\$194,812,438
What is your department's amount of new capital need?	\$40,500	\$3,804,786	\$125,000	\$4,420,519	\$95,119,643

Department Personnel

The following table shows the aggregated full-time and non-full-time positions from the responding agencies. By measuring in Full Time Equivalents (FTEs), it is possible to get a better sense of the actual workforce. Volunteers are included to indicate the departments' use of non-payroll staff.

Personnel	Median	Average	25% Quartile	75% Quartile
How many full-time (full-benefit/year-round) positions are in your parks and recreation department budget?	32.5	83	10	80.75
How many non-full-time employee positions are in your parks and recreation department budget?	225	355	99	550
Number of FTEs	103	144	34	241
How many volunteers are in your parks and recreation department?				
Number of Volunteers	175	897	48	496
Number of Hours Worked by Volunteers	2,600	29,165	1,000	24,189
Hours Per Volunteer	23	54	9	40





Parks, Trails and Facilities

The following two tables provide an overview of the aggregated park lands and trail information for the participating counties. Facilities data has been left out of this summary due to the difficulty of compiling the data in aggregate and its relative value in that format.

The trails table below shows the multi-purpose trail with no equestrian access as the most popular type of trail. Cells showing no value indicate that there were not enough departments indicating a positive number to calculate the function.

Park Lands	Median	Average	25% Quartile	75% Quartile
Park Attendance	200,000	1,145,219	65,000	1,425,000
How many individual parks or sites does your department/agency maintain and/or have management responsibility over?				
Number of Parks or Sites	40.00	60.00	11.50	59.50
Total Number of Acres	679.00	2,413.02	106.00	1,715.50
Acres per Park Site	14.90	47.10	9.10	31.65
Percent of your acreage developed?	74.00%	63.66%	43.00%	89.00%
Percent of your acreage undeveloped?	26.00%	36.87%	15.00%	56.00%

What is the total mileage of greenways and trails managed by your agency?

Type	Median	Average	25% Quartile	75% Quartile
Multi-purpose—No Equestrian	4.88	15.26		14.79
Multi-purpose—Equestrian permitted		12.29		7.88
Hiking/walking only	0.50	10.18		9.50
Bicycling only		0.78		
Equestrian only		0.98		
Other, please describe:	1.75	21.40		36.40
Total	12.00	39.20	4.13	33.07

Miscellaneous Ratios

Whether looking for budget justification, best practices, or performance measures to monitor work progress, the operating ratios are of the greatest value. The operating ratios created in PRORAGIS reporting may not provide the detail that you need to manage your department. It does, however, provide a framework for identifying the ratios that will be the most helpful. For example, you can drill down into the cost recovery revenue to see where most of your revenue is coming from. You can see if increasing the revenue winners is an option. One department increased their program revenues by \$1.2 million dollars when they moved to an online automated registration system that cut program cancellations by 21% over a year. The ratios will inform you where you are positioned in the group of your peers.

As has been mentioned throughout this report, the development of operating ratios is of value because it allows a department to measure certain aspects of performance across differences that may exist. Further, each department can determine what level of service they wish to provide to their citizens.

Miscellaneous Benchmarking Ratios	Median	Average	Low Quartile	Hi Quartile
Operating Expenditures per Capita	\$205	\$216	\$67	\$340
Operating Expenditures per FTE	\$121,525	\$374,951	\$95,080	\$227,400
Operating Expenditures per Acre of Land Managed or Maintained	\$16,225	\$32,871	\$7,350	\$33,369
Acreage of Parkland per 1,000 Population	12	19	6	20
Acres of Parkland Maintained per FTE	7	13	4	22
Jurisdiction Population Per Square Mile Served	1,866	2,299	298	3,203
Jurisdiction Population per FTE	908	12,654	460	3,003
Revenue per Capita	\$60	\$82	\$19	\$134
What is your department's TOTAL Earned Revenues for your fiscal year?	\$2,307,684	\$5,451,212	\$525,249	\$9,180,742
Revenue as a percent of Total Operating Expense (Cost Recovery Rate)	36.00%	36.07%	22.00%	50.13%
Revenue per Visitor	\$9	\$31	\$2	\$22
Total Operating Expenditures per Visitor	\$46	\$113	\$12	\$150
Total Capital plus Total Operating Expenditures per Capita	\$264	\$266	\$88	\$404
Total Capital Costs per Capita	\$28	\$54	\$9	\$62
Tax Cost per Capita	\$119	\$1,453	\$33	\$188

Note that these ratios do not denote winners and losers. No specific conclusion can be drawn without further analysis. The fact that one department does something for less money or with fewer people does not necessarily mean that they are doing the function better, just differently.

National Standards

The following data, though sparse, provides departments with a sense of the population standards that actually exist for facilities. We all knew that the former NRPA standards were not viable for most department operations, but there has never been a replacement for them until now. As more profiles are completed this table of population per facility will become an increasingly credible guide for use in master planning and funding. For example, if you are master planning for recreation centers you can choose to build to the median, the average, or at a logical point along the quartile line. If you review the data on the centers, you will note that larger centers have a higher population ratio.

For facilities like fitness centers, the population ratio is of little value. A fitness facility, often located in a larger recreation center usually has a minimum design size of 3,500 sq. ft. with maximum size dependent on the feasible clientele. Many fitness spaces are in excess of 10,000 sq. ft. to accommodate the mix of equipment desired for the fitness program.

Other standards are dependent on the profiles from specific areas of the country. For example, indoor ice rinks may have a fairly consistent standard nationwide. Outdoor ice rinks standards will only be of value when there are sufficient profiles from states in northern climates. Eagan, MN a city of 80,000 in Dakota County has two indoor ice sheets and 24 outdoor rinks. The old NRPA Standards indicated a need for 1 ice sheet per 50,000 residents.



Jurisdiction Population Per Facility	Median	Average	25% Quartile	75% Quartile
Recreation/Community Center	22,966	34,680	13,500	34,125
Fitness Center	36,000	58,301	11,986	46,883
Playground	2,688	6,257	1,581	4,716
Tot Lots	17,333	42,926	3,794	58,500
Tennis court (indoor)	58,000	96,955	41,496	118,000
Tennis court (outdoor)	3,149	7,930	2,337	6,157
Basketball court (outdoor)	4,850	24,082	3,333	6,568
Swimming pool (indoor) - Competition pools	100,278	160,964	49,481	216,503
Swimming pool (indoor) - Non-Competition pools	36,000	114,023	25,000	45,974
Swimming pool (outdoor) - Competition pools	43,403	114,586	31,250	95,144
Swimming pool (outdoor) - Non-Competition pools	36,000	49,918	23,494	67,809
Senior center	63,085	86,038	32,542	134,927
Ice skating rink (indoor)	45,974	84,699	27,342	66,646
Ice skating rink (outdoor)	18,000	38,120	11,375	29,500
Rectangular fields - Football	12,916	20,326	4,409	29,250
Rectangular fields - Soccer, Lacrosse, Field Hockey (Regulation Size)	7,769	17,063	3,566	12,432
Rectangular fields - Soccer, Lacrosse, Field Hockey (Small-Sided Fields)	9,552	25,613	3,919	19,500
Diamond Fields - Baseball with 90 ft. base paths	24,459	41,928	11,425	41,779
Diamond Fields - Baseball with 50-65 ft. base paths and mound	7,074	11,404	3,300	12,325
Diamond Fields - Softball (youth)	8,025	10,539	3,806	11,530
Diamond Fields - Softball (adult)	11,800	22,407	7,188	20,187



Conclusion

As departments increasingly understand the value of completing the PRORAGIS profile, the data will become more credible for all agencies. Special Districts may find data most valuable at the state and regional levels. This will require a concerted effort to engage more special agencies in completing the profiles.

NRPA is moving forward with a number of initiatives focusing on health and wellness, conservation of parklands and open space, efforts to identify jobs and economic value of park and recreation agencies and ensuring social equity in Park and Recreation Services. We are also emphasizing the ways and means of sustainable funding resources. In 2012 we will likely be in contact regarding funding opportunities within your state as we try to catalog the options.

All of these initiatives are being incorporated into PRORAGIS to make it the “go-to” management tool for your department. Please let us know of any issues you incur providing data or getting reports from PRORAGIS.

If you have any questions, would like more information, or need some clarification or help with completing the PRORAGIS Profile please contact:

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NRPA members can join the PRORAGIS Connect group and interact with peers that have already completed the profile.



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