



Bend Metro Park & Recreation District

February 4, 2020

Board of Directors

Annual Workshop Agenda

www.bendparksandrec.org



play for life



Our Vision

To be a leader in building a community connected to nature, active lifestyles and one another.

Our Mission

To strengthen community vitality and foster healthy, enriched lifestyles by providing exceptional park and recreation services.

We Value

Excellence by striving to set the standard for quality programs, parks and services through leadership, vision, innovation and dedication to our work.

Environmental Sustainability by helping to protect, maintain and preserve our natural and developed resources.

Fiscal Accountability by responsibly and efficiently managing the financial health of the District today and for generations to come.

Inclusiveness by reducing physical, social and financial barriers to our programs, facilities and services.

Partnerships by fostering an atmosphere of cooperation, trust and resourcefulness with our patrons, coworkers and other organizations.

Customers by interacting with people in a responsive, considerate and efficient manner.

Safety by promoting a safe and healthy environment for all who work and play in our parks, facilities and programs.

Staff by honoring the diverse contributions of each employee and volunteer, and recognizing them as essential to accomplishing our mission.

play for life

District Office | Don Horton, Executive Director

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Board of Directors

Workshop – February 4, 2020

Bend Park and Recreation District Office – Conference Rm A

Agenda

Workshop – 9:00 a.m.

1. **Strategic Plan - Annual Action Plan (Mid-Year Review) and Performance Measures –**
Michelle Healy and Rachel Colton (45 min)

On June 18, 2019, the board adopted the 2019-2022 Strategic Plan (plan). The plan includes three pillars--Employees and Workplace Culture, Community Relationships, and Operations and Management Practices. Within the pillars, there are 11 desired outcomes, 21 strategies, and numerous actions to support the strategies. The plan also includes suggested performance measures for each desired outcome to track the district's progress over time.

The Strategic Plan is a living document that will include annual updates to ensure the plan's relevancy in meeting the district's desired outcomes, and bi-annual updates to track progress in accomplishing the action items that support the desired outcomes.

The Strategic Plan includes identified actions to be completed annually. These actions fall into calendar years and as part of the forthcoming annual update to the Strategic Plan, staff will assign action items to fiscal years to align with the district's budget cycle and to give more clarity to target completion timing for action items.

For the third and fourth quarter of calendar year 2019 (or the first two quarters of fiscal year 2019/2020 fiscal year) 21 action items were identified in the Strategic Plan. All identified action items are complete or in progress, as presented in the action item tracker included as an attachment to this memorandum. Additionally, eight actions are noted that are ahead of their anticipated timelines originally included in the plan.

Performance measures are a valuable tool to help the district track progress towards achieving desired outcomes. This Strategic Plan is the first time the district has formally employed the use of performance measures, and the plan includes suggested measures for consideration. Staff has used those measures as a starting point and developed 11 draft performance measures to illicit feedback from the board on the high-level approach and framework of the draft measures. The draft measures are included as an attachment.

Goal of agenda item: Review progress made on the actions and draft performance measures and suggest modifications.

Supporting Documents (attached): Adopted Strategic Plan – available on the BPRD website ([direct link](#)), [Attachment A - 2019-20 Annual Action Plan \(Mid-Year Review\)](#) and [Attachment B - Draft Performance Measures report](#)

2. **Recreation Subsidy** – *Matt Mercer (60 min)*

The Recreation Department is funded largely through user fees but also requires general fund tax support to ensure programs and services are financially feasible and accessible to all. The level of fee and tax support for programs is determined by board adopted cost recovery guidelines. Cost recovery expectations vary depending on the type or category of service. Over the past two years, the amount of tax support required to subsidize recreation programs has grown greatly from around \$1 million dollars in the three fiscal years bridging 2015-2018 to an estimate of over \$2 million for the current fiscal year. This is the result of a combination of factors including:

- Wage and benefits increasing at a higher rate than can be recovered through fee increases
- Capacity constraints in some programs and facilities that limit participation increases
- Additional resources allocated to outreach and needs-based assistance efforts
- Increased opportunities provided by the private sector

This upward trend in recreation subsidy will likely accelerate over the next 5 years with the opening of Larkspur Community Center. Staff will provide an overview of the cost recovery/subsidy allocation philosophy and guidelines, share recent trends and future projections, and identify potential issues that may have an impact on future subsidy requirements.

Goal of agenda item: Review recreation cost recovery/subsidy allocation philosophy, guidelines and trends and seek board input on priorities and issues that may have an impact on future subsidy requirements.

Supporting Documents: Fees and Charges Policy, attached. Draft 5-year recreation subsidy forecast will be provided at the meeting.

3. **Recreation Access and Outreach Efforts** – *Matt Mercer (60 min)*

The board has expressed strong interest in district efforts to reach underserved and vulnerable populations in recreation programs. Staff will provide an overview of current initiatives, strategies and resources for reaching underserved populations. Staff will also share ideas on how the effectiveness of district efforts can be measured.

Goal of agenda item: Provide the board with an overview of district outreach efforts to underserved populations and seek board input on future goals, resources and what success ultimately looks like.

Supporting Documents: Fees and Charges Policy attached (Needs-Based Assistance section). Draft Performance Measures included in Attachment B to Agenda Item #1. Additional material will be provided at the meeting.

Lunch 12:00-12:30

4. Capital Improvement Plan (CIP) Discussion – Michelle Healy and Brian Hudspeth (60 min)

During prior workshops, the CIP discussion has allowed for each of the CIP projects to be discussed in an open format that ended with clear direction to staff, and the creation of a CIP that carefully weighed the prioritization of projects against available resources. For the first draft of the 2021-2025 CIP staff has updated the 2020-2024 adopted CIP to reflect changes in current year projects and to incorporate board, staff or community-driven proposed future projects. Staff intends to use the same process this year to provide guidance for CIP revisions. The draft CIP will be adjusted upon board direction over the upcoming few months and adopted in June as a part of the annual budget process.

Goal of agenda item: Review status of current projects and reach board consensus on the Draft 5-year 2021-2025 CIP.

Supporting Documents: Draft 2021-2025 Five-Year CIP will be provided at the meeting.

5. General Fund Commitments – Lindsey Lombard (20 min)

The district has many commitments on property tax revenues in the upcoming five years and beyond:

- Asset management including JSFC indoor pool replacement,
- Capital projects reliant upon property taxes, including saving for the park services shop
- Larkspur Community Center operations
- Big Sky expansion and Alpenglöw maintenance and operations
- Personnel cost impacts
- Increased funding for programs that reach underserved populations
- PERS Unfunded Actuarial Liability payments

Goal of agenda item: Staff to share with the board the current prioritization and funding strategies for future projects and financial commitments, as a precursor to the financial forecast presentation.

6. Financial Forecast – Lindsey Lombard (2 hrs.)

The financial forecasting model has become a valuable tool in predicting the effects of capital funding decisions, operational strategies, levels of service, subsidy levels, expanding parks and facilities, and economic circumstances on the district's financial viability. Being able to foresee how decisions today will affect the district's future operational budgets is vital to ensure the long-term financial sustainability of the district. Financial forecasting becomes even more important as the district adds facilities and services, and as operating costs continue to increase.

The forecasts, and the underlying assumptions, will be presented and discussed during the workshop. The forecasts reflect the projected impacts to the district's short-term financial future, primarily from growth in operational revenues and costs (including PERS, minimum wage and benefit cost increases), and as we increase our services as we open Larkspur Community Center, Big Sky expansion and Alpenglöw. The forecasts also show the impacts of

the current and potential future debt service and of the proposed 2021-2025 Capital Improvement Plan (CIP) projects.

The forecasted System Development Charge (SDC) revenues, expenditures and ending fund balances will be shown on a separate graph.

Goal of agenda item: Staff hopes that this tool will help provide a means for the board to gain an understanding of the future financial capacity of the district for decision-making on property tax-funded priorities.

Supporting Documents: Financial forecasts – to be provided at the meeting.

**BEND PARK AND RECREATION DISTRICT
2019-2022 STRATEGIC PLAN
PILLARS AND DESIRED OUTCOMES**



- Sufficiently staffed with well qualified employees in all positions
- Employees have the opportunity to learn and grow
- A workforce that is heard, informed, involved and valued

Community Relationships
Strengthening community connections and partnerships



- The district is strategic about partnerships
- A community better informed about the district
- District services that are accessible to all
- Exceptional customer and community experiences

Operations & Management Practices
Building upon current management practices that support responsible use of resources and stability



- Staffing levels that are consistent with district growth
- Balance between caring for existing infrastructure and new development
- Be a local leader in environmental stewardship
- Financial well-being supported by strong business practices



BEND PARK AND RECREATION DISTRICT 2019-2022 STRATEGIC PLAN MID-YEAR ACTION ITEM SUMMARY

Employees and Workplace Culture

- Sufficiently staffed with well qualified employees in all positions
 - Employees have the opportunity to learn and grow
 - A workforce that is heard, informed, involved and valued

Completed

- None – all are in progress

In Progress

- Recruit to new audiences
- Enhance professional development program for interested employees
- Transfer Employee Relations Committee from policy to charter and evaluate purpose and effectiveness

Ahead of Schedule – In Progress

- Evaluate part-time/seasonal structure to determine if there are more responsive ways to meet business and employee needs (Q4 2020)
- Collect and analyze data to inform and improve employee retention strategies in areas with high turnover (Q4 2021)
- Evaluate effectiveness and value of mandatory training (Q1 2020)
- Introduce or enhance communication tools to improve employees' ability to communicate with one another (Q3 2021)

Ahead of Schedule – Complete

- Develop specific policies and practices for use of trade/exchange/flex time for exempt staff (Q1 2020)



BEND PARK AND RECREATION DISTRICT 2019-2022 STRATEGIC PLAN MID-YEAR ACTION ITEM SUMMARY

Community Relationships

- The district is strategic about partnerships
- A community better informed about the district
 - District services that are accessible to all
- Exceptional customer and community experiences

Completed

- Develop questions for public perception survey that are designed to identify trust-building opportunities

In Progress

- Revise the district's current partnership policy to define different levels of collaborative relationships and criteria
- Create stronger and more meaningful partnerships with government agencies
- Educate our workforce on how to respond effectively and professionally to misinformation about BPRD
- Develop method for ongoing education and information sharing with Board, Budget Committee members and the public on district finances and resources allocation decisions
- Increase knowledge of and access to the District's scholarship program
- Invest in targeted programming that minimizes barriers for low-income populations
- Expanded targeted outreach for the Latino population
- Launch Larkspur Community Center programming and operations, and integrate into the overall recreation program



BEND PARK AND RECREATION DISTRICT 2019-2022 STRATEGIC PLAN MID-YEAR ACTION ITEM SUMMARY

Operations & Management Practices

- The district is strategic about partnerships
- A community better informed about the district
 - District services that are accessible to all
- Exceptional customer and community experiences

Completed

- Update of Park Services IPM Program to consider a pilot program to eliminate the use of chemicals in certain areas

In Progress

- Cross train employees to ensure there is back up and support for key functions in order to balance work loads
- Determine additional steps and resources necessary to fully implement the district's Asset Management Plan.
- Develop a tool to forecast O&M costs prior to a project being listed on the CIP
- Implement additional sustainable practices in each operational area which embrace environmental standards and support the City of Bend's Climate Action Plan
- Complete the River Access Study that identifies the appropriate level of recreation access with the environmental impacts on the Deschutes River
- Develop a communications plan to educate and inform district staff about operating and capital budgets
- Create business plans for recreation service areas to ensure services are responsive to community needs and support long term financial sustainability.
- Earn Commission for Accreditation of Park and Recreation Agencies (CAPRA) re-accreditation

Ahead of Schedule - In Progress

- Plan and prioritize funding for a new Park Services Shop (Q1 2020)
- Work with the Board of Directors to determine the district's role in providing transportation options within the urban trail system in collaboration with the City of Bend (Q2 2020)
- Measure progress on meeting the LOS targets for parks and trails⁸ in the adopted Comprehensive Plan and CIP (Q1 2020)

**BEND PARK AND RECREATION DISTRICT
2019-2022 STRATEGIC PLAN
PERFORMANCE MEASURES REPORT
1/24/20**

Performance measures are a valuable tool to help the district track progress towards achieving desired outcomes. This Strategic Plan is the first time the district has formally employed the use of performance measures, and the plan includes suggested measures for consideration. Staff has used those measures as a starting point and developed 11 draft performance measures to illicit feedback from the board on the high-level approach and framework of the draft measures.

What follows are definitions for terms used in the performance measures report:

- **Baseline:** Identified Key Performance Indicator (KPI) starting point based upon historic district data and/or industry benchmark data.
- **Desired Outcome:** The highest-level objectives that support achievement of the three district pillars.
- **Key Performance Indicator (KPIs):** Measurable value that illustrates how effective the district is at achieving desired outcomes. Includes a baseline, identified target, and a timeframe for measuring success.
- **Performance Metric:** Measurable value that informs overall district strategy, but does not have clearly defined target tied to desired outcomes.
- **Pillar:** The three areas where the district will place energies and resources, which make up the foundation of the 2019-2022 strategic plan.
- **Target:** Identified success metric that the district strives to achieve as identified in the KPI.

Improved level of community awareness of the district

Pillar: Community Relationships

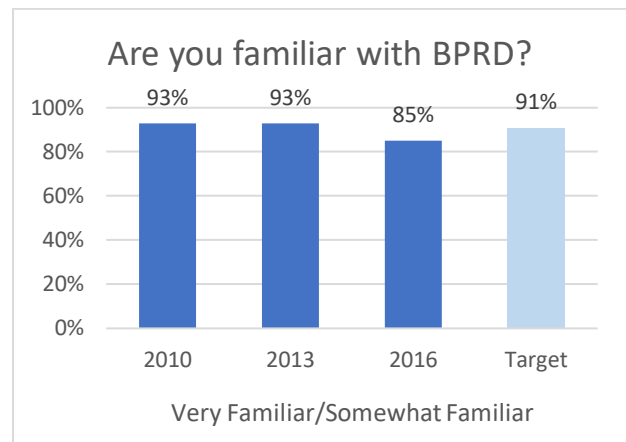
Desired Outcome 3: A community better informed about the District

Perception Survey Question: Are you very familiar, somewhat familiar, or not at all familiar with BPRD?

Key Performance Indicator (KPI): Percentage of individuals who are very or somewhat familiar with BPRD. This is measured every three years, with a 2010 baseline of 93% and an established target of 91%.

Target: The target was established as the average percentage of people very or somewhat familiar with BPRD in 2010, 2013 and 2016. This resulted in a target of 91% for the current three-year Strategic Plan period from 2019 to 2022.

Current Status: The most current perception survey data is from 2016, which indicates that 85% of individuals surveyed are very or somewhat familiar with the district. This is below our established target of 91%. This decrease in awareness may be a result of rapid population growth within the service area. 2019 survey data will be available soon, which will help confirm if this trend continues.



Improved level of community awareness of the district

Pillar: Community Relationships

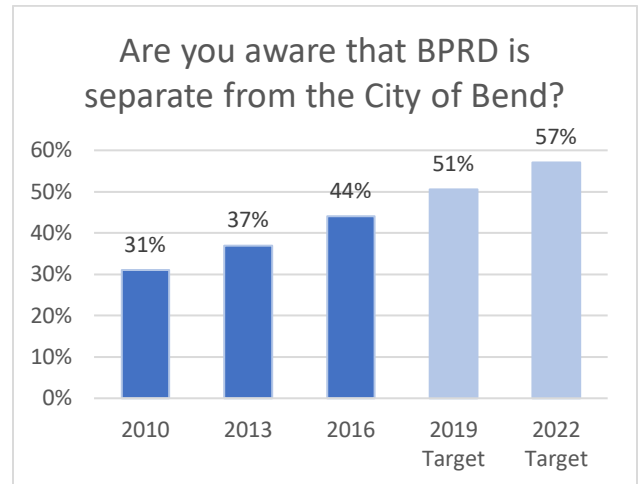
Desired Outcome 3: A community better informed about the District

Perception Survey Question: Is BPRD a department with the City of Bend, or a separate agency not part of the City of Bend?

Key Performance Indicator (KPI): Percentage of individuals who know that BPRD is a separate agency from the City of Bend. This is measured every three years, with a 2010 baseline of 31% of individuals who know that BPRD is a separate agency and an established target of a 6% increase in the number of individuals who know that BPRD is a separate agency every three years.

Target: The target was established as the average percentage increase in the number of individuals who know that BPRD is separate agency from the City of Bend between 2010, 2013 and 2016. This resulted in a target of a 6% increase every time we complete a perception survey (approximately every three years) for the duration of the current three-year Strategic Plan period from 2019 to 2022.

Current Status: The most current perception survey data is from 2016, and the 2019 perception survey data will be available at the time of the Board Retreat. Staff anticipates that the number of individuals who know that BPRD is a separate agency from the City of Bend will have increased since 2016. With the rapid population growth being experienced in Bend, continued education efforts will be necessary to increase public knowledge regarding BPRD and its relationship to the City of Bend.



Customer Satisfaction Rating

Pillar: Community Relationships

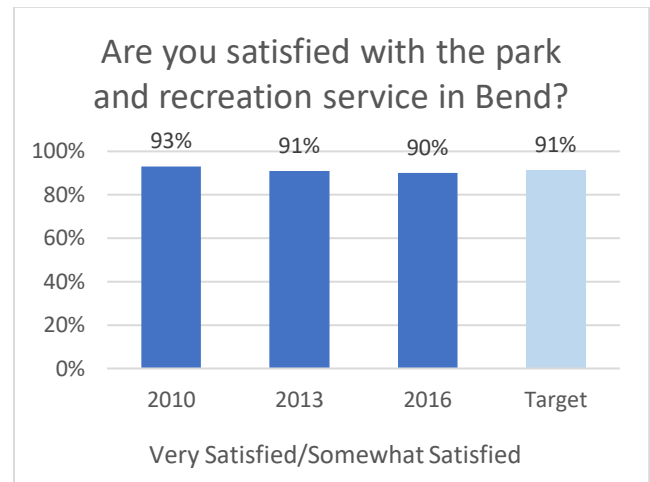
Desired Outcome 4: Exceptional customer and community experiences

Perception Survey Question: Are you very satisfied, somewhat satisfied, not too satisfied or not at all satisfied with parks and recreation services in Bend?

Key Performance Indicator (KPI): Percentage of individuals who are very or somewhat satisfied with parks and recreation services in Bend. This is measured every three years, with a 2010 baseline of 93% of individuals and an established target of 91% of individuals either very or somewhat satisfied with park and recreation services.

Target: The target was established as the average percentage of people very or somewhat familiar with park and recreation services in Bend in 2010, 2013 and 2016. This resulted in a target of 91% for the current three-year Strategic Plan period from 2019 to 2022.

Current Status: The most current perception survey data is from 2016, which indicates that 90% of individuals surveyed are very or somewhat satisfied with parks and recreation services in Bend. This is just below our established target of 91%. This 91% target is a high standard and BPRD staff is currently interviewing similar jurisdictions to better understand applicable industry data in order to validate this target.



Customer Service Rating

Pillar: Community Relationships

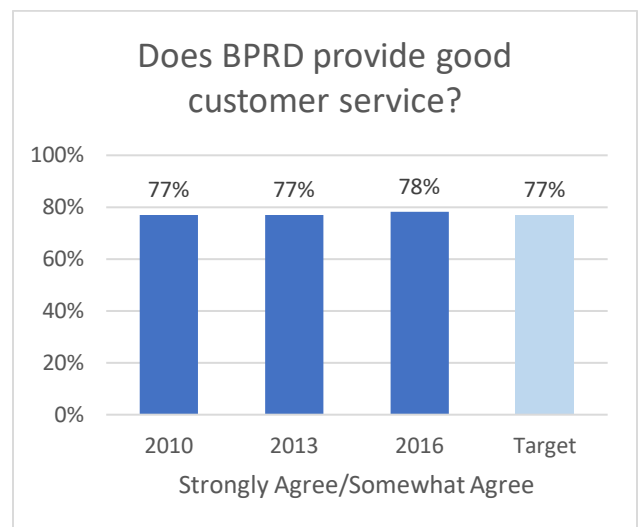
Desired Outcome 4: Exceptional customer and community experiences

Perception Survey Question: Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with this statement about BPRD – provides good customer service?

Key Performance Indicator (KPI): Percentage of individuals who strongly or somewhat agree that BPRD provides good customer service. This is measured every three years, with a 2010 baseline of 77% of individuals and an established target of 77% of individuals.

Target: The target was established as the average percentage of people in 2010, 2013 and 2016 who strongly or somewhat agree that BPRD provides good customer service. This resulted in a target of 77% for the current three-year Strategic Plan period from 2019 to 2022.

Current Status: The most current perception survey data is from 2016, which indicates that 78% of individuals surveyed strongly or somewhat agree that BPRD provides good customer service. This exceeds our established target of 77%. BPRD staff is currently gathering industry data to better understand how this target aligns with targets of similar jurisdictions

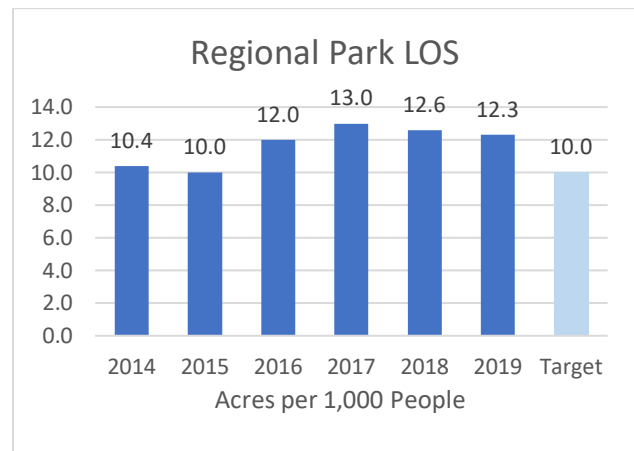
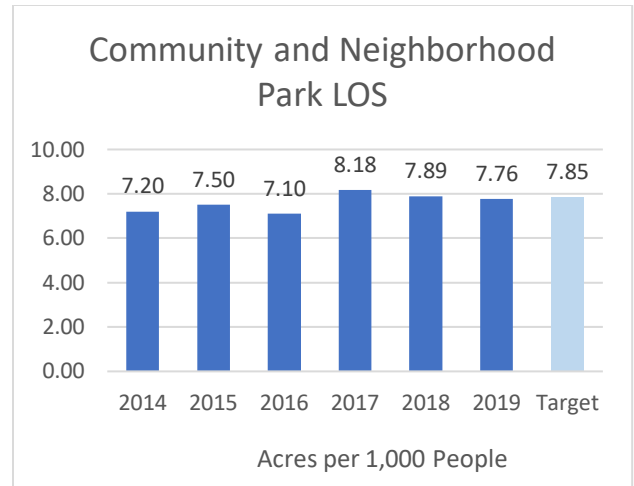
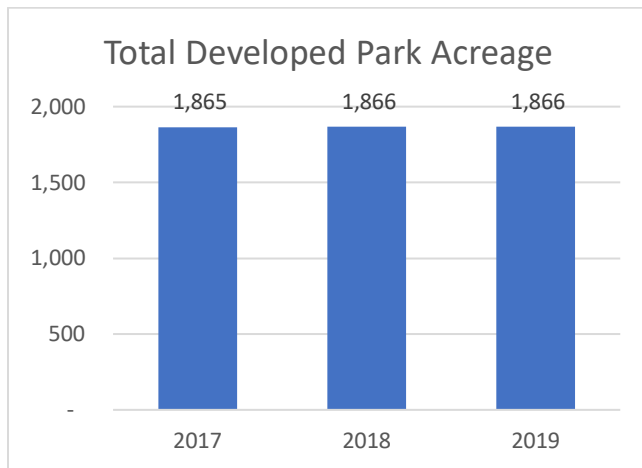


Levels of Service (LOS) in Comprehensive Plan are met or exceeded

Pillar: Operations and Management Practices

Desired Outcome 2: A balance between caring for existing infrastructure and new development

Performance Metric: Total developed park acreage (inclusive of regional, community and neighborhood parks) provided by BPRD.



Key Performance Indicators (KPI) and Target: LOS for parks is measured annually and has the following targets, which were established in the 2018 comprehensive plan.

- Neighborhood and Community Parks – 7.85 acres/1,000 people
- Regional Parks – 10.0 acres/1,000 people

Though the metric for community and neighborhood parks differed prior to 2018, previous years data is included for comparison purposes.

Current Status: BPRD is currently meeting the established LOS target for regional parks, but falling short for neighborhood/community parks. This is a result of rapid population growth and is one of the reasons that BPRD is evaluating proximity to neighborhood or community parks as an additional metric to track to evaluate performance. Specific LOS for 2019:

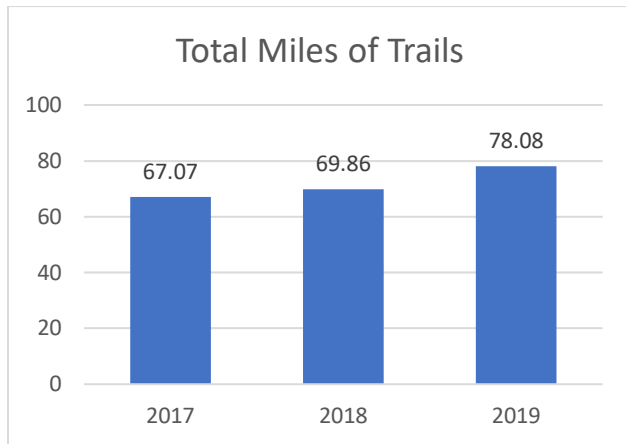
- Neighborhood and Community Parks – 7.76 acres/1,000 people
- Regional Parks – 12.3 acres/1,000 people

Levels of Service (LOS) in Comprehensive Plan are met or exceeded

Pillar: Operations and Management Practices

Desired Outcome 2: A balance between caring for existing infrastructure and new development

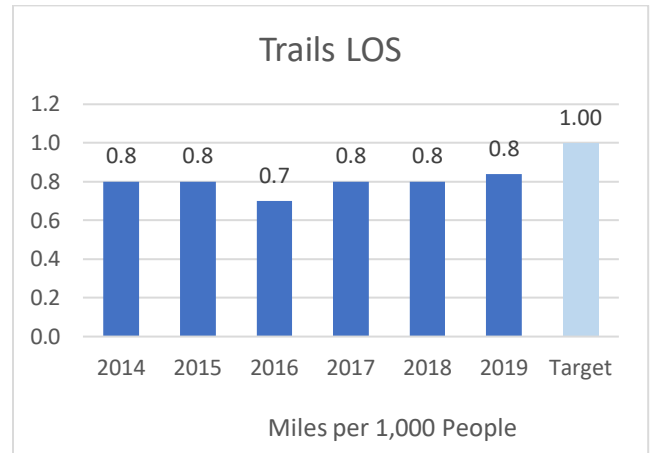
Performance Metric: Total miles of trails provided by BPRD.



*Total trail miles do not include connector trails. Increases in 2018 are attributed to a new counting method and increases in 2019 are partially attributed to digitization of trails/improved mapping

Key Performance Indicators (KPI) and Target: LOS for trails is measured annually and has the following target which was reaffirmed in the 2018 comprehensive plan.

- Trails – 1.0 miles/1,000 people



Current Status: BPRD is currently falling short for trail miles. This is a result of rapid population growth and increased densities, and BPRD is actively working to increase trail mileage and improve trail connections to parks. In addition, as with parks, BPRD is evaluating proximity to trails as an additional metric to track to evaluate performance. Specific LOS for 2019:

- Trails – 0.8 miles/1,000 people

Level of awareness regarding district efforts to be environmentally responsible

Pillar: Operations and Management Practices

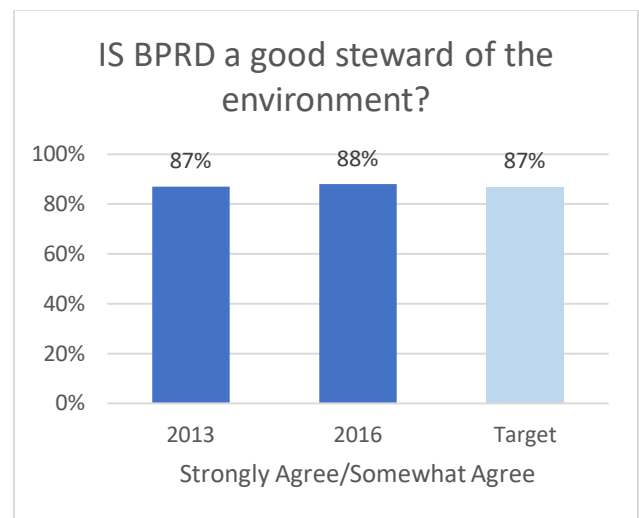
Desired Outcome 3: Be a local leader in environmental stewardship

Perception Survey Question: Do you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with this statement about BPRD – is a good steward of the environment?

Key Performance Indicator (KPI): Percentage of individuals who strongly or somewhat agree that BPRD is a good steward of the environment. This is measured every three years, with a 2013 baseline of 87% of individuals and an established target of 87% of individuals.

Target: The target was established as the average percentage of people in 2013 and 2016 who strongly or somewhat agree that BPRD is a good steward of the environment. This resulted in a target of 87% for the current three-year Strategic Plan period from 2019 to 2022.

Current Status: The most current perception survey data is from 2016, which indicates that 88% of individuals strongly or somewhat agree that BPRD is a good steward of the environment. This exceeds our established target of 87%. This question was not asked in years prior to 2013. Additional data will be available from the 2019 survey.



Residents Served by Organized Recreation Programs

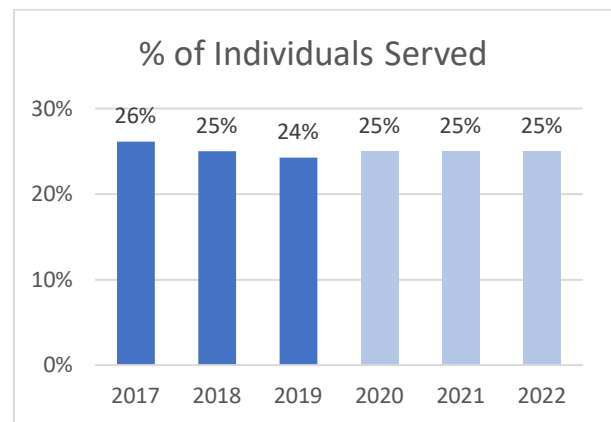
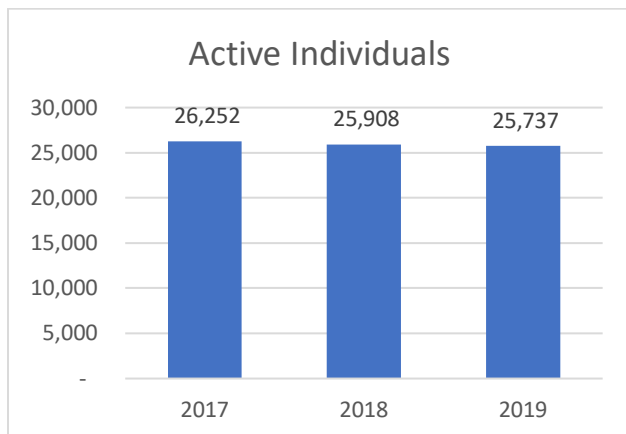
Pillar: Community Relationships

Desired Outcome 3: District Services that are accessible to all

Performance Metric: The number of unique individuals who registered for at least one organized recreation program or purchased a recreation facility multi-day pass during a one-year period. These numbers do not include drop-in, single admission visits to recreation facilities, rental user groups, special events and other activities that do not require individuals to register. Measurement period: Annually from September 1-August 31.

Key Performance Indicator: The percentage of the total estimated district population served by organized recreation activities during the period. The baseline over the past several years is approximately 25%. This is much higher than the national average for park and recreation agencies.

Target: The district's goal is to maintain this high level of participation as the population continues to grow. This will require increasing program and facility capacity to ensure recreation services are accessible to all who desire them.



Status: The district was slightly under the target of 25% in 2019. This is due to the district population growing rapidly and limited additional capacity, especially at recreation facilities. Another contributing factor may be the increasing number of other recreation and fitness providers in the market.

Residents Served by Drop-in Activities at Recreation Facilities

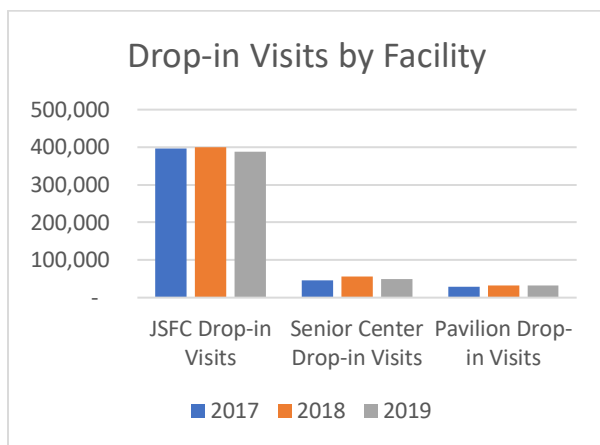
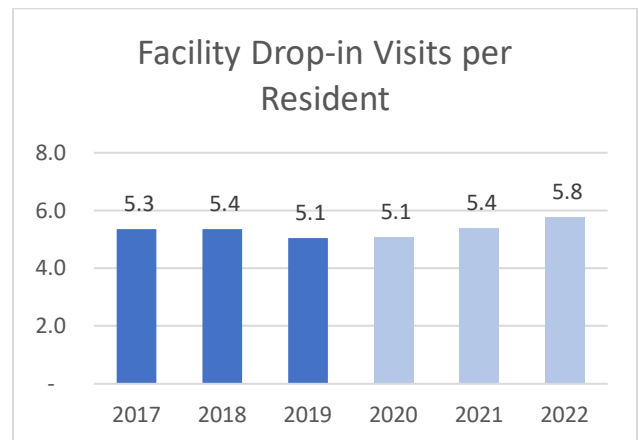
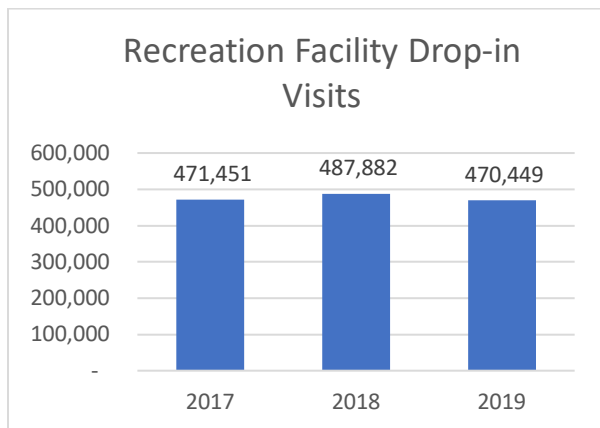
Pillar: Community Relationships

Desired Outcome 3: District Services that are accessible to all

Performance Metric: The number of drop-in visits to district recreation facilities. This includes pass check-ins and single visit admissions for all drop-in activities including swimming, ice skating, roller skating, fitness center and group exercise classes. This does not include visits generated by registered programs and most facility rental groups. Measurement period: Annually from September 1-August 31.

Key Performance Indicator: The number of drop-in visits per resident at district recreation facilities. The baseline has eroded slowly over the past 3 years as population has grown and current facilities are operating near capacity.

Target: With the additional capacity provided by the opening of Larkspur Community Center in the Fall of 2020, the district’s goal is to increase drop-in facility use back to 5.5 visits per resident or higher. The impact will be delayed some due to the closing of the indoor pool at Juniper Swim & Fitness Center for renovation from September 2020-February 2021.



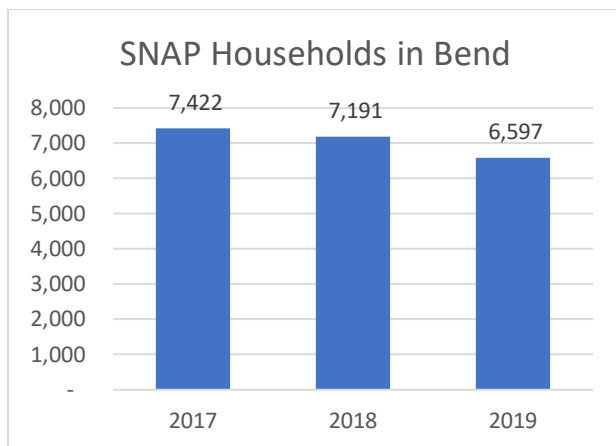
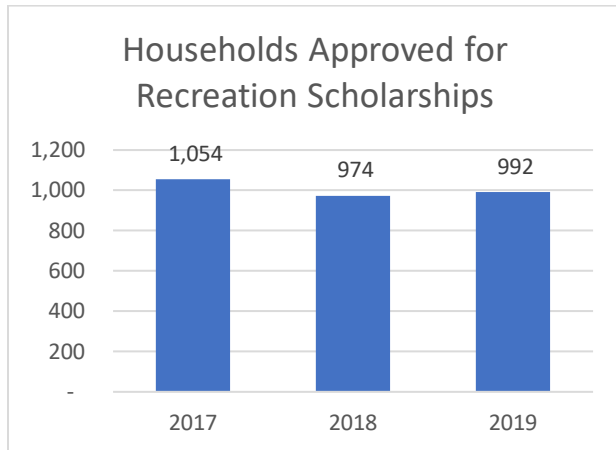
Status: The visits per resident is lower in 2019 than previous years due to a combination of rapid population growth, no new facility development and existing facilities operating near capacity. The closure of the Senior Center during the summer and continued growth in the private fitness market also impacted facility visits some in 2019. Limited growth is expected in 2020 with the first full year of roller sports at the Pavilion and the Senior Center being operational the full year.

Scholarship Program Access

Pillar: Community Relationships

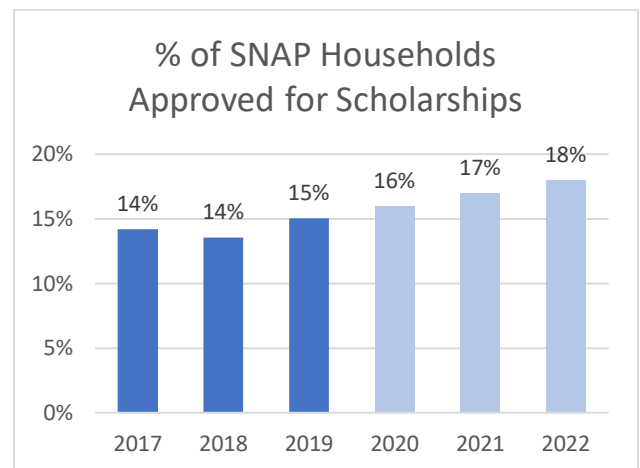
Desired Outcome 3: District Services that are accessible to all

Performance Metric: The number of households that have access to the Recreation Scholarship program. Measurement period: Annually from September 1-August 31.



Key Performance Indicator: The percentage of households qualifying for the recreation scholarship program as a percentage of households qualifying for the Supplemental Nutrition Assistance Program (SNAP). The district uses the same income qualifications as SNAP and the both programs are available to all ages. The current baseline is 14%.

Target: The district's goal is to increase this 1% each year.



Status: The % of SNAP households that also had access to the recreation scholarship program increased to 15% in 2019 as the district saw a slight increase in eligible households at the same time as SNAP qualifying households decreased. This demonstrates that district efforts to increase outreach and streamline qualifying processes have had a positive impact on scholarship access even when the overall need is trending down with a strong economy

Needs-Based Assistance (NBA) Provided

Pillar: Community Relationships

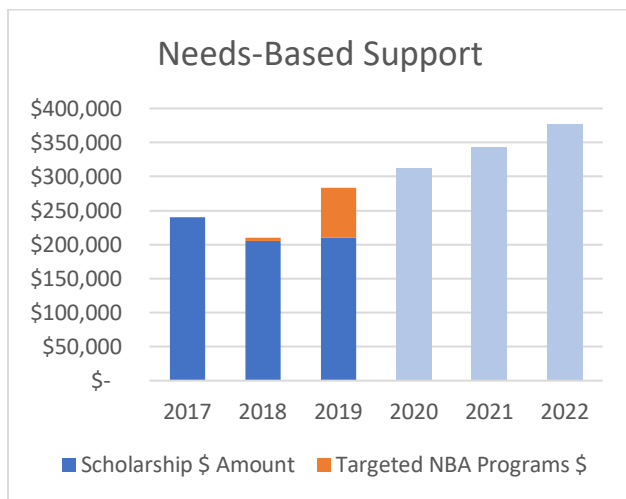
Desired Outcome 3: District Services that are accessible to all

Performance Metric: Amount of needs-based financial support provided including recreation scholarships and programs that exclusively serve low income populations. Measurement period: Annually from September 1-August 31.

Key Performance Indicator: The year over year increase in the amount of need's based financial support provided.

Target: The district's goal is to increase the amount of financial assistance to low income populations by a minimum 10% each year through continued scholarship program outreach efforts and targeted programming efforts.

Status: The amount of financial assistance provided by the district increased 35% from 2018 to 2019. This was largely the result of a substantial increase in investment in programs serving low income populations and a small increase (2.6%) in recreation scholarships. Mid-year trends for the 2020 period are showing a 40% increase in recreation scholarships.



Latino Outreach and Support

Pillar: Community Relationships

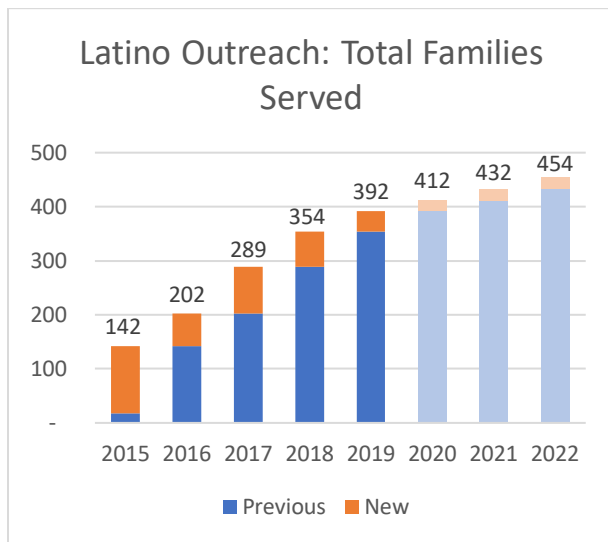
Desired Outcome 3: District Services that are accessible to all

Performance Metric: The number of Latino households or families directly served through the district Latino outreach efforts and support. Measurement period: Annually September 1-August 31.

Key Performance Indicator: The cumulative number of Latino families served by district outreach efforts. Since its inception in 2015, the district has tracked the number of families served. The number of new families reached each year has diminished as the cumulative number of families has grown.

Target: The district’s target is to increase the cumulative number served by at least 5% each year.

Status: In 2019, the district increased the number of families served by nearly 11% to a total of 392 families reached by the program. Increased outreach efforts, including hours worked by the district Latino Outreach Specialist contributed to this.



USER FEES AND CHARGES**SECTION 1: GENERAL POLICY****1. Purpose**

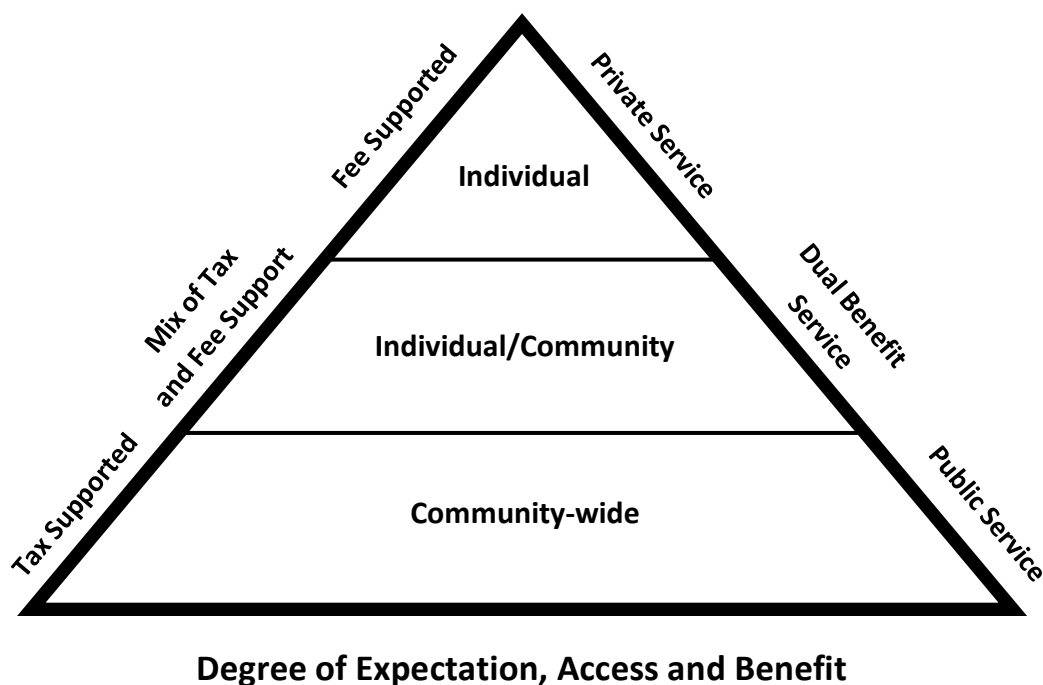
The purpose of the policy is to provide Board direction to staff in setting fees and charges for programs, facilities and other services.

2. Introduction

The Bend Park and Recreation District relies on a mixture of tax revenue and user fees to provide high quality, accessible and diverse park and recreation services to district residents. Tax revenues fund basic services such as parks, trails and natural areas and help support a wide variety of recreation opportunities. Fees and charges are used to offset some or all of the cost of individual participation in a program or use of a facility. Fees and charges shift some of the cost of providing a service to the individuals who benefit directly from it. By charging fees, greater tax support is available to spread over a broader range of services allowing for a more diverse and sustainable park and recreation system.

3. Funding Philosophy

The District approach to funding park and recreation services is represented in the Funding Model below. This model illustrates the relationship between the expectation for, access to and benefit from a service and how the service is funded.



4. General Service Categories

- A. **Community-wide:** Public services that are basic expectations, are widely accessible and provide community-wide benefit make up the base of the Funding Model. These services are usually supported fully or heavily through tax revenues. Examples include: acquiring, developing and maintaining parks, trails and natural areas; completing capital improvement projects; providing essential planning and administrative services; and, facilitating outreach and inclusion so that all may benefit from the system.
- B. **Individual/Community:** Many services provided by the District are not usually considered a basic service but respond to varying levels of community expectations and offer a blend of community and individual access and benefit. These dual benefit services are supported by a mix of user fees and tax revenues proportional to the degree of community expectation and access that the service provides. Examples include: the operation of recreation facilities; most recreation programs; community events; and, facility rentals for non-profit organizations offering community programs.
- C. **Individual:** Services that are not generally expected and/or have limited access and benefit to the community at large are considered private services. These services should not be subsidized through tax revenue and in most cases should generate revenue that help support other services that provide broader community access and benefit. Examples include: concession and merchandise sales; private and/or advanced instruction; and, private and commercial use of facilities.

5. Cost Recovery Methodology

- A. Cost recovery is the method for aligning fee and tax support with the funding philosophy described above. Cost recovery represents the portion of the cost of providing a program or service that is recovered through user fees. Services with broader community expectation, access and benefit therefore should have a lower cost recovery expectation than services that have more limited and individual access and benefit.
- B. Cost recovery expectations for different categories of services are approved and periodically reviewed by the Board of Directors. These cost recovery expectations provide guidance and direction to staff for establishing fees for fee-based services. The cost recovery expectations for service categories are expressed as a range. This is because a variety of factors influence actual cost recovery that cannot always be predicted during the fee setting process including: the number of enrollments; facility utilization levels; and, certain costs. By providing a cost recovery range instead of a single target, it is more realistic to ensure that services are consistently falling in the approved cost recovery guidelines.

6. Subsidy Allocation

Subsidy allocation is the actual amount of tax subsidy that is provided for a service based on the cost recovery expectation. For example, a service that costs \$100,000 to provide and has an 80% cost recovery expectation would require a tax subsidy of \$20,000 whereas another service that has the same cost recovery expectation but costs \$1,000,000 to provide would require a \$200,000 tax subsidy. Because tax subsidy requirements can vary greatly even with the same cost recovery expectation, it is important that subsidy allocation is considered alongside cost recovery. Subsidy allocations for different services are approved by the Board of Directors annually through the budget process.

7. Fee Setting Methods

- A. Fee setting for District programs and services are based primarily on the cost recovery methodology described above. Specifically, this includes:
 - Determining the appropriate category for the program/service
 - Identifying the cost of providing the program/service
 - Applying the approved cost recovery guidelines
- B. Fee setting will also take into account market considerations where applicable including:
 - What people would typically expect or be willing to pay for the service
 - Comparisons with other providers, both public and private, relative to the value of the service
 - Balancing participation goals and affordability with cost recovery expectation
- C. Program fees should at a minimum meet the cost recovery guidelines. Program fees and the resulting cost recovery may be higher when market conditions allow, freeing resources for programs and services that require higher rates of tax support.

8. Fee Setting Authority

- A. The Board of Directors approves cost recovery guidelines for different categories of programs and services. These guidelines are included in this policy and shall be reviewed no less than every four (4) years.
- B. Fees are established by staff for specific programs and services based on the Board-approved guidelines in this policy. Fees will be evaluated and updated to ensure they continue to meet cost recovery guidelines.
- C. The Board delegates to the Executive Director or designee the authority to approve fees that do not meet the cost recovery guidelines.

SECTION II: COST RECOVERY GUIDELINES FOR RECREATION PROGRAMS AND SERVICES

1. **Program Category Descriptions:** District recreation programs and services are separated into the following categories based on the degree of community versus individual access and benefit the program provides and the relative level of expectation and reliance the community has for the program.
 - A. **Issue-Focused Services:** Programs and services designed to address a community issue or need that the District has identified as a priority for use of tax resources. Services such as needs-based assistance, inclusion services, outreach and targeted programming to underserved populations are examples.
 - B. **Core Programs:** Programs that are central to supporting the District’s mission and initiatives and that there is strong expectation that the District provides. It is also unlikely that other providers could meet the community need. Programs in this category have broad interest, access and participation such as public swimming and skating times or serve a strongly identified need such as after school care, swim lessons and youth sport leagues.
 - C. **Complementary Programs:** Programs that complement core services and contribute to fulfilling the District mission but that there is a lower expectation for the District to provide. Similar programs are typically offered by other providers. Programs in this category include activities with more specialized interest and focus and generally lower capacity and participation such as art, enrichment, STEM and facilitated outdoor programs.
 - D. **Specialized Programs:** Programs not expected and/or necessary to fulfill the mission of the District and serve a narrower population or interest. Programs often require a specific skill level and/or have very limited capacity, and are usually offered by private providers as well. Examples include advanced classes and camps, individualized instruction, small group training, etc.
 - E. **Private Benefit Services:** Services that do not directly support the District mission but are desired by some and can produce revenue to help offset the cost of providing public benefit services. Examples include food and beverage sales, merchandise for resale and private rentals of facilities.

2. **Cost Recovery Guidelines:** The following cost recovery guidelines will be used to establish fees for the categories of recreation programs and services described above. Operated facilities include Juniper Swim & Fitness Center, The Pavilion and Larkspur Community Center.

Table 1: Cost Recovery Guidelines for Recreation Programs

Program Category	Operated Facility	Non-Operated Facility
Issue-Focused Services	0-50%	0-50%
Core Programs	60-80%	80-100%
Complementary Programs	80-100%	100-120%
Specialized Programs	100-120%	120-140%
Private Benefit Services	120%+	140%+

3. **Costs Included in Cost Recovery:** The following cost will be considered when applying the cost recovery guidelines to the different categories of recreation programs and services.

Table 2: Costs included in Recreation Program Cost Recovery

Location	Direct Costs	Program Management	Registration	Marketing	Facility Operations	Organizational Support	Capital Costs
Operated Facility	Yes	Yes	Yes	Yes	Yes	No	No
Non-Operated	Yes	Yes	Yes	Yes	No	No	No

- **Direct Costs** – costs directly associated with providing the program including staff wages, payroll taxes and benefits, consumable program supplies, etc.
- **Program Management** – costs of planning, coordinating and managing the program including staff wages, payroll taxes and benefits, and indirect costs such as office supplies, phone, staff training, etc.
- **Registration** – costs associated with registration and customer service to support the activity including customer service wages, payroll taxes and benefits, credit card processing fees, printing, etc.
- **Marketing** – costs associated with marketing and communication efforts including the production and mailing of the program guide, website management, advertising and other collateral material.
- **Facility Operations** – direct costs of operating and maintaining facilities including utilities, maintenance, repairs, janitorial, and staffing and materials required to support the ongoing maintenance and operations of a facility.
- **Organizational Support** – services that support the overall operation of the District, including: Human Resources, Finance, Business, IT, Community Relations, Planning and Development, Executive Directors office, etc.
- **Capital Costs** – the initial capital costs to develop the facility, including annual debt service payments or depreciation of these investments and ongoing capital costs required to maintain and improve District facilities and assets.

SECTION III: COST RECOVERY GUIDELINES FOR RENTAL FACILITIES

1. **Rental Definitions:** A facility rental is considered any third party reserved use of a District park, facility or portion thereof. Facility rentals are divided into the following three service categories for cost recovery consideration.
 - **Community Events:** Functions that are promoted as community-wide events and open to all who choose to participate.
 - **Organized Sport User Groups:** Use of facilities to operate organized sports or other recreation activities that are open with some limitations to registered participants.
 - **Exclusive Functions:** Rentals intended for exclusive use by invited guests such as weddings, birthday parties, holiday parties, reunions, etc.

2. **Renter Types:** The District recognizes four types of renters in its cost recovery guidelines. The renter type is based on the purpose of the rental function rather than the renting entity.
 - **Partner:** Renter is a formal partner of the District for the rental function.
 - **Non-profit:** Renter is a non-profit organization conducting activities that directly support the mission and purpose of the non-profit organization.
 - **Private:** Renter is a private individual.
 - **Commercial:** Renter is engaging in a commercial “for-profit activity” whether a fee is charged directly or not.

3. **Cost Recovery Guidelines:** The following cost recovery guidelines will be used to establish fees for the various categories and types of facility rentals.

Table 3: Cost Recovery Guidelines for Rental Facilities

Rental Function	Partner	Non-Profit	Private	Commercial
Community Events	0-50%	50-75%	N/A	100-125%
Organized Sport User Groups	0-50%	75-100%	100-125%	125-150%
Exclusive Rentals	0-50%	100-125%	125-150%	150-200%

4. **Costs Included in Cost Recovery:** The following cost will be considered when applying the cost recovery guidelines to the different types of facility rentals.

Table 4: Costs included in Rental Facility Cost Recovery

Facility Type	Reservation	Direct Service	Facility Operations	Organizational Support	Capital Improvements	Capital Costs
Parks & Shelters	Yes	Yes	No	No	No	No
Athletic Fields	Yes	Yes	No	No	No	No
Recreation Facilities	Yes	Yes	Yes	No	No	No
Rental Halls	Yes	Yes	Yes	Yes	Yes	No

- **Reservation** – costs associated with reserving and renting the facility, including processing reservations, credit card procession fees, permits, logistical plans, etc.
- **Direct Service** – cost of direct services provided by the District to support the rental activity such as athletic field preparation for specific activity, athletic field lighting, additional trash or restroom service, site and utility modifications, staff logistical support, delivery and/or set-up of equipment, etc.
- **Facility Operations** – direct costs of operating and maintaining a park or facility including utilities, maintenance, janitorial service, general turf maintenance, staffing and materials required to support the ongoing maintenance and operations of a facility, etc.
- **Organizational Support** – services that support the overall operation of the District, including: Human Resources, Finance, Business, IT, Community Relations, Planning and Development, Executive Directors office, etc.
- **Capital Improvements** – capital costs required to maintain and improve District facilities and assets.
- **Capital Costs** – the initial capital cost to develop the facility, including annual debt service payments or depreciation of these investments.

SECTION IV: OUT-OF-DISTRICT USE AND FEES

1. Philosophy: The Bend Park and Recreation District was established to provide park and recreation services to those who reside or own property within district boundaries. District residents and property owners pay taxes to support District operations. The District recognizes visitors and residents from outside of the District's boundaries will also use and enjoy District parks, facilities and programs. In order to limit the financial subsidy of providing services to non-resident users and ensure that non-resident users pay their fair share for services, the District will normally assess additional fees to non-resident users where fees are charged.

2. Recreation Programs

A. Most District recreation programs are designed primarily to serve and benefit district residents; however, the District encourages non-resident participation as many would not otherwise have access to these services. Non-resident participation can also contribute to the overall financial viability of programs by filling available spots. In the event that non-resident participation significantly displaces district residents, the District will consider implementing priority registration to district residents through early registration or other means.

B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to participate in most recreation programs. The following recreation programs are exempt from out-of-district fees:

- Drop-in fees at recreation facilities (due to the difficulty in verifying District residency)
- Programs offered in partnership with Bend-La Pine Schools (for students who reside outside the Bend Park and Recreation District, but within the Bend-La Pine School District boundaries)
- Private-benefit and specialized services that exist to generate revenue and do not require tax support (i.e. concession and merchandise sales, personal instruction, specialized training, etc.)
- Exceptions as granted by the Executive Director

3. Facility Rentals

A. District facilities are developed and operated primarily to benefit district residents. Many of these facilities are made available for rent by private parties or organizations. The District will prioritize residents when feasible; however, many facilities are scheduled on a first come, first serve basis so resident priority is not possible.

B. Non-residents will be charged a 20% out-of-district fee in addition to the in-district fee to rent facilities. The following rentals are exempt from out-of-district fees.

- Governmental agencies or non-profit organizations serving district residents
- Exceptions as granted by the Executive Director

SECTION V: NEEDS-BASED ASSISTANCE

- 1. Philosophy:** The District believes that everyone should have the opportunity to benefit from recreation activities. The District provides this opportunity by offering a diverse array of recreation options, from parks and trails to recreation facilities and programs. Many recreation options are available to the public without charge, including: parks, trails, playgrounds, outdoor basketball courts, skate parks, tennis and pickleball courts, etc. Most organized recreation programs and indoor recreation facilities require a fee to participate. The District recognizes that these fees can present a barrier for some. As a result, the District provides assistance to facilitate access to fee-based recreation programs and facilities for those who are unable to pay the regular fee. While the District would like to make all programs available to district residents regardless of ability to pay, services must be prioritized to ensure that the highest and most critical needs are met with available resources.

- 2. Types of Needs-Based Assistance:** Financial assistance is provided by the District through two primary methods.
 - A. Recreation Scholarship Program** uses resources from a specifically budgeted line item to fund a portion of the regular participation fees. The Recreation Scholarship Program is supported through revenue received from cell phone tower leases, Bend Park and Recreation Foundation donations, and General Fund tax resources.
 - B. Free or Low Fee Programs** includes programs that are offered free to the entire community and/or subsidized services that target low income families and individuals.

- 3. Eligibility For Needs-Based Assistance:**
 - A.** Eligibility will be based on Federal Poverty Guidelines for household income and family size. The District will have a two-tiered system: high need and moderate need. To the degree possible, the qualifying income levels will be coordinated with other assistance programs including school Free and Reduced Lunch Program, SNAP, TANF and Oregon Health Plan,
 - B.** The District will work with the Family Action Network and other local agencies to identify and address extreme cases where assistance programs are not adequate to facilitate participation.

- 4. Funding Priorities:** In order to ensure the most critical needs and services are funded, the following priorities have been established:
 - A.** Priority will be given to the following **populations** in order:
 1. Individuals with disabilities, including those on long-term disability.
 2. Youth 18 years and younger.
 3. Adults 19 years and older with qualifying health considerations.
 4. General senior population (65-years or older).
 5. General adult population (19-64 years).

- B. Priority will be given to the following **programs/services** in order:
 - 1. Issue-focused programs.
 - 2. Core recreation programs.
 - 3. Complementary recreation programs.
 - 4. Needs-based assistance will not be offered for specialized programs, private services, rentals or the out of district portion of fees.

5. Needs-Based Assistance Plan and Funding:

- A. An annual Needs-Based Assistance Plan including recommendations regarding service levels and funding requirements will be approved by the District Board of Directors.
- B. The funding required for the Needs-Based Assistance Plan will be approved through the budget process each year.
- C. The following strategies will be considered if the approved funding is not adequate to meet the demand for needs-based assistance.
 - 1. Suspend funding to lower priority populations.
 - 2. Suspend funding of complementary recreation programs.
 - 3. Reduce the percentage of fee covered by needs-based assistance programs.
 - 4. Implement limits on the amount of funding received per individual/household.