



# KIRKLAND PARK BOARD REGULAR MEETING

Date: April 11, 2018

Time: 7:00 p.m.

Place: Council Chambers, City Hall

*The mission of the Park Board shall be to provide policy advice and assistance to the Department of Parks and Community Services and City Council in order to ensure the effective provision of Parks and Community Services programs and facilities to the residents of the City of Kirkland.*

## AGENDA

Estimated Time:

1. **CALL TO ORDER**
2. **ROLL CALL** 5 minutes  
Welcome new Park Board Member Uzma Butte  
Welcome Park Board Alternate Member Mike Holland
3. **APPROVAL OF MINUTES** 5 minutes
4. **ITEMS FROM THE AUDIENCE** 5 minutes
5. **REVIEW OF ACTION ITEMS**
6. **PRESENTATIONS**
  - 1) Introduction of new Parks and Community Services staff members
    - a) Ryan Fowler – Parks Maintenance Supervisor
    - b) Heather Lantz-Brazil – Administrative Assistant
7. **COMMUNICATIONS** 20 minutes
  - a. Correspondence
  - b. Staff Reports
  - c. Committee Reports
  - d. Comments from the Chair

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**8. UNFINISHED BUSINESS**

- a. Juanita Beach Bathhouse Project Update 15 minutes  
*Action: Discussion only*
- b. 2019 – 2024 Parks CIP 20 minutes  
*Action: Board motion to approve or amend the staff recommendation*

**9. NEW BUSINESS**

- a. Neighborhood Liaison Assignments 5 minutes  
*Action: Confirm Assignments*
- b. Cost Recovery Study Introduction 20 minutes  
*Action: Information only*

**10. GOOD OF THE ORDER**

- a. Discussion items or questions for Board liaison role 5 minutes  
*Action: Bring input to next Park Board meeting*

**11. ADJOURNMENT**

Estimated meeting completion: 9 p.m.

Next meetings:

May 9, 2018  
June 13, 2018  
July 11, 2018

# **KIRKLAND PARK BOARD**

## **Minutes of Regular Meeting**

### **March 14, 2018**

#### **1. CALL TO ORDER**

The March 14, 2018 Park Board Regular meeting was called to order at 7:00 p.m. by Chair Rosalie Wessels.

#### **2. ROLL CALL:**

Members Present: Vice Chair Kelli Curtis, Jason Chinchilla, Sue Contreras, Kobey Chew, Kevin Quille and Chair Rosalie Wessels

Richard Chung arrived at 7:02 p.m.

Susan Baird-Joshi was excused.

Staff Present: Jason Filan, John Lloyd, Lynn Zwaagstra and Michael Cogle

Recording Secretary: Cheryl Harmon

#### **3. APPROVAL OF MINUTES**

The minutes from February were presented. Ms. Contreras requested an amendment to the minutes. Ms. Contreras moved to approve the minutes as amended, Mr. Quille seconded. The motion carried (6-0; Mr. Chung was absent).

#### **5. ITEMS FROM THE AUDIENCE**

No items

#### **6. PRESENTATIONS**

##### **a. Green Kirkland Partnership 2017 Report**

Green Kirkland Partnership Supervisor, Sharon Rodman, presented a report on 2017 Green Kirkland Partnership progress, shared recruitment details for new park stewards, answered questions from Board members, and announced two events: April's Earth Month, and a celebration for volunteer David Ramsay at Carillon Woods Park.

#### **7. COMMUNICATIONS**

##### **a. Correspondence**

Correspondence was received from C. Miller, and the Juanita Neighborhood Association.

b. Staff Reports

Ms. Zwaagstra reported on playground maintenance, the finalization of a contract for a cost recovery study, and the hiring of a new administrative assistant. Staff responded to questions and comments concerning the monthly report.

Mr. Chew and Ms. Contreras will be honored at the City's upcoming volunteer recognition event.

c. Committee Reports

Ms. Contreras reported on playground equipment at Juanita Beach Park, and plant potting at McAuliffe Park.

Mr. Chung reported on the City's volleyball leagues.

Mr. Chew reported on an interview for the KITE STEM Challenge.

Ms. Wessels reported on the Juanita neighborhood meeting.

**8. UNFINISHED BUSINESS**

a. 2019-2024 Capital Improvement Project (CIP) Funding Plan

Mr. Cogle presented a review of the project scoring for potential CIP projects, shared a preliminary CIP funding plan, and answered questions related to the proposed funding plan.

**9. NEW BUSINESS**

No items.

**10. GOOD OF THE ORDER**

a. Ms. Zwaagstra discussed the Board's assignments to the neighborhood associations.

b. The Board and staff thanked Ms. Contreras for her years of service on the Board.

**11. ADJOURNMENT**

Ms. Contreras moved to adjourn the meeting, Mr. Quille seconded. The motion carried (7-0). The meeting was adjourned at 8:43 p.m.

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Lynn Zwaagstra, Director  
Parks and Community Services

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Rosalie Wessels, Chair  
Park Board

**From:** Bill Blanchard  
**To:** [Park Board](#)  
**Subject:** For Kelli Curtis  
**Date:** Wednesday, March 21, 2018 4:40:58 PM

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Hi Keli,

I'm on the Board of Directors for Finn Hill and I'm reaching out to you today because you are our liaison for the park.

We'd love to meet with you and talk about Big Finn Hill Park!

I look forward to meeting you in the future.

Thanks,

Bill Blanchard  
Finn Hill Neighborhood Alliance  
Board of Directors

## **Parks and Community Services**

### **Department Report – March 2018**

#### **Administration, Planning and CIP Projects**

- Totem Lake Park Development Phase 1 – On March 6 staff provided the City Council with an update on the project. The Council provided staff with positive feedback and also supported the integration of a 'sprayground' into the children's play area. The consultant team will further refine the park design in anticipation of an open house to be scheduled in June.
- Marina Pier Improvements – Construction activities have concluded at the park. Renovation work to the pier included replacement of deteriorated wood piles, structural supports, and fascia boards.
- Edith Moulton Park Development – General contractor Allied Construction is nearing the mid-point of their construction schedule, with upcoming work to include installation of dog trail fencing, boardwalk construction, and foundation work for the new picnic shelter. A 'soft' park opening will occur in June with an official grand opening ceremony to be scheduled in July.
- Juanita Beach Bathhouse Replacement – The architects are about 60% complete with design work. Public comment has concluded on an application for a stream setback variance, with a public hearing to be scheduled in May. A project update will be provided to the Park Board in April.
- 2019 – 2024 Capital Improvement Program – A preliminary new six-year funding plan for the CIP was reviewed by the Park Board this month and will be presented to the City Manager in April. The plan proposes distribution of over \$20 million from 2019 to 2024 across a variety of park renovation, development, and acquisition projects. Revenue sources include real estate excise tax (REET), development fees (Park Impact Fees), the 2012 Kirkland Parks Levy, and the King County Parks Levy.
- Cost-Benefit Study - Parks and Community Services is kicking off a "cost recovery study". More accurately, this can be considered a cost-benefit analysis resulting in a pricing and subsidy allocation philosophy. The goal is to articulate and illustrate a comprehensive cost recovery and subsidy allocation philosophy in order to ensure a sustainable system into the future by using tax revenues and fees in the most appropriate ways.
- Park Planning and Development Manager Hiring – Due to Michael Cogle's retirement, staff are working on hiring a Park Planning and Development Manager. Applications were reviewed and the goal is to have the manager onboard May 1 in order to train with Mr. Cogle.
- Administrative Assistant – Heather Lantz-Brazil joined the team as the Department's new Administrative Assistant. Heather comes to the city with years of experience with personnel management and administration. She is a certified administrative and nonprofit professional and holds a degree in Recreation and Sport Management.

### **Parks Maintenance and Operations**

- Sometimes winter projects involve smaller projects to keep the amenities in good order. A new climbing trellis built by Sr. Grounds Staff, Carol Dean.



*Back patio of Heritage Hall*

- This month Horticulture staff began the crime prevention through environmental design, (CPTED) projects at Juanita Bay Park and OO Denny Park. The work primarily involves trimming-up tree branches and heavy pruning of shrubs to create visibility from the street frontage.
- Ballfield season is in full-swing this month. Staff are busy trying to keep fields playable while working with the nice spring rains!
- This month staff begin the weekly process of getting everything mowed. Green grass abounds and we are thankful for the cooler temperatures in this transition month.
- Special thanks to the Parks Operations team for receiving the award for “Most Work Orders Completed” in a quarter. Staff completed a little over 11,000!
- Special thanks to Neptune Marine for their work at Marina pier. 95% of the work they did was under water and hard to appreciate. They were great to work with and did a great job.
- The pool shell continues to come along. The contractor is making good progress and we are looking forward to refilling the pool this month.
- Special thanks to Hydroseeding & Barkblowers Inc. for their help in blowing 1,233 yards of ADA accessible play chips this past month. All (26) play areas received a full complement of product.
- A couple interesting stats for the month: (thank you GIS)
  - Its .41 miles to walk the pier loop and promenade at Juanita Beach Park.
  - Our Park system contains 27,266,136 square feet of park lands.

## Recreation

- Staff are working with the City's Fleet Manager on replacement of two vehicles:
  - A new Dodge Grand Caravan minivan has been ordered to support both Green Kirkland and Recreation staff. Fleet assisted us in finding this vehicle that serves two purposes: cargo (with seats stowed away) and up to 7 passengers when needed.
  - For risk management purposes and at the suggestion of the Washington Cities Insurance Authority (WCIA), we are accelerating replacement of the Department's larger passenger van with a new Ford StarCraft All-star van that accommodates up to 12 passengers plus 2 wheelchairs. We are very pleased to have a vehicle to assist with the high demands for our afterschool programs and day camps. It will be wrapped in the same branding – picture of Marina Park waterfront including the Puddle Jumpers artwork and [www.Kirklandparks.net](http://www.Kirklandparks.net).



*A new 12-passenger van will help with transport of program participants.*

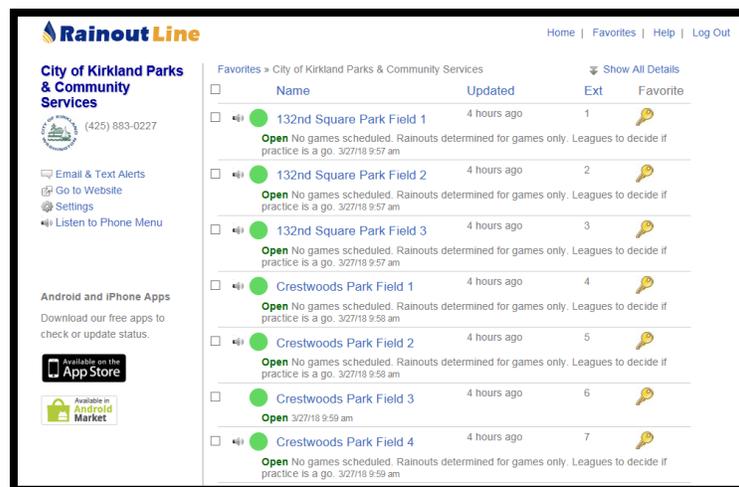
- After only 10 days of registration there are 1,300 registered preschoolers, and 575 on waiting lists, for NKCC spring and summer preschool programs.
- Preschool Giggles and Grins art-based camps are completely full for the full eight weeks, for a total of 96 children. Of 96 spaces available, only five openings remain for the Preschool Theater Camp.
- There are 415 youth currently enrolled in a variety of spring and summer programs at North Kirkland Community Center, some of which include dance, self-defense, engineering, and jump roping. A combined total of 665 youth are enrolled in spring break and summer camps at NKCC. Junior Camp was the first to fill by 6:30 a.m. on day one of registration. A total of 348 are on various camp waiting lists.
- Adult Volleyball Spring Season is underway. We have 47 teams playing at Kamiakin Middle School and Emerson High School.

- Pee Wee Multi-Sport has 68, 3-to-6 year olds playing a variety of sports from basketball, t-ball, soccer, and kickball on Saturdays at Finn Hill Middle School.
- Pee Wee Soccer registration is almost full with 395 of the 400 spots filled; season begins April 21.
- The first ever Mermaid Ball held on Friday, March 23 sold out with 100 registered participants plus 100 escorts. An “under the sea” theme transformed the multi-purpose room while couples danced the night away.



*The inaugural Mermaid Ball was a smash hit and went swimmingly.*

- New KTUB Director, David Toledo, has been hired by the YMCA and will begin March 19. David has been Director of Extended Learning with YMCA's Powerful Schools programs for the past year, and prior to that he spent 17 years leading programs for Unified Outreach – an organization focused on bringing arts programs and services to transitional housing, shelters, and youth populations in the Seattle area. David brings a strong background in youth development, program operations, social justice work, community building and visual arts.
- Aquatics planning and hiring process continues. Over 53 applicants have applied for aquatics seasonal employment. Selected candidates will staff Houghton, Juanita and Waverly Beaches and Peter Kirk Pool as well as teach a variety of programs including swim team, swim lessons, stroke lessons, and lifeguard training courses. Peter Kirk Pool will open June 4 and lifeguards will begin guarding the beaches July 1.
- As of Tuesday, March 20, 1,841 infants, preschools, youth, teens and adults are registered for Learn-to-Swim summer swim lessons, with 250 people on the wait-list.
- The Peter Kirk Day Camp is currently at 70% capacity for the summer and the Afterschool Camp program for the 2018-2019 school year is currently at 100% capacity with a wait list.
- Summer Day Camp staff recruitment is underway; we will be hiring for both the Peter Kirk Day Camp and the North Kirkland Junior Camp. Interviews will be held in the middle of March, we will be hiring two directors and eight counselors for the program.
- The City's Annual Volunteer Recognition will be held at PKCC this year on April 12. The PKCC staff is always pleased to be part of this much loved event.
- Peter Kirk Pool is now available for online private rental reservations through CivicRec. Customers can now reserve their summer pool parties without having to come in to a facility or pick up the phone!
- Staff began using our new online Playfield Rainout Line system on Friday, March 23. Customers are now able to view the rainout status of each field through the website option (<https://rainoutline.com/search/dnis/4258830227>). Customers can also sign-up to be notified by text or email if all fields or a specific field are available for play. This will be a great customer service enhancement for our staff and the general public as we continue into the busy season!



A screenshot from the new online field status system – Rainoutline.com

- The Customer Service Hub team is now in the process of transitioning the Harbor Master program from Parks Maintenance. The Harbor Master position has been posted to the GovJobsToday.com website. Harbor Master staff should be in place for the start of the summer months sometime in May. The Harbor Master program runs Memorial Day to Labor Day each year (May 28 - September 3 for 2018) at the downtown marina at Marina Park.
- The City’s Pea Patch program has one plot remaining to be booked for the season. There are currently seven interested gardeners on the wait-list for this year. Staff should be filling the spot shortly.
- Seattle Tilth Alliance are offering four gardening classes this season for gardeners that have reserved plots at the three Pea Patch sites. The first class will take place on Sunday, April 15 at McAuliffe Park.
  - The first day of 2018 Spring/Summer registration was a huge success. Comparing 2017 to 2018, first day registrations increased by 843 transactions, 1724 in 2017, 2567 in 2018. Staff did an incredible job on the first day!

	2017	2018	Variance between 17 & 18	Percent Difference
First day Spring/Summer Registration Revenue	\$349,687	\$541,554	+\$191,867	+55%

*CivicRec “Go Live” was in March 2017*

- The first week of registration kept up the great momentum from the first day. CivicRec did have a credit card outage that lasted from Friday, March 16 to 12:19pm on Monday, March 19. Even with the outage, staff continued to take registrations/reservations and followed up with customers when the credit card system came back online. The tables below compare registration numbers for this year and last year through March 26:

<b>Start of Registration (March 15-26)</b>	<b>2017</b>	<b>2018</b>	<b>Difference</b>
<i>Transactions</i>	2,975	4,062	26.76%
<i>Revenue</i>	\$465,079	\$641,709	27.52%

<b>Start of Registration (March 15-26)</b>	<b>2017 Transactions</b>	<b>2017 Revenue</b>	<b>2018 Transactions</b>	<b>2018 Revenue</b>
<i>Online</i>	2,242	\$412,942	3,096	\$575,877
<i>Phone and Over the Counter</i>	549	\$52,137	950	\$65,832
<i>Percent Online</i>	75.51%	87.37%	69.32%	88.57%
<i>Percent Phone &amp; OTC</i>	24.49%	12.63%	30.68%	11.43%

### **Youth Council**

- Filming for the next “We’ve Got Issues” video is complete. Editing sessions will be taking place beginning in early April. The KYC project team is hoping to have the video complete by May.
- Five cases were heard at the March session of Student Traffic Court.

- Leadership met with Superintendent Traci Pierce on March 8. Topics of discussion included technology, the failed bond measure, and school safety.
- The 2018 Kirkland Youth Summit took place Thursday, March 29. Fifteen KYC members completed a two hour facilitator training conducted by David Wolbrecht, Neighborhood Services Coordinator, in order to lead breakout sessions at the Summit. Summit participants will be delving into four main topics: Transportation System and Options, School Safety, Student Rights, and Improving Parks for Teens. Over 150 Kirkland youth are signed up for the event.

### **Senior Council**

- Over 100 people attended the Senior Property Tax Forum on March 13 at City Hall. Featured speakers were King County Assessor John Wilson and Elena G. Huizar from the Washington State Attorney General's office. The presentation was filmed and can be watched on the City's YouTube Channel – <https://youtu.be/tipPIhgzfdA>
- Neighborhood Services Coordinator David Wolbrecht attended the March meeting to discuss the City's neighborhood network.
- Several members are currently working on updating the Community Resource Guide that was last published in 2015. The hope is that a new edition will be completed by late summer.
- The next event for KSC will be the Senior Art Show that runs June 7-22 at Merrill Gardens.

### **Human Services**

- Human Services Commission - At the Commission's March meeting, members discussed lessons learned over the last six months and how the information may inform the upcoming grant process.
- Permanent Shelter for Women and Families with Children - The State Housing Trust Fund awarded two million dollars to the project!
- Eastside Advocacy and Collaboration - Leslie facilitated a joint meeting of human services city staff from north, east and south jurisdictions.
- One Table - Leslie continues to participate in the regional One Table homelessness initiative on behalf of Mayor Walen.
- Leslie assisted with Eastside Race and Leadership Coalition's first regional equity summit.

### **Green Kirkland Partnership**

- On March 3, the GKP Supervisor attended a Washington Native Plant Society Stewardship Summit in Seattle to continue a stewardship partnership with WNPS, which has trained three groups of Native Plant/Green Kirkland Stewards since 2009.
- On March 5 and 8, 25 middle school students from Environment and Adventure School in Kirkland joined Green Kirkland Stewards at Crestwoods and Juanita Bay Parks for two days of environmental service learning projects.

- On March 10, EarthCorps and Green Kirkland launched the first of 12 community stewardship events. Over 45 community members joined Green Kirkland at O.O. Denny Park, saving 18 mature trees from invasive ivy at this event. This event was made possible with support from the King Conservation District.
- In early March, Green Kirkland Stewards finished potting over 800 native plants. Plants were both donated from the community and secured with King Conservation District funds.
- On March 18 UW-REN students and Green Kirkland staff hosted 15 community members at an environmental stewardship event to plant the final native plantings before summer at North Rose Hill Woodlands Park.
- On March 19 Green Kirkland staff accepted an invitation to meet with the North Rose Hill Neighborhood Association and provide an update on Earth Month activities and other opportunities for the NRH neighborhood to participate in the Green Kirkland Program.
- At the March 20 City Council meeting Green Kirkland Stewards, GKP staff, and UW Restoration Ecology Network students joined the City's Green Team staff and associated community groups, as Mayor Walen officiated for the City's first April Earth Month Proclamation.



*Mayor Walen proclaimed April as Earth Month. Supporters participating at the March 20<sup>th</sup> City Council meeting included Green Kirkland Stewards and staff, and UW Restoration Ecology Network students.*

- On March 24 Green Kirkland staff hosted new steward orientation for 12 community members. Attendees were trained in best practices for volunteer event management, environmental restoration, and an overview of the Green Kirkland Partnership. Attendees represented the Finn Hill, Evergreen Hill/Kingsgate, Totem Lake, North Rose Hill, and Juanita neighborhoods, demonstrating broad interest in the program across Kirkland's neighborhoods.
- On March 24 and 25 Green Kirkland Stewards and staff hosted four environmental stewardship events at Josten, Juanita Bay, OO Denny, and Crestwoods parks. Over 50 community members joined these projects with Girl Scout troop 45355, St. John Vianney Church, and Kirkland Builders Club in attendance.
- On March 28 and March 30 Green Kirkland Stewards hosted two stewardship events at Juanita Bay Park with local employees from Amazon and QuarDev in attendance alongside community volunteers.

- Applications for the six-month GKP Seasonal Laborer position are being processed. Interviews will be held in early April. The successful candidate will start work in May.
- On March 28, the GKP Supervisor attended Forterra’s annual Green Cities Network Summit held this year in Des Moines, which has recently joined the 12-city network. Cities participating in the Green Cities Network shared information on how restoration benefits extend beyond parkland, such as for stormwater management.



*On March 10, Green Kirkland and partners at EarthCorps hosted a community service event. Over 45 volunteers helped to save mature trees at O.O. Denny Park from invasive ivy.*

#### Upcoming Events:

- April is Earth Month and GKP has public events every weekend and many week days to celebrate in conjunction with other City Departments.
- The Washington Conservation Corps will be returning to Kirkland, April 16 to 19, to help maintain restoration sites in stream buffers in Everest and Watershed parks.
- **Saturday April 7**, from 10 a.m. to 2 p.m. GKP and EarthCorps will host an environmental stewardship event at Juanita Bay Park. This event is open to the public and made possible with support from the King Conservation District.
- **Saturday April 14**, from 10 a.m. to 12 p.m. Green Kirkland Stewards host environmental stewardship events at Juanita Beach Park and Josten Park. Both events are open to the public.
- **Saturday April 21**, from 10 a.m. to 2 p.m. GKP and EarthCorps will host an environmental stewardship event at North Rose Hill Woodlands Park. Dignitaries will be making speeches between 12:00 and 12:30 p.m. at this Earth Month pinnacle activity. This event is open to the public and made possible with support from the King Conservation District.
- **Saturday April 28**, Green Kirkland Stewards host an environmental stewardship event at Juanita Bay Park from 10 a.m. to 1 p.m. This event is open to the public.

#### **Special Events & Special Events Service Team**

- Staff supported the following events through permitting; coordination with other City departments for street closures, fire and police support, safety and sanitary regulations and banners; City facility use such as parks, parking lots and streets; evening and weekend on-call logistical support as needed; and communication with the public:

○ ***Kirkland Parent March, March 14***

Local parents showed commitment to their children’s safety by participating in the Kirkland Parent March which was organized by the parent of a Ben Franklin Elementary student. Immediately following the national student led walkout, parents marched with signs in hand from their local neighborhood schools to City Hall. While at City Hall participants had the opportunity to meet with the Mayor, Councilmembers, Police, Fire and City staff to discuss what the community can do to protect children. Staff provided support through safe route design and dedicated police escorts for each participating school.

○ ***Kirkland Shamrock Run, March 17***

Registration for the 7<sup>th</sup> annual Kirkland Shamrock Run sold out nearly a week in advance of the race this year, eliminating event day walk-up registration for fair weather runners. Due to the shorter 5K distance, the race is capped at 1,500 athletes which allows us to keep runners contained to one lane of traffic. The route requires twenty off-duty officers, nearly forty course monitors and coordination with King County Metro. Park Board Chair Rosalie Wessels (center photo) approaches the finish line with a big smile.



*2018 Kirkland Shamrock Run*

○ ***Nowruz Celebration, March 18***

The Iranian Society of Washington State hosted the third annual Nowruz Celebration (Persian New Year) at Marina Park. The holiday was celebrated with hot traditional foods, festive music, and dancing. Event organizers pose (center photo) in front of the Haft-Seen which is a traditional display of seven symbolic items that all start with the letter Seen in the Persian alphabet. Event support included sanitation, maintenance, and safety inspections by City staff and the King County Health Department.



*2018 Nowruz Celebration*

○ ***Ecumenical Good Friday Service, March 30***

St. John’s Episcopal Church hosted their annual Good Friday service which included a procession of approximately 75 congregation members from St. John’s on State Street to Marina Park where a brief service was held in the Pavilion.

Special Events Team (Sudie Elkayssi):

- Sudie Elkayssi shared a draft of the 2017 Special Event Cost Analysis report, recapped discussions with key staff regarding potential KMC revisions addressing community programs and holiday light displays, led a discussion on moving to an on-line permitting system via MyBuildingPermit.com, and provided a project overview that will focus on incorporating special event related codes and regulations to the Special Event Guide.
- The Special Events Team reviewed the Kirkland Downtown Association's Community Program Permit Application for the annual children's Kirkland Summer Concert Series at Juanita Beach Park. The seven-week program will include weekly concerts from 10 a.m. – 11 a.m. on Tuesdays, July 10 – August 21. The City Manager approved the KDA's request for a reduction in fees. The KDA will pay a one-time permit fee of \$110.00, reducing the total permit fees by \$660.00 for this program.
- National Alliance on Mental Illness (NAMI) representatives presented plans for the annual NAMI Walks Washington. They anticipate close to 1,500 people will attend the event which includes a 2.5K and 5K walk route, music, food and other surprises. Their goal is to raise \$275,000 which will help the organization raise awareness of mental illness and fund their mission to help individuals and families affected by mental illness build better lives through support, education, advocacy, and leadership.
- Representatives from the Kirkland Downtown Association presented plans for the 2018 Kirkland Wednesday Market. They requested additional dedicated vendor parking which was approved. The market will now have access to the Lakeshore Plaza Auxiliary Lot, Lakeshore Plaza and forty parking permits to be used along Lake Avenue W and the Westor Lot. In addition, the KDA's request for a reduction in fees was approved by the City Manager. The market will pay a one-time permit fee of \$110.00, reducing the total permit fees by \$1,650.00 for this program.

Upcoming Important Dates:

- **Sunday, April 8, 10 a.m.** – Day Out for Inclusion Walk and Family Fair, Marina Park

**Interdepartmental/Interagency Committees**

Grant Team (Sharon Rodman) - No meeting in March. The next meeting is Wednesday April 4, 2018.

Green Team (Sharon Rodman)

- Met March 14 to finalize arrangements for the City's first April Earth Month proclamation at City Council on March 20, and to plan events and activities across departments during April Earth Month.
- April Earth Month activity photos from Parks and Community Services divisions (Green Kirkland, Recreation, Parks Maintenance) will be submitted for potential inclusion in a video to be shown at City Council May 15.

Volunteer Service Team (Jeremy Jones)

- No March meeting. Preparations continue for the City of Kirkland Volunteer Appreciation event on April 12.

Customer Service Team (Jairid Hoehn, Lourdes Mansanarez)

- No March meeting. The next meeting is Wednesday, April 25, 2018.

### Parks and Community Services Monthly Tracking – February, 2018

#### Marina use

	Number	Revenue
Boat slip rentals	0	0
Boat launch cards sold	0	0
Commercial dockings	2	\$320

#### Monthly facility rentals and use

	Hours used by City programs	Hours used by community
Heritage Hall	0	24
PKCC Rooms (aggregate)	454	59
NKCC Rooms (aggregate)	471	29
School gymnasiums	286	
Picnic shelters (# of bookings)	6	0
Ballfields - Kirkland	51	0
Ballfields - LWSD	60	0

#### Green Kirkland Partnership

Number of volunteer hours	428.5
Number of volunteer events	19
Value of volunteer hours	\$12,872
Acres of new restoration	0.1
Acres in restoration maintained	5.6
Total plants planted	344
Invasive trees removed	150
Contracted crew field hours	240

#### Youth Services

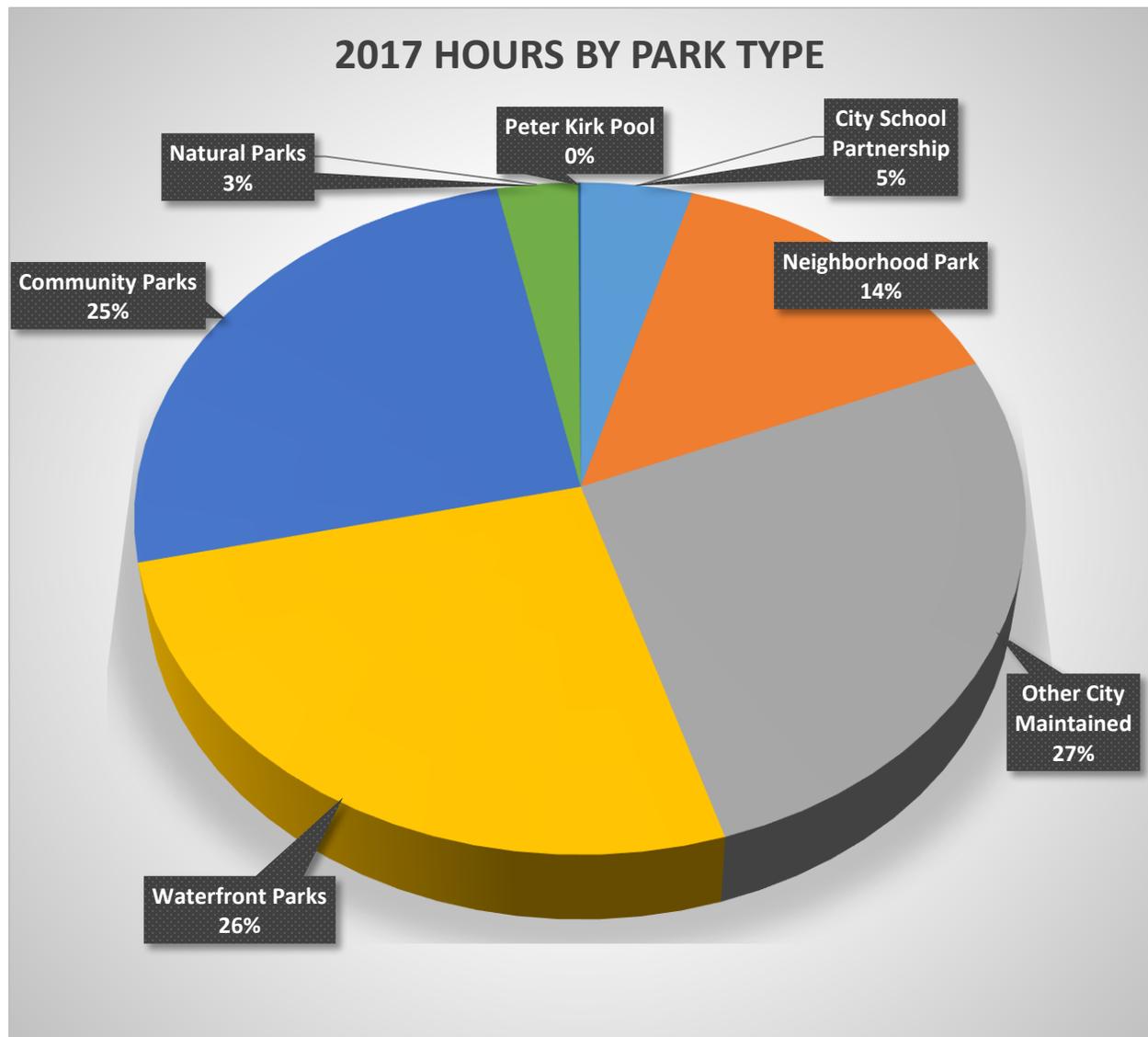
Number of events	0
Volunteer hours	0
Traffic court cases heard	5

#### Special Events

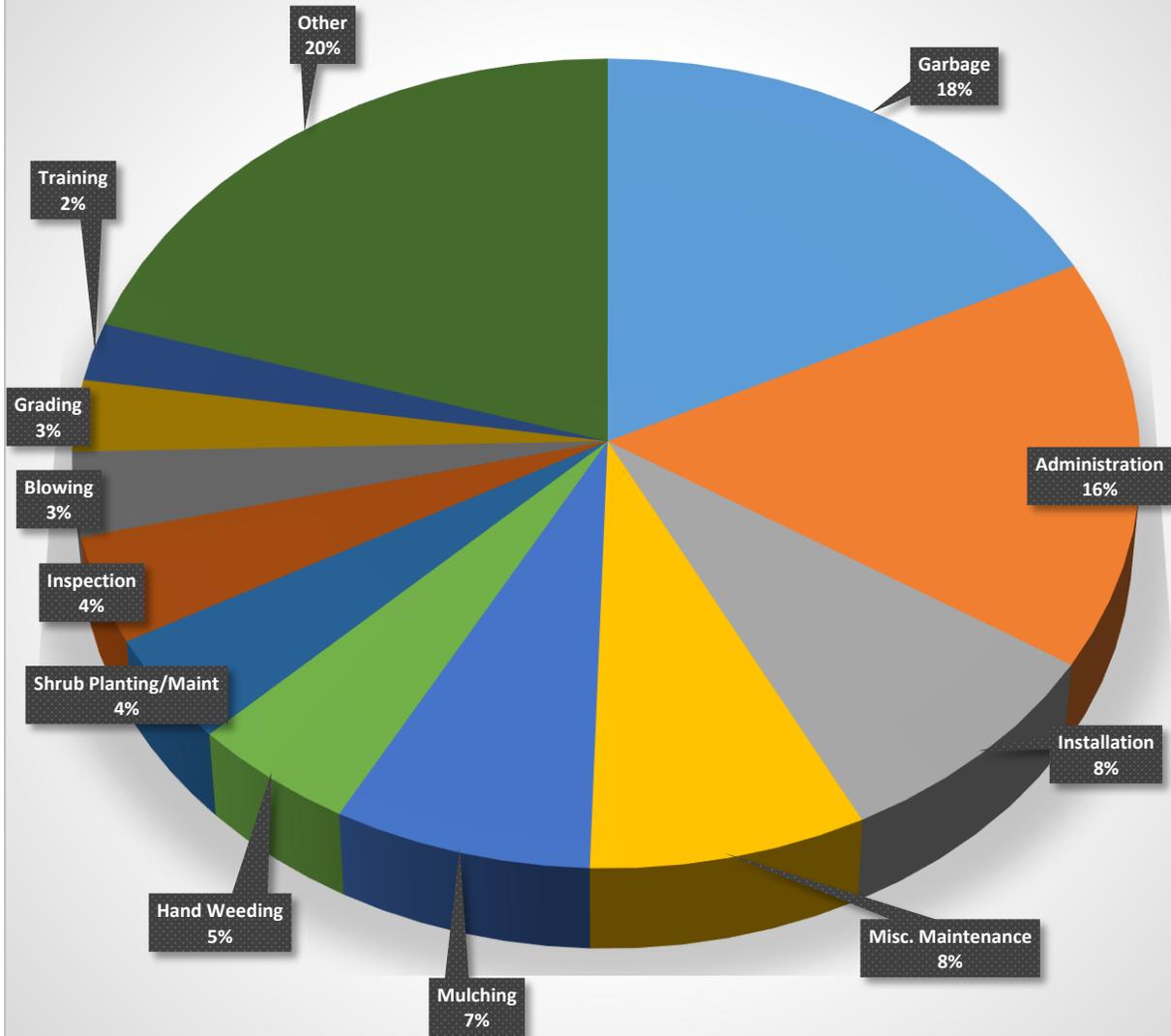
Number of events	0
Calendar days	0
Estimated event participants	0

# PARKS MAINTENANCE FEBRUARY REPORT

Park Type	Labor Hours	Percentage
City School Partnership	130.75	4.42%
Neighborhood Park	423.25	14.31%
Other City Maintained	783.75	26.50%
Waterfront Parks	774.75	26.19%
Community Parks	747.5	25.27%
Natural Parks	94.75	3.20%
Peter Kirk Pool	3	0.10%
<b>Grand Total</b>	<b>2957.75</b>	<b>100.00%</b>



# TASK HOURS



Park/Location	Labor Hours
132nd Square Park	90.5
2nd Avenue South Dock	3.25
Ben Franklin Elementary School Field	14.5
Brookhaven Park	3.5
Bud Homan Park	3.25
Carillon Woods	20
Cedar View Park	4.75
City Hall	4.5
Crestwoods Park	51.75
David E. Brink Park	35.5
Doris Cooper Houghton Beach Park	203
Edith Moulton Park	5.25
Emerson High School Field	14.5
Everest Park	108.5
Finn Hill Middle School Field	34.25
Fire Station 21	3
Fire Station 22	6.25
Fire Station 24	1
Fire Station 26	3
Fire Station 27	4
Forbes Creek Park	17.5
Forbes Lake Park	6
Hazen Hills Park	4
Heritage Park	64.75
Heronfield Wetlands	16.75
Highlands Park	8.25
Josten Park	2.25
Juanita Bay Park	55.75
Juanita Beach Park	211
Juanita Elementary School Field	14
Kingsgate Park	3
Kirkland Cemetery	174
Kirkland Justice Center	16
Kirkland Middle School Field	10.75
Kiwanis Park	2.75
Lake Ave W Street End Park	2.75
Lakeview Elementary School Field	5.75
Maintenance center	553
Marina Park	55.5
Mark Twain Elementary School Field	9.5
Mark Twain Park	16.75
Marsh Park	35.5
McAuliffe Park	326.75
North Kirkland Com Ctr & Park	26.5
North Rose Hill Woodlands Park	36.5
O O Denny Park	184.5
Parks Maintenance Center	40.75
Peter Kirk Park	159.75
Peter Kirk Pool	3
Phyllis A. Needy - Houghton Neighborhood	44.5
Reservoir Park	9.5
Rose Hill Elementary School Field	10.25
Rose Hill Meadows	86
Settler's Landing	2.75
South Norway Hill Park	7.5
South Rose Hill Park	34.5
Spinney Homestead Park	11.5
Terrace Park	9.25
Tot Lot Park	9.25
Totem Lake Park	2
Van Aalst Park	8.75
Watershed Park	2.25
Waverly Beach Park	38.25
Yarrow Bay Wetlands	4
<b>Grand Total</b>	<b>2957.75</b>



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**To:** Park Board  
**From:** Michael Cogle, Deputy Director  
**Date:** April 5, 2018  
**Subject:** Juanita Beach Bathhouse Replacement Project Update

**RECOMMENDATION**

That the Park Board receive an update on the Juanita Beach Bathhouse Replacement Project.

**BACKGROUND**

Staff will provide the Board with an update on the project design at your meeting of April 11. Attached is a rendering showing placement of the two picnic pavilions for the Board to consider in advance.

Attachment



SITE LAYOUT PLAN V2



# JUANITA BEACH PARK BATHHOUSE REPLACEMENT PROJECT

KIRKLAND, WASHINGTON | APRIL 11, 2018



SITE LAYOUT RENDERING V2



# JUANITA BEACH PARK BATHHOUSE REPLACEMENT PROJECT

KIRKLAND, WASHINGTON | APRIL 11, 2018



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**To:** Park Board

**From:** Michael Cogle, Deputy Director

**Date:** April 5, 2018

**Subject:** 2019-2024 Capital Improvement Program (CIP) Funding Plan

RECOMMENDATION:

That the Park Board provide guidance to staff on the final proposed Parks 2019 – 2024 CIP funding plan. Staff requests a motion accepting the proposed CIP as recommended (or as amended by the Board).

BACKGROUND DISCUSSION:

At the Board's March meeting staff presented a proposed projects and a funding plan for the 2019 – 2024 Parks CIP. The proposal is attached.

Staff will be meeting with the City Manager and Finance Department staff on April 9 to review the proposal. Staff will provide the Board with a summary of the meeting, which could result in modifications to the staff proposal.

Attachment

**PARKS 2019 - 2024 CIP FUNDING PLAN (proposed)**

March 30, 2018

Project Number	Project Title	Available as of 01/18*	Proposed		Projected				Total 2019-2024
			2019	2020	2021	2022	2023	2024	
1	PK 0056 000 Forbes Lake Park Improvements	\$ 933,000							\$ -
2	pk 0108 000 McAuliffe Park Planning and Improvements	\$ 164,000							\$ -
3	PK 0119 100 Juanita Beach Bathhouse Replacement	\$ 2,670,000							\$ -
4	PK 0123 100 Peter Kirk Pool Liner Replacement	\$ 260,000							\$ -
5	PK 0133 200 School Playfields Partnership Program	\$ 1,000,000							\$ -
6	PK 0133 401 Edith Moulton Park Development	\$ 1,823,000							\$ -
7	PK 0138 000 Everest Park Restroom Replacement Design	\$ 75,000							\$ -
8	PK 0152 000 O.O. Denny Park Irrigation	\$ 175,000							\$ -
9	PK 0066 000 Park and Play Area Enhancements & Accessibility Improvements	\$ 100,000	\$ 250,000	\$ 250,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 1,100,000
10	PK 0087 101 Waverly Beach Park Shoreline Restoration		\$ 515,000						\$ 515,000
11	PK 0121 000 Green Kirkland Forest Restoration Program		\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 600,000
12	PK 0133 100 Dock and Shoreline Improvements	\$ 580,000			\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 1,200,000
13	PK 0133 300 Neighborhood Park Land Acquisition		\$ 1,218,000	\$ 300,000	\$ 1,050,000	\$ 1,150,000	\$ 1,000,000	\$ 1,000,000	\$ 5,718,000
14	PK 0134 100 132nd Square Park Synthetic Turf Playfield			\$ 1,549,000					\$ 1,549,000
15	PK 0139 200 Totem Lake Park Development Phase 1	\$ 2,190,000	\$ 3,285,225	\$ 724,000					\$ 4,009,225
16	PK 0142 000 Houghton Beach Park Restroom Replacement (Design)			\$ 85,000					\$ 85,000
17	PK 0147 000 Parks Maintenance Center	\$ 250,000	\$ 500,000	\$ 750,000					\$ 1,250,000
18	PK 0151 000 Park Facilities Life Cycle Projects	\$ 146,000	\$ 162,000	\$ 151,000	\$ 162,000	\$ 169,000	\$ 150,000	\$ 150,000	\$ 944,000
19	PK 0153 000 Synthetic Turf Playfield Master Plan		\$ 135,000						\$ 135,000
20	PK 0134 200 132nd Square Park Master Planning		\$ 135,000						\$ 135,000
21	PK 0154 000 Indoor Recreation and Aquatic Facility Study				\$ 160,000				\$ 160,000
22	PK 0155 000 Finn Hill Neighborhood Green Loop Trail Plan					\$ 160,000			\$ 160,000
23	PK 0156 000 Park Restrooms Renovation/Replacement						\$ 1,583,000		\$ 1,583,000
24	PK 0157 000 Neighborhood Park Development							\$ 1,583,000	\$ 1,583,000
<b>Total</b>		<b>\$ 10,366,000</b>	<b>\$ 6,300,225</b>	<b>\$ 3,909,000</b>	<b>\$ 1,922,000</b>	<b>\$ 2,029,000</b>	<b>\$ 3,283,000</b>	<b>\$ 3,283,000</b>	<b>\$ 20,726,225</b>

\*Projected project balance



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## **MEMORANDUM**

**To:** Park Board  
**From:** Lynn Zwaagstra, Director, Parks and Community Services  
**Date:** April 11, 2018  
**Subject:** Park Board Liaison Role

## **RECOMMENDATION**

It is recommended that the Park Board continue to seek feedback from the community about community needs and interests as it pertains to capital improvement projects.

In this Park Board packet is a memo provided by Michael Cogle on the 2019-2024 Preliminary CIP Program. Mr. Cogle will present this to Park Board at this meeting in order to receive feedback to prepare the program for consideration by the City Manager and City Council. The 2019-2024 CIP Program will be in draft stage until it is adopted by City Council in the late fall. Therefore, feedback can continue to be considered throughout the process.

## **BACKGROUND DISCUSSION**

The Park Board mission statement is as follows:

“The mission of the Park Board shall be to provide policy advice and assistance to the Department of Parks and Community Services (PCS) and City Council in order to ensure the effective provision of Parks and Community Services programs and facilities to the residents of the City of Kirkland.”

The job description of the Park Board discusses involving the community and meeting with volunteer groups and neighborhoods to determine needs and interests. Some years ago, the Park Board made a decision to assign each board member to be the liaison with one or more neighborhood organizations. These assignments are typically made just after new Park Board members are appointed by City Council.

Park Board members have requested assistance in meeting liaison role expectations. After discussion, it was determined that the following two strategies would be used to prepare Park Board members for neighborhood meetings.

- Park Board members should use the monthly report provided by staff and pick out key items to convey to the neighborhoods. This could be followed by questions and feedback.
- Staff will highlight a topic or a discussion question for use with neighborhoods that would solicit community input for consideration. Discussion questions could be related to upcoming Park Board agenda items or be generic in nature.

## Current Neighborhood Liaison Assignments

- Finn Hill Neighborhood – Kelli Curtis
- Market Neighborhood – Kelli Curtis
- Highlands – Richard Chung
- Norkirk – Kevin Quille
- Everest – Uzma Butte
- Evergreen Hill Neighborhood (Kingsgate) – Kobey Chew
- Juanita – Rosalie Wessels
- Lakeview – Rosalie Wessels
- Moss Bay – Richard Chung
- Central Houghton – Jason Chinchilla
- North Rose Hill – Uzma Butte
- South Rose Hill/Bridle Trails – Susan Baird-Joshi



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## **MEMORANDUM**

**To:** Park Board  
**From:** Lynn Zwaagstra, Director, Parks and Community Services  
**Date:** April 11, 2018  
**Subject:** Information on Cost Recovery Study

## **RECOMMENDATION**

That the Park Board receive information on the status of the Parks and Community Services cost recovery study.

## **BACKGROUND DISCUSSION**

The City of Kirkland last conducted a cost of service study for Parks and Community Services in 2005. This study was conducted utilizing 2004 budget actuals and served as an update to a previous study conducted in 1999. The study determined actual costs by programmatic area and established a pricing policy based on establishing the level of community benefit (to be funded by taxes) versus individual benefit (to be funded by fees) provided by the recreation and community services programs. The study also conducted benchmarking on fees charged by several surrounding jurisdictions and made recommendations for specific fee changes.

Since that time, the City experienced an economic downturn that resulted in significant changes to the City's financial structure and levels of service. Parks and Community Services implemented service level and staffing reductions. In 2011, the City annexed the North Juanita, Finn Hill and Kingsgate areas. In 2012, a Park Levy was initiated by the community to restore park service levels and establish funding for the Green Kirkland Partnership program. The combination of these factors along with many incremental changes in service levels since that time, render the 2005 financial policy obsolete.

Parks and Community Services is now undertaking a new "cost recovery study". More accurately, this can be considered a cost-benefit analysis resulting in a pricing and subsidy allocation philosophy. The goal is to articulate and illustrate a comprehensive cost recovery and subsidy allocation philosophy in order to ensure a sustainable system into the future by using tax revenues and fees in the most appropriate ways.

The Park Board will play a role in the cost-benefit study. Therefore, in order to begin introducing the study methodology, staff would like to share 3 articles with Park Board.

Attachment 1 – "Cost recovery in public parks and recreation" by Chris Dropinski  
 Attachment 2 – "They pyramid methodology" by GreenPlay LLC  
 Attachment 3 - "Resource allocation plan framework" by GreenPlay LLC

by Chris Dropinski, CPRP

# cost recovery

in public parks and recreation

Any way you look at it, cost recovery is a complex subject. Essentially, it represents a park, recreation or conservation agency's decision to generate revenues by charging fees for some, or all, of its programs and services in order to offset the expenses of providing those programs or services. Cost recovery does not imply that the target is total cost recovery; an agency establishes the target according to a variety of considerations, from 0 percent to more than 100 percent of direct costs.

Among the challenges to cost recovery is explaining and justifying the fees to a board of trustees, or to other municipal officials or to members of the community. Two other challenges are assessing appropriate fees and identifying the right target of cost to recover.

Cost recovery through fees and charges means that the cost of the program is not being borne completely by the tax resource and that individuals taking advantage of that particular service or opportunity pay for at least a portion of it.

The public is demanding specific programs; cost recovery is the means by which parks and recreation can meet that demand, says

In this manner, residents' collective taxes do not bear the full costs of all programs; tax dollars can be applied more specifically to broad community services; and specialized programs can be augmented by the residents who participate in them.

Barron noted that in Lisle, as in many communities, there are groups (albeit sometimes small) for almost any interest. "For each, we look at the number of users and how we can accommodate those users. We determine if a program's costs are based on a small group, or if the program is something from which a large number of people can benefit."



Laura Barron, director of parks and recreation for the Oakbrook Terrace Park District in Illinois and formerly the superintendent of recreation for the Lisle Park District.

"[At Lisle] we changed our philosophy in this competitive marketplace: to offer more to a more sophisticated resident," Barron said. It was a matter of balance, she said.

### Why Cost Recovery Matters

Cost recovery signifies an agency's responsibility to use its budget wisely, points out Daniel Betts, deputy manager of recreation and facility services for the Denver Department of Parks and Recreation. Agencies are simultaneously accountable for maintaining a functional, sustainable system that attracts the overall community and one that also responds to the interests of the individuals. Park and recreation professionals have a broad mission to provide opportunities and services that will improve the quality of their residents' lives.

Revenues have an obvious impact on their ability to do this.

"In city government, we're not in business to generate a profit. We're only in business to be more efficient with the limited resources we have and to be equitable with our programs, structures and fees," Betts said. "The balance is not giving it away, but also making our services attractive so that folks want to come and play with us."

One philosophy holds that there should be a relationship between the way tax revenues are spent and the extent to which the community as a whole benefits from the resulting opportunity. If some individuals receive greater benefit from a specialized program or service, the opportunity exists to charge them for part, or a bulk of, the operational costs.

### Controversy

Public recreation programs were initiated in the United States primarily for social reasons and were supported by taxes. Early programs were free, and there wasn't originally a thought about collecting money. Some parks and recreation professionals hold to that ideal.

As Harvey Feldman notes, "I started in this business because parks and recreation was a public good. I felt that we had a responsibility to provide at least a basic set of recreation services for all of our community members." Feldman is the former superintendent of administration for the Minneapolis Park and Recreation Board and director of the Recreation Facilities Management Institute at the University of Minnesota.

Feldman's concerns relate to community centers that are called enterprise fund operations. For example, he says, some groups convince local communities to build specialized recreation facilities with assurances that they will achieve full cost recovery. "To me, cost recovery becomes an issue mainly when it comes to facilities like golf courses, ice arenas and water parks."

Oftentimes city councils and park boards tell their citizens that facilities of this nature ultimately will not use any tax dollars. But when the facilities are unable to generate the expected revenues, city officials or park boards may blame park agency personnel, said Feldman. "There are directors of parks and recreation, there are community directors and there are ice arena managers being fired because the council and the mayor have suggested to the public that they'll have full cost recovery in these facilities," he said.

## Effective Application of Cost Recovery

Reliable cost recovery analysis helps an agency make decisions and discern if it is on track with its own goals and standards. Analysis also provides the means by which an agency can, over time, recognize and respond to changes in the community and in the programs.

"In order for park districts to survive now, they have to adopt a cost recovery philosophy," Barron said. "They need to be run as a government agency that does provide services, but more in a current business fashion, the ways businesses operate today." This does not mean generating a "profit," but being accountable and maximizing resources.

Resources are limited and government agencies have to justify their decisions, expenditures and fees. Effective cost recovery analysis builds credibility with stakeholders. Denver uses its analysis to improve its programs and to explain its pricing, said Betts. "[Our residents] get a better product, because we can invest more into it," he said. "And cost recovery analysis provides the details we need to inform the public and our key stakeholders why we price the way we do."

When parks and recreation professionals want to add programs or services, they try to assess value based on what the outcome is going to be. They match the outcome with the input of resources. But in order to know how costs stack up to benefits, they have to have a clear understanding of what to count as a cost and what revenues can be reasonably expected.

Furthermore, by having a clear understanding of who is benefiting from a particular program, fees can be explained. Being able to explain a pricing structure to community leaders, staff and the residents is empowering for parks and recreation professionals. It raises morale and confidence with all audiences. People are willing to pay for a program when they understand where their tax dollars are going and why it takes a combination of both taxes and fees to offer the caliber of program those patrons say they want.

## Counting Costs and Benefits

One way to develop a cost-benefit analysis model and pricing philosophy is to break services into various categories based on the balance of community benefit with individual benefit. The breakdown can be represented in a pyramid shape, because, based on the public parks and recreation mission, the greatest quantity of service goes to the community at large, with less service, comparatively, going to specialized programs.

The foundation level of the model represents the mainstay of a public park, recreation or conservation agency's programming. Programs that serve smaller segments of the population are appropriate to higher levels of the model and should be offered only when the preceding levels are carried out well enough to provide a platform for the next level.

A pyramid structure that graphically represents cost-benefit and pricing – having a foundation with upward progression – can demonstrate both the agency's core mission and the maturity of the organization as it enhances its program and facility offerings.

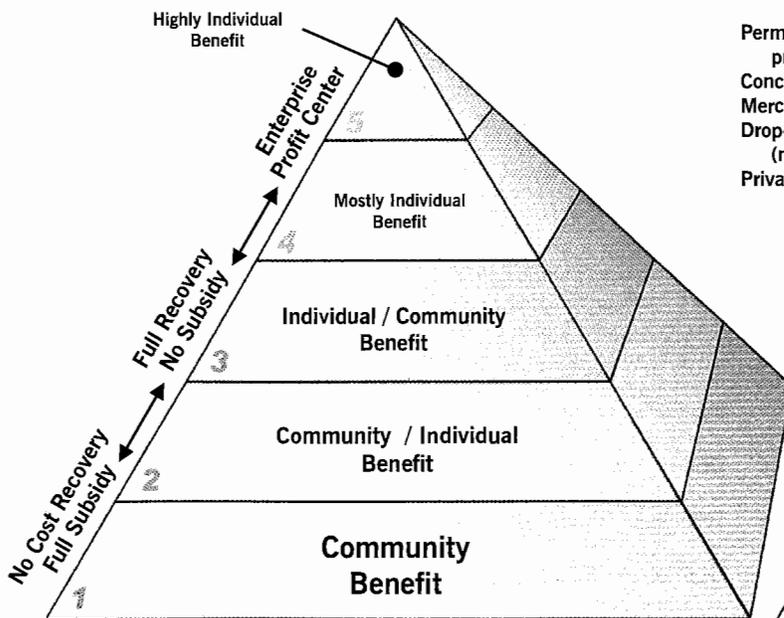
This approach provides perspectives for discussion and requires an agency to determine which programs and services belong on each level. Those determinations will depend largely on the agency's circumstances and history. Cultural, regional, geographical and resource differences play a large role. Each agency that applies this methodology will come up with unique results.

Among the figures that cost recovery analysis will consider are:

- the number of participants,
- fees,
- revenues,
- direct costs and, possibly,
- indirect costs.

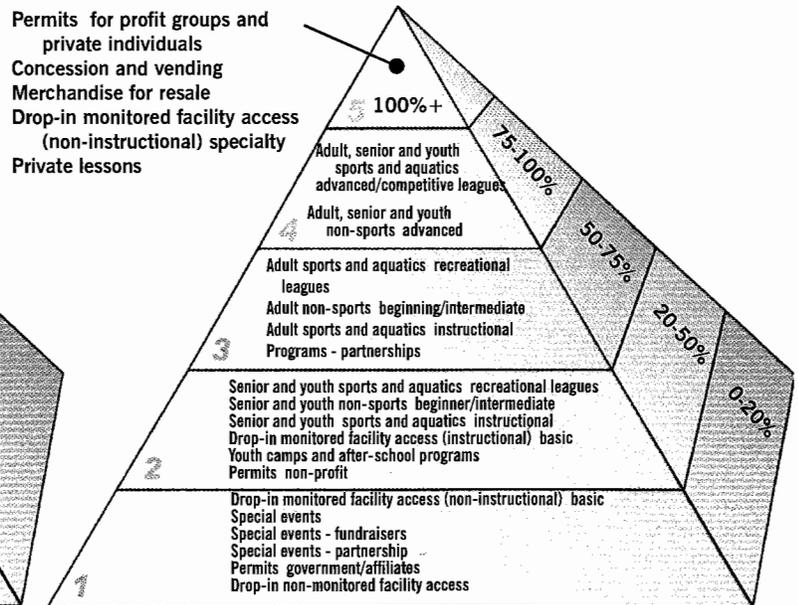
For existing programs, history should provide data regarding

**Cost Recovery Pyramid**



© 2001 GreenPlay, LLC

**Denver Parks & Recreation Department Cost-Benefit Analysis Pyramid / DRAFT**



© 2001 GreenPlay, LLC

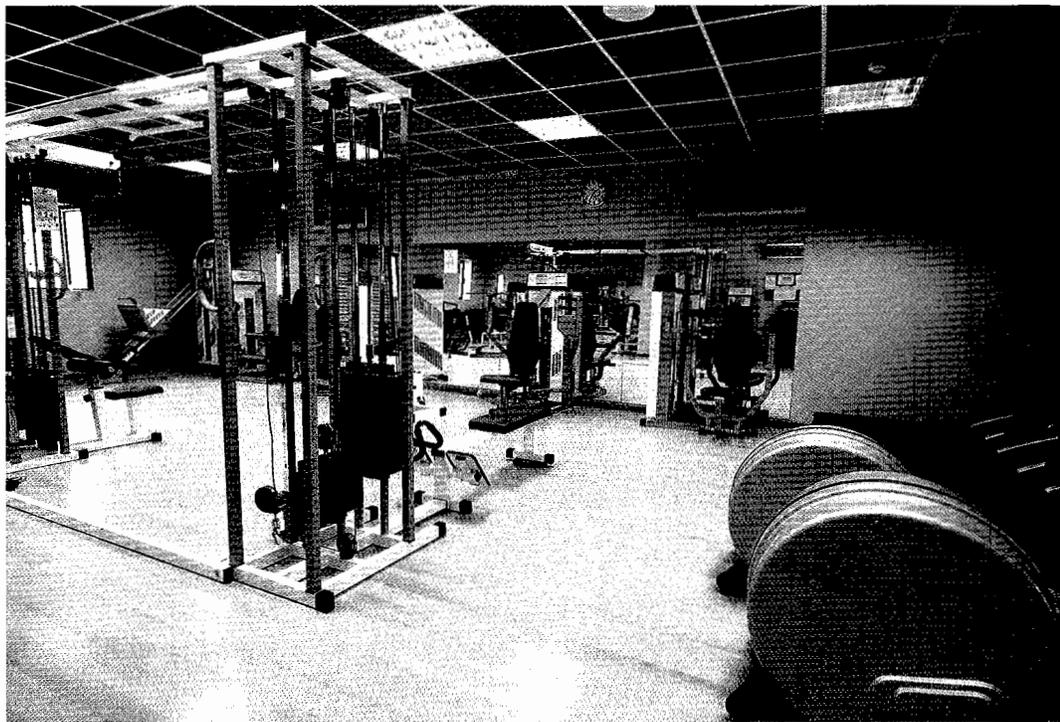
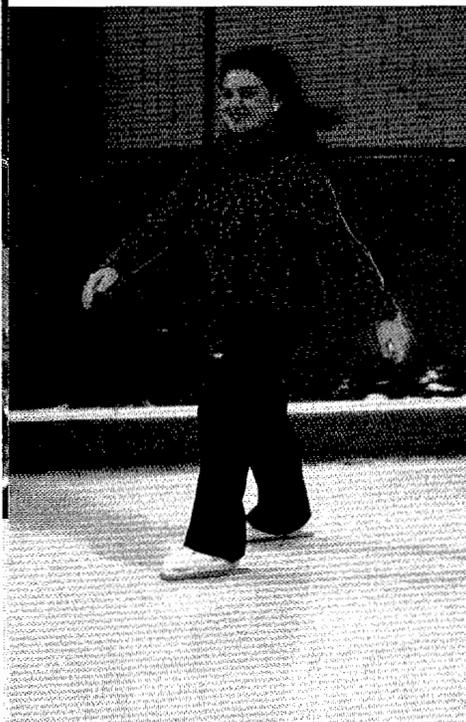
The cost recovery pyramid is a method that allows agencies to look at their programs from the point-of-view of the breadth of the community served. Generally, agency programs that serve a select segment of the community should recover more – or all – of their costs. The figure on the left is a model cost-recovery pyramid. The figure on the right represents a draft version of how the Denver Parks and Recreation Department is putting the model to use.

participation numbers and revenues. For new programs or services, similar programs or area benchmarks can be used to estimate usage and income.

But a good starting point for any analysis is counting the costs, a task that is more challenging than it may first appear.

### Direct Costs

Among the direct costs are the instructors hired to lead a program, the supplies and materials used only in that program and, perhaps, the room rented. In a cost recovery analysis, direct costs are commonly counted and people try to recover all or part of those costs.



### Indirect Costs

While some of the costs are obviously and solely associated with a program, the percentage of other costs stemming from a program are less easy to quantify. Indirect expenses – which include the percentage of wages paid to the instructors' superior, who did the legwork to launch the new program, for example – can be difficult to determine. Some costs, such as the administrators' time, are split across several programs, making them difficult to delineate and measure by function or program. As a result, the sincere question for many institutions is: 'Do we invest the energy in calculating those costs?'

In Betts' opinion, it is necessary to calculate the indirect costs. "I made the decision to count as much as I can to show a more accurate picture of what our cost recovery actually is," he said. "For all of our programs, we do a business cost-benefit analysis. This gives us insight to assess current programs and to consider prospective programs."

According to Barron, the Lisle Park District does program analyses each season, looking at how the fees and charges are affecting the programs' performance. The agency uses the information not only to make decisions about adding or eliminating programs, but also to make changes to the fees, if necessary.

### Obstacles: Educating Decision-makers

In most cases, administrators understand the premise for considering, and possibly implementing, a cost recovery philosophy. However, local governments and staff throughout the organization may not grasp the justification and potential importance of the subject.

This may be particularly true in a municipal setting. In Betts' opinion, the biggest obstacle is "the political wheel, city government," which he attributes to a lack of education around the significance of cost recovery and poor communication with the upper ranks. This makes the analysis of program costs, tax revenues and fee income important, he says. "If you haven't done the analysis around where

you are and where you want to be, it's hard to even have those conversations," Betts said.

The other big obstacle is determining the fees. "Once you do the analysis, it becomes easier to associate fees to what you do," he said. Betts maintains that letting the abilities of low-income residents define fee amounts is the wrong approach and one that undermines the sustainability of the department. "It's really about pricing our programs to the 80 percent who can afford to pay and subsidizing those who can't," said Betts. "Historically the parks and recreation sector has directed fees for programs to the 20 percent of the community that can't afford to pay. In this scenario, 80 percent get a great bargain and our cost recovery stays in the basement. We're changing that focus, and that's the right thing to do."

It's not uncommon for a community to set up scholarship programs for low-income families and individuals who can't afford to pay, making their access to parks and recreation programs less of a defining issue.

### Obstacles: Educating Staff and the Public

The staff interfaces directly with the residents. Their clarity about the subject, conviction in its justification and buy-in to the cost recovery plan influences morale within the organization and understanding from the community.

Cost recovery analysis allows the staff to recognize the needs of the organization as a whole, Barron says. In order to survive, the individual programs depend on the health of the entire organism; they don't exist in a vacuum. The agency's vitality is influenced by its overall ability to satisfy community demand, use tax revenues equitably and provide specialized, high-quality services when they are justified by community participation.

"The staff needs to be educated," Barron said. "When they see the big picture, agency-wide breakdowns, rather than individual program breakdowns, they understand the justification for cost recovery."

One of the biggest dilemmas across the country is that people try to compare their programs and costs to those of other communities. This stems from a perspective of 'shoulds.' For example, the question, "What should our cost recovery percentage be?"

Little work has been done to determine a national average for cost recovery for park and recreation agencies for a variety of reasons. One reason is because agencies do not calculate their percentages the same way; what is, and is not, counted on the cost side varies widely. This obviously undermines the value of comparing cost recovery data from one agency to another.

The breadth of the services under consideration also varies. Some wish to compare an entire park and recreation agency budget, or

"The more inclusive that you can be, the better," Betts said. "It's about informing the people who don't deal with this every day. What we're doing with the cost-benefit analysis is involving key stakeholders – city council, user groups and staff. They've been at the table almost from the beginning, and, by involving them in the conversation, we have given them a broad understanding of the fees and the need for the fees. Our strategy is to communicate with our public and elected officials on a monthly basis. We update them on these kinds of initiatives through a communication that goes strictly to city council. Also, we get on their calendar to present our initiatives in person. Our department is constantly in front of them with issues."

Internally, Denver has created a Fees and Charges Committee devoted to related issues, such as the costs of its programs, pricing them and relevant trends. Additionally, Denver has earned the support of its staff by positioning the subject in slightly different way. "We changed the conversation with our staff by changing the language," Betts said. "We moved from 'cost recovery' to 'cost-benefit.' People can associate spending money if they're benefiting from something. Quality is the driving piece."

Barron notes that when communicating with the public, the possibility exists to provide too much information. At Lisle, her staff generally explained simply that the tax dollars do not support

**"We educated the public broadly with annual reports and electronic newsletters, letting them know which portion came from tax dollars and educating them on the big picture."**

perhaps just the recreation division. It is more common to consider a single facility such as a recreation center. However, there are also a variety of "cost centers" within a single facility with a wide range of potential cost recovery targets. For example, a senior services wing may have very low cost recovery potential, while a fitness center may experience high cost recovery, making it difficult to compare facilities offering different activities. It may be more beneficial for an agency to set its own cost recovery targets and work to hold that line, modifying the target as circumstances change.

Two other factors that influence a program's cost recovery potential, and also challenge the notion of standards, are the size and type of community. Different economies have different needs. Residents of rural communities have different expectations of a recreation center than residents of affluent suburban communities. The same is true of other demographics, such as age.

National averages do not reflect the nuances of individual communities and they do not reflect a number of decisions that distinct agencies will make in conducting a cost recovery analysis.

Betts considers standards helpful but doesn't apply them to his own process unless he knows what has actually gone into the calculations. "It's easy for the folks to say, 'We did 50 percent cost recovery,' but what are you counting as indirect costs?" Betts said. "Often, that changes the conversation. Some folks who are at a higher cost recovery are not counting the same things I'm counting. I can show on paper a 50 percent or 60 percent cost recovery, but it wouldn't be the real story."

### **Overcoming the Challenges**

Communication is essential to overcoming challenges to implementing a cost recovery approach. The form of communication and frequency will vary by community. Each organization chooses the best means for educating its stakeholders.

everything the agency provides and so the agency relies on user fees to support those services. "We educated the public broadly with annual reports and electronic newsletters, letting them know which portion came from tax dollars and educating them on the big picture," Barron said. "By doing this, they saw that we were funded minimally in comparison to other governmental bodies, such as schools or the fire department."

### **Cost-Benefit and the Balanced Use of Tax and Fee Revenues**

Cost recovery reserves tax revenues for those things that really should be supported by the entire local population. As Barron says, public park, recreation and conservation agencies are entrusted with taxpayer dollars. As such, they are responsible for providing as many high quality services as possible, without placing an exceptional burden on the taxpayers.

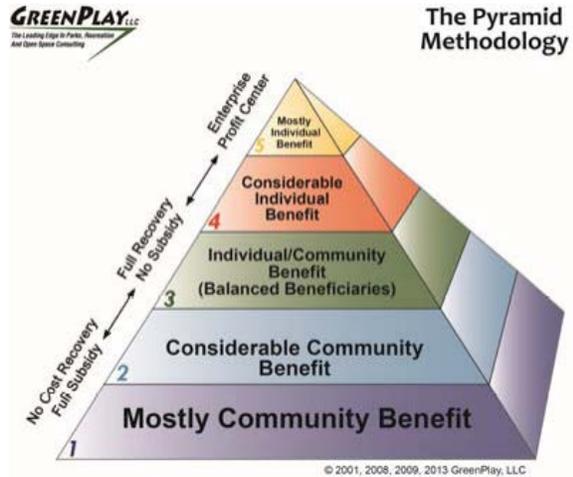
By determining the appropriate balance of tax and fee revenues, recreation managers can decide confidently how to broaden participation and serve the expectations of their constituents.

**Chris Dropinski, CPRP**, has more than 30 years of experience in the public parks, recreation and open space industry. She is currently a management consultant with GreenPlay, LLC. Her career has focused on management, facility development, public and alternative funding, as well as open space and park planning, public process facilitation, board/council relations, analysis and policy research and development. She is a fellow of the American Academy for Park and Recreation Administration and currently serves as chair of the Rocky Mountain Revenue Management School. She is a frequent speaker in the industry.

**THE PYRAMID METHODOLOGY: COST RECOVERY AND SUBSIDY ALLOCATION PHILOSOPHY**

The creation of a cost recovery and subsidy allocation philosophy and policy is a key component to maintaining an agency’s financial control, equitably pricing offerings, and helping to identify core services including programs and facilities.

Critical to this philosophical undertaking is the support and buy-in of elected officials and advisory boards, staff, and ultimately, citizens. Whether or not significant changes are called for, the organization should be certain that it philosophically aligns with its constituents. The development of a financial resource allocation philosophy and policy is built upon a very logical foundation, based upon the theory that those who benefit from parks and recreation services ultimately pay for services.



The development of a financial resource allocation philosophy can be separated into the following steps:

**Step 1 – Building on Your Organization’s Values, Vision, and Mission**

The premise of this process is to align agency services with organizational values, vision, and mission. It is important that organizational values are reflected in the vision and mission. Oftentimes, mission statements are a starting point and further work needs to occur to create a more detailed common understanding of the interpretation of the mission and a vision for the future. This is accomplished by engaging staff and community members in a discussion about a variety of Filters.

**Step 2 – Understanding the Pyramid Methodology, the Benefits Filter, and Secondary Filters**

Filters are a series of continuums covering different ways of viewing service provision. **Filters** influence the final positioning of services as they relate to each other and are summarized below. The **Benefits Filter**, however; forms the **foundation** of the **Pyramid Model** and is used in this discussion to illustrate a cost recovery philosophy and policies for parks and recreation organizations.

Filter	Definition
<b>Benefit</b>	Who receives the benefit of the service? (Skill development, education, physical health, mental health, safety)
<b>Access/Type of Service</b>	Is the service available to everyone equally? Is participation or eligibility restricted by diversity factors (i.e., age, ability, skill, financial)?
<b>Organizational Responsibility</b>	Is it the organization’s responsibility or obligation to provide the service based upon mission, legal mandate, or other obligation or requirement?
<b>Historical Expectations</b>	What have we always done that we cannot change?
<b>Anticipated Impacts</b>	What is the anticipated impact of the service on existing resources? On other users? On the environment? What is the anticipated impact of not providing the service?
<b>Social Value</b>	What is the perceived social value of the service by constituents, city staff and leadership, and policy makers? Is it a communitybuilder?

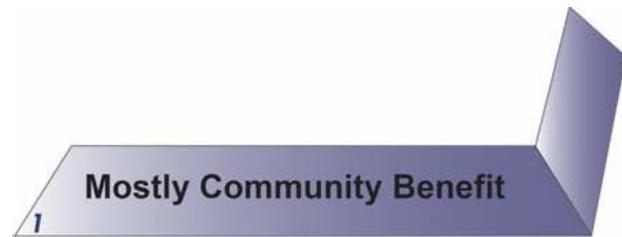
## THE BENEFITS FILTER

The principal foundation of the Pyramid is the **Benefits Filter**. Conceptually, the base level of the pyramid represents the mainstay of a public parks and recreation system. Services appropriate to higher levels of the pyramid should only be offered when the preceding levels below are comprehensive enough to provide a foundation for the next level. This foundation and upward progression is intended to represent public parks and recreation's core mission, while also reflecting the growth and maturity of an organization as it enhances its service offerings.

It is often easier to integrate the values of the organization with its mission if they can be visualized. An ideal philosophical model for this purpose is the pyramid. In addition to a physical structure, *pyramid* is defined by Webster's Dictionary as "an immaterial structure built on a broad supporting base and narrowing gradually to an apex." Parks and recreation programs are built with a broad supporting base of core services, enhanced with more specialized services as resources allow. Envision a pyramid sectioned horizontally into five levels.

### MOSTLY COMMUNITY Benefit

The foundational level of the Pyramid is the largest, and includes those services including programs and facilities which **MOSTLY** benefit the **COMMUNITY** as a whole. These services may increase property values, provide safety, address social needs, and enhance quality of life for residents. The community generally pays for these basic services via tax support. These services are generally offered to residents at a minimal charge or with no fee. A large percentage of the agency's tax support would fund this level of the Pyramid.

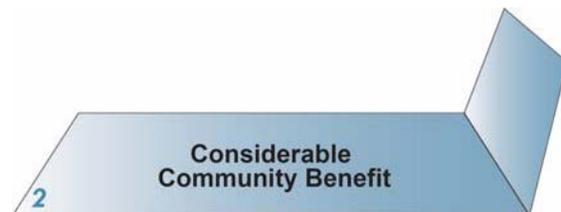


*Examples of these services could include: the existence of the community parks and recreation system, the ability for youngsters to visit facilities on an informal basis, low-income or scholarship programs, park and facility planning and design, park maintenance, or others.*

**NOTE: All examples above are generic – individual agencies vary in their determination of which services belong in the foundation level of the Pyramid based upon agency values, vision, mission, demographics, goals, etc.**

### CONSIDERABLE COMMUNITY Benefit

The second and smaller level of the Pyramid represents services which promote individual physical and mental well-being, and may begin to provide skill development. They are generally traditionally expected services and/or beginner instructional levels. These services are typically assigned fees based upon a specified percentage of direct (and may also include indirect) costs. These costs are partially offset by both a tax subsidy to account for **CONSIDERABLE COMMUNITY** benefit and participant fees to account for the **Individual** benefit received from the service.



*Examples of these services could include: the capacity for teens and adults to visit facilities on an informal basis, ranger led interpretive programs, beginning level instructional programs and classes, etc.*

### BALANCED INDIVIDUAL/COMMUNITY Benefit

The third and even smaller level of the Pyramid represents services that promote individual physical and mental well-being, and provide an intermediate level of skill development. This level provides balanced **INDIVIDUAL** and **COMMUNITY** benefit and should be priced accordingly. The individual fee is set to recover a higher percentage of cost than those services that fall within lower Pyramid levels.



*Examples of these services could include: summer recreational day camp, summer sports leagues, year-round swim team, etc.*

### CONSIDERABLE INDIVIDUAL Benefit

The fourth and still smaller Pyramid level represents specialized services generally for specific groups, and those which may have a competitive focus. Services in this level may be priced to recover full cost, including all direct and indirect expenses.



*Examples of these services could include: specialty classes, golf, and outdoor adventure programs.*

### MOSTLY INDIVIDUAL Benefit

At the top of the Pyramid, the fifth and smallest level represents services which have profit center potential, may be in an enterprise fund, may be in the same market space as the private sector, or may fall outside the core mission of the agency. In this level, services should be priced to recover full cost in addition to a designated profit percentage.



*Examples of these activities could include: elite diving teams, golf lessons, food concessions, company picnic rentals, and other facility rentals such as for weddings or otherservices.*

## Step 3 – Developing the Organization’s Categories of Service

In order to avoid trying to determine cost recovery or subsidy allocation levels for each individual agency service including every program, facility, or property, it is advantageous to categorize agency services into like categories. This step also includes the development of category definitions that detail and define each category and service inventory “checks and balances” to ensure that all agency services belong within a developed category. *Examples of Categories of Service could include: Beginner Instructional Classes, Special Events, and Concessions/Vending.*

## Step 4 – Sorting the Categories of Service onto the Pyramid

It is critical that this sorting step be done with staff, governing body, and citizen representatives involved. This is where ownership is created for the philosophy, while participants discover the current and possibly varied operating histories, cultures, and organizational values, vision, and mission. It is the time to develop consensus and get everyone on the same page – the page that is written together. Remember, this effort must reflect the community and must align with the thinking of policy makers.

**Sample Policy Development Language:**

XXX community brought together staff from across the department, agency leadership, and citizens to sort existing programs into each level of the Pyramid. The process was facilitated by an objective and impartial facilitator in order to hear all viewpoints. It generated discussion and debate as participants discovered what different people had to say about serving culturally and economically varied segments of the community, about historic versus active-use parks, about the importance of adult versus youth versus senior activities, and other philosophical and values-based discussions. This process gets at both the “what” and “why” with the intention of identifying common ground and consensus.

**Step 5 – Defining Direct and Indirect Costs**

The definition of direct and indirect costs can vary from agency to agency. What is important is that all costs associated with directly running a program or providing a service are identified and consistently applied across the system. Direct costs typically include all the specific, identifiable expenses (fixed and variable) associated with providing a service. These expenses would not exist without the service and may be variable costs. Defining direct costs, along with examples and relative formulas is necessary during this step.

Indirect costs typically encompass overhead (fixed and variable) including the administrative costs of the agency. These costs would exist without any specific service but may also be attributed to a specific agency operation (in which case they are direct expenses of that operation). If desired, all or a portion of indirect costs can be allocated, in which case they become a direct cost allocation.

**Step 6 – Determining (or Confirming) Current Subsidy/Cost Recovery Levels**

This step establishes the expectation that the agency will confirm or determine current cost recovery and subsidy allocation levels by service area based on the new or revised definition of direct and in-direct costs. This will include consideration of revenues sources and services costs or expenses. Typically, staff may not be cost accounting consistently, and these inconsistencies will become apparent. Results of this step will identify whether staff members know what it costs to provide services to the community, whether staff have the capacity or resources necessary to account for and track costs, whether accurate cost recovery levels can be identified, and whether cost centers or general ledger line items align with how the agency may want to track these costs in the future.

**Step 7 – Establishing Cost Recovery/Subsidy Goals**

Subsidy and cost recovery are complementary. If a program is subsidized at 75%, it has a 25% cost recovery, and vice-versa. It is more powerful to work through this exercise thinking about where the tax subsidy is used rather than what is the cost recovery. When it is complete, you can reverse thinking to articulate the cost recovery philosophy, as necessary.

The overall subsidy/cost recovery level is comprised of the average of everything in all of the levels together as a whole. This step identifies what the current subsidy level is for the programs sorted into each level. There may be quite a range within each level, and some programs could overlap with other levels of the pyramid. This will be rectified in the final steps.

This step must reflect your community and must align with the thinking of policy makers regarding the broad picture financial goals and objectives.

**Examples**

Categories in the bottom level of the Pyramid may be completely or mostly subsidized, with the agency having established limited cost recovery to convey the value of the experience to the user. An established 90-100% subsidy articulates the significant community benefit resulting from these categories.

The top level of the Pyramid may range from 0% subsidy to 50% excess revenues above all costs, or more. Or, the agency may not have any Categories of Service in the top level.

**Step 8 – Understanding and Preparing for Influential Factors and Considerations**

Inherent to sorting programs onto the Pyramid model using the Benefits and other filters is the realization that other factors come into play. This can result in decisions to place services in other levels than might first be thought. These factors also follow a continuum; however, do not necessarily follow the five levels like the Benefits Filter. In other words, a specific continuum may fall completely within the first two levels of the Pyramid. These factors can aid in determining core versus ancillary services. These factors represent a layering effect and should be used to make adjustments to an initial placement on the Pyramid.

**THE COMMITMENT FACTOR:** What is the intensity of the program; what is the commitment of the participant?



**THE TRENDS FACTOR:** Is the program or service tried and true, or is it a fad?



**THE POLITICAL FILTER:** What is out of our control?

This filter does not operate on a continuum, but is a reality, and will dictate from time to time where certain programs fit in the pyramid

**THE MARKETING FACTOR:** What is the effect of the program in attracting customers?



**THE RELATIVE COST TO PROVIDE FACTOR:** What is the cost per participant?



**THE ECONOMIC CONDITIONS FACTOR:** What are the financial realities of the community?



**FINANCIAL GOALS FACTOR:** Are we targeting a financial goal such as increasing sustainability, decreasing subsidy reliance?



### Step 9 – Implementation

Across the country, ranges in overall cost recovery levels can vary from less than 10% to over 100%. The agency sets their goals based upon values, vision, mission, stakeholder input, funding, and/or other criteria. This process may have been completed to determine present cost recovery levels, or the agency may have needed to increase cost recovery levels in order to meet budget targets. Sometimes, simply implementing a policy to develop equity is enough without a concerted effort to increase revenues. Upon completion of steps 1-8, the agency is positioned to illustrate and articulate where it has been and where it is heading from a financial perspective.

### Step 10 – Evaluation

The results of this process may be used to:

- Articulate and illustrate a comprehensive cost recovery and subsidy allocation philosophy
- Train staff at all levels as to why and how things are priced the way they are
- Shift subsidy to where is it most appropriately needed
- Benchmark future financial performance
- Enhance financial sustainability
- Recommend service reductions to meet budget subsidy targets, or show how revenues can be increased as an alternative
- Justifiably price new services

*This Cost Recovery/Subsidy Allocation Philosophy: The Pyramid Methodology Outline is provided by:*



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## Resource Allocation Plan Framework

### What are we trying to accomplish?

This comprehensive effort and approach to providing services is undertaken to introduce and implement strong “best practice” business tools to the department. Parks and recreation services are varied and make up a lot of smaller “businesses” that each have their unique place in the market and appeal to the population in myriad ways. The overall goal of this plan is to initiate and sustain practices and examine policy and rules that affect overall desired outcomes of a healthy and vibrant community.

Although fee adjustments are likely, the goal is not to simply generate new revenues through fees, but to ensure a sustainable system into the future by using tax revenues and fees in the most appropriate ways, supplemented where possible by grants, donations, partnerships, and other sources of alternative revenues. Paying taxes supports “core services,” whereas fees and charges account for activities and services that benefit individuals. The new practices will allow the agency to allocate its resources wisely and provide valuable information for decision making and setting priorities for improvements and changes to the system.

### What do we mean by a “sustainable system”?

**Figure 1: Concepts of Sustainability**



“Sustainability” is a very popular and perhaps overused word these days. Often, the users have in mind only one of the three basic elements of sustainability (**Figure 1**) – Financial or Economic, Environmental, and Social or Recreational - making it very challenging to come to any kind of consensus when others may be focusing on one of the other elements. In order to manage the system of parks and recreation, economic or financial, environmental, and social or recreational sustainability must be balanced. The financial resources must be adequate to maintain the system into the future; the environment that

we love so dearly cannot be “loved to death;” and the people must be allowed appropriate use of the system to properly connect to and understand the value represented, creating stewardship while promoting the other benefits of physical activity and mental/emotional engagement. When all three are attended to, a dynamic, yet sustainable system is possible.

### What are “core services”?

Core services satisfy an agency’s values and vision, typically benefiting all community members, or are seen as essential to the lives of under-served populations. It is not necessary that an individual participate in a specific recreational or cultural activity, or even step into a park setting to receive



benefit. Having a nice park and trail system with trees, open space, and recreational amenities available in the community adds to home values and a quality living environment and **provides opportunity** for partaking in activity, as well as contributes to clean air and provides relief from urban density. To achieve these and other outcomes, an agency invests its tax dollars in these **core services**.

### **We pay taxes, why do we have to pay fees too?**

Parks and recreation services provide value to the community as a whole in terms of economic, environmental, and social benefits. Tax dollars support these “core services.” Beyond those benefits realized by all residents, the agency is also able to provide specific activities and services that benefit individuals. There are not adequate tax dollars to completely support this level of activity, and it is appropriate and common to charge at least minimally for these services. For example, if an individual takes a swimming lesson or participates in a senior trip, there are certain levels of skill building, social engagement, or entertainment that accrue to that person, while it can still be argued that there is a benefit to the community as a whole by teaching people safety around water, and through the social capital and health gained by keeping seniors active and in touch. This warrants covering at least a portion of the cost of a program or activity through an individual fee. Other opportunities, such as the rental of a space for a private party would warrant a fee to cover the entire cost of providing that space.

### **How is the cost of a program or activity determined?**

Dollars spent will now be accounted for more specifically by programs and services offered. The “direct” cost includes easily tracked expenses such as the cost of an instructor, supplies needed, equipment rented, etc. Other costs are more “indirect” and are often shared among several programs or services. This could include the cost of a supervisor, utility expenses, security services, etc. Often when calculating the cost of an instructor or other type of employee, only the direct wage is considered. However, in addition to the hourly wage of an employee, other costs are incurred including FICA, worker’s compensation, unemployment insurance, and training, etc. This plan includes the methodology to account for these expenses and ultimately to make better more sustainable decisions.

### **Does “Cost recovery” mean that we need to cover all of the cost of a program or activity through fees?**

No, in most cases where fees are appropriate, the cost recovery target will be set to recover a portion, or all, of the “direct” cost. In some case where the individual benefit is very high, the cost recovery target will be set to cover more than 100 percent of the direct cost. This will allow the fee to also recover some or all of the indirect cost of providing the program or services as these are still very real costs that are caused by the program or activity. Cost recovery can also be accomplished through other forms of revenue such as grants, donations, sponsorships, etc.

### **What about those who cannot afford to pay a fee?**

Options are always available for those with economic need. Agencies generally make provision through a scholarship policy and program. It is not a sustainable practice to keep fees artificially low in order to assure that all can afford to pay. Many residents are very capable of paying fees.