



Bend Metro Park & Recreation District

February 2 and 5, 2021

# Board of Directors

## Annual Workshop Agenda

[www.bendparksandrec.org](http://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

799 SW Columbia St., Bend, Oregon 97702 | [www.bendparksandrec.org](http://www.bendparksandrec.org) | (541) 389-7275



# Board of Directors

Workshop – February 2 and 5, 2021

Bend Park and Recreation District Office – Zoom

## AGENDA



To support Governor Brown’s recommendation for social distancing, the Board of Directors will conduct the regular board meeting by video.

**Please use the link below to join the webinar both days**

<https://us02web.zoom.us/j/87827314665?pwd=NFpTbzRCRzdXUHBUY3dmRFBDbkt3dz09>

Passcode: 937207

**Join by phone, toll-charges may apply:**

**1 253 215 8782**

**Webinar ID: 878 2731 4665**

**Passcode: 937207**

**Tuesday**

**Workshop start: 8:30 a.m. – Noon**

### **1. Strategic Plan - Annual Strategic Action Plan (Mid-Year Review) – Rachel Colton and Michelle Healy**

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 plan is a living document that will include annual updates to ensure the plan’s relevancy in meeting the district’s desired outcomes, and to track progress in accomplishing the action items that support desired outcomes. It includes identified actions to be completed annually based upon the BPRD fiscal year. The last action update to the board was in February of 2020. This update will focus on progress on calendar year 2020 action items.

For the 2020 calendar year, the plan identified 45 action items (which includes one future action item that is in progress early). In addition, as a result of COVID and other circumstances, 19 additional action items were added for 2020. The majority (28) of the 45 action items are complete or in progress, with 15 items on-hold or delayed due to COVID necessitating a shift in priorities. The on-hold and delayed actions are balanced by the additional 19 action items, which illustrate the significant workload shift and reprioritization necessitated by COVID.

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 used those measures as a starting point and presented 11 draft performance measures for board review and feedback last year. This year staff will be bringing forward updates for six of these performance measures (the remaining five are tied to the perception survey and can only be updated every three years), and providing an update regarding potential future performance measures.

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

*Supporting Documents:* Adopted Strategic Plan – available on the BPRD website  
Attachment A – 2020 Action Plan Update  
Attachment B – Performance Measures Report

## **2. Financial Outlook – Lindsey Lombard and Betsy Tucker**

In past annual workshops, we have provided various scenario projections created through our five-year financial forecasting model. This year, the district has experienced significant financial, operational and service impacts due to COVID. In this ever-changing environment, we have extremely limited confidence in our ability to project what may happen through the end of this fiscal year and into the next, let alone five years out. Because of this, we will not be providing any five-year financial projections at the workshop.

Instead, we will focus this workshop’s financial discussion on: 1) COVID impacts that we know (prior fiscal year and half way through the current fiscal year); 2) projections on the remainder of the current fiscal year; and 3) priorities for the upcoming fiscal year’s budget. Staff will also provide information on projected future financial impacts and the difficult decisions that the district has made over the last 11 months in order to maintain its financial sustainability now and into the future.

Staff has completed a forecast for System Development Charge (SDC) revenues, expenditures and ending fund balances. This information is intended to provide a long-term view to help inform the board for Capital Improvement Plan (CIP) decision-making.

*Goal of agenda item:* This discussion will help provide a means for the board to gain an understanding of the COVID-related impacts to the district’s current and future finances and priorities as we move into the budget and CIP development process.

*Supporting Documents:* SDC Fund Forecast to be provided during the meeting

## **3. Recreation Service Subsidy Allocation and Cost Recovery Update – Matt Mercer**

Recreation services operations and budget have been severely impacted by the COVID pandemic since March 2020 and will continue to be impacted in the 2021-22 fiscal year. The ongoing effects of the pandemic, combined with the anticipated opening of Larkspur Community Center, make it very difficult to apply our cost recovery goals and estimate tax subsidy requirements with any level of confidence.

Recognizing these challenges, we will provide an updated estimate of the tax subsidy required for the current fiscal year and compare cost recovery levels to our adopted targets and historical levels. Not surprisingly, cost recovery levels are substantially lower as revenues have decreased at a much greater rate than expenses.

We will then provide a range of financial scenarios for the coming fiscal year in order to understand the tax subsidy that may be required to support recreation services as it rebuilds programs and opens Larkspur Community Center. We do not recommend any changes in the adopted cost recovery targets; however, we want to acknowledge that we are unlikely to achieve these targets in many programs during the rebuild. The cost recovery targets remain critical to returning to financial sustainability even if it takes several years to return to these levels.

*Goal of agenda item:* Review recreation cost recovery/subsidy allocation status and projections.

Attachment C: User Fees and Charges Policy

## **Friday**

**Workshop start: 8:30 a.m. – Noon**

### **1. Capital Improvement Plan (CIP) – Michelle Healy and Brian Hudspeth**

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 2022-2026 CIP staff has updated the 2021-2025 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 2022-2026 CIP.

*Supporting Documents:* Draft 2022-2026 Five-Year CIP will be provided at the meeting.

### **2. Board Priorities Discussion - Don Horton and Michelle Healy**

In this year's Executive Director's performance evaluation, the board spent a great deal of time developing goals that have broad implications on the district. Even though the goals closely relate to the strategic plan, the process allowed the board to determine what is more important for the district to accomplish.

*Goal of agenda item:* Revisit set goals to review status to date and to reaffirm that this list of goals remains the board's top priorities.

Attachment D: Executive Director Goals Alignment with Strategic Plan

### **3. Board evaluation**

Board of directors' self-evaluation is a best practice to make sure that the board remains accountable to those they serve and that the board is collectively working to meet the mission of the district. The purpose of board self-assessments is to be sure that the board is fulfilling the duties and responsibilities and that appropriate processes are in place to ensure that the board is giving due diligence to planning and oversight over the organization.

Last year the self-assessment was led by Special Districts of Oregon, however in years past the board conducted the self-evaluation on their own. Sheila Reed sent each of you the board self-evaluation form to fill out on your own and then to return to her. Thank you to those of you have completed and returned the form. The form is to be used to help guide board discussion.

*Goal of agenda item:* To conduct board self-evaluation.

*Supporting Documents:* Board self-evaluation form to be provided during the meeting



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

**Employees &  
Workplace Culture**  
*Becoming a workplace  
that is second to none in  
performance and  
satisfaction*



- 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  
SUMMARY OF 2020 ACTION STATUS BY PILLAR**

**Employees &  
Workplace Culture**  
*Becoming a workplace  
that is second to none in  
performance and  
satisfaction*



- 4 completed actions
- 4 in progress actions (includes 1 ahead of schedule)
- 4 new actions
- 3 on hold/delayed actions

15

**Community  
Relationships**  
*Strengthening community  
connections and  
partnerships*



- 11 in progress actions
- 13 new actions
- 6 on hold/delayed actions

30

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



- 2 completed actions
- 9 in progress actions
- 2 new actions
- 6 on hold/delayed actions

19



**BEND PARK AND RECREATION DISTRICT  
2019-2022 STRATEGIC PLAN  
2020 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**

- Implement findings and recommendations from the Classification and Pay Equity Study and communicate to employees
- Transfer Employee Relations Committee from policy to charter and evaluate purpose and efficiency
- Introduce or enhance communication tools to improve employees' ability to communicate with one another
- Develop specific policies and practices for use of trade/exchange/flex time for exempt staff

### **In Progress**

- Recruit to new audiences
- Evaluate part-time/seasonal structure to determine if there are more responsive ways to meet business and employee needs
- Evaluate effectiveness and value of mandatory training

### **Ahead of Schedule – In Progress**

- Collect and analyze data to inform and improve employee retention strategies in areas with high turnover





**BEND PARK AND RECREATION DISTRICT  
2019-2022 STRATEGIC PLAN  
2020 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

### **In Progress**

- Create stronger and more meaningful partnerships with government agencies
- Identify and formalize legacy community partnerships that have not been documented
- Educate our workforce on how to respond effectively and professionally to misinformation about BPRD
- 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 Latinx population
- Analyze recreation participant data to identify underserved geographic areas in programming
- Create a diversity, equity and inclusion program that develops a value statement, policies and training opportunities
- Launch Larkspur Community Center programming and operations, and integrate into the overall recreation program
- Develop and implement a Customer Loyalty Program
- Develop operational and communications strategies for the opening of the bike park at Big Sky and unique amenities at Alpenglow



**BEND PARK AND RECREATION DISTRICT  
2019-2022 STRATEGIC PLAN  
2020 ACTION ITEM SUMMARY**

## Operations & Management Practices

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

### Completed

- 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

### 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
- Plan and prioritize funding for a new Park Services Shop
- Evaluate current and preventative maintenance practices and adjust as needed
- 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
- Measure progress on meeting the LOS targets for parks and trails in the adopted Comprehensive Plan and 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



## BEND PARK AND RECREATION DISTRICT 2019-2022 STRATEGIC PLAN 2020 ACTION ITEM SUMMARY

### New Action Items

#### Employees & Workplace Culture

- Develop virtual training for new employees to provide a welcoming onboarding experience in times of remote work
- Develop and implement electronic workflow for numerous processes in HR, payroll and safety to improve efficiency and support remote work
- Develop virtual benefits orientation including fillable forms to streamline benefits enrollment
- Complete financial statement audit electronically/virtually for the first time in BPRD's history

#### Community Relationships

- Live stream all board meetings to provide transparency in planning and operations
- Provide virtual recreation classes to engage a diverse cross section of the district's population
- Provide IT, RecTrac & communication resources to address frequent changes in recreation services and ensure seamless patron experience
- Develop contract procurement processes in DocuWare to improve efficiencies and customer service experience
- Develop and implement a contract retainage account process to improve external customer service communication and experience, and relationships with bankers and contractors
- Partner with City of Bend and Deschutes County to provide personal protective equipment for staff and the community
- Partner with Better Together and Bend-La Pine Schools to create all-day childcare program for working families in need during distance learning
- Serve as deputy Joint Information Center manager for tri-county communications support to Emergency Operations Center
- Develop relationship with Deschutes County Health Department to establish criteria and notification protocols to reduce community infection of COVID-19
- Manage staff and volunteer effort for public health distribution of masks at the river and at fall sports
- Convene partners to align messaging and education for water activities during COVID, including at lakes and rivers
- Update Park Services operating processes to minimize potential COVID exposure for employees and park visitors
- Install approximately 2,000 signs in parks and on trails to support safe public use of parks, river corridor and trails

#### Operations & Management Practices

- Update building HVAC systems to increase outdoor air circulation, and installation of over 300 high efficiency filters to remove particulate matter particles from indoor air
- Reassign staff during COVID pandemic to allow for cross training and minimize layoffs



## BEND PARK AND RECREATION DISTRICT 2019-2022 STRATEGIC PLAN 2020 ACTION ITEM SUMMARY

### On Hold/Delayed Action Items

#### Employees & Workplace Culture

- Enhance professional development program for interested employees
- Provide supervisors and managers tools and/or training to improve the performance evaluation process
- Address the need for on-call support for all departments

#### Community Relationships

- Revise the district's current partnership policy to define different levels of collaborative relationships and criteria
- Develop a communications partnership plan
- Create a partnership management plan with supporting processes and systems
- Develop method for ongoing education and information sharing with Board, Budget Committee members and the public on district finances and resource allocation decisions
- Develop a BPRD 101 fact sheet, presentation template and talking points
- Evaluate the value and feasibility of collecting demographic information through registration and implement if warranted

#### Operations & Management Practices

- Define minimum and desired staff levels for each service area of the District
- Education and outreach for staff about the Comprehensive Plan LOS Target and current status
- Develop specific environmental responsibility guidelines which drive purchasing decisions (including equipment, supplies, structures and furnishings, etc.)
- Integrate sustainability values and practices in recreation programming when feasible
- Develop a communications plan to educate and inform district staff about operating and capital budgets
- Implement risk-based approach to reserves and periodically evaluate

**BEND PARK AND RECREATION DISTRICT  
2019-2022 STRATEGIC PLAN  
PERFORMANCE MEASURES UPDATE  
1/27/21**

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 used those measures as a starting point and presented 11 draft performance measures for board review and feedback last year. This year staff is providing updates for six of these performance measures (the remaining five are tied to the perception survey and can only be updated every three years).

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

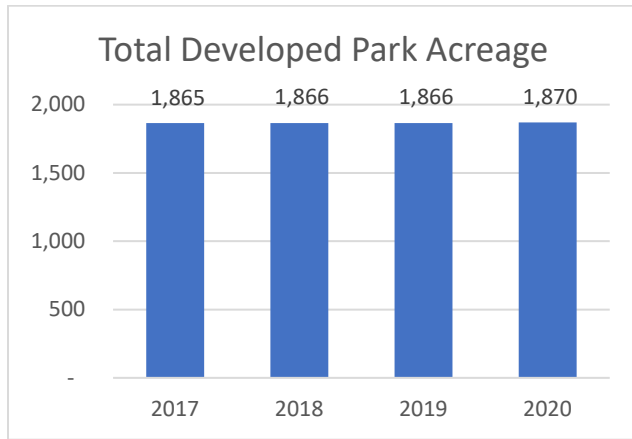
- **Baseline:** Identified Key Performance Indicator (KPI) starting point based upon historic district data and/or industry benchmark data.
- **Desired Outcome:** The highest-level objectives that support achievement of the three district pillars.
- **Key Performance Indicator (KPIs):** Measurable value 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.

## 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

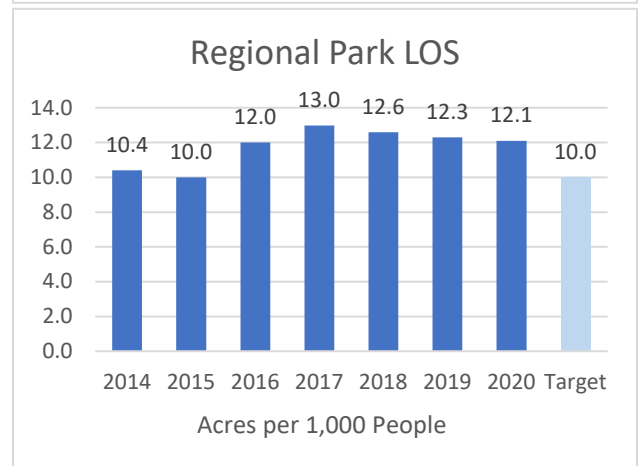
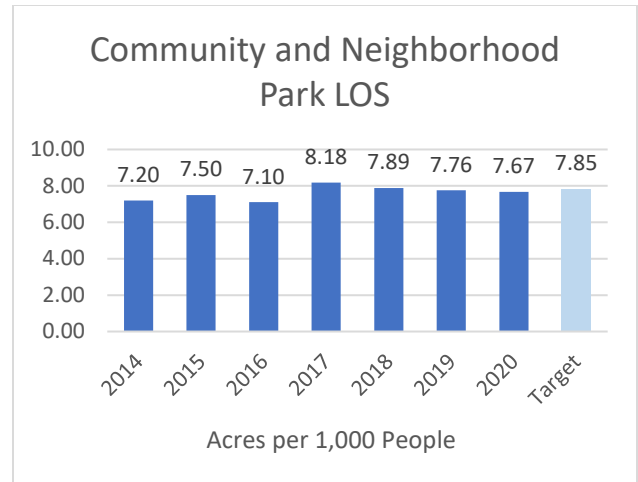
**Performance Metric:** Total developed park acreage (inclusive of regional, community and neighborhood parks) provided by BPRD.



**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 2020:

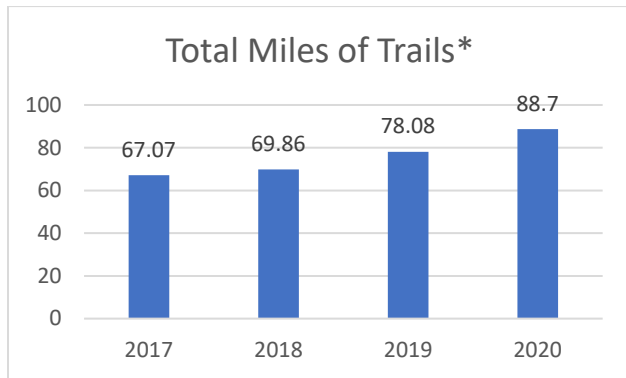
- Neighborhood and Community Parks – 7.67 acres/1,000 people
- Regional Parks – 12.1 acres/1,000 people

## 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

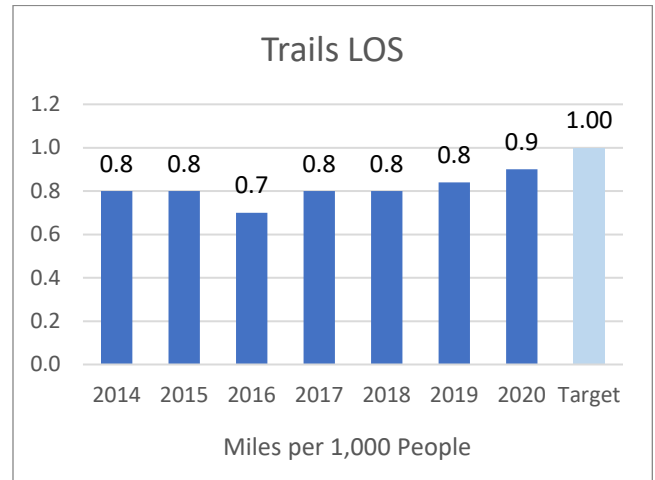
**Performance Metric:** Total miles of trails provided by BPRD.



\*Total trail miles include primary and primary interior trails and do not include connector trails. Increases in 2018 are attributed to a new counting method. Increases in 2019 are partially attributed to digitization of trails/improved mapping. Finally, increases in 2020 are primarily attributed to construction/mapping of multi-use trails through the Tree Farm and Westgate Developments, reclassification of Discovery Park Trails & Alpine Park Trails to Primary Interior Park Trails, and continued field mapping/refinement of the trail database.

**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 2020:

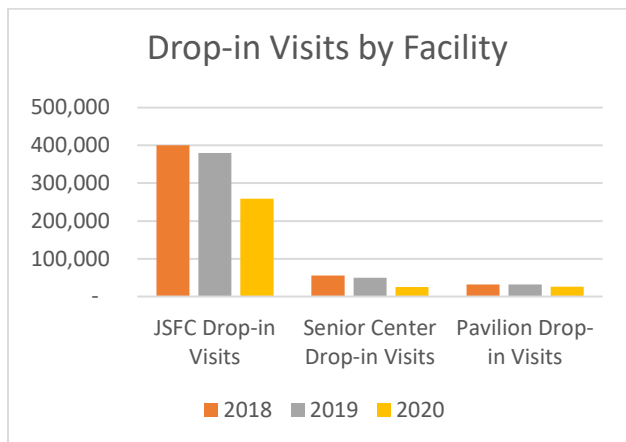
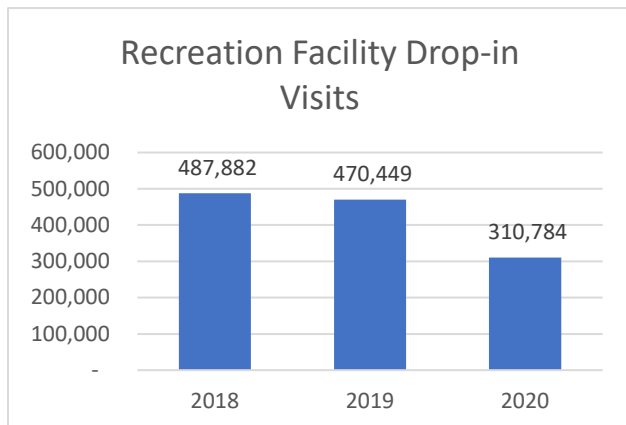
- Trails – 0.9 miles/1,000 people

## Residents Served by Drop-in Activities at Recreation Facilities

**Pillar:** Community Relationships

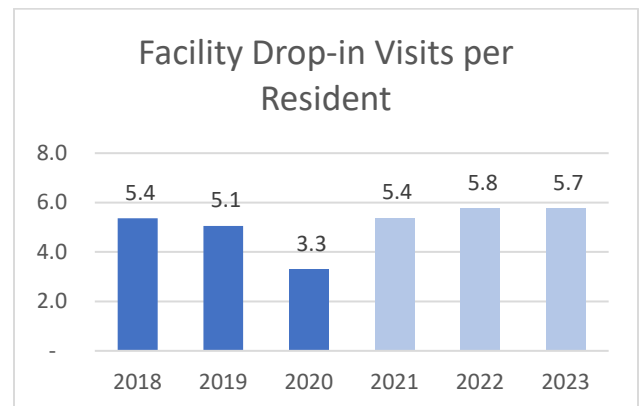
**Desired Outcome 3:** District Services that are accessible to all

**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 anticipated opening of Larkspur Community Center, the district’s goal is to increase drop-in facility use to 5.5 visits per resident or higher.



**Status:** Visits per resident dropped substantially in 2020 to 3.3 visits per resident due to facility closures and capacity limitations resulting from the COVID-19 pandemic from April-August. The 2021 reporting period will also be severely impacted due to continuing facility closures, capacity limitations and the delay of the opening of Larkspur Community Center. It will likely be 2022 before we can begin to recover to pre-pandemic levels.



## Latino Outreach and Support

**Pillar:** Community Relationships

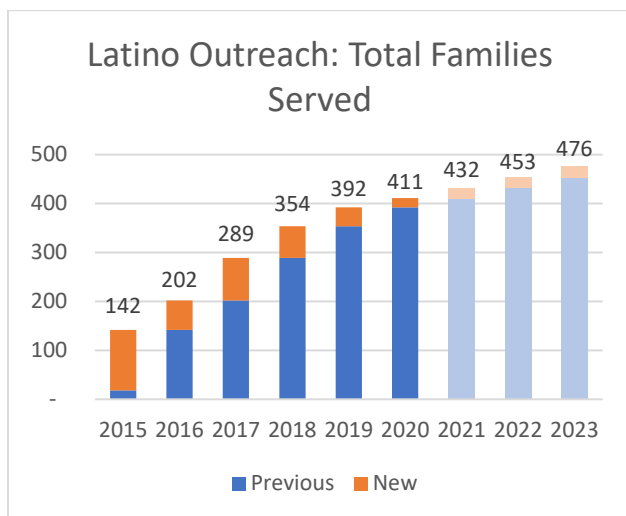
**Desired Outcome 3:** District Services that are accessible to all

**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% annually.

**Status:** The district nearly met the 5% target, increasing the cumulative number of Latino households served by 4.8% despite in person outreach being severely limited since the start of the COVID-19 pandemic. What this does not measure is the amount of contact our Latino Outreach specialist had with existing families to help them navigate the many changes and challenges the pandemic created for recreation programs and facilities and park use in general.



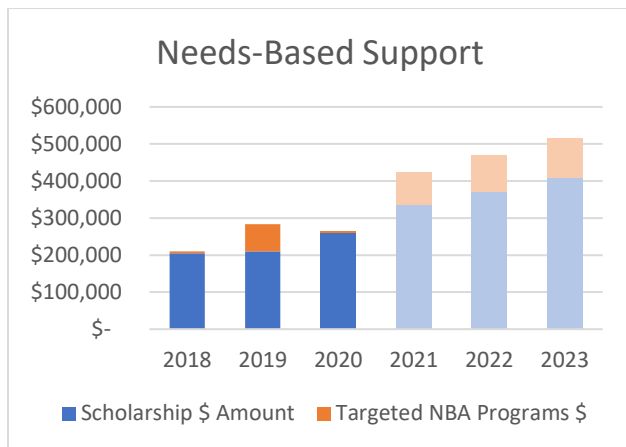
## Needs-Based Assistance (NBA) Provided

**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% annually through continued scholarship program outreach efforts and targeted programming efforts.

**Status:** The district provided nearly 25% more scholarship assistance this year than the previous two years despite offering substantially less program opportunities due to the pandemic restrictions. The increase in scholarships can be attributed to continued outreach efforts, strong partnerships, improved application process and a new communication plan.

While scholarship use increased, overall needs-based assistance was down 7% since the district was unable to offer summer programs that target low-income populations due to the pandemic. This resulted in most of those funds going unused. Needs-based assistance funding will continue to be impacted in the 2021 measurement period due to less program offerings, the Team- Up all day care program for school age children, and CARES funding supporting the Team-Up program.

## Residents Served by Organized Recreation Programs

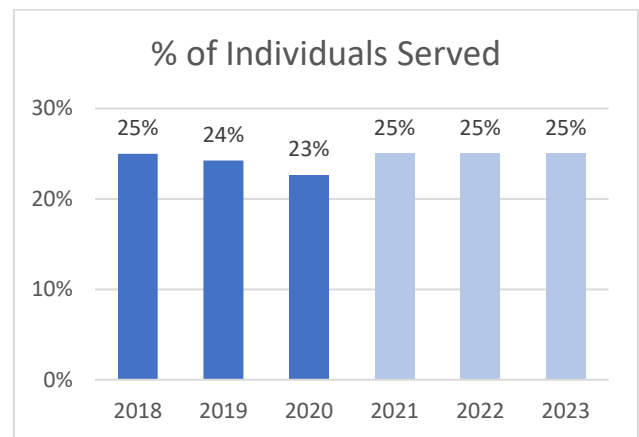
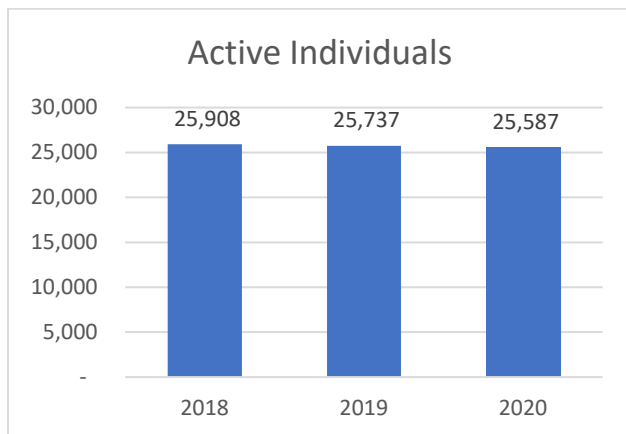
**Pillar:** Community Relationships

**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 (25%) 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:** Despite the COVID-19 pandemic severely impacting recreation service for half of the measurement period, the district still served nearly the same number of individuals as the previous two years, and at 23% of the total population served is just 2% short of the target of 25%. 2021 may be more severely impacted due to a longer impact from the pandemic.

## Scholarship Program Access

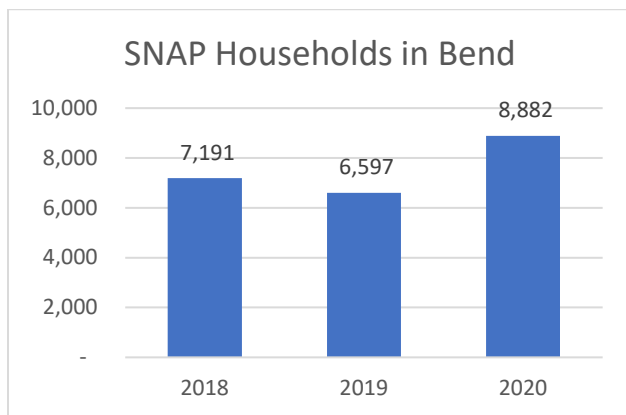
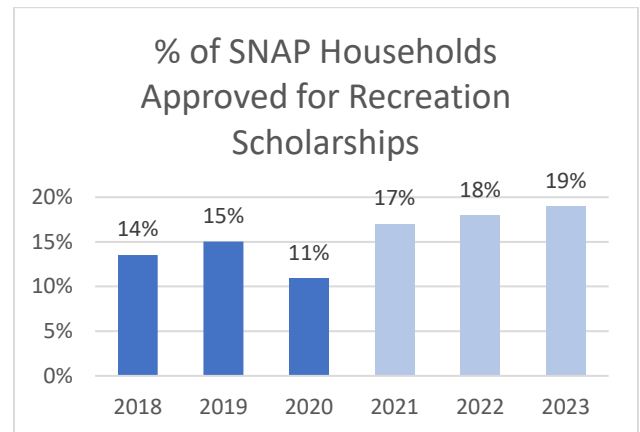
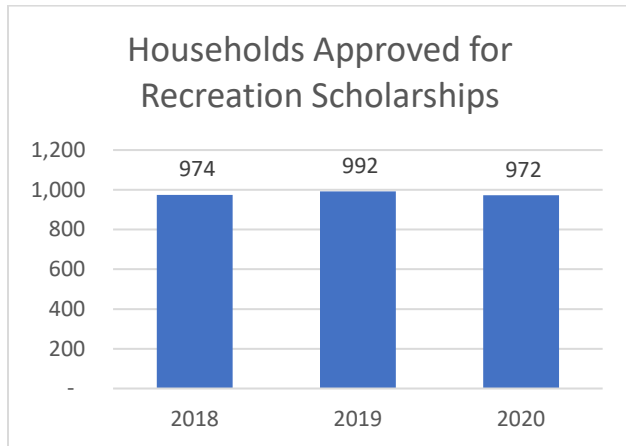
**Pillar:** Community Relationships

**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.

**Target:** The district’s goal is to increase 1% annually.



**Status:** The number of households approved for scholarship is nearly the same as the previous 2-years despite recreation programs being limited greatly the second half of the measurement period due the COVID-19 pandemic. At the same time, the number of households qualifying for SNAP due to the pandemic increased greatly resulting in a drop in percentage of SNAP recipients served from 15% to 11%.



Brady Fuller, Chair

**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.



Reviewer: Director of Recreation  
Last Review Date: February 2019  
Next Review Date: February 2024  
Review Schedule: 5 years

### 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.

#### 4. 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.

## 5. 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.

## 6. 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.

## 7. 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**

<b>Program Category</b>	<b>Operated Facility</b>	<b>Non-Operated Facility</b>
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**

<b>Rental Function</b>	<b>Partner</b>	<b>Non-Profit</b>	<b>Private</b>	<b>Commercial</b>
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.



## BPRD Executive Director Goals Alignment with Strategic Plan

### February 2021 Status

**Overview:** This document aligns Don Horton’s goals with all applicable Strategic Plan pillars, desired outcomes, strategies and actions. It also provides the status of each referenced action item. Where no such strategic plan reference exists, an update on the status of the goal is provided.

**Goal 1** – Assess BPRD polices, practices, programs (including recreation scholarships) to ensure BPRD strengthens its work on diversity, equity, inclusion. Develop a scope of work to be presented to the board for further refinement of the goal.

a. **Pillar** – Community Relationships

**Desired outcome** – District services that are accessible to all.

**Strategy** – Develop solutions and required resources to mitigate identified barriers to participation and involvement.

- i. **Action** – Increase knowledge of and access to the district’s scholarship program.
  1. **Status** – Substantial progress includes simpler, more accessible application and qualification process, and coordinated communication plan. Scholarship use up significantly as a result.
- ii. **Action** – Invest in targeted programming that minimizes barriers for low-income populations.
  1. **Status** – Programs planned for summer 2020 were cancelled due to COVID. Priority shifted to serving low income families in all day Team Up program during distanced learning. Seventy percent of participants are lower income families.
- iii. **Action** – Expand targeted outreach for the Latino population.
  1. **Status** – Progress made with 19 additional families reached, but due to COVID and the limitations of in person engagement we fell just short of our 5% annual performance measure target. Our Latino Outreach coordinator provided focused assistance to many existing families to help them navigate the changes and challenges the pandemic created for recreation programs, facilities and park use in general.
- iv. **Action** – Analyze recreation participant data to identify underserved geographic areas in programming.
  1. **Status** – Has been integrated into annual evaluation of all recreation programs.
- v. **Action** – Evaluate the effectiveness of the Needs Based Assistance (NBA) policy and plans in 2022, and adjust as necessary.
  1. **Status** – This is a future action item.
- vi. **Action** – Develop maps, signage and other information highlighting accessible recreation opportunities.
  1. **Status** – This is a future action item.

- vii. **Action** – Evaluate and prioritize additional barriers to participation (that are in addition to physical access, Latino population and low-income population).
  - 1. **Status** – This is a future action item.
- b. **Pillar** – Community Relationships
 

**Desired outcome** – District services that are accessible to all.

**Strategy** – Foster a climate of inclusion for all community members.

  - i. **Action** – Create a diversity, equity and inclusion program that develops a value statement, policies, and training opportunities, etc.
    - 1. **Status** – Informal staff working group formed, DEI consultant selected in November, consultant work commenced in December of 2020.
  - ii. **Action** – Evaluate the value and feasibility of collecting demographic information through registration, and implement if determined valuable and feasible.
    - 1. **Status** – On hold due to COVID.

**Goal 2** – Seek board direction on district’s role in working collectively with community partners to tackle community-wide issues such as affordable housing, tax abatement, child care, and trail connectivity that fall within legal parameters of a Park Special District.

- a. **Pillar** – Community Relationships
 

**Desired outcome** – The district is strategic about partnerships.

**Strategy** – Partner when there is a shared mission and a broad community benefit.

  - i. **Action** – Revise the district’s current partnership policy to define different levels of collaborative relationships and criteria (this includes sponsorships).
    - 1. **Status** – On hold due to COVID.
  - ii. **Action** – Create stronger and more meaningful partnerships with other governmental agencies.
    - 1. **Status** – Strengthened relationships with other organizations as an outcome of COVID management and response strategies, especially around child care/programming, public safety and communications. District board members and Executive Director engaged with newly formed shared collaborative process, Collective Impact Bend (with COB, Library, School District), which is aimed at working together to find ways to address broad community issues and needs.
    - 2. **Status** – Considered request of city to add additional affordable housing waivers by adopting Resolution 2021-01.
  - iii. **Action** – Identify and formalize “legacy” community partnerships that have not yet been documented.
    - 1. **Status** – Future action item.
  - iv. **Action** – Create a partnership management plan with supporting processes and systems.
    - 1. **Status** – On hold due to COVID.
- b. **Pillar** – Operations and Management Practices



**Desired outcome** – Balance between caring for existing infrastructure and new development.

**Strategy** – Ensure the district is maintaining its adopted Level of Service (LOS) targets.

- i. **Action** – 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.

- 1. **Status** – See Goal 4 below for update.

**Goal 3** – Evaluate current and alternate practices to determine best practices to maintain vegetation in parks, fields, and open spaces.

- a. **Pillar** – Operations and Management Practices

**Desired outcome** – Be a local leader in environmental stewardship.

**Strategy** – Improve efforts to be responsible stewards of the natural environment.

- i. **Action** – Update the Park Service’s Integrated Pest Management Program to consider a pilot program to eliminate the use of chemicals in certain areas.

- 1. **Status** –Over the past year, herbicide use is down 50%. In addition, Park Services continues to explore alternative herbicides.

**Goal 4** – (Multi-year goal) Work with the board to (1) develop metrics to measure trail level of service; and (2) create an action plan listing priority tasks to advance the trail system within the district’s purview. Action plan to include specific projects, based on an evaluation of system gaps and priority routes, wayfinding and crossing needs, development opportunities and constraints, as well as an analysis of population served including density and demographics; and (3) work with the city to develop an Urban Services Agreement on trails and trail maintenance.

- a. **Pillar** – Operations and Management Practices

**Desired outcome** –Balance between caring for existing infrastructure and new development.

**Strategy** – Ensure the district is maintaining its adopted Level of Service targets.

- i. **Action** – 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.

- 1. **Status** – Significant progress has been made on the Trail Maintenance IGA, which is the foundation for defining trail maintenance responsibilities with the city. In January of 2021 P&D began working on a plan to reevaluate our current high priority trail projects for the next several fiscal years.

- ii. **Action** – Measure progress on meeting the LOS targets for parks and trails in the adopted Comprehensive Plan and Capital Improvement Plan (CIP).

- 1. **Status** – Work is ongoing to measure progress using LOS methodology. P&D has been successful in replicating the walkshed analysis originally done by a consultant so that we can continue to calculate this metric in-house. Additionally, staff completed the first draft of a mapping tool to

supplement comprehensive plan trails LOS by establishing walking distance to trail system. Updated LOS metrics will be presented to the board at the annual board workshop as part of the performance metrics discussion. Additional presentation with more details will be presented at the board meeting on February 16.

**Goal 5** – Carry out the directions identified in the comprehensive and strategic plans and continue to develop and implement the performance measurement tools.

- a. **Status** – Work is ongoing to implement the comprehensive plan and the strategic plan. Progress on the comprehensive plan is demonstrated through the Capital Improvement Plan investments and other capital expenditures made. Both reflect progress toward acquisition and buildout of parks, trails and facilities, and major maintenance of the park and recreation system. Progress on the strategic plan is reported to the board at least annually and further noted in each board agenda item.
- b. **Status** – It is important to use appropriate performance metrics that will illustrate if we are achieving our goals. Initial performance metrics have been developed to help track the effectiveness of the Strategic Plan. Staff will further build upon these metrics over the years when goal or strategy modification warrant additional metrics to gauge the effectiveness of the plan.

**Goal 6** – Open Larkspur Community Center and replace JSFC pool tank.

- a. **Pillar** – Community Relationships  
**Desired outcome** – Exceptional customer and community experiences.  
**Strategy** – Provide exceptional experiences during each facet of the customer’s interaction with the district.
  - i. **Action** – Launch Larkspur Community Center programming and operations, and integrate into the overall recreation program.
    - 1. **Status** – Larkspur construction is complete and the facility will open once COVID conditions allow.
- b. **Status** – JSFC pool tank replacement is underway after the board’s approval of the guaranteed maximum price (GMP) in November 2020.

**Goal 7** – Evaluate potential sites and enter into a contract for the location of a new Park Services Shop complex.

- a. **Pillar** – Operations and Management Practices  
**Desired outcome** –Balance between caring for existing infrastructure and new development.  
**Strategy** – Continue to “take care of what we have” by prioritizing investments in the district’s existing assets.
  - i. **Action** – Plan and prioritize funding for a new Park Services shop.

1. **Status** – This is in progress and being discussed with the board during executive sessions. To date the district has set aside \$4M in reserves for this project and plan to significantly increase those reserves over the upcoming few years.

**Goal 8** – Complete the Pay Equity study and develop a strategy for funding needed staff upgrades.

- a. **Pillar** – Employees and Workplace Culture  
**Desired outcome** – Sufficiently staffed with well qualified employees in all positions.  
**Strategy** – Be an employer of choice through recruitment and retention practices that reflect the needs and work experiences desired by a modern work force.
  - i. **Action** – Implement findings and recommendations from the Compensation and Pay Equity Study and communicate to employees.
    1. **Status** – Pay equity study is complete and implemented.  
(Note: In an effort to advance the district DEI initiative and to maintain competitive hiring practices, all district job descriptions were reviewed as part of the pay equity study. Minimum education and work experience requirements were adjusted for many positions to assure they were not overstated).

**Goal 9** – Assist the board in resolving the BPRD commitment to the Mirror Pond dredging project.

- a. **Status** – This is in progress. Staff was successful at gaining the Mirror Pond Solutions (MPS) signature which will allow for permitting of the project to be awarded.
- b. **Status** – The board authorized the executive director to enter into an MOU with the city of Bend to modify the 2015 Mirror Pond Community Vision to consider an alternate fish passage due to PacifiCorp’s decision to continue operating the power facility.

**Goal 10** – **(NEW)** Reestablish the recreation program and financial health of the district following the recovery from the COVID-19 pandemic. Offer programs and open facilities as guidance allows.

- a. **Status** – The district has been modifying programs in order to provide as much service to the community as possible. As risk levels improve additional services will be restored.
- b. **Status** – It is still unknown what the financial impact the pandemic will have on the district resources, however early projections indicate that the financial wellbeing of the district will be maintained due to difficult decisions made as a result of COVID impacts: closing facilities, postponing projects, suspending COLA and merit pay increases and redirecting recreation subsidy. During the budget process staff will strive to bring a budget to the board that funds priorities including taking care of staff and funding recreation services that we hope will be reinstated in FY 2021-22, while also maintaining financial sustainability for the future provision of services.