

3rd
Edition

Small Community Parks and Recreation Master Planning Resource Guide

Version II—Individual Professional/
Student Edition



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Acknowledgments

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INTRODUCTION

This *Version II Summary Guide* is intended to provide an affordable step-by-step outline manual for students or individual professionals wanting to learn how to prepare a master plan for smaller park and recreation agencies. The authors are professional parks and recreation planners who have conducted more than 450 successful community plans around the United States.

This guide explains tasks can be completed by agencies and provides an overview of other tasks, such as a statistically valid survey, which may be most effectively and efficiently completed as contracted services, and why they are important. In addition, it provides an overview of the potential decision to contract with an independent third party, such as a professional park, recreation, and open space management consulting firm, which can provide unbiased credibility to the planning process. Suggestions for decision-making, community and stakeholder engagement, innovative inventory and programming analysis, financial review, technological tools, and an appropriate approval process are included.

A full Version I Guide is also available separately, which includes 18 valuable appendix resources, such as questionnaires, matrices, invitation and inventory templates, and other sample documents to help fully implement a comprehensive planning process.



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AUTHORS AND EDITORS



Pat O'Toole

Pat brings more than 40 years of management planning experience for parks and recreation agencies, and has been leading projects for GreenPlay as a Principal since 2003. Prior to joining GreenPlay, Pat worked for another planning firm and as a private consultant. He also served as director and assistant director for several progressive agencies in four different states. Pat was the original author of the 1st edition of this guide when he was working as a sole consultant, and has contributed to updates of the 2nd and 3rd editions. Pat has extensive expertise in budgeting, operational pro-formas, cost recovery, activity-based costing, public process, and all other facets of agency leadership and planning. Pat excels at providing creative visioning and implementation strategies to forward-focused projects and teams. Pat has been speaking at NRPA, many state park and recreation conferences, NRPA Revenue Schools, and NRPA Executive Development Schools since the early 1980s.



Karon Badalamenti, CPRE

Before passing away tragically from cancer in 2014, Karon contributed over 25 years of experience in special district and municipal government management and parks and recreation to her work as Principal for GreenPlay LLC, after she joined the firm in 2004. Karon was instrumental in updating the 2nd edition of this guide in 2006. Karon specialized in government and public sector planning, fiscal sustainability, operations management, and leadership development. She trained professionals nationally regarding planning processes, best practices and innovative tools, alternative funding, core services, and resource allocation, among other topics. Karon believed passionately in the value that parks and recreation brings to communities, and that public agencies need to demonstrate their sound fiscal stewardship practices through transparent forward thinking and public engagement.



Teresa Penbrooke, PhD, CPRE

Teresa founded GreenPlay LLC in 1999 and continues as CEO of the firm, leading completion of over 450 community master plans and related planning efforts around the U.S. She is also secretary, lead faculty, and director of the Healthy Communities Research Group for GP RED. Teresa has been integral in the research, quality, recommendations, and implementation of innovations for the field of parks and recreation. She finished her PhD at NC State University in Parks, Recreation, & Tourism Management in 2017 while working full-time, and continues to teach and help update curricula there and for other universities. She also teaches and researches best practices in agency administration and planning for national and state conferences and individual agencies. She was previously Curriculum Chair for the Reitz Marketing and Revenue School Planning and Management Institute. She is also an Official Visitor Chair for the Commission on Accreditation for Parks and Recreation Agencies (CAPRA). Teresa has been a primary author and editor for both the 2nd and 3rd editions of this guide.



Chris Dropinski, CPRE

Chris is a Certified Parks and Recreation Executive with over 40 years in the field of parks and recreation administration and management. Since 2001, she has been co-owner and Senior Principal consulting for GreenPlay. Her passion for teaching and moving the field forward has led to many successful master planning and feasibility projects across the country. Earlier in her career, she served as Director of the City of Boulder, Colorado, Parks and Recreation Department for over a decade, providing leadership for the development and provision of parks, open space, trails, and recreation services. She is an invited member of the American

Academy for Park and Recreation Administration. Chris provides an innovative and respected approach toward addressing cost recovery, policy development, organizational development, strategic management, cost benefit analysis and revenue philosophy in the public setting, building relationships with alternative providers and partners, developing board/staff relationships, and establishing effective public engagement processes. Chris has been a primary author and editor for both the 2nd and 3rd editions of this guide.



Melissa M. Chew, CPRP

Melissa used her over 35 years of experience in public parks and recreation for state, county, municipal, and special district agencies to contribute heavily to the update of this 3rd edition. She joined GreenPlay as a consultant in 2014 until retiring in 2016. During her career, Melissa was involved in bringing two new recreation centers and an expansion on line and administered large multifaceted departments including traditional parks and recreation programs and facilities, natural resources management, cemeteries, forestry, museums, historic preservation and special events. Melissa assisted agencies with master plans, feasibility studies, operational analyses, and pro-forma business plans. She was skilled at facilitation and communication,

building consensus within diverse groups.



Rob Layton, PhD, FASLA, CPRP

Rob is a founding partner of Design Concepts, a national landscape architecture firm, an instructor of the North Carolina State University's College of Design Landscape Architecture Program, and currently serves as Executive Director for GP RED. Rob's interest has always focused on how the landscape of the public realm affects the lives of people. This has led to his involvement nationally toward helping communities understand, create, and manage their public spaces. He has been a key innovator in parks and recreation digital component-based methods for inventory and level of service analysis, and a primary architect of the GRASP® methodology. Rob has contributed updated chapters on this topic for both the 2nd and 3rd editions

of this guide. He is dedicated to perfecting the science and practice of measuring how the built environment affects the people who live within it. Rob travels throughout the world, presents at conferences, leads community workshops, and writes articles on the processes he has helped develop for improving the built environment.



Chris Cares, MCP

Chris possesses a diverse background in public and private planning, starting in the 1970s with a Masters in City Planning from Harvard. A founding partner of RRC Associates, he specializes in practical applications of research techniques including survey and qualitative research, modeling and applied analysis to solve problems in city planning, administration, and business applications. Parks and recreation needs assessments are particular areas of specialization, and he has led over 100 community survey projects for GreenPlay. Chris has overseen numerous community/citizen surveys for local communities throughout the United States, which provide

input to parks, recreation, trails, open space, and planning needs assessments. The results of these studies typically become incorporated into parks and open space master plans, or other policy documents. Chris has been instrumental in updating the survey and community engagement sections of the 2nd and 3rd editions of this guide.



Chapter 1: Why a Master Plan?

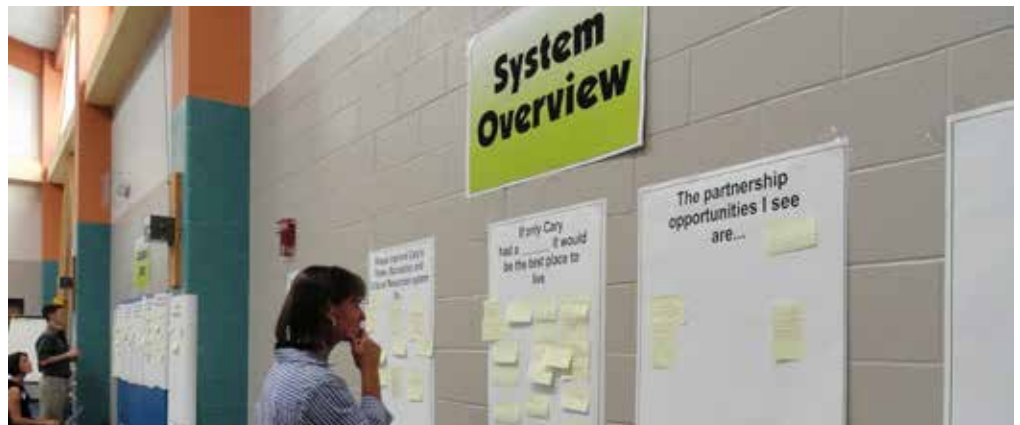
Note: For purposes of this guide, “parks and recreation” is used as an “umbrella” term for agencies who provide these types of quality of life services for their community. This guide is appropriate for agencies, organizations, or departments that provide services, and may include those who only have parks, those who only offer recreation, or those who offer open space, libraries, cemeteries, airports, and/ or other related services, and any combination thereof. The terms “agency” and “department” may apply to a section within a larger organization or to a district specializing in those services alone.

A parks and recreation master plan provides an overall framework to guide the provision of park and recreation services in a community. It is a dynamic plan focused on the future that includes short, medium, and long-range action and implementation strategies. It creates a clear set of goals, policies, and objectives that guide staff for the development, redevelopment, and enhancement of a parks and recreation system including facilities and amenities, programs and services, and operations and finances.

■ Planning – Why Do We Do It?

- To evaluate current status, assets, policies, and procedures
- To measure customer satisfaction levels and identify unmet needs
- To identify how resources are allocated in alignment with those needs
- To justify existence, articulate a mission, and create a vision for the future
- To aid in decision-making and to create organizational efficiencies
- To gain buy-in from staff and governing bodies and provide a framework within which staff can work
- To serve as an implementation guide and provide effective coordination
- To recognize political constraints and provide a platform to defend or explain actions to citizens
- To promote attraction of partners and funding
- To keep policies from straying or having unintended consequences
- To create credibility with governing councils and/or boards and to develop relationships with outside organizations
- To establish governing council and board “buy-in” for budget requests

Ultimately, a good plan protects the agency and is essential to the ability to conduct business efficiently. Governing bodies trust staff to have proven and reliable rationale for decisions made. The planning process provides the basis for decision-making and serves as a guide for staff as well as the governing bodies.



■ Planning – Why Do We Dread It?

- Takes time away from “core jobs”
- Costs money – in time and resources
- Invites confrontation and examination
- If done well, invites in the UNKNOWN!

Types of plans can be difficult to understand/utilize. There are dozens of types of plans for a variety of situations. One of the first questions is often, “Which type of plan is needed, and how does it relate to other plans?” The following schematic is intended to give some framework to the typical hierarchy of plans, but it is representational, not absolute. Typically, a master plan will be the “umbrella plan” and serve as a guide for an agency. All of the other types of plans will be interrelated. Some are agency-wide, some department-wide, and some, such as feasibility studies and park master plans, are for specific projects. All plans are just that—PLANS—until actually funded through an allocated capital and/or operational budget and staff is assigned through a work plan. Approving a plan does not necessarily mean that it will be implemented, but a coordinated, well thought-out effort will not happen if there is no plan.

Figure 1: The Hierarchy of Community Planning



■ Community Comprehensive Plan

Local governments such as municipalities, towns, and counties have multiple business units that provide the total public services of a community, such as:

- Law Enforcement
- Fire
- Public Works
- Parks, Recreation, Cultural Arts, Libraries, and Open Space
- Transportation, Streets, and Roads
- Housing
- Utilities (gas and electric, water, sewer, trash, etc.)

For these agencies, the comprehensive plan focuses on the larger picture of the entire community and how the mission of each business unit, and the vision of the community, interrelate. It identifies policies and goals to guide all services within the community. Under the broad spectrum of the comprehensive plan, it is appropriate for each business unit, such as a parks and recreation department, to have its own unique master plan.

■ Agency System-Wide Master Plan

The focus of this guide is a parks and recreation system-wide master plan to present an overall framework guiding the provision of park, recreation, and related public services in a community. It is designed to provide a dynamic plan focused on the future that includes short, medium, and long-range action/implementation plans. It creates a clear set of goals, policies, and objectives that guide staff for the development, redevelopment, and enhancement of the parks and recreation system. If a comprehensive plan is in place for a community, this document can be informed by it. If a comprehensive plan is not in place (such as for a district, where parks and recreation may be the sole business unit), the master plan can serve to inform the development of a comprehensive plan, or it can be the comprehensive plan. It is very different than site-specific master planning for parks or facilities.



The master plan drives the creation of all other sub plans and studies. It is the foundation of budgets, policies, and management practices using the mission statement as its foundation. It must be integrated with all other plans and studies that have come before its creation or that affect its content.

The master plan can also support the collaborative approach to regional planning and partnering. A good plan should compile a comprehensive inventory of public and private facilities and programs within the service area, and their various categories of current users. It should establish priorities for future park and recreation services and facilities based upon the needs and recommendations in the plan.

It should also:

- Ensure that facilities are sufficiently explored in establishing development priorities.
- Determine the type of facilities and programming desired, the preferred location, and level of operational costs the community is willing to support and fund.
- Determine the level of public funding the citizens are willing to approve to develop park and recreational facilities.
- Establish a capital improvement plan and operational strategies based upon the resulting development priorities and level of funding the community is willing to support.

A parks and recreation agency may manage and maintain parks, recreation, libraries, cemeteries, golf courses, open spaces, trails, civic areas, etc. Each of these areas is typically considered and addressed as sub elements within the planning effort. For the purposes of this guide, this entire system-wide planning effort is referred to as a master plan. Specific master planning documents may go by many names, and may be referred to as the following:

- Comprehensive Master Plan
- Parks and Recreation Master Plan
- Parks, Recreation, Trails, and Open Space Master Plan
- Public Spaces Master Plan
- A variety of other titles that make sense within the context of an agency

■ Specific Plans

Other specific plans such as these include a public involvement process:

- Needs Assessments
- Feasibility Studies
- Strategic Plans
- Operational Audits
- Parks Master Plans
- Conceptual Plans

These additional types of plans are discussed in **Chapter 10: Other Plans**.

Just as agency purview and jurisdictions vary, agency master plans vary widely in terms of content and detail. A first step is to determine what will be included in the system-wide agency master plan.

■ Implementation Tools

This guidebook contains a step-by-step process for how to create a master plan for a small community. Many samples have been included for reference and use. They are starting points to customize the plan to the particular circumstances of a community.

■ Sequence of Work

A typical master planning process usually takes from 8-10 months to complete, depending on the level of detail in the plan, whether or not a community needs assessment mail survey is included, and the level of resources allocated to the effort. The final length of the project is primarily determined by the time needed to carry out the various elements, number of desired public meetings, presentations, and time for approvals. Some activities can happen concurrently. **Figure 2** graphically represents the key elements of a typical master planning sequence of work.

Figure 2: Sample Master Plan Sequence of Work



■ Master Plan Elements

The master plan typically includes the following elements that are discussed in detail in subsequent chapters:

- Acknowledgment (to be done at the end, discussed in Chapter 8)
- Table of Contents (a working outline, discussed in Chapter 2)
- Executive Summary (to be completed last, discussed in Chapter 8)
- Introduction (to be done at the end, discussed in Chapter 8)
- The Planning Context (discussed in Chapter 3)
- Purpose of the Plan (discussed in Chapter 3)
- The Community and Identified Needs (discussed in Chapter 4)
- Inventory, Findings and Analysis Related to Programs and Spaces (discussed in Chapter 5)
- Findings and Analysis Related to Administration (discussed in Chapter 6)
- Recommendations and Action Plans (discussed in Chapter 7)
- Appendices (discussed in Chapter 8)