



METROPARKS OF THE TOLEDO AREA

TODAY



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TOLEDO AREA

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TABLE OF CONTENTS

CHAPTER 1 – EXECUTIVE SUMMARY.....	1	CHAPTER 6 – ORGANIZATIONAL ASSESSMENT	43
INTRODUCTION	1	ORGANIZATIONAL STRUCTURE	43
KEY RECOMMENDATIONS	4	CHAPTER 7 – IMPLEMENTATION PLAN.....	45
CONCLUSION	8	LAND MANAGEMENT AND ACQUISITION	45
CHAPTER 2 – COMMUNITY NEEDS ASSESSMENT	9	FACILITIES	46
KEY LEADERSHIP AND STAKEHOLDER SUMMARY	9	PROGRAMMING	47
DEMOGRAPHIC ANALYSIS	12	PARTNERSHIPS	48
CHAPTER 3 – PROGRAMMING AND PARTNERSHIP ANALYSIS ..	13	PARK MAINTENANCE.....	48
INTRODUCTION	13	FINANCE	49
OVERVIEW OF PROGRAMS	13	ADMINISTRATIVE AND MARKETING OPERATIONS	50
PRIORITIES AND CORE PROGRAMS	14	CHAPTER 8 – CONCLUSION	51
LIFECYCLE ANALYSIS	21	Appendix A – Demographic Information	53
PROGRAM FINANCIAL ASSESSMENT	22	Appendix B – Core Competency	61
PROGRAM STANDARDS AND PERFORMANCE MANAGEMENT .	24		
VOLUNTEERS AND PARTNERSHIPS	25		
MARKETING AND PROMOTION	26		
CHAPTER 4 – PARK CLASSIFICATIONS AND STANDARDS.....	27		
PARK DESIGN PRINCIPLES	27		
CHAPTER 5 – FINANCIAL MANAGEMENT STRATEGY	29		
DATA COLLECTION.....	29		
FINANCIAL ASSESSMENT	30		
FINANCIAL PROJECTIONS	32		
FINANCIAL MANAGEMENT PRINCIPLES.....	34		
FUNDING AND REVENUE STRATEGIES.....	35		

CHAPTER 1 – EXECUTIVE SUMMARY



INTRODUCTION

For the last decade, the Metropolitan Park District of the Toledo Area (Metroparks) operated within a three-year strategic planning cycle framed in the context of the agency's connection to the land, community, staff, and to the future. This approach to strategic planning was embedded within a comprehensive plan based on a series of policies adopted by the Metroparks Board of Park Commissioners. These policies required all operations of the park system to meet or exceed established standards, ensuring exceptional stewardship of natural resources, and fiscal responsibilities. They also addressed the agency's commitment to public satisfaction, public and staff safety, internal and external service, and communication.

The strategic plan for the period of 2007-2010 had no provisions for the impacts associated with the financial crisis of 2007-2008 and the subsequent recession.

The agency was primarily funded through two independent tax levies: a 1.4 millage General Operation Levy with a term of collection from 2007 through 2017 and a .3 millage Land Acquisition Levy running from 2002 through 2012. This revenue stream was also supplemented with local government funds, which were reduced during the recession. Other economic impacts also included a severe reduction of tax-based revenue associated with devaluation of residential and commercial property, delinquent payments, and property foreclosures.

This loss of revenue presented significant challenges to the day-to-day operations and all levels of future planning of the park system. As a result, the primary objectives of the strategic planning cycle of 2010-2013 were to reduce overhead, while maintaining essential basic core services, yet continue with planned repair and replacement of critical park infrastructure. Staffing and program levels were reduced and the developments of several park projects were put on hold.

During the 2010-2013 strategic planning cycle, senior staff and the board of park commissioners began to consider operational changes to maintain the agency's commitment to the land, community, staff, and future. It was apparent through analysis of ten-year financial projections that revenue would need to increase, along with the requirement of additional budget reductions or both.

Two independently conducted public surveys in 2012 clearly illustrated one belief and two desires expressed by the residents: the community's value of the Metroparks system, the aversion to entry fees, and the willingness to support the park system with additional taxes. A series of public presentations and meetings were conducted with community organizations, existing park partners, potential new partners, individuals, and business associations. The purpose of the meetings was to share reasons why there was a need for the new tax levy, to discuss opportunities it would present, and to solicit input and observations about the park system not discovered from the survey data.

The decision to ask the voters to support a new levy was predicated on the fact that revenue losses had resulted in an erosion of fundamental core park services and the development of several major new parks had been indefinitely suspended. After careful consideration, the board of park commissioners decided to allow the .3 millage Land Acquisition Levy to expire and move forward with a proposed new .9 millage levy.



Wiregrass Lake

In November 2012, the citizens of Lucas County saw fit to pass a .9 millage Park District Levy for the purpose of general operations, land acquisition, land development, and capital improvements. With the passage of this levy, the park system was presented with an opportunity to chart a new course for the next two decades, including restoring lost services, continued reinvestment in capital improvements, the initiation of major maintenance activities in the existing parks, completing the development of two new parks, resuming planning and subsequent development for several new park projects that had been stopped, planning for park development on recent acquisitions, and to continue essential land acquisition for future open space and greenways.

The park administration and the board of park commissioners were also committed to work toward the creation of an operational plan that would preclude the need to ask voters for increased tax millage for the next two decades, barring any unforeseen problems when planning forward.

In 2013, Metroparks of the Toledo Area launched a comprehensive planning process, the purpose of which was to establish a long term 20-year vision for the park system, inventorying existing conditions, identifying opportunities for connecting natural area and open spaces, and connecting parks and parkways to communities. This comprehensive planning would also create a collection of conceptual plans to guide the completion of new park developments over the next ten years and create a corresponding business and sustainability plan to ensure the balance and stability of Metroparks over the next decade and beyond.

To fully maximize the potential of this multi-tiered planning approach, three consulting firms were selected based on their specific areas of expertise: URS, MKSK, and PROS Consulting.

URS was challenged to create a 20-year future plan. This future plan would identify and inventory opportunities to connect existing parks and open spaces to communities and population centers, and to recommend preservation strategies for significant natural areas. MKSK was retained to review preliminary plans for existing undeveloped parks and to create conceptual plans for the new park development in selected study areas. PROS



Consulting was contracted to review existing park operations and to offer recommendations to enhance services, to provide guidelines for controlled growth, and to create standards to ensure a sustainable future for Metroparks.

Each consulting firm approached their portion of the project with the instruction to create a document that could stand alone as an independent plan. The three aforementioned firms worked together to coordinate their data collection and information evaluation.

Metroparks has a long legacy and has received and continues to enjoy tremendous public support and use. Therefore, this study was built on several basic principles that have been the operational foundation for Metroparks, synonymous with the success of the organization to date. As part of this planning process, a new mission statement was created reflecting these values. The mission statement was carefully crafted to mirror the language of state legislation, enabling the creation of Ohio Park Districts. Legislation adopted in 1917 allowed for the creation of Metroparks of the Toledo Area.

The mission of Metroparks of the Toledo Area:

“The mission of Metroparks of the Toledo Area is to conserve the region’s natural resources by creating, developing, improving, protecting, and promoting clean, safe, and natural parks and open spaces for the benefit, enjoyment, education, and general welfare of the public.”

KEY RECOMMENDATIONS

LAND MANAGEMENT

Our vision for land is to appropriately develop existing underutilized regional parks to serve the district and connect regional parks with an integrated trail system for the purpose of linking open spaces, promoting health and wellness and regional connectivity.

KEY RECOMMENDATIONS

- Complete a network of trails in Lucas County. The trails would ideally link with regional, national, and international trails systems, including the North Coast Inland Trail, and the North Country National Scenic Trail.
- Develop water trails or blue trails along the Toledo and Lucas County tributaries to serve a growing demand for recreation canoeing and kayaking.
- Connect existing parks to the water along Ottawa and Maumee Rivers, Tenmile Creek, Swan Creek, and the Lake Erie Shoreline.
- Develop launch points with adequate parking to accommodate non-motorized recreational watercraft.
- Link parks to parks and create loop trails.
- Develop view sheds along the river and streams for users to enjoy the river and wildlife.
- Continue to develop partnerships in land management for Oak Openings with the Maumee State Forest, Toledo Airport Authority, local communities, and the Nature Conservancy.



- Develop The Middlegrounds in 2014-2015, Howard Farms by 2018, Fallen Timbers Battlefield by 2015, Chessie Trail by 2015, Belt Property by 2016, Keil Farms by 2017, Blue Creek Conservation Area by 2018, portions of Oak Openings by 2015, Manhattan Marsh by 2018, regional trail connections by 2018.
- Develop a Natural Resource Management Plan across the system with a communication plan and staffing requirements to support it.
- Consider developing an Eco-tourism Plan with the Convention and Visitor Bureau to enhance existing eco-tourism opportunities.
- Acquire future park land based on set criteria approved by the board of commissioners with an established goal.
- Incorporate a video production of the work done by the Natural Resources Division to educate the community and district staff on the value of their work.

FACILITIES

Our vision for park facilities and amenities is to provide a wide-range of park related experiences for users of all ages to create lifetime users without over extending the system financially.

KEY RECOMMENDATIONS

- Incorporate design principles into the development of the parks with measurable outcomes, including ecological services and health and fitness components. Programs and program experiences need to drive design.
- Design for at least four experiences for each of the 17 age segments that make up a person's life in each of the new park designs. Use these principles when updating existing parks to create stronger experiences and create destination parks. This will help spread visitors from Wildwood to other parks.
- Incorporate partners in the design process for parks.
- Develop a true cost of service assessment for the operations and maintenance of the updated parks or new parks so proper operational funding for staff and equipment will occur. This needs to be done in the form of a mini-business plan.
- Incorporate adequate program space in the parks and buildings to create a good experience for users and staff.



Caretaker's Cottage Living Room

- Create a virtual view of the park district's facilities before people rent them and post them on the website.
- Consider adding new amenities, such as single track trails, horse trails, and outdoor adventure amenities to draw young adults to the parks.
- Consider the development of a park ranger headquarter space.
- Consider expanding the purchasing limits for the Executive Director to move projects along at a faster pace.
- Incorporate minority business inclusion process working with the African American Chamber of Commerce.
- Maintain an asset management plan to identify and track the lifecycle of park amenities.
- Continue exploring improved utility alternatives to reduce the cost and increase the efficiency of utilities.
- Improve integrated planning process involving maintenance and program staff in the design process to ensure that they have input into how the facilities will be as productive and efficient as possible.
- Develop technology into design of parks and facilities to include Wi-Fi and GIS access points.

PROGRAMMING

Our vision is to broaden program services to appeal to a wider age segment and offer opportunities for new experiences to increase the value of Metroparks to the community.

KEY RECOMMENDATIONS

- Incorporate consistent program principles into all programs developed by Metroparks' staff.
- Categorize all programs as core essential, important, and value added.
- Consider broadening program offerings to include outdoor recreation skills, senior recreation, wellness, special population recreation, adventure activities, and urban youth enrichment programs.
- Track national and regional trends for programs and services and how they may apply to Metroparks.
- Track lifecycle of all programs and terminate programs that are in the decline and saturation phase.
- Establish themed programs and offer four seasons of programs.
- Stronger marketing of programs, offerings need to be spread to all parks in the system.
- Update policies for programs, such as pricing and partnership development.
- Develop a cost recovery plan for all programs that have a fee to fall into the important and value added classification. This needs to include a cost of service analysis to determine the level of tax subsidy each program and person receives.
- Better staff training of part-time employees is needed before the programs start.
- Enhance standards for programming, education, and interpretation.
- Incorporate stronger performance measures when demonstrating key outcomes of programs on the system.
- Incorporate additional special events throughout the park system.
- Incorporate a culture of quality management as outlined in the program section of the report.
- Incorporate more exposure and enhance cross marketing between volunteers and members.
- Ensure volunteer record keeping systems are coordinated so that it is easy to determine who is volunteering and where.
- Keep volunteers fully informed of district activities to gain support and advocacy from this important pool of agency representatives.



PARTNERSHIPS

Our Vision for Partnerships is to build capacity and advocacy through effective partnerships that are financially equitable and provide the residents a higher level of services than Metroparks can provide alone.

KEY RECOMMENDATIONS

- All partnerships will have a working agreement that is updated every two years with measurable outcomes. Yearly reporting to the park commissioners should occur.
- All partnerships will track costs to measure the public investment made into the partnership to demonstrate the level of public value and service.
- All partnerships will incorporate a culture that focuses on regular collaborative planning, communications, and annual reporting.
- Develop a policy for public / public partnerships, public / not-for-profit partnerships and public / private partnerships.

PARK MAINTENANCE

Our vision for park maintenance is to provide clean, safe parks that are natural by design with maintenance that exceed the user's expectations and provides an enjoyable experience.

KEY RECOMMENDATIONS

- The maintenance staff will create a true cost of service to maintain parks, trails, and amenities to determine all unit costs. This will help to determine the level of productivity, efficiency, and management standards.

- Maintain a maintenance management plan for the district to focus on standards, costs, and staff levels needed.
- Expand technology use into park operations.
- Consider going to district management versus site-based management to eliminate operational silos.
- Maintenance staff needs to support volunteers in their operations. Staff training is required so staff can learn to appreciate and effectively use volunteers.
- The staff in each park needs to know the budget they have to work with and then manage it with measurable outcomes.
- Set policies like standard opening and closing times needs to be addressed.
- Consider a separate trail crew to build and maintain trails to move the implementation of trails along at a faster pace.
- Contracting of services needs to be explored in high cost to service areas.
- Consider reducing the number of ground tech levels from five to two.
- The district should consider having regional managers over all services in the designated regions. All divisions that provide services in that region would report to that person.
- An updated signage plan is needed in the parks to help guide users.

FINANCE

Our vision for finance is to provide well documented, accurate, and timely finance information for the board and staff that meets all the state requirements for effective reporting and supports the financial principles determined in this plan.

KEY RECOMMENDATIONS

- Continue to use and enhances a system-wide approach to developing the yearly operational budget involving key staff.
- Complete improvements toward how purchasing and capital improvement systems are processed.
- Develop a stronger full-time staff-training program to improve more effective use of existing systems.
- Help staff in the field to determine their true unit costs to produce a unit of service.
- Consider developing a business development office to help staff implement business principles in each division.
- Develop a long-term financial plan for the agency that is consistent with the goals and objectives of Metroparks and support the initiatives and strategies as reflected in district approved plans. Agency goals and objectives, which affect park-operating funds, need to be consistent with fund availability and financial projections.
- Use a minimum of a three-year financial management plan for the general operations and capital funds. Total projections need to be up to ten years. The plan will be updated annually and used as the basis for the development of budgets and revenue / fee schedules.
- Metroparks budget will be developed as an operational based budget, ensuring the highest possible accuracy of revenue projections and the review and evaluation of budget expenditure requirements. Annual budget plan submittals will meet the finance department's budget requirements. All efforts will be made to optimize productivity for improved service delivery at the lowest possible cost levels to the agency.
- The annual operating budget will project and produce a positive cash balance for each fiscal year. A cost recovery commitment for the budget-planning year will be developed and integrated into the financial management plan.

- Management of the Education Fund for budgeting purposes will be at a cost / profit center level so that each program and function is reviewed annually for revenue projections and expenditure needs. Where possible, each cost center will produce some income and keep expenditures to the lowest possible levels.
- A Managed Reserve will be maintained within the annual carryover at a sufficient level to allow for yearly cash flow requirements and to provide for financing unforeseen emergency needs. The reserve will be a minimum of six months of the approved annual general fund expenditure budget. The Carryover Reserve shall be adjusted annually at the time the budget is adopted.
- Net revenue generated from the fiscal year, above that needed to sustain the reserve, and the general fund may be committed to special allocations as approved by the park district board. Funding priority of the special allocation will be given to CIP fund, land acquisition fund and for support of educational programs or other special funds.
- All revenue producing facilities will develop an annual business plan.

ADMINISTRATIVE AND MARKETING OPERATIONS

Our vision for Administration and Marketing is to develop systems, policies, and procedures that reduce bureaucracy and make it easy for staff in the field to manage their respective functions to achieve the outcomes that the board of park commissioners desire.

KEY RECOMMENDATIONS

- Update policies and procedures on an annual basis. Ensure that they create maximum flexibility for the staff in the field to do their work in a timely manner.
- Train staff on how to effectively work with volunteers and conduct on an annual basis to improve the value the district can gain from their contribution.
- Train staff on how to be a lead function or a support function in the work that they do.
- Develop a marketing and branding plan for the district.
- Update the district's website.
- Teach staff how to effectively use marketing data to make good decisions when programming their facilities and managing their park sites.

- Work to improve system communication via the daily update and weekly board reports. Establish a communication network posting results of performance outcomes on a monthly and quarterly basis.
- Update job descriptions and do a salary assessment every five years to ensure the district is meeting the pay level requirements to keep effective staff in place.
- Continue biannual performance evaluations for staff and supervisors to maximize everyone's capabilities and tie these to operational goals and objectives.
- Develop a succession plan for the district for key positions in the system.
- Develop a place in the organization where office systems can be effectively managed to the expectations of staff and the public.
- Make customer service the focus of the district's mission.
- Hold staff accountable through effective performance measures that are biannually.
- Develop a continuous improvement model for staff to center on for the services they provide.
- Work on collaboration between divisions to reduce silos through effective planning, which will improve trust and communication.
- Develop a technology plan for the district and update every year.
- Track workload management to ensure that people are not overloaded while others are not managed to the same expectation.

CONCLUSION

The board of park commissioners and staff has developed a great park system for the residents of Lucas County. The Toledo region has supported the district very well over the last 85 years. New leadership in the organization recognized the importance of effective planning by developing three separate planning documents to help guide the organization for the next 20 years. Each planning document supports a preferred future for the district in the functional area it represents. The Operational Assessment and Business Sustainability Report centers on how the organization operates and how it thinks on a daily basis. The recommendations outlined supports changes that the board of park commissioners, key leadership of the agency, and the staff (who directly delivers services) desires.

The information gathered in the report supports every functional division and the system as a whole. The recommendations follow accreditation guidelines for CAPRA as well as demonstrating best practices in the industry. The recommendations are both a continuation of existing practices as well as new objectives. They may not be easy to implement, but are necessary to move the organization forward in a positive and productive manner. Many of the recommendations will have never been tried before and the culture of the organization may resist them. However, if implemented, the organization will be stronger, more fluid and flexible. The results will create a better culture to work in. The challenge is before the staff to implement this plan. Let the process begin!



Manor House Garden

CHAPTER 2 – COMMUNITY NEEDS ASSESSMENT



KEY LEADERSHIP AND STAKEHOLDER SUMMARY

The Metroparks GIS planning department created an inventory of recreational service providers in 2013 providing a basis to identify potential future partnerships and supportive relationships to meet community expectations, needs or gaps in services. A baseline survey was also completed with comparable park districts in Ohio. Metroparks of the Toledo Area has contracted with SHOA to conduct an attitude and opinion survey with registered Lucas County voters on an annual basis for over ten years. The purpose of this survey is to measure the public perception, satisfaction and comprehensiveness of the park systems facilities management and service. In addition to evaluating the results of the 2012 and 2013 survey, PROS Consulting met with key leadership in the community, Metroparks Board of Commissioners, and staff to gather insight on their vision for the future of Metroparks. Observations were recorded representing a broad set of issues considered in the Operational Assessment and Business Sustainability Plan.

VISION FOR THE STRATEGIC MASTER PLAN

The stakeholders repeatedly indicated the importance of clean, safe, natural parks and the importance of leaving an open space legacy for future generations. That Metroparks provide good places for families and groups to visit yet provide opportunities to find solitude and tranquility. They offer up-to-date maintenance and amenities that celebrate nature. They offer nature and educational programs to the visitor. They are perceived to be “free” and this is an important perception.

The park system has been and needs to continue to be reliable and predictable. The parks are always as they are expected to be. Stakeholders indicated apprehension toward new items or directions that would throw a “curve-ball” into what people expect from Metroparks.

Locations of parks are important as people appreciate that a nice, beautiful park is reasonably assessable from any location in the county.

There are characteristic differences between the major reservations. Stakeholders indicated that the public values these differences.

Metroparks is observed as a responsible steward of public resources within the community. Metroparks has the trust of the community. It is a general perception that if Metroparks says it will do something, it will do so. And that the park district has a tremendous staff from top to bottom with a lot of internal procedures that work well.

Toledo supports four major public institutions: The Toledo-Lucas County Public Library, Toledo Museum of Art, Toledo Zoo and Metroparks. All of these institutions instill a broad-based sense of pride.

The connectivity people make with their parks stays with them for many years.

VALUED MOST ABOUT METROPARKS' AMENITIES AND SERVICES

The agency's stated commitment to providing clean safe and natural parks is greatly appreciated. Each Metropark provides visual beauty. The park system is perceived to be responsive, predictable and accountable. Nature, habitat and important elements of local history are preserved within the parks.

What is undervalued? The Maumee River is extremely underappreciated and perhaps under-programmed by Metroparks. Excellent customer service is expected and perhaps taken for granted.



KEY OUTCOMES DESIRED

Metroparks of the Toledo Area wants to:

- Be recognized throughout the country as a great park system that is consistently meeting or exceeding public expectations.
- Be recognized as a leader in regional open space preservation, conservation, natural resource management, environmental education, interpretation and outdoor recreation.
- Be a regional contributor for wellness, family, and community values.
- Be known as a willing community partner.

KEY PROGRAM SERVICES THAT NEED TO BE ADDRESSED

Educational and interpretive programming needs to be expanded. The goal would be to engage all school systems in the county and region both in the parks and in classrooms. This should include programs that teach people of various ages how to enjoy out of door activities within the parks introducing outdoor skills and encouraging active life styles and engagement with the park system.

Partnerships should be developed or enhanced that promote the relationship between human health and ecological balance and the value of parks and open spaces as area to host active life styles.

While the marketing and image of the agency is very good, there needs to be more targeted communication to specific demographic segments. Marketing unique and significant features, programs and activities beyond the region and communicating to various user groups in the most effective methods.

“Best places” within the park system need to be showcased as a method of encouraging visitors to seek them out and visit other park areas. This would create a greater sense of place for the parks and stimulate destination travel within the region and drive users out to all parks at all times of the year. Examples might be the best sunrise, best bike path, best butterfly place, best view of the river, best wild flower location, etc.

The agency's commitment to ecological restoration needs to be communicated effectively to staff and the public.

Financial procedures, budget development, management, procurement and vendor payment need to be effective and understood and followed by all users.



RECREATION / EDUCATION FACILITIES AND / OR AMENITIES MOST NEEDED

The annual attitude and opinion survey indicate that trails and all trail related activities are highly valued. This is consistent with state and national trends. Trails are the most expected, common, and wide spread amenity across the park district. Efforts to monitor the use and conditions of all trails are critical. Methods to disperse trail use across the park system to avoid overcrowding and deterioration of user experience are important. Wildwood appears to be at or near capacity with this regard. Trails must clearly be marked for acceptable use and ranked for condition, length and user experience. Multipurpose trails must be designed appropriately.

User surveys and reservation rates indicate an adequate supply of reservation facilities and a high rate of satisfaction with support amenities like restrooms.

Nature-based programming, and specialized outdoor skill activities have high local interest as well as increasing participation in many nationally tracked user areas. Metroparks has begun to restore prior programming levels in addition to increasing staff investment for outdoor education.

With an increased investment in outdoor education, appropriate support facilities must be available for staff office work, equipment and supply storage and presentation space. These factors should be considered as new parks are being designed and built.

Small boat access to the Maumee River is weak at best. The increased small boat registration in Ohio, mirrors national recreational user trends; consequently opportunities for blue way trails should be explored and implemented as feasible. Partnerships should be explored for access to Maumee Bay and Lake Erie.

Single track / mountain bicycling trails should be considered to match local, state and national trends.

Methods to accurately monitor county population demographic as well as park user age groups should be established to adequately prepare and / or provide for various user needs and expectations.

PARTNERSHIP OPPORTUNITIES

Partnerships should be mutually beneficial with an equal return for services provided or benefits received. The park system should be receiving a service that would not otherwise be as effectively attained.

Metroparks has a significant number of partnerships ranging from volunteer friend groups at specific parks to sophisticated, three party arrangements such as the Toledo Botanical Garden, Inc.

The manner in which these arrangements are monitored or managed is inconsistent. The diversity of these partnerships is so broad that creating criteria to formally rank these relationships and establish a process for reporting, accountability and communication would be beneficial.

DEMOGRAPHIC ANALYSIS

The demographic analysis provides an understanding of the population within Lucas County, Ohio. This analysis is reflective of the total population, and its key characteristics such as age segments, income levels, race, and ethnicity.

It is important to note that future projections are all based on historical patterns and unforeseen circumstances during or after the time of the projections could have a significant bearing on the validity of the final projections.

Understanding and periodically reviewing regional demographics is essential for being responsive to meeting service expectations and planning for operational and capital needs.

Please refer to Appendix A for additional demographic information.



Toledo Botanical Garden

CHAPTER 3 – PROGRAMMING AND PARTNERSHIP ANALYSIS



INTRODUCTION

As part of the planning process, the consulting team performed an assessment of the programs and services offered by Metroparks. The assessment offers an in-depth perspective of program and service offerings and helps identify strengths, weaknesses, and opportunities regarding programming. The assessment also assists in identifying core programs, program gaps within the community, key system-wide issues, and areas of improvement in determining future programs and services for residents. The consulting team based these program findings and comments from a review of information provided by the district, including program descriptions, participation statistics, financial data, website content, focus groups, stakeholder interviews, and discussions with staff. This report addresses the program offerings from a systems perspective for the entire portfolio of programs, as well as individual program information. It identifies key issues and presents recommendations for these issues, summarized at the end of this section.

OVERVIEW OF PROGRAMS

The Visitor Service Division, led by the Director of Programs, provides activities and services that encompass a wide variety of interests related to the district's purpose. Division staff is responsible for the management and implementation of programming, special community-wide events, and the operation of facilities. Staff in the Division is engaged year round in planning, implementing, conducting, and evaluating programs and events.

All functions within the division combine to provide hundreds of programs in the areas of history, nature, outdoor recreation, youth camps, and special events. In 2012, the park district served over 70,700 participants among all program areas. The Visitor Service Division also operates attractions such as the Wildwood Manor House, the Canal Experience at Providence, the Lathrop House, Oak Grove School, Johlin Cabin, and the National Center for Nature Photography.

In addition to the provision of services provided directly by the district at Metroparks' facilities, partnerships with other organizations are utilized throughout the service area. Through formal and informal cooperative relationships, partners assist with delivering select programs, training of Metroparks' staff, granting access to specialized facilities, and providing support to programs with supplies and materials.

The remainder of this chapter will discuss park district priorities, program lifecycles, program finances, standards, volunteerism, partnerships, and marketing in greater detail.

PRIORITIES AND CORE PROGRAMS

The mission of Metroparks is to "conserve the region's natural resources by creating, developing, improving, protecting, and promoting clean, safe, and natural parks and open spaces for the benefit, enjoyment, education, and general welfare of the public."

To help achieve this mission, the district has identified a number of operating principles regarding visitor experiences, education, safety, facility management, communication, and organizational excellence. Of those, several key principles should be given particular attention in this program assessment to frame recommendations and to ultimately help the park district achieve their long-term goals. They include:

- Metroparks recognizes that disseminating knowledge through public programs, events, and communication is the key to building community awareness and stewardship in natural, historical, and cultural preservation.
- Metroparks will measure success when serving visitors through the standards of excellent service and rewarding experiences.
- Metroparks will protect the health and welfare of visitors, volunteers, and employees and the integrity of natural, historical, and cultural resources.
- Metroparks will work actively to preserve the best examples of Northwest Ohio's natural areas for public enjoyment, transcending all other purposes and uses.

- Metroparks is committed to a workplace fostering employee wellbeing, development and satisfaction within a culture of respect, creativity and innovation.
- Metroparks will embrace and encourage the diverse ideas, cultures, and thinking of its employees and community.
- Metroparks' leaders will promote teamwork and respect in all areas of operations. Employee involvement and empowerment will be a hallmark of Metroparks workplace environment.
- Professional development will be encouraged and available for all employees. Metroparks recognizes reward and recognition of employees as a best practice and vital component of organizational development.
- Continuous improvement through performance management provides Metroparks' owners with the highest value for their tax dollar.
- Knowledge sharing across work units ensures that Metroparks is an agile and responsive organization.

It is important to identify core programs based on current and future needs to create a sense of focus around specific program areas of greatest importance to the community. Public recreation is challenged by the premise of being all things to all people, especially in a community such as Toledo. The core program philosophy assists staff in being able to focus on what is most important. Programs are categorized as core programs if they meet a majority of the following categories:

- The program has been provided for a long period of time (over 4-5 years) and / or is expected by the community.
- The program consumes a large portion (5% or more) of the district's overall budget.
- The program is offered 3-4 seasons per year.
- The program has wide demographic appeal.
- There is a tiered level of skill development available within the program's offerings.
- There is full-time staff responsible for the program.
- There are facilities designed specifically to support the program.
- The district controls a significant percentage (20% or more) of the local market.



EXISTING CORE PROGRAM AREAS

The core program areas for the district are listed below. It is important to recognize that limits on the district's staffing, resources, and availability of space may hinder some of the efforts to maintain or expand core programs; therefore, it is essential that staff commit to a concerted effort towards managing and prioritizing core program areas throughout fluctuations in resource availability.

ENVIRONMENTAL PROGRAMS

Environmental program area includes a district-wide approach to nature education, inspiring a love of the outdoors, native species, preservation, and conservation. This area includes public programming, requested programming, and targeted school outreach. Metroparks encourages park visitors to be active in the outdoors and to foster a healthy lifestyle. Environmental programs have a fee policy and pricing strategy that is reviewed annually and approved by the board of park commissioners. This includes free and fee-based programming. Fees are competitively priced within the local marketplace and priced to be affordable to most. Within the environmental program structure there is specific focus on school outreach tied to curriculum standards and an emphasis on onsite field trip experiences. A portion of programming is expanding to greater emphasis on outdoor skills such as canoeing, kayaking, biking, and camping. Public offerings include programs that align with trends such as bird watching, geocaching, running, and walking.

Features of the program area include nature programs, nature walks, bird studies, geocaching, canoe programs, scout programs, and nature photography. Learning levels are age appropriate from toddler to advanced adult learners enrolled in Volunteer Walk Leader Training. Many programs are offered in parks within the Metroparks system, which represents nearly 12,000 acres of public lands, including some lands that are restricted access only for programs. Natural interpretation includes lakes and rivers, oak savanna, prairies, wetlands, and woodlands.

Historical data has been tracked to measure such goals as program attendance, gross program revenue, program participant satisfaction, Lucas County school children served, percentage of Lucas County elementary schools reached, and program marketing effectiveness. Desired outcomes of environmental programs include inspiring a love of nature, a commitment to preservation, understanding of the local natural features, and plant and animal communities as well as the park district's value to the community as a whole.



Metroparks Summer Camp

NATURE CAMPS

In 2014, the district will be in its sixth season of summer nature camps. Week-long day camps are offered for children ages 3 to 14. These camp offerings include:

- Wee Workshop Preschool Summer Camp, ages 3-5 with parent (Wildwood and Oak Openings);
- Metroparks Explorers / Earthstar, ages 5-7 (five sessions at Oak Openings and Wildwood);
- Nature Camp / Camp Badger, ages 8-12 (five sessions at Oak Openings and Wildwood);
- And Art of Nature, ages 7-14 (single-day themed camp experiences to explore natural materials and nature as inspiration to create works of art).

In 2013, the nature camp season ran from June 6 until August 16 for a total of ten weeks with 16 camps. Camp options include a one-day experience to weekly day camps. Teens ages 13-18 are trained and utilized as counselors in training / camp staff. Other staffing includes Metroparks' volunteers, interns, and paid staff. All camps are fee based and competitively priced within the market.

Overall, nature camps aim to cultivate life-long supporters and users of Metroparks. Other goals and outcomes for this program area include connecting kids with the outdoors, introducing nature education, fostering place-based identity, providing exposure to other Metroparks or mission-related activities, and encouraging participants to make Metroparks a part of their lives. Through each camp experience, children will be able to demonstrate an understanding of the natural world and the animals and plants discussed during camp and the natural environment. Youth will be excited and push their boundaries. The children and their families will be inspired to discover more. With each camp experience, children will be inspired to know more and impact those around them about nature and humans' impact on world.

HISTORICAL PROGRAMS

The historical program area includes both programmatic opportunities and site-based programming. The district has interpreter led, self-directed, and community outreach programs. Onsite programming includes:

- Johlin Black Swamp Cabin at Pearson Metropark
- Manor House and Oak Grove Schoolhouse at Wildwood Preserve
- Fort Miamis and Fallen Timbers Battlefield part of Side Cut Metropark
- Lathrop House-Underground Railroad

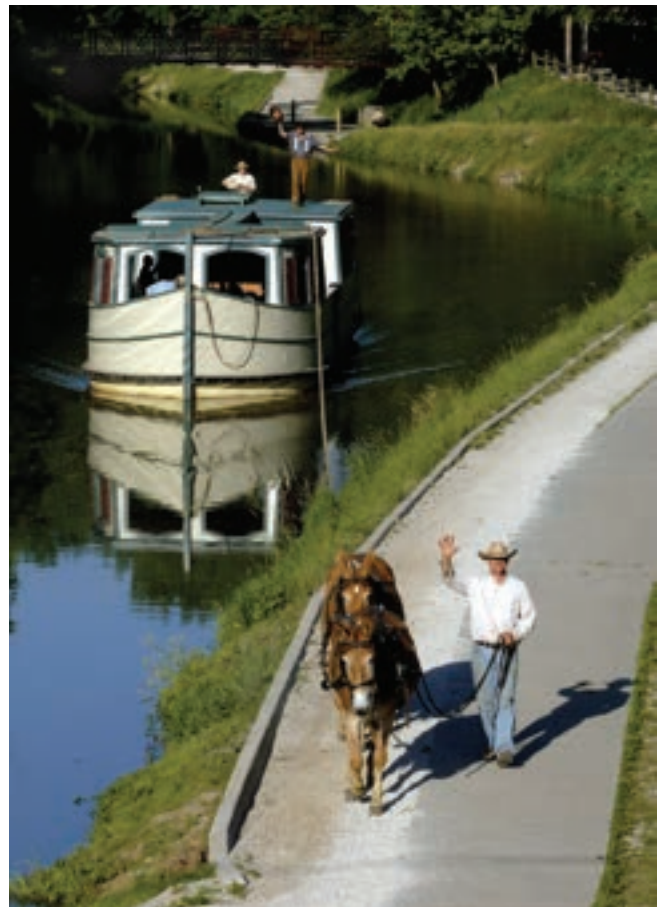
Programs are centered on lectures, demonstrations, and hands-on history experiences. The sites provide the opportunity for first and third person interpretation with period appropriate clothing and furnishings. As possible, the guests are immersed at actual historic sites significant to Northwest Ohio. Metroparks' historical interpretations span from 1794 until 1974. General history programs, both public and requested, include focus on the history of northwest Ohio, provide a glimpse into American Indians of the area, early settlement, frontier education, significant American military battles, the underground railroad, the pre- and post-World War II era history, WPA projects, the auto baron industrial age, and the role northwest Ohio played in shaping our country's history.

The internal goals and desired outcomes for the historical programs' area include engaged and informed participants, the cultivation of a sense of ownership in preservation and understanding of the value and significance of the park district to the community, opportunities for volunteer involvement, and always a positive customer experience. These components come together to cultivate and ensure support and sustainability for Metroparks.

THE CANAL EXPERIENCE

The canal experience at Providence Metropark provides the visitor a step back in time to discover what life was like along the Miami and Erie Canal in 1876. The canal experience includes The Volunteer, a reproduction, mule-drawn canal boat; the Isaac Ludwig Mill, a working water powered saw and grist mill; more than a mile of the original Miami and Erie Canal and Towpath; Lock #44; the General Store; and the Scenic Providence Dam.

Providence's unique feature is having an original canal lock that functions and that participants can ride a replica canal boat through the functioning lock. Goals and outcomes for the program area include helping visitors understand the history of the Miami and Erie Canal and the town of Providence, Ohio, including and the role that the canal boat played in the transportation and development of the area, observe and understand the operation of a water-powered saw and grist mill, and observe and understand the operation of a canal lock.



SPECIAL EVENTS

The special events program area is designed to create opportunities for people to use the parks, make connections in meaningful ways to the parks, and create target market opportunities. It is designed to encourage fun, family friendly activities and an opportunity for visitors to visit parks they would not usually visit. An environmental or historical educational component is always included. The program area is designed to create signature events for the community on an annual or regular basis.

Three major annual special events include the Happy Trails 5K, Metrobarks, and Holidays in the Manor House. These programs have been longstanding Metroparks' offerings for up to 40 years. A newer special event added in 2013 is an Under the Moon fun run program.

- The Happy Trails 5K is an annual run / walk event that draws individuals and families of all ability levels. It is a fee-based summer weekend event that has grown in popularity and participation over the course of the last ten years. The program is produced in partnership with community retailers, media, running clubs, and special interest groups. The number of participants in this event makes it one of the top five runs / walks in the area. The event is staffed and organized by Metroparks and a large contingent of volunteers, who give hundreds of hours of volunteer time per year. It is a key special event that brings together participants, the business community, running groups, and



Happy Trails 5K



Metrobarks

volunteers. Happy Trails encourages healthy outdoor activity in a natural park setting. It promotes both individual and group family participation, and the revenue raised benefits Metroparks Trail Fund. In 2013 there were nearly 800 participants.

- Metrobarks is special event that celebrates dogs. It is a day-long summer weekend festival that includes retail vendors, rescue groups, media, special dog demonstrations, and competitions. The event is free and open to the public and all dogs are “encouraged to bring their owners.” The benefits of the program include a significant well-developed relationship with the largest local newspaper in the production of a Pet Idol contest that culminates on the naming of the winning dog. In addition, the Humane Society hosts a 5K run / walk with dogs and their owners. The event is hosted by Metroparks with community partners that form a committee that plans the event year to year. Committee members include representatives from area rescue groups, retailers, and the media. Metrobarks generates revenue through vendor fees and the money is designated to support Metroparks' educational programs. This program has grown in popularity; participation in 2013 generated more than 1,500 in attendance.

- Holidays in the Manor House is Metroparks most iconic special event. 2013 marks the 38th anniversary of this holiday tradition. Visitation in 2012 was nearly 20,000 people. This program brings together hundreds of volunteers to decorate and staff a 32,000 square foot Georgian-style mansion located in the heart of Metroparks most popular preserve. The week-long event is free and generates a great deal of positive media attention. Given its long history, this event is unique in becoming a multigenerational special occasion. This event spreads out into additional programs that take place during the event, including a craft show and café run by Volunteers In Parks, as well as kids and adult activities that include storytelling and wreath making.
- The newest special event, Under the Moon, is an after dark 5K run / walk for individuals, families, and groups of people of all abilities. It provides participants an opportunity to experience the parks after dark. It is minimally fee based. Metroparks' partners with running groups, the media, retailers, and volunteers promote and provide the event.

Over the course of the special event program area history, programs have been evaluated for mission relevance and success. Each special event is designed to bring together public participants, the business community, other nonprofits, and volunteers.

The internal goals and desired outcomes are mirrored in the overall benefits of the program, including cross functionality throughout all divisions and departments of the park district. Each team plays a role in special event production to ensure efficiency, joint ownership, and ultimately a successful event. Overall, desired outcomes include happy participants, engaged volunteer involvement, strong community partnerships, mission-based outreach, and revenue generation where relevant.



Holidays at the Manor House

SUGGESTED ADDITIONAL CORE PROGRAM AREAS

In addition to the core program areas listed above, Metroparks should consider designating the following program areas as core. They reflect services currently provided and / or areas that have been identified for future growth in strategic alignment with the Metroparks mission and anticipated demographic trends:

- Health and wellness (emphasis on outdoor fitness recreation)
- Senior recreation, wellness, and enrichment
- Special population recreation and enrichment
- Volunteerism
- Adventure activities
- Urban youth enrichment

STAKEHOLDER GROUP FINDINGS

As part of the planning process for Metroparks, PROS Consulting conducted stakeholder group discussions with the board of park commissioners, department heads, managers, line staff, part-time staff, and seasonal staff. Participants provided the following insights about district programs and services (a full report of stakeholder group findings can be found earlier in this Master Plan):

- The existing mission does not address education, interpretation, or recreation.
- There is a need to build the Strategic Plan on key themes such as Health, Sustainability, Customer Service, and Community Pride.
- Marketing of services, programs, and park amenities could be improved.
- There should be a growing emphasis on programs geared toward health and wellness.
- As the senior population continues to increase, more programs should be targeted to them.
- A more strategic approach could be used in forming, managing, and evaluating partnerships.
- Visitation and participation in programs needs to be more balanced.
- Staff is afraid of being over-extended.
- There could be improvements regarding how to serve the community as a whole.
- Some standards are lacking in terms of programming, education, and interpretation.
- The agency is very bureaucratic given the size of the system.
- Updated policies are needed for pricing, partnerships, marketing, program development, and program evaluation.
- Program and calendar scheduling is an issue that needs to be addressed.
- The registration system is cumbersome and not user friendly.
- The website needs to be updated.



LIFECYCLE ANALYSIS

A lifecycle analysis involves reviewing every program identified by Metroparks' staff to determine the stage of growth or decline for each as a way of informing strategic decisions about the overall program portfolio managed by the district. This analysis is not based on strict quantitative data, but rather is based on staff members' knowledge of their program areas. Figure 1 shows the percentage distribution of the various lifecycle categories of the district's programs. These percentages were obtained by comparing the number of programs in each individual stage with the total number of programs listed by staff.

Overall, the lifecycle analysis results indicate a fair balance of all programs across the lifecycle. A combined total of 67% of programs fall into the Introduction, Take-Off, and Growth stages. The consulting team recommends that this total be between 50-60%, therefore, Metroparks appears to be providing ample new programs to align with trends and to help meet the evolving needs of the community. Additionally, several of these programs are also good candidates for revenue generation due to their novelty, popularity, and / or growth.

However, it is also important to have a stable core segment of programs that are in the Mature stage. Currently, Metroparks has about 25% of their programs in this category. The consulting team recommends this to be about 40% so as to provide stability to the overall program portfolio, but without dominating the portfolio with programs that are advancing to the later stages of the lifecycle. Programs in the Mature stage should be tracked for signs that they are entering the Saturation or Decline stages. According to staff, there is an ongoing process to evaluate program participation and trends to ensure that program offerings continue to meet the community's needs.

A total of about 8% of programs are saturated or declining. Programs in the Decline stage must be closely reviewed to evaluate repositioning or eliminating them. The consulting team's recommendation is to modify these programs to begin a new lifecycle with the Introductory stage as well as to continue to add new programs based on community needs and trends. Staff should complete a lifecycle review on an annual basis and ensure that the percentage distribution closely aligns with desired performance. Furthermore, the district could include a performance measure of percentage of total number of new programs offered annually as an incentive for more innovation.

Lifecycle Stage	Description	Actual Program Distribution		Recommended Distribution
Introduction	New program, modest participation	13%	67% total	50-60% total
Take-Off	Rapid participation growth	19%		
Growth	Moderate, but consistent population growth	35%		
Mature	Slow participation growth	25%	25%	40%
Saturation	Minimal to no participation growth, extreme competition	4%	8% total	0-10% total
Decline	Declining participation	4%		

Figure 1 - Program Lifecycle Analysis - Current Distribution and Recommendations

PROGRAM FINANCIAL ASSESSMENT

Finding ways to enhance revenue year-on-year and improve service-pricing strategies are priorities for Metroparks. To that end, the consulting team conducted a review of program cost recovery and pricing strategies based on information provided by district staff.

COST RECOVERY STRATEGIES

According to information provided to the consulting team, cost recovery performance is currently tracked at an overall level. Metroparks aims to recover 20-30% of costs for all programs offered directly by the district. In addition to tracking cost recovery at the overall district level, the consulting team recommends using core program areas as an additional basis for categorization. Cost recovery targets should be identified for each program area, at least, and for specific programs or events if necessary. The previously identified core programs would serve as an effective breakdown for tracking cost recovery metrics, which would theoretically group programs with similar cost recovery and subsidy goals.

Targets should reflect the degree to which the program area provides a public versus private good. The district should subsidize programs providing public benefits; programs providing private benefits should seek to recover costs

and / or generate revenue for other services.

Generally, non-core programs, which are less critical to the organizational mission, should aim to yield a higher cost recovery rate to sustain themselves, leaving the limited tax-based appropriations to fund core programs.

To assist the plan and implement cost recovery policies, PROS has developed the following definitions presented in Figure 2 to help classify specific programs within program areas.

Programs falling into the Important or Value-Added classifications generally represent programs that receive lower priority for subsidization. Important programs contribute to the organizational mission, but are not essential to it; therefore, cost recovery for these programs should be high (i.e., at least 80% overall). Value-added programs are not critical to the mission and should be prevented from drawing on limited public funding, so overall cost recovery for these programs should be near to or in excess of 100%.

To develop specific cost recovery targets, full cost of accounting should be created on each class or program that accurately calculates direct and indirect costs. Cost recovery goals are established once these numbers are in place, and Metroparks' staff should be trained on this process.

Category	Description	Cost Recovery	Subsidy
Core-Essential	<ul style="list-style-type: none">Part of the organizational missionServes a majority of the community"We <i>must</i> offer this program."	None to moderate	High to complete
Important	<ul style="list-style-type: none">Important to the communityServes large portions of the community"We <i>should</i> offer this program."	Moderate	Moderate
Value-Added	<ul style="list-style-type: none">Enhanced community offeringsServes niche groups"It would be <i>nice</i> to offer this program."	High to complete	Little to none

Figure 2 - Cost Recovery and Subsidy Program Categories

PRICING STRATEGIES

The pricing of programs and services should be established based on the cost of services, overlaid onto program areas or specific events, and strategically adjusted according to market factors and / or policy goals. Currently, Metroparks uses several pricing strategies for each core program area (see Figure 3).

All pricing strategies are used by the district except for weekday / weekend and prime / non-prime time differential pricing. Early bird pricing, another temporal strategy, is only used for the Happy Trails 5K. Pricing based on competition (market rate), cost recovery goals, and Metroparks memberships are used in every core program area.

The degree to which pricing strategies are used currently is healthy. Staff should continue to monitor the effectiveness of the various pricing strategies they employ and make adjustments as necessary within the policy frameworks that guide the overall pricing philosophies of Metroparks. It is especially

important, however, for yearly competitor and other service providers to be benchmarked, shopped, and evaluated, in order to monitor changes and track how those other providers compare with Metroparks' programs.

Furthermore, the consulting team recommends that mini-business plans (2-3 pages) be created for each core program service area on a yearly basis. These plans should evaluate the program area based on meeting the outcomes desired for participants, cost recovery, percentage of the market and business controls, cost of service, pricing strategy for the next year, and marketing strategies that are to be implemented. If developed regularly and consistently, they can be effective tools for budget construction and justification processes. Furthermore, these plans can address other financial and operational needs such as cash collection standards and refund process standards that need to be incorporated.

	Environmental Programs	Summer Camps	Historical Programs	Canal Experience	Special Events
Age Segment				✓	✓
Family / Household Status					✓
Residency	✓		✓	✓	
Weekday / Weekend					
Prime / Non-Prime Time					
Group Discounts	✓		✓	✓	✓
By Location			✓		
By Competition (Market Rate)	✓	✓	✓	✓	✓
By Cost Recovery Goals	✓	✓	✓	✓	✓
By Customer's Ability to Pay		✓	✓		
By Metroparks Membership	✓	✓	✓	✓	✓
Earlybird Registration					✓

Figure 3 - Pricing Strategies by Core Program Area



PROGRAM STANDARDS AND PERFORMANCE MANAGEMENT

The relationship between meeting the needs of the community, achieving the agency mission, and executing service delivery is of critical importance. With an understanding of this important dynamic, the following section provides an analysis of the service system and includes building on the service foundation that already exists in the district. As observed from the discussions with and data from the staff, the community does seem to exhibit a high level of satisfaction with the offerings provided by Metroparks. Based on the consulting team's observations, the district's operations and program offerings are above average based on nationwide trends, but enhancements to performance management practices would yield overall improvements to the services provided to the community. This section is intended to move Metroparks to a higher level of sophistication in quality management and into the realm of state- and national-level best practices.

PROGRAM STANDARDS

The practice of using program standards is essential for agencies desiring to perform at high levels and that aspire to be community and industry leaders. One of the most significant issues in managing a program system includes the challenges faced with the complexity associated with thousands of service transactions, in-person and online, from multiple staff members dealing with a diverse audience at a variety of facilities within the system. Furthermore, the heavy reliance on part-time and seasonal staff in the service delivery process creates even greater challenges. These dynamics result in significant program and service quality variation.

In reviewing the program assessment information collected from staff, there is significant evidence of the ongoing use of performance measures throughout the district to gauge performance.

Examples of measures in place include:

- Total participants
- Participant to staff ratios
- Program cancellation rate
- Percentage of local schools reached
- Customer satisfaction level
- Customer retention rate
- Social media participants / followers
- Positive media events / occasions
- Negative media events / occasions
- Donations

Many performance measures are used across all core program areas, and several others are used only for particular program types. This is acceptable, and even desirable, as long as the universal measures are reflective of core performance outcomes are applicable across all district programming, and that specific / specialized measures are used to track critical attributes unique to certain programs. According to the consulting team's observations, however, there is a danger of Metroparks using performance measurement in excess, creating a situation wherein staff are hampered by the bureaucratic process of tracking performance rather than benefiting from it. Again, this issue can be mitigated by identifying critical program outcomes, developing a limited yet comprehensive set of performance metrics, and deploying them across the district with an emphasis on efficient measurement by staff.

Additional performance metrics to consider, if they align with desired organizational outcomes, include the following:

- Household percentage of program participation
- Percent of programs in introduction and growth stage
- Market penetration by age group
- Program distribution by age group
- Customer satisfaction towards specific program attributes, such as:
 - Registration system
 - Customer service
 - Facility cleanliness
 - Instructor quality
 - Available program times
 - Perceived safety

VOLUNTEERS AND PARTNERSHIPS

Today's economic climate and political realities require most public park and recreation departments to seek productive and meaningful partnerships with both community organizations and individuals to deliver quality and seamless services to their residents. These relationships should be mutually beneficial to each party to better meet overall community needs and expand the positive impact of the agency's mission. Because of the constraints facing Metroparks, effective partnerships and meaningful volunteerism are key strategy areas for the district to meet the needs of the community in the years to come.



Volunteer Trail Patrol

PARTNERSHIPS

Metroparks has a burgeoning partnership network that shows strong signs for further growth. Current partners include school districts, private businesses, media, nonprofit organizations, and foundations. A community and organizational goal for Metroparks is to further expand and formalize partnerships for the district. The initial step in developing multiple partnerships in the community that expand on existing relationships is to have an overall partnership philosophy that is supported by a policy framework for managing these relationships. Many times, partnerships are inequitable to the public agency and do not produce reasonable shared benefits between parties. The recommended policies will promote fairness and equity within the existing and future partnerships, while helping staff to manage against potential internal and external conflicts. The district must adopt certain partnership principles for existing and future partnerships to work effectively. These partnership principles are as follows:

- All partnerships require a working agreement with measurable outcomes and will be evaluated on a regular basis. This should include reports to the district on the performance and outcomes of the partnership.
- All partnerships should track costs associated with the partnership investment to demonstrate the shared level of equity.
- All partnerships should maintain a culture that focuses on collaborative planning on a regular basis, regular communications, and annual reporting on performance and outcomes.

Partnerships can be pursued and developed with other public entities, such as neighboring cities, schools, colleges, state or federal agencies; nonprofit organizations; and with private for-profit organizations. There are recommended standard policies and practices that will apply to any partnership, and those that are unique to relationships with private for-profit entities.



Metroparks Mascots – Otis, Owlberta and Boggs

MARKETING AND PROMOTION

Metroparks' staff is engaged in marketing and promotion to varying degrees, including facilitating the production of a program guide, news releases, program information, media requests, and other communication and promotion tasks. Overall, marketing and public relations efforts are of relatively high quality, particularly toward school / youth programming. But in an effort to further enhance these labors, it is a stated priority of the district to enhance communication and marketing activities to increase public awareness of Metroparks' programs and services among all residents of the district, particularly minority groups and nonusers. These goals were also articulated by focus groups and are prevalent throughout the organization.

CHAPTER 4 – PARK CLASSIFICATIONS AND STANDARDS



PARK DESIGN PRINCIPLES

In developing design principles for parks, it is important that each park be programmed, planned, and designed to meet the needs of its service area and classification within the overall system. The term “programming” when used in the context of planning and developing parkland, refers to a list of uses and facilities, and does not always include staff-run programs. The program for a site can include such elements as shelters, restrooms, trails, natural resource stewardship, open meadows, nature preserves, or interpretive areas. These types of amenities are categorized as lead or support components. The needs of the population of the park it is intended to serve, should be considered and accommodated at each park. Every park regardless of type needs to have an established set of outcomes and when those outcomes are established, the park designers need to design those outcomes, including operational and maintenance cost outcomes.

Each park classification category serves a specific purpose, and the features and facilities in the park must be designed for the number of age segments the park is intended to serve, the desired length of stay deemed appropriate, and the uses it has been assigned. Recreation needs and services required differ based on the age segments that make up the community. A varying number of age segments will be accommodated with the park program, depending on the classification of the park. The age segments are:

- Ages 2-5
- Ages 6-8
- Ages 9-12
- Ages 13-17
- Ages 18-24
- Ages 25-34
- Ages 35-44
- Ages 45-54
- Ages 55-64
- Ages 65-75
- Ages 76+

REGIONAL PARK

A regional park serves a large area of several communities, residents with a city or county, or across multiple counties. Depending on activities with a regional park, users may travel as many as 60 miles for a visit. Regional parks include recreational opportunities such as boating, camping, conservation-wildlife viewing, overlooks, site-specific amenities, and fishing. Although regional parks usually have a combination of passive areas and active facilities, they are likely to be predominantly natural resource based parks. Common regional park attributes include:

- Common size of park: 100 to 1,000 acres.
- Service radius: 4 acres per 1,000 residents.
- Length of stay: All-day experience.
- Amenities: 10 to 12 amenities to create a signature facility (lake, regional playground, 3+ reservable shelters, camping, outdoor recreation / extreme sports amenities in place, nature center, gardens, trails, public restrooms, concessions, restaurant, ample parking, special event site.
- Revenue producing facilities: More than two; park designed to produce revenue to offset operational costs.
- Land usage: Up to 20 percent active / 80 percent passive.
- Programming: More than four recreation experiences per age segment with at least four core programs provided in the park.
- Maintenance Standards: Level two mode of maintenance with the exception of entrances receiving level one maintenance mode care.
- Signage: Strong signage throughout the park.
- Landscaping: Strong focal entrances and landscaping throughout the park.
- Parking: Sufficient for all amenities.



GREENWAYS AND MULTIPURPOSE TRAILS

Multise trails are corridors of land recognized for their ability to connect people and places. Linking neighborhoods, parks, recreation facilities, attractions, and natural areas with a multiuse trail fulfills two guiding principles simultaneously: protecting natural areas along corridors and providing people with a way to access and enjoy them. Multiuse trails also offer a safe, alternative form of transportation, substantial health benefits, habitat enhancements for plants and wildlife, and unique opportunities for outdoor education and cultural interpretation. Greenways and multipurpose trails include:

- Age segments served: 2 to 90.
- Amenities: walk, bike, run, equestrian.
- Lighting: At trailheads and high use areas.
- Amenities: parking, restrooms at trailheads, safety / emergency phones, some small neighborhood rest area parks along the trails for relief of runners or bicyclist.
- Signage: Half-mile markers and “where your are” kiosks.
- Maintenance standards: higher than maintenance levels of surrounding neighborhood, with a consistent minimum level throughout the city.
- Other: 12 feet or wider, strong color scheme, connectivity to signature / regional parks / facilities or attractions.

CHAPTER 5 – FINANCIAL MANAGEMENT STRATEGY



DATA COLLECTION

This section of the report presents the financial assessment of Metroparks of the Toledo Area as a part of the strategic plan process. As a key element of the Plan, PROS Consulting reviewed available information to assess the financial situation of the district. The revenues, expenditures, and capital funds were analyzed to identify trends and assess the district's financial integrity. The cost recovery for facilities, programs and services at major functional levels has been analyzed to assess the cost of service readiness.

DATA REVIEWED

The PROS team reviewed the detailed cost and activity information prepared by the district staff. Following is a list of the cost and activity data reviewed by PROS:

- District Financial Statements for years ending 2008 through 2012
- District 2014 Draft Budget Book
- Financial Summary from Workshop, June 2013
- General Fund Multi-Year – Forecast 2014

FINANCIAL ASSESSMENT

The operations reports provided by district staff were analyzed to assess the financial situation of Metroparks. The information for this section is from the Audited Financial Statements for 2008 through 2012.

FINANCIAL STRENGTH

The district has experienced increasing financial strength for each year shown in Figure 4. The total assets and net assets have increased for each year in the study period. The total net assets amounts are an indicator of the capital maintenance, land acquisitions and investment in the total system.

Cash balances provide flexibility with respect to managing programs, maintaining assets, and meeting the changing needs of the district. The cash plus cash investments increased significantly between fiscal years 2008 and 2012. The fiscal year 2012 cash plus cash equivalents is 129% greater than the fiscal year 2008.

For such a large agency, the total liabilities are minor as of the year ending 2012.

The unrestricted net assets show strength in operations and maintenance of the system. The unrestricted net assets increased each year for fiscal years 2008 through 2012.

The statements and reports show a financially strong entity. The district continues to invest in the system and to maintain system assets.

CASH RESERVES

The cash and investments are compared to the total expenditures in Figure 5. The cash and investments have increased in relation to the total expenditures over the period. PROS recommends a range of cash and investments between two and three months to cover unexpected revenue drops, and / or unusual and emergency expenditures. The cash and investment totals are above the high target ranges for all years. The high number of months of expenditures indicates that the district should have sufficient resources to improve and maintain the district's assets.

PROPERTY TAX REVENUES

The revenue for the park system is primarily derived from voted tax levies. There are currently two levies providing income for the organization, a 1.4 mill levy that will be up for renewal in 2017 and a .9 mill levy that may be renewed in 2022. The .9 mill levy was passed in 2012 replacing a .3 mill levy more than replacing lost tax revenue. As these two ten year levies are subject to renewal at five-year intervals the system has great stability with ample opportunity to anticipate and adjust as needed. Between fiscal years ending 2008 and 2012, the taxable property values have decreased by 13.6% or approximately 3.58% per year as shown in Figure 6. Assessed real property values decreased by 11% over the five-year period, but the public utility values decreased by 18.6% and the personal property values have been phased out by the state and now come back to the district as a State Reimbursement

Fiscal Year Ending	2008	2009	2010	2011	2012
Cash and Investments	\$9,708,381	\$13,861,781	\$17,479,076	\$19,781,826	\$22,190,604
Long-Term Liabilities	\$360,780	\$350,977	\$361,133	\$405,618	\$429,454
Unrestricted Net Assets	\$8,598,873	\$10,594,027	\$13,084,448	\$14,865,137	\$16,901,605
Total Net Assets	\$70,143,563	\$75,820,143	\$82,847,778	\$91,077,337	\$95,116,882

Figure 4 - Selected Financial Statement Balances

Fiscal Year Ending	2008	2009	2010	2011	2012
Expenditures	\$14,660,887	\$12,884,176	\$11,988,789	\$10,495,704	\$12,650,033
Cash and Investments	\$9,708,381	\$13,861,781	\$17,479,076	\$19,781,826	\$22,190,604
Cash as a % of Expenditures	66%	108%	146%	188%	175%
Expenditure Coverage (months)	7.9	12.9	17.5	22.6	21.1

Figure 5 - Cash and Investments to Expenditures

under Intergovernmental Revenue (Entitlements). In some areas of the U.S., the mortgage markets have experienced significant difficulty with respect to interest rates and foreclosures. These issues can result in flat or decreased property values, which result in flat or decreased property tax revenues.

Fiscal Year Ending	2008	2009	2010	2011	2012
Lucas County					
Real Property	\$8,656,759,040	\$8,694,858,210	\$7,784,913,254	\$7,707,789,720	\$7,707,789,720
Tangible Personal Property	\$244,965,756	\$25,942,257			
Public Utility Property	\$277,551,480	\$206,265,870	\$221,492,520	\$225,867,030	\$225,867,030
Total	\$9,179,276,286	\$8,927,066,337	\$8,006,405,774	\$7,933,565,750	\$7,933,656,750

Figure 6 - Property Tax Values

CAPITAL ADDITIONS

For 2013, the district has an annual capital budget of \$9.1 million that is split between the Land Acquisition Fund and Capital Construction Fund. Annual capital expenditures are an indication of an entity's willingness to invest and maintain its system assets. The district has added 2.3% to 19.5% to the total capital assets each year during fiscal years 2008 through 2012. The average net addition to capital assets is 5.27% per year. The industry best practice is 4% to 6% of the system value. This is sign of a financial growth and an expanding system. Capital expenditures funds are shown in Figure 7.

2011	Additions	Deletions	2012	Net Additions
\$69,891,931	\$1,712,644	(95,443)	\$71,509,132	2.3%
2010	Additions	Deletions	2011	Net Additions
\$63,812,121	\$6,205,122	(125,312)	\$69,891,931	9.5%
2009	Additions	Deletions	2010	Net Additions
\$60,478,924	\$3,344,188	(10,991)	\$63,812,121	5.5%
2008	Additions	Deletions	2009	Net Additions
\$58,219,122	\$2,264,383	(4,581)	\$60,478,924	3.9%
2007	Additions	Deletions	2008	Net Additions
\$48,711,612	\$9,540,894	(33,384)	\$58,219,122	19.5%

Figure 7 - Capital Asset Additions and Deletions

FINANCIAL PROJECTIONS

District staff prepared financial projections for years ending 2014 through 2021.

PROJECTED OPERATIONS

The revenues are projected to exceed the operating expenditures for all years as shown in Figure 8. The capital program expenditures are projected to be partially funded by reducing the fund balances. Using the benchmark goals of two to three months of fund balance, the projections show that the district will be able to maintain three months or more of fund balance through the year ending 2017 are shown in Figure 9.

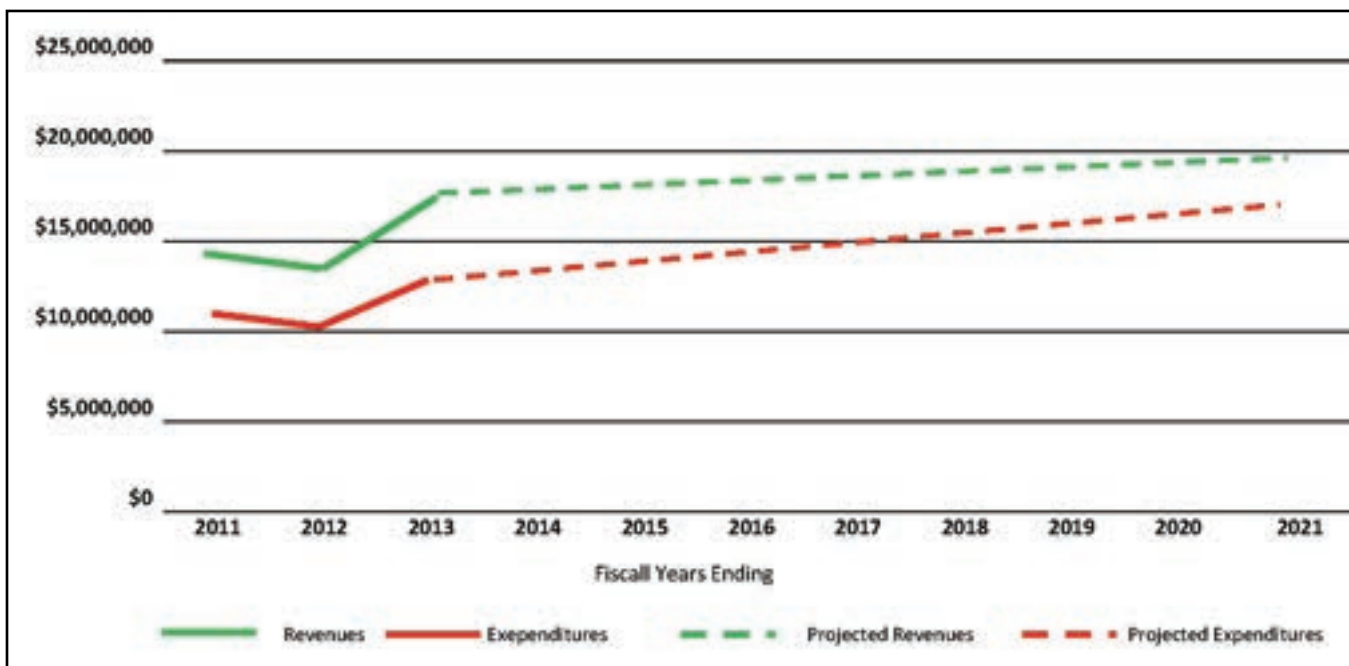


Figure 8 - Revenues and Operating Expenditures

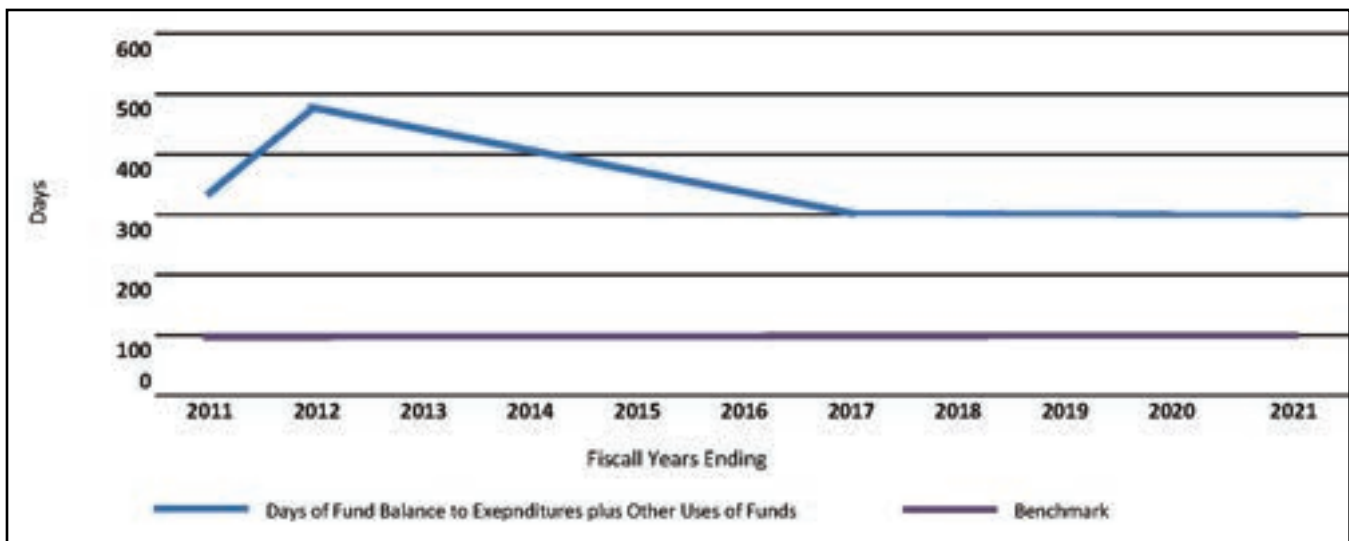


Figure 9 - Revenues and Operating Expenditures

As shown in Figure 10, the fund balance is projected to cover the following year expenditures for over six months. The General Fund is over nine months. The Education Fund has a projected two months of fund balance. The capital plan projects to spend all of the available funds for capital projects, resulting in Capital Construction and Land Acquisition Fund Balances to be near zero. The other funds are substantially over the benchmark goals.

PROJECTED 2014 FINANCIAL RESULTS

District staff prepared projected financial results for the year ending 2014. The financial results are shown in Figure 11 for fiscal year ending 2014.

The projected decrease in total fund balance is mostly used for Land Acquisition and Capital Construction. The General Fund covers more than General Fund expenditures.

The Education / Programming revenues are projected to cover 12% of the expenditures. The district's costs recovery goal for Education / Programming services is 15% and maybe be increased.

Fund:	General	Land Acquisition	Education / Programming	Capital Construction	Grant Funds	All Other Funds	TOTAL ALL FUNDS
Months of Fund Balance	9.1	0.0	2.0	0.2	0.0	171.3	6.9

Figure 10 - Months of Expenditure Coverage with 2014 Year End Projected Fund Balances

Fund	Estimated Revenues	Appropriations	Cost Recovery on Operations	Other Financing Sources	Other Financing Uses	Net Change in Fund Balance	Est. Fund Balances of 1/1/2014	Est. Fund Balance as of 12/31/2014
General	\$17,272,519	(\$13,271,411)	130%	\$367,418	(\$8,625,000)	(\$4,256,473)	\$14,351,270	\$10,094,797
Land Acquisition	\$0	(\$5,758,670)	0%	\$3,405,000	\$0	(\$2,353,670)	\$2,353,670	\$0
Education / Programming	\$157,000	(\$1,294,611)	12%	\$825,000	\$0	(\$312,611)	\$523,275	\$210,664
Capital Construction	\$0	(\$6,372,500)	0%	\$4,395,000	\$0	(\$1,977,500)	\$2,100,770	\$128,270
Grant Funds	\$367,418	\$0	N/A	\$0	(\$367,418)	\$0	\$0	\$0
All Other Funds	\$187,180	(\$358,862)	52%	\$0	\$0	(\$171,681)	\$5,293,945	\$5,122,264
Total All Funds	\$17,984,117	(\$27,056,054)	66%	\$8,992,418	(\$8,992,418)	(\$9,071,936)	\$24,622,930	\$15,550,995

Figure 11 - 2014 Year End Projected Funds Balances

FINANCIAL MANAGEMENT PRINCIPLES

Metroparks' board and staff have a fiduciary responsibility for managing the Parks and Recreation Funds. The financial management principles will form the basis for policy decisions affecting the park and recreation funds.

- The financial planning for the park district will be consistent with the goals and objectives of Metroparks and support the initiatives and strategies as reflected in board approved plans. Likewise, the agency's goals and objectives, which affect the park's operating funds, will be consistent with fund availability and financial projections.
- Metroparks will maintain an expenditure ratio of 65% of all available tax revenue for general operations and 35% available for capital repair, replacement or new development. This ratio does not apply to grants, donations or earned income.
- Metroparks will maintain a five-year capital improvement plan with a ten-year general financial projection. These will be updated annually and used as the basis for the development of budgets and revenue / fee schedules.
- The annual budget will be developed as an operational based budget, ensuring the highest possible accuracy of revenue projections and the review and evaluation of budget expenditure requirements. Annual budget plan submittals will meet all Finance Department budget development requirements. All efforts will be made to optimize productivity for improved service delivery at the lowest possible cost levels.
- The annual operating budget will project and produce a positive ending year cash balance. A cost recovery commitment for the budget-planning year will be developed and integrated into the financial management plan.
- Management of the park district's General Fund purposes will be detailed at the department level so cost / profit centers can be monitored throughout the year for tracking both revenue projections and expenditures. Where applicable, each cost center will be expected to meet revenue goals and keep expenditures to the lowest possible levels.
- The annual carry over balance and projected tax revenue will be maintained at a sufficient level to allow for yearly cash flow requirements and to provide for financing unforeseen needs of an emergency nature. The available cash of the carry over balance will be a minimum of six months of the approved annual general fund expenditure budget and will include an emergency contingency reserve of at least two percent of the approved annual expenditure budget of the general fund. The following year projected carry over balance shall be adjusted annually at the time the budget is adopted.
- Net revenue generated during the fiscal year, including donations, grants or other earned income above that needed to sustain the reserves will be committed as approved by the park district board.
- Funding priority will be given to the source of the funding stream, the repair and renovation requirements of the Metroparks facilities or for support of educational programs.
- All revenue producing facilities will develop an annual business plan.
- New or significantly renovated facilities will include financial cost projections for construction and operational impacts.
- All park district improvements and expenditures will be identified and approved by the board in the budget process.



FUNDING AND REVENUE STRATEGIES

This section identifies funding options to help support operational and capital cost. This is provided from PROS Consulting based on national work with other park systems.

REVENUE AND FUNDING OPTIONS TO CONSIDER FOR GREENWAYS AND TRAILS

Metroparks has enjoyed a remarkable success securing grant funding for land acquisition, park development, resource management, facility development and programming.

In addition the following areas maybe valuable considerations for alternative funding streams.

The greenway funding opportunities cited below are applicable to organizations and agencies throughout the U.S. that are seeking funding, including Metroparks. The most common method for funding greenways is to combine local, public sector, and private sector funds with funds from state, federal, and additional private-sector sources. Many communities involved with greenway implementation are choosing to leverage local money as a match for outside funding sources, in essence multiplying their resources.

Local advocates and district staff should pursue a variety of funding sources for land acquisition and greenway construction as well as funding opportunities for operations and maintenance costs. A greenway program that relies on limited funding sources may come to a grinding halt should these sources dry up. The following list of sources is divided into local and state funding sources that include:

Land Leases: Many communities across the United States have allowed land leases for commercial retail operations along trails as a source of funding. The communities that have used land leases look for retail operations that support the needs of recreation users of the trails. This includes coffee shops, grill and food concessions, small restaurants, ice cream shops, bicycle shops, farmers markets and small local business. The land leases provide revenue to maintain the trails and / or to be used for in-kind matching.

Tax Increment Financing (TIF Funds): The concept behind the tax increment financing is that taxes in a designated area are frozen and the redevelopment that occurs in the blighted, conservation, or economic development area will increase the assessed valuation of the property and generate new property tax revenues. The increase can be used on an annual basis to retire revenue bonds issued to finance redevelopment costs. A great deal of development is required to generate sufficient revenues to make it work.

Sale of Development Rights Below the Ground: Some public agencies have sold their development rights next to greenways below the ground for fiber optic lines and utility lines for gas and electric on a lineal foot basis. This has occurred in King County, Washington.

Special Recognition License Tag: In Indianapolis, Indiana, the Greenways Foundation has a special Greenways designation car tag that provides income to the Greenways Foundation to provide matching grant monies for the City of Indianapolis greenways program. The tag provides \$45 per tag sold back to the foundation.

Greenway Foundations: Greenway Foundations have been developing across the United States over the last 15 years to support greenway matching monies for cities and counties. Greenway Foundations raise money for capital monies and operational money.

Floodway Funding Sources: Many cities and counties have used floodway funding sources to support development and operations of greenways. This funding source is used extensively in Houston, Texas, and in Cleveland, Ohio.

Greenway Trust Fund: Another strategy used by several communities is the creation of a trust fund for land acquisition and facility development that is administered by a private greenway advocacy group, or by a local greenway commission. A trust fund can aid in the acquisition of large parcels of high-priority properties that may be lost if not acquired by private sector initiative. Money may be contributed to the trust fund from a variety of sources, including the municipal and county general funds, private grants, and gifts.

Greenway Fundraising Programs: Agencies across the United States have used greenways for not-for-profit fundraisers in the form of walks, runs, bicycle races, and special events. The local managing agency usually gets \$2-\$5 per participants in the events to go back to support the operations and maintenance costs.

Greenways Conservation Groups: Conservation groups adopt green corridors to support the operations and capital costs for specific greenway corridors. These groups raise needed money for designated greenways for capital and operations costs.

Local Private-Sector Funding: Local industries and private businesses may agree to provide support for greenway development through one or more of the following methods:

- Donations of cash to a specific greenway segment.
- Donations of services by large corporations to reduce the cost of greenway implementation, including equipment and labor to construct and install elements of a specific greenway.
- Reductions in the cost of materials purchased from local businesses that support greenway implementation and can supply essential products for facility development.

Adopt-A-Foot Program: These are typically small grant programs that fund new construction, repair / renovation, maps, trail brochures, facilities (bike racks, picnic areas, birding equipment) as well as provide maintenance support. The Adopt-A-Foot program is in the form of cash contributions that range from \$2,640 to \$26,400 over a five-year period.

State Departments of Transportation: Many states are the local administrators of federal funding from the Transportation Equity Act for the 21st Century (TEA-21) – see more info below, under Federal Funding Sources.

Community Development Block Grants: Through its state CDBG Program, the U.S. Department of Housing and Urban Development (HUD) provides states with annual direct grants, which they in turn award to smaller communities and rural areas for use in revitalizing neighborhoods, expanding affordable housing and economic opportunities, and / or improving community facilities and services.

Safe-Routes to Schools Program: The federal government provides safe-routes to school funding for greenways to promote youth walking to school. Grants are 100% federally funded.

State Water Management Funds: Funds established to protect or improve water quality could apply to a greenways / trails project if a strong link exists between the development of a greenway and the adjacent / nearby water quality. Possible uses of these funds include the purchase of critical strips of land along rivers and streams for protection, which could then also be used for greenways; develop educational materials, displays; or for storm water management.

VOLUNTEER ASSISTANCE AND SMALL-SCALE DONATION PROGRAMS

Greenway Sponsors: A sponsorship program for greenway amenities allows for smaller donations to be received both from individuals and businesses. The program must be well planned and organized, with design standards and associated costs established for each amenity. Project elements that may be funded can include mile markers, call boxes, benches, trash receptacles, entry signage and bollards, and picnic areas.

Volunteer Work: Community volunteers may help with greenway construction, as well as conduct fundraisers. Organizations that might be mobilized for volunteer work include the Boy Scouts and Girl Scouts.

Estate Donations: Wills, estates, and trusts may be also dedicated to the appropriate agency for use in developing and / or operating the greenway system.



FEDERAL GOVERNMENT FUNDING SOURCES

Some federal programs offer financial aid for projects that aim to improve community infrastructure, transportation, and housing and recreation programs. Some of the federal programs that can be used to support the development of greenway systems include:

The Transportation Equity Act for the 21st Century (TEA-21): The primary source of federal funding for greenways is through the Transportation Equity Act for the 21st Century (TEA-21). There are many sections of the act that support the development of bicycle and pedestrian transportation corridors.

Community Development Block Grant Program (CDBG): The U.S. Department of Housing and Urban Development (HUD) offers financial grants to communities for neighborhood revitalization, economic development, and improvements to community facilities and services, especially in low and moderate-income areas. Several communities have used HUD funds to develop greenways, including the Boscobel Heights' "Safe Walk" Greenway in Nashville, Tennessee.

Land and Water Conservation Fund (LWCF)

Grants: This federal funding source was established in 1965 to provide "close-to-home" park and recreation opportunities to residents throughout the United States. Money for the fund comes from the sale or lease of nonrenewable resources, primarily federal offshore oil and gas leases and surplus federal land sales. LWCF grants can be used by communities to build a variety of parks and recreation facilities, including trails and greenways.

LWCF funds are annually distributed by the National Park Service to the states. Communities must match LWCF grants with 50-percent of the local project costs through in-kind services or cash. All projects funded by LWCF grants must be used exclusively for recreation purposes, in perpetuity.

Conservation Reserve Program: The U. S. Department of Agriculture (USDA), through its Agricultural Stabilization and Conservation Service, provides payments to farm owners and operators to place highly erodible or environmentally sensitive landscapes into a 10-15 year conservation contract. The participant, in return for annual payments during this period, agrees to implement a conservation plan approved by the local conservation district for converting sensitive lands to less intensive uses. Individuals, associations, corporations, estates, trusts, cities, counties and other entities are eligible for this program. Funds from this program can be used to fund the maintenance of open space and non-public-use greenways along bodies of water and ridgelines.

Wetlands Reserve Program: The U.S. Department of Agriculture provides direct payments to private landowners who agree to place sensitive wetlands under permanent easements. This program can be used to fund the protection of open space and greenways within riparian corridors.

Watershed Protection and Flood Prevention (Small Watersheds) Grants: The USDA Natural Resource Conservation Service (NRCS) provides funding to state and local agencies or nonprofit organizations authorized to carry out, maintain, and operate watershed improvements involving less than 250,000 acres. The NRCS provides financial and technical assistance to eligible projects to improve watershed protection, flood prevention, sedimentation control, public water-based fish and wildlife enhancements, and recreation planning. The NRCS requires a 50-percent local match for public recreation, and fish and wildlife projects.

Urban and Community Forestry Assistance Program: The USDA provides small grants of up to \$10,000 to communities for the purchase of trees to plant along city streets and for greenways and parks. To qualify for this program, a community must pledge to develop a street-tree inventory, a municipal tree ordinance, a tree commission, committee or department, and an urban forestry-management plan.

Small Business Tree-Planting Program: The Small Business Administration provides small grants of up to \$10,000 to purchase trees for planting along streets and within parks or greenways. Grants are used to develop contracts with local businesses for the plantings.

Economic Development Grants for Public Works and Development of Facilities: The U. S. Department of Commerce, Economic Development Administration (EDA), provides grants to states, counties, and cities designated as redevelopment areas by EDA for public works projects that can include developing trails and greenway facilities. There is a 30-percent local match required, except in severely distressed areas where federal contribution can reach 80 percent.

National Recreational Trails Program: These grants are available to government and nonprofit agencies, for amounts ranging from \$5,000 to \$50,000, for the building of a trail or piece of a trail. It is a reimbursement grant program (sponsor must fund 100% of the project up front) and requires a 20% local match. This is an annual program with an application deadline at the end of January. The available funds are split such that 30% goes toward motorized trails, 30% to non-motorized trails, and 40% is discretionary for trail construction.

Design Arts Program: The National Endowment for the Arts provides grants to states and local agencies, individuals and nonprofit organizations for projects that incorporate urban design, historic preservation, planning, architecture, landscape architecture, and other community improvement activities, including greenway development. Grants to organizations and agencies must be matched by a 50% local contribution. Agencies can receive up to \$50,000.

GRANTS THROUGH PRIVATE FOUNDATIONS AND CORPORATIONS

Many communities have solicited greenway funding from a variety of private foundations and other conservation-minded benefactors. Some of these grants include:

American Greenways Eastman Kodak Awards: The Conservation Fund's American Greenways Program has teamed with the Eastman Kodak Corporation and the National Geographic Society to award small grants (\$250 to \$2000) to stimulate the planning, design, and development of greenways.

REI Environmental Grants: Recreational Equipment Incorporated awards grants to nonprofit organizations interested in protecting and enhancing natural resources for outdoor recreation. The company calls on its employees to nominate organizations for these grants, ranging from \$500 to \$8,000, which can be used for the following:

- Protect lands and waterways and make these resources accessible to more people.
- Better utilize or preserve natural resources for recreation.
- Increase access to outdoor activities.
- Encourage involvement in muscle-powered recreation.
- Promote safe participation in outdoor muscle-powered recreation, and proper care for outdoor resources.

Coors Pure Water 2000 Grants: Coors Brewing Company and its affiliated distributors provide funding and in-kind services to grassroots organizations that are working to solve local, regional and national water-related problems. Coors provides grants, ranging from a few hundred dollars to \$50,000, for projects such as river cleanups, aquatic habitat improvements, water quality monitoring, wetlands protection, pollution prevention, water education efforts, groundwater protection, water conservation and fisheries.

World Wildlife Fund Innovative Grants Program:

This organization awards small grants to local, regional and statewide nonprofit organizations to help implement innovative strategies for the conservation of natural resources. Grants are offered to support projects that accomplish one or more of the following: (1) conserve wetlands; (2) protect endangered species; (3) preserve migratory birds; (4) conserve coastal resources; and (5) establish and sustain protected natural areas, such as greenways.

Innovative grants can help pay for the administrative costs for projects including planning, technical assistance, legal and other costs to facilitate the acquisition of critical lands; retaining consultants and other experts; and preparing visual presentations and brochures or other conservation activities. The maximum award for a single grant is \$10,000.

Bikes Belong: Bikes Belong coalition is sponsored by members of the American Bicycle Industry. The grant program is a national discretionary program with a small budget, to help communities build TEA-21-funded projects. They like to fund high-profile projects and like regional coalitions. An application must be supported by the local bicycle dealers (letters of support should be attached). Bikes Belong also offers advice and information on how to get more people on bikes. Government and nonprofit agencies are eligible and no match is required. The maximum amount for a grant proposal is \$10,000. Applications may be submitted at any time and are reviewed as they are received.

Steelcase Foundation: Steelcase Foundation grants are restricted to locally sponsored projects in areas where there are Steelcase, Inc. manufacturing plants. In general, Steelcase does not wish to be the sole funder supporting a program. Grants are also only made to nonprofit organizations. It does support educational and environmental projects, and is particularly interested in helping the disadvantaged; disabled, young and elderly improve the quality of their lives. Applications may be submitted anytime and are considered by the Trustees four times a year.

Wal-Mart Foundation: This foundation supports local community and environmental activities and educational programs for children (among other things). An organization needs to work with the local store manager to discuss application. Wal-Mart Foundation only funds 501(c)3 organizations.

PARKS AND RECREATION FUNDING SOURCES THAT FUND OPERATIONAL AND CAPITAL COSTS

The following funding sources can provide revenue opportunities for the district, but it will take a dedicated staff person to investigate and pursue the source and manage for the future. The following are funding sources that can be developed for the city.

Redevelopment Money: Redevelopment money from the county or the state to promote economic development in the area. Redevelopment agencies are typically located as part of cities and counties in most states.

Bed Tax (transient occupancy tax): A Bed Tax (transient occupancy tax) money from hotels and motels in the city who would directly benefit from the attractions or special events held at the city park sites. Counties usually manage this funding source, which would require the county to support the funding source. This could be one or two percent added to the existing bed tax to support the development of a specific facility or park.

CDBG Money: This source can be used for a park site. The city does qualify for this funding source.

Local, Regional or National Foundations: Many communities have turned to their local, regional and national foundations in their area to support the development of an element of the park system.

Park Income Tax Issue: This would require local residents to vote on an income tax issue to develop or enhance existing and new parks from income taxes of residents and people who work in the area. Metroparks has successfully used this funding source.

Lease Back Option: The agency would enter into a lease back option with a private finance company to provide the financing for the project. The agency, along with their partners, would agree to pay the development costs back over a 30-year period from the revenues earned from the site or from general fund dollars dedicated to the project.

Partnership Development Agreement: Each partner would develop their respective facilities based on set design guidelines with the city managing all the site elements. Partners would work collectively to promote the site as a whole versus individual amenities. This process was successful for Papago

Park, located in the City of Phoenix, Arizona. The site included a major league spring training facility and minor league baseball complex, zoo, botanical gardens, history museum, and other attractions on site.

Naming Rights: Private fundraising could be developed to fund a portion or all of it through naming rights for a park site and through individual amenity naming rights. Naming rights are calculated by the number of impression points by visitors to the site. A park could raise 20%-30% of the development costs from naming rights. Individual naming rights could support the development of sports fields, a dog park, skate park, ice rink, BMX track, winter sports area, children's play area, hockey rink, and golf course.

Grants: Grants have always been a good source for funding of parks throughout the United States. Grants can be provided by the federal government such as the land and conservation fund, transportation enhancement funds for trails and greenways, state grant funds from gambling taxes or alcohol funds, and local grants from community foundations. Research for funding included, but is not limited to Federal / State Grants, Foundation Sources, and Corporate Grants for areas of support and fields of interest.

Community Forest and Open Space Program: Federal Grant with Estimated Total Program Funding of \$3,150,000. Individual grant applications may not exceed \$400,000. The program pays up to 50% of the project costs and requires a 50% non-federal match. Eligible lands for grants funded under this program are private forests that are at least five acres in size, suitable to sustain natural vegetation, and at least 75% forested.

Land and Water Conservation Fund: Preserve, develop, and renovate outdoor recreation facilities. Focus is on America's Great Outdoors Initiative. New or renovation of pavilions, playgrounds or play areas, ball fields, bleachers, golf course meeting rooms, multi-purpose courts, parking facilities, pathways and trails, roads, signs, ski areas, snowmobile facilities, and tennis courts. Federal Funds-Average Award is \$70,000.

Congestion Mitigation and Air Quality Program-fund: This source is for transportation projects that improve air quality and reduce traffic congestion. Projects can include bicycle and pedestrian projects, trails, links to communities, bike rack facilities. Average grant size \$50-\$100,000.

Ohio Community Foundations: In this area are some very large community foundations that the city should pursue for elements of the park systems needs to support economic development for the area.

Community Facilities Grant and Loan Program-Grant Program: This source is established to assist communities with grant and loan funding for the expansion, renovation and or remodeling of former school facilities and or existing surplus government facilities that have an existing or future community use. Facilities may be space for community gatherings and functions, recreational athletic facilities for community members, particularly youth. These include space for non-for-profit offices, childcare, community education, theater, senior centers, youth centers, and after school programs. CFP match requirements for requests up to \$250,000 are 10% eligible project costs. For requests over \$250,000 to \$1 million, the match is 15%.

American Hiking Society: Fund on a national basis for promoting and protecting foot trails and the hiking experience.

The Helen R. Buck Foundation: This foundation provides funding for playground equipment and recreational activities.

Deupree Family Foundation: The Deupree Family Foundation provides grants for Recreation, parks / playgrounds, and children / youth, on a national basis. This foundation supports building / renovation, equipment, general / operating support, program development, and seed money.

The John P. Ellbogen Foundation: Children / youth services grants as well as support for capital campaigns, general / operating support, and program development.

Economic Development Grants for Public Works and Development of Facilities: The U. S. Department of Commerce, Economic Development Administration (EDA), provides grants to states, counties, and cities designated as redevelopment areas by EDA for public works projects that can include developing trails and greenway facilities. There is a 30% local match required, except in severely distressed areas where the federal contribution can reach 80%.

OPERATIONAL FUNDING COSTS OPPORTUNITIES

The district has numerous revenue sources to draw from to support operational and management costs that include long term capital replacement costs. The following are funding options to consider in operations of the system.

User Fees: User fees to access or use elements of parks exist currently but could be expanded to include fees to access recreation and education programs, a dog park, nature center, sport leagues, winter sports area, ice skating.

Concessions: Concessions can be leased out to a private operator for a percentage of gross profits. Typically, 15%-18% of gross profits for concessions of a profit operator, or a managing agency over a park site could manage concessions.

Parking Fees: During major special events, the park system could charge a \$5 parking fee for special events in the parks.

Field Permits: The district can issue recreational use permits for activities, practice or games. Permits should cover the operational cost of each field and management costs. If a private operator desires to rent the site for a sporting tournament for private gain, the district should provide a permit fee plus a percentage of gross from the event for the exclusive use of the fields.

Admission Fee: An admission fee to an event in the park can be utilized.

Walking and Running Event Fees: Event fees for walking and running events in the park can be assessed to cover safety staff managing the event in the park.



Lamb Center – reservable

Food and Equipment Sponsors: Official drink and food sponsors can be utilized for the district. Each official drink and food sponsor pays back to the district a set percentage of gross. Typically, this is 15%-20% of costs for being the official product and receiving exclusive pouring and food rights to the complex. Likewise official equipment sponsors work well for trucks, mowers, and tractors.

Advertising Revenue: Advertising revenue can come from the sale of ads on banners in the parks. The advertising could include trashcans, trail markers, visitor pull trailers, tee boxes, scorecards, and in restrooms.

Wi-Fi Revenue: The district can set up a Wi-Fi area whereby a Wi-Fi vendor is able to sell the advertising on the Wi-Fi access banner to local businesses targeting the users of the site. This revenue has amounted to \$20,000-\$50,000 in revenue for similar systems.

Cell Tower: Cell tower leases can be used. This revenue source would support \$35,000-\$50,000 annually for the site if cell towers in areas needing cell towers.

Program Fees: Program fees to support existing programs can be employed in the form of lessons, clinics, camps, life skill programs, and wellness and fitness. These types program help support the operations of the park and recreation system as a whole. Metroparks has done a good job in establishing program fees.

Special Event Sponsors: Special events provide a great venue for special events sponsors as it applies to a concert, stage, entertainment, and safety.

Capital Improvement Fee: A Capital Improvement Fee on all programs and events can be added. A capital asset fee of \$2-\$3 on each person who participates in a class, event, or program can be incorporated into the cost of the program or event.

Room Reservations: Rental of rooms in the park system can gain operational revenues from these amenities with a typical range of \$200-\$500 a day for exclusive rental reservations.

Volunteerism: The revenue source is an indirect revenue source in that persons donate time to the district to assist in providing a product or service on an hourly basis. This reduces the district's cost in providing the service plus it builds advocacy for the district.

Special Fundraiser: Many agencies hold special fundraisers on an annual basis to help cover specific programs and capital projects to be dedicated to a facility or district as a whole.

Catering: The district has many sites that set up well to have high, medium and low level caterers on contract that groups can use. Caterers usually provide the parks with a fixed gross rate on food and beverage at 12%-15% of the cost of food and 18% of drink back to the district.

CHAPTER 6 – ORGANIZATIONAL STRUCTURE



ORGANIZATIONAL STRUCTURE

With the down turn of the economy in 2008, Metroparks began to make adjustments to staffing level to reduce operational overhead; consequently service levels were also reduced. The passage of the new .9 mill levy in 2012 afforded the agency to not only to begin to restore staffing levels to pre-recession level, but to do so in a manner that was reflective of changing or new programming opportunities and trends, anticipated facility growth, and the agency's administrative needs.

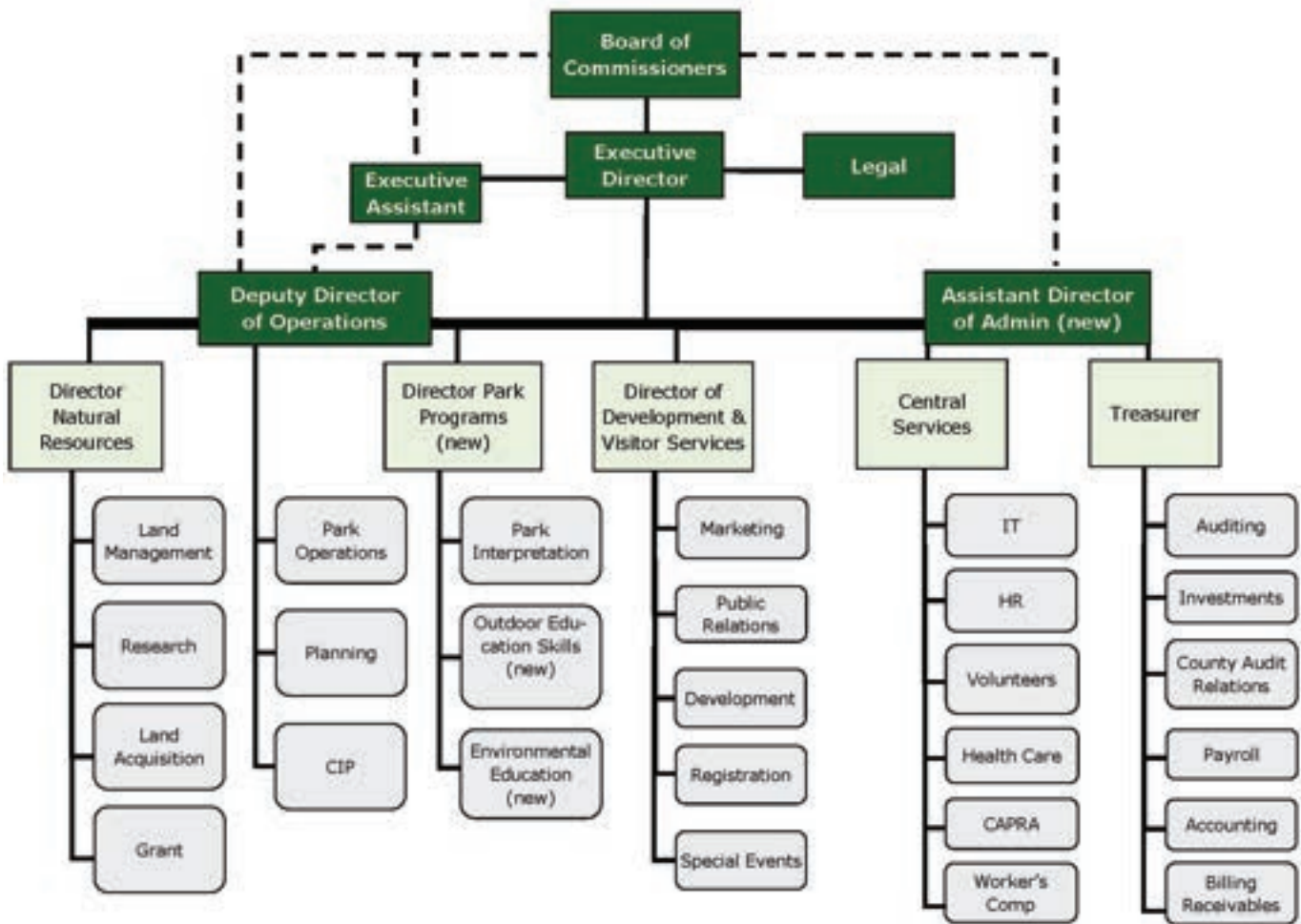
The administrative organizational chart was modified in 2013 to begin to provide succession stability by creating and filling a Deputy Director position. A conditional land acquisition position was reclassified to a permanent position, Director of Natural Resources. Two additional full time midlevel management positions were created and filled in the Finance Department to prepare for additional

work-load associated with organizational growth and increased capital improvements. An additional project manager was hired in the planning group, An Executive Assistant position was created and filled and several additional permanent part-time programming staff was hired.

The following functional administrative organizational structure is recommended for the district to consider implementing over the next two years. This organizational structure provides a foundation for growth. As the agency moves forward with additional programming initiatives, building new parks and facilities and developing regional trails there will be increased staffing needs. This structure allows for expanding field and programming staff, segregated administrative functions stability and succession.

Please refer to Appendix B for Core Competency findings and recommendations.

METROPARKS OF THE TOLEDO AREA ORGANIZATION 2014-15



CHAPTER 7 – IMPLEMENTATION PLAN



The following are key recommendations for each division within the District. These recommendations are not in order of magnitude.

LAND MANAGEMENT AND ACQUISITION

Our vision for land is to develop existing underutilized open space to provide additional public service and promote awareness on ecologically significant resources. Efforts should continue to connect regional parks with an open space corridors and integrated trail system for the purpose of enhancing and perpetuating ecological services, a sense of regional identity, neighborhood connectivity and promoting active life styles health and wellness.

KEY RECOMMENDATIONS

- Complete a network of open space corridors and trails in Lucas County that connect population centers to regional parks or reservations. The trails would ideally link with regional, national, and international trails systems, including the North Coast Inland Trail, and the North Country National Scenic Trail.
- Develop water trails or blue trails along the major regional streams linking existing and new parklands. This will serve a growing demand for recreation canoeing and kayaking.
- Connect existing stream side parks with access sites along Ottawa and Maumee Rivers, Tenmile Creek, Swan Creek, and where possible create connections to the Lake Erie Shoreline.
- Develop launch points with adequate parking to accommodate non-motorized recreation watercraft.
- Link parks existing linear green way trails to create regional loop trails.

- Develop view shed protection plans along the river and streams to perpetuate scenic views and user enjoyment and the character of existing parks.
- Continue partnerships in land management for Oak Openings with the Maumee State Forest, Toledo Airport Authority, local communities, and the Nature Conservancy.
- Develop The Middlegrounds in 2014-2015, Howard Farms by 2015-18, Battlefield Park by 2014-15, Chessie Trail by 2015-16, Belt Property by 2014-15, Keil Farms by 2017, Blue Creek Conservation Area by 2018, portions of Oak Openings by 2015-16, Manhattan Marsh by 2018, with an ongoing commitment to regional trail.
- Develop and implement a Natural Resource Management Plan for the entire district with an education outreach to promote and support this focus.
- Develop a controlled growth plan for related staffing needs with contingency for outside funding, partnerships or lack-there-of.
- Consider developing an Eco-tourism Plan with the Convention and Visitor Bureau to enhance existing eco-tourism opportunities that exist now.
- Acquire future park plans based on set criteria approved by the board of commissioners with an ongoing three year goals.
- Consider formalizing interagency land management plans for the Oak Openings region greenways and lakeshore.
- Create a video production of the work done by the Natural Resources Division to educate the community and district staff on the value of their work.

FACILITIES

Our vision for park facilities and amenities is to provide a wide-range of park related experiences for users of all ages to create lifetime users without over extending the system financially.

KEY RECOMMENDATIONS

- Incorporate design principles into the development of the parks with measurable outcomes, including designs to encourage active lifestyles and outdoor activities. User demand and expectations for programs and quality program experiences need to drive design.
- Design for at least four experiences for each of the 17 age segments that make up a person's life in each of the new park designs. Use these principles when updating existing parks to create stronger experiences and create destination parks. Efforts should be made to help spread user from Wildwood to other parks.
- Incorporate viable service partners in the design process for parks.
- Develop a true cost of service assessment for the operations and maintenance of the updated parks or new parks so proper operational funding for staff and equipment will occur. This needs to be done in the form of a park specific operational business plan.
- Incorporate adequate program space in the parks and buildings to create a good experience for users and staff.
- Create a virtual view of the park district's facilities before people rent them and post them on the website.
- Consider adding new amenities, such as single-track mountain bike trails, and outdoor adventure amenities to draw young adults to the parks.
- Evaluate demand for additional horse trails and other viable special interests.
- Incorporate maintenance and program staff in the design process to ensure that they have input into how the facilities will be as productive and efficient as possible.
- Develop technology into design of parks and facilities to include Wi-Fi and GIS access points.

PROGRAMMING

Our vision is to broaden program services to appeal to a wider age segment and offer opportunities for new experiences to increase the perception of the value of Metroparks to the community.

KEY RECOMMENDATIONS

- Incorporate consistent service and educational principles into all programs developed by Metroparks' staff.
- Categorize all programs as core essential, important, and value added.
- Consider broadening program offerings to include outdoor skills and recreation, senior recreation, wellness, special population recreation, adventure activities, and urban youth enrichment programs.
- Track national and regional trends for programs and services and how they may apply to Metroparks.
- Track lifecycle of all programs and terminate programs that are in the decline and saturation phase.
- Consider themed program series at introductory, skill development and expert levels.
- Expand year round programs expanding programs offered in late fall, winter and early spring to augment summer program levels.
- Develop a strategy to diversify program offerings across the system and away from Wildwood along with a supportive marketing plan.
- Continue to annually update policies for programs, such as pricing and partnership development.
- Develop a cost recovery plan for all programs that have a fee to fall into the important and value added classification. This needs to include a cost of service analysis to determine the level of tax subsidy each program and person receives.
- Commit to better staff training for part-time or seasonal employees before seasonal programs start.
- Enhance standards for programming, education, and interpretation through monitoring industry standards and trends.
- Self-driven visitor experiences need to be recognized as a program area. Greater use of technology needs to be incorporated into self-driven visitor experiences.
- An improved program plan for scheduling of sites, people, and level of services is needed.
- Incorporate stronger performance measures to identify key outcomes of programs toward promoting the value of the park system.
- Incorporate additional special events into the park system and at various regional parks.
- Incorporate a culture of quality management as outlined in the program section of the report.
- Incorporate more exposure and enhance cross marketing
- Train staff on how to effectively work with volunteers and conduct on an annual basis to improve the value the district can gain from their contribution between staff, volunteers and members.
- Ensure volunteer record keeping systems are coordinated so that it is easy to determine who is volunteering and where.
- Keep volunteers fully informed of district activities to gain support and advocacy from this important pool of agency representatives.
- Create opportunities to engage volunteers at higher performance levels with regards to specific projects, programs and project management.



PARTNERSHIPS

Our Vision for Partnerships is to build capacity and advocacy through effective partnerships that are financially equitable and provide the residents a higher level of services than Metroparks can provide alone. Metroparks has a tremendous number of partnership agreements. They need to be evaluated for relevance, common value and agency benefit.

KEY RECOMMENDATIONS

- All partnerships will have a working agreement that is updated every two years with measurable outcomes. Yearly reporting to the park commissioners should occur.
- All partnerships will track costs to measure the investment made into the partnership to demonstrate the shared level of equity.
- All partnerships will incorporate a culture that focuses on regular collaborative planning, communications, and annual reporting.
- Develop a policy for public / public partnerships, public / not-for-profit partnerships and public / private partnerships.

PARK MAINTENANCE

Our vision for park maintenance is to provide clean, safe parks that are natural by design with maintenance that exceed the user's expectations and provides an enjoyable experience.

KEY RECOMMENDATIONS

- The maintenance staff will create a true cost of service to maintain parks, trails, and amenities to determine all unit costs. This will help to determine the level of productivity, efficiency, and management standards.
- Develop a maintenance management plan for the district to focus on standards, costs, and staff levels needed.
- Incorporate technology to a greater level into park operations.
- Consider going to an operational management system based on three regions versus site-based management to eliminate operational silos, encourage shared resources and efficiency and accommodate new park developments. Regional managers would oversee all services in the region with all divisions that provide services in that district would reporting coordinating with that manager.



- Maintenance staff needs to support volunteers in their operations. Staff training is required so staff can learn to appreciate and manage the value that volunteers bring to each park site.
- The staff in each park needs to know the budget they have to work with and then manage it with measurable outcomes.
- Set policies like standard opening and closing times need to be addressed.
- Consider a separate trail crew to build and maintain trails to move the implementation of trails along at a faster pace.
- Consider the development of a centralized park ranger headquarter space
- Contracting of services needs to be explored in locations in special use areas where maintenance requirements are outside normal park skill proficiencies.
- Consider reducing the number of ground tech levels from five to two.
- Evaluate the asset management plan to identify and track the lifecycle of park amenities.
- Evaluate the work order system for efficiency and ease of use.
- Incorporate improved utility alternatives to reduce the cost and increase the efficiency of utilities.
- An updated signage plan is needed in the parks to help guide users.

FINANCE

Metroparks is well positioned for positive revenue flows through 2022 provided the organization continues to maintain the public support they have historically enjoyed. Our vision for the agency's financial management is to provide well documented, accurate, and timely information for the board and staff. Financial operations will continue to meet or exceed all state of Ohio auditing and investment practices and follow requirements for effective financial management and reporting. Financial policies and procedures will be both efficient, easily understood and adhered to throughout the agency.

KEY RECOMMENDATIONS

- In addition to annual independent financial audits, consider periodic performance or organizational audits within the areas of finances, investment, budget development, payroll, procurement and vendor services.
- Refine system-wide approach to developing the yearly operational budget involving key staff.
- Complete improvements toward purchasing and capital improvement system processes.
- Incorporate minority business inclusion process working with the African American Chamber of Commerce and other similar organizations.
- Develop a stronger full-time staff-training program to improve more effective use of existing systems.
- Help staff in the field to determine their true unit costs to produce a unit of service.
- Consider developing a business development office to help staff implement business principles in each division.
- Revise the multi-year forecast to reflect planned capital improvements. Develop a general operating long-term financial plan for the agency that is consistent with the goals and objectives of Metroparks and support the initiatives and strategies as reflected in district approved plans. Agency goals and objectives, which affect park-operating funds, need to be consistent with fund availability and financial projections.
- Maintain a five-year capital improvement plan for the park system with ten year financial projections for all areas of revenue and expense. This will be up-dated annually and used as the basis for the development of general fund operational budgets, land acquisition and special projects.
- Metroparks budget will be developed as an operational based budget, ensuring the highest possible accuracy of projected revenues and expense.
- Annual budget plan submittals will meet all of the finance department's requirements. All efforts will be made to understand expenditures and improve service delivery at the lowest possible costs.
- The annual operating budget will project and produce a positive cash balance for each fiscal year. Operational objectives will be developed to identify cost recovery opportunities and integrated for the yearly budget.
- Development and management of the agency budget will be maintained at a department level so that each program and function can be easily monitored for revenue attainment against projected expenditures. All departments will monitor the budget in order to keep expenditures to the lowest possible levels.
- A managed carry over balance will be maintained at a sufficient level to allow for yearly cash flow requirements and to provide for financing unforeseen emergency needs. Available cash will be approximately six months of the approved annual general fund budget. This will carry over balance will also include available funds for contingency or unforeseen emergencies of at least two percent of the approved annual general fund expenditure budget. The managed carry over balance will be reported within the annually adopted budget.
- Net revenue generated from the fiscal year, above that needed to sustain carry over balances, will be committed to the funding source or special allocations as approved by the park district board. Funding priority of the special allocations will be given to the repair and renovation requirements of the district's facilities or for support of programs.
- All revenue producing departments will develop an annual business plan projecting revenues and expenses.
- Design financial principles will include financial costs and operational impacts at a specific dollar amount for any redesign or a new design of a park.

ADMINISTRATIVE AND MARKETING OPERATIONS

Our vision for Administration and Marketing is to develop or refine systems, policies, and procedures that reduce bureaucracy, provide operational efficiency, stability and accountability. Administration will work to and attain the goals and objectives of the Board of Park Commissioners. This is a vision that affords future sustainability with adequate organizational structure to afford ongoing growth and allowing for administrative succession. We recognize how important it is to protect the current level of public support for Metroparks. It is essential that the image and brand of Metroparks be protected or enhanced.

KEY RECOMMENDATIONS

- Review policies and procedures on an annual basis making recommendations to the board as needed for revision or change. Ensure that they create maximum flexibility for the staff in the field to do their work in a timely manner.
- Train staff on how to be a lead function or a support function in the work that they do.
- Develop a marketing and branding plan for the district.
- Update the district's website.
- Teach staff how to effectively use marketing data to make good decisions when programming their facilities and managing their park sites.
- Continue to improve system communication via the daily update and enhanced intranet. Establish a communication network posting results of performance outcomes on a monthly and quarterly basis.
- Update job descriptions and do a salary assessment every five years to ensure the district is meeting the pay level requirements to keep effective staff in place.
- Continue and refine the commitment for regular staff evaluations and supervisors to maximize everyone's capabilities. Hold staff accountable through effective performance measures that are reviewed biannually.
- Develop and implement an organizational structure that affords a leadership succession plan for the district for key positions in the system.
- Centralize administrative support functions where possible to improve business and administrative functions serving the staff and the public.
- Expand the understanding of customer service within the district's operational efforts to include such areas as a uniform signage plan, digital interpretive access, trail rankings and user capacity issues.
- Develop a continuous improvement model for core services.
- Work on collaboration between divisions to reduce silos through effective planning, which will improve trust and communication.
- Develop a technology plan for the district and update every three years.
- Track workload management to ensure that people are not overloaded while others are not managed to the same expectation.

CHAPTER 8 – CONCLUSION



METROPARKS OF THE TOLEDO AREA COMPREHENSIVE AND STRATEGIC PLANNING

In November of 2012, the citizens of Lucas County saw fit to pass a new .9 mill park district levy for the purpose of general operations, land acquisition, land development and capital improvements.

With the passage of this levy the park system was presented an opportunity to chart a course for the next two decades. This would include restoring lost services, reinvestment in capital improvements and major maintenance in the existing parks, resuming planning and completing development for several new park projects, initiate planning for park development on recent acquisitions and to continue essential land acquisition for future open space and greenways.

The park administration and the Board of Park Commissioners were also committed to working towards the creation of an operational plan that, barring any unforeseen circumstances, would preclude the need to ask voters for increased tax millage for the next two decades.

In 2013 Metroparks of the Toledo Area launched a comprehensive planning process to establish a long term 20 year vision for the park system. This effort involved creating an inventory of existing conditions and identifying opportunities and priorities for protecting high quality natural areas and streamways and to create open space corridors or trails to connect existing and new parks. This comprehensive planning would also include developing a collection of conceptual plans to guide the completion of new park developments over the next ten years and create a corresponding business and sustainability plan to insure the balance and stability of Metroparks over the next decade and beyond.

To fully maximize the potential of this multi-tiered approach, three separate consulting firms were selected based on their specific areas of expertise. Each consulting firm would create an independent plan representing one part of a three part comprehensive plan. Consequently the three firms worked together to coordinate their data collection and information evaluation.

AN INVENTORY OF OPPORTUNITIES AND A FOUNDATION FOR THE FUTURE

URS was challenged to create a 20-year future plan for the park system. This future plan would identify natural resource attributes and amenities of the park district and the county within the context of national, state and regional significance. The process would inventory opportunities to connect existing parks and open spaces to communities and population centers and to recommend preservation strategies for significant natural areas and greenway corridors. The plan would provide a framework to leverage collaborative conservation and marketing efforts, identifying relationships between natural features, existing parks and protected open spaces, population and development centers.

A BUSINESS PLAN FOR OPERATIONAL SUSTAINABILITY AND SERVICE

PROS was contracted to review existing park operations, develop fundamental principles for operational excellence and to create standards to insure a sustainable future for Metroparks. This included evaluation of long range financial planning, relationships between operational overhead and available capital improvement funds, service delivery, educational and recreational programs, marketing and communication. The resulting outcome would ensure a commitment to maintaining best management practices for all areas of park operations and would provide a basis for planning controlled park wide staff expansion as new parks, services and facilities come on line.

EMERGING PARKS

Metroparks of the Toledo Area has not opened a new park for several decades. As a result of a ten year land acquisition levy that ran from 2002 through 2012, a great deal of open space had been acquired however due to the economic recession of 2008 several planned new park development projects had stalled.

At the time this comprehensive planning process began in 2013 two major park projects were already moving forward, the Middlegrounds and Howard Farms. Both of these projects had significant grant funding and associated completion schedules.

MKSK was retained to review and evaluate existing preliminary plans for other non-developed parks, and to create conceptual plans for new parks in selected study areas.

Several of MKSK's project sites had a basic level of planning completed as represented by the National Park Service General Management Plan format. They included: Keil Farm, The Fallen Timbers Battlefield and Fort Miamis, Blue Creek Conservation Area, Swan Creek Corridor and Brookwood Center.

In addition the park system had acquired approximately 4,000 acres within the Oak Openings Open Space Corridor. None of this property had been formally evaluated for public accessibility or facility development. MKSK was challenged to create conceptual plans that would provide a suitable platform for additional planning and development work.

The resulting outcome would be essential in developing the park district's annual capital improvement budget and projected capital improvement roster for the next five to ten years.

The board of park commissioners and staff has developed an outstanding park system for the residents of Lucas County. The Toledo region has supported the district very well over the last 85 years. With the successful passage of the 2012 levy Metroparks has the opportunity and responsibility to resume planning for the future by developing three separate planning documents to help guide the organization for the next 20 years. Each planning document supports a preferred future for the district in the functional area it represents. The operational assessment and business sustainability report centers on how the organization operates and how it thinks on a daily basis. The recommendations outlined supports changes that the board of park commissioners, key leadership of the agency, and the staff (who directly delivers services) desires.

The information gathered in the report supports every functional division and the system as a whole. The recommendations follow accreditation guidelines for CAPRA as well as demonstrating best practices in the industry. The recommendations will not be easy to implement, but are necessary to move the organization forward in a positive and productive manner. Many of the recommendations will have never been tried before and the culture of the organization may resist them. However, if implemented, the organization will be stronger, more fluid and flexible. The results will create a better culture to work in. The challenge is before the board, administration and staff to implement this comprehensive plan in an effective, accountable and sustainable manner. Let the process begin!

APPENDIX A – DEMOGRAPHIC INFORMATION



DEMOGRAPHIC OVERVIEW

The total population of Lucas County had a slight decrease of approximately 2.9% from 455,054 in 2000 to 441,815 in 2010. The current estimated population for 2012 is 439,195, and it is projected to fall to 432,521 in 2017, and total 419,294 by 2027.

According to the U.S. Census reports, the total number of households in the county has decreased by approximately 1.4%, from 182,847 in 2000 to 180,267 in 2010. The county is estimated to have 178,669 households in 2012, and is expected to grow to 174,022 households by 2027.

Lucas County's median household income (\$40,607) and per capita income (\$23,347) are well below both state and national averages.

Based on the 2010 Census, the population of Lucas County is a little younger (36.9 years) than the median age of the U.S. (37.2 years). Projections show that by 2027 the county will continue to age,

with the 55+ age group being the only age segment experiencing a growing trend, representing 33.4% of the total population.

The gender balance of the county's residents is slightly skewed toward females (51.5%), which represent 225,967 of the estimated 2012 population.

The estimated 2012 population of the county is primarily White Alone (73.81%), with the Black Alone (18.98%) group representing the largest minority. From 2000 to 2010, the county's racial composition was relatively unchanged, as the White Alone category dropped by just over 3.5%, and the Black Alone segment grew its representation by approximately 2%. Future projections show that by 2027 Lucas County will slowly become more diverse, but remains predominately White Alone (69.93%), while the Black Alone group will slowly grow to 21.1% of the total population.

METHODOLOGY

Demographic data used for this analysis was obtained from U.S. Census Bureau and from Environmental Systems Research Institute, Inc. (ESRI), the largest research and development organization dedicated to Geographical Information Systems (GIS) and specializing in population projections and market trends. All data was acquired in July 2013 and reflects actual numbers as reported in the 2000 and 2010 Censuses, and estimates for 2012 and 2017 as obtained by ESRI. Straight-line linear regression was utilized for projected 2022 and 2027 demographics. The geographic boundary of Lucas County was utilized as the demographic analysis boundary shown in Figure 1.



Figure 1 - Lucas County Boundaries

RACE AND ETHNICITY DEFINITIONS

The minimum categories for data on race and ethnicity for federal statistics, program administrative reporting, and civil rights compliance reporting are defined as below. The 2010 Census data on race are not directly comparable with data from the 2000 Census and earlier censuses; caution must be used when interpreting changes in the racial composition of the U.S. population over time. The latest (Census 2010) definitions and nomenclature are used within this analysis.

American Indian: This includes a person having origins in any of the original peoples of North and South America (including Central America), and who maintains tribal affiliation or community attachment.



Asian: This includes a person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black: This includes a person having origins in any of the black racial groups of Africa.

Native Hawaiian or Other Pacific Islander: This includes a person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

White: This includes a person having origins in any of the original peoples of Europe, the Middle East, or North Africa.

Hispanic or Latino: This is an ethnic distinction, a subset of a race as defined by the Federal Government; this includes a person of Mexican, Puerto Rican, Cuban, South or Central American, or other Spanish culture or origin, regardless of race.

POPULATION

Lucas County has witnessed a slow decline in recent years. From 2000 to 2010, the county's total population experienced a small decrease of 2.9% or an annual rate of decrease of nearly 3%. This is the opposite of national growth averages, which were just over 1% annually. Projecting ahead, the total population of the county is expected to continue to undergo a gradual decline over the next 15 years. Based on predictions through 2027, the county is expected to have approximately 419,294 residents living within 174,022 households.

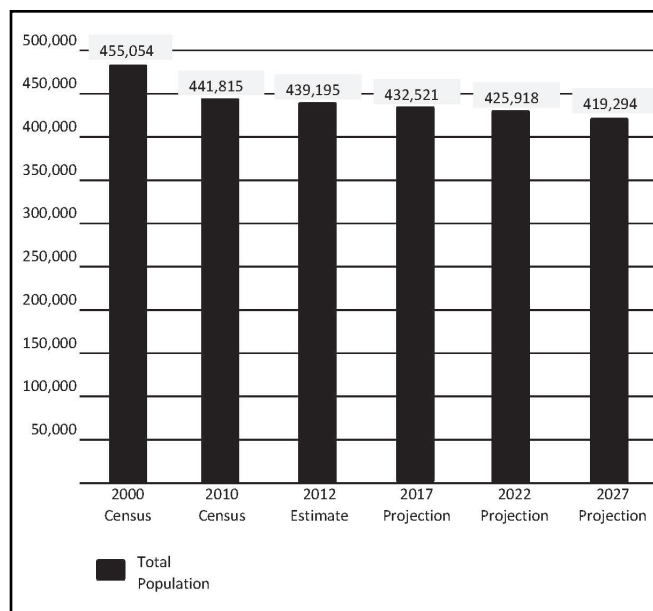


Figure 2 – Lucas County: Total Population

AGE SEGMENT

Evaluating the distribution by age segments, the county is fairly evenly balanced between youth, young adult, family, and senior populations. In 2010, the highest segment by population was the 35-54 age group, representing 27%, and the lowest is the 18-34 segment, which constitutes 23.6% of the population.

Over time, the overall composition of the population for the county is projected to gradually become older. The Census results from 2000 and 2010 show a slight increase in the 18-34 (from 21.1% to 23.6%) and 55+ (from 23% to 25.4%) segments. In the same 10-year period, the county experienced a small decrease in both the <18 (from 24.8% to 24%) and 35-54 (from 31.1% to 27%) populations. Future projections through 2027 show that each age segment, except the 55+ age group, will undergo

small but steady decreases in size as compared to the population as a whole. The 55+ age group is expected to gradually grow to represent approximately 33.4% of the population by 2027, making it the single largest age segment. This is consistent with general national trends where the 55+ age group has been growing as a result of increased life expectancies and the baby boomer population.

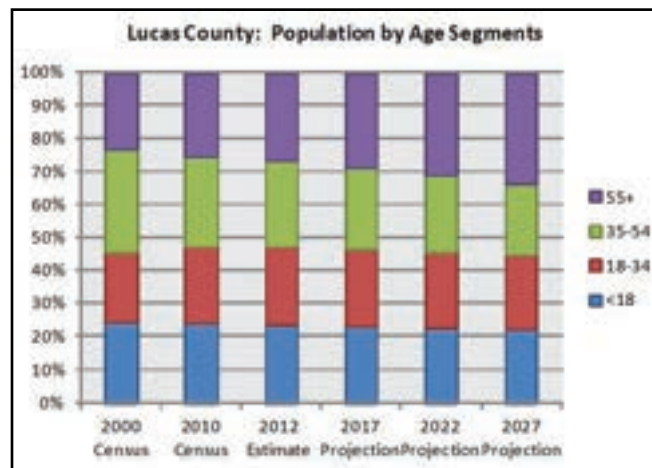


Figure 3 – Population Age by Segments

RACE AND ETHNICITY

In analyzing race and ethnicity, Lucas County is very limited in diversity. The 2012 estimate shows that the majority of the population falls in the White Only (73.81%) category. In the time between Censuses of 2000 and 2010, the county recognized very little diversification as the White Only category reduced slightly from 77.5% to 73.98%, while the Black Alone segment increased from 16.98% to 19%. Predictions for 2027 expect Lucas County to remain predominately White Alone (69.93%), while the Black Alone group expects to gradually grow to 21.1% of the total population. See Figure 4.

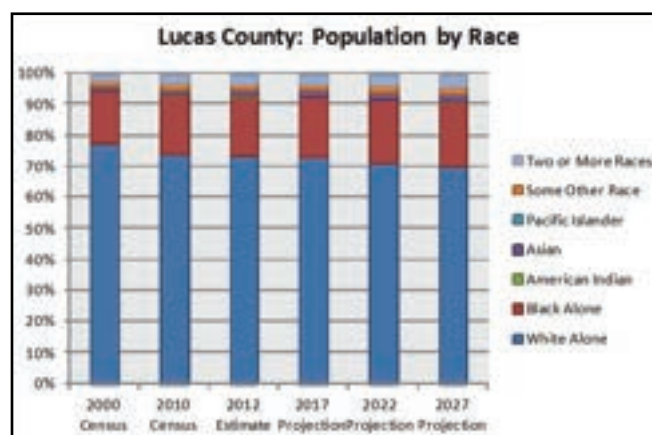


Figure 4 – Population by Race

HOUSEHOLDS AND INCOME

Lucas County's income characteristics demonstrate steady growth trends. The median household income was \$38,078 in 2000 and \$40,607 in 2012. It is projected to grow to \$51,990 by 2027. The median household income represents the earnings of all persons age 16 years or older living together in a housing unit. The per capita income is also projected to increase from \$20,518 in 2000 and \$33,347 in 2012, to \$28,762 by 2027 (Figure 5).

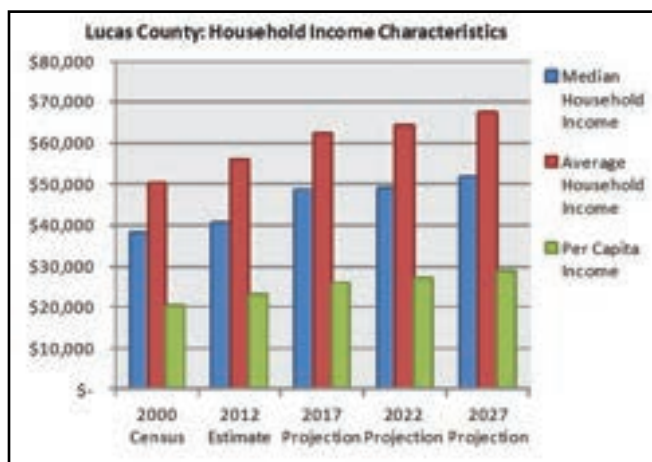


Figure 5 – Household Income Characteristics

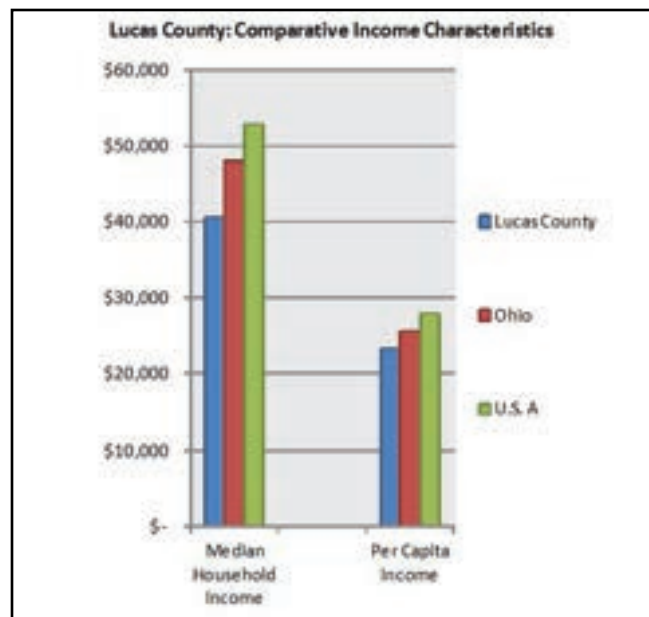


Figure 6 - Comparative Income Characteristics

As seen in Figure 6, the county's median household income (\$40,607) is well above the state (\$48,071) and national (\$52,762) averages. Lucas County's per capita income (\$23,347) is also significantly higher than state (\$25,618) and national (\$27,915) averages. Future predictions expect that both median household income and per capita income for the area will increase to \$51,990 and \$25,618, respectively, by 2027.

TRENDS ANALYSIS

Information released in the Outdoor Foundation's Outdoor Recreation Participation Report 2013 reveal a record number of Americans (nearly 142 million people) participated in outdoor activities. The Outdoor Recreation Participation Report helps the outdoor industry, public agencies, and community organizations better understand the trends in outdoor recreation participation, enabling groups to address America's inactivity crisis and the disconnect between children and the outdoors. During January and early February 2013 a total of 42,363 online interviews were carried out with a nationwide sample of individuals and households from the U.S. Online Panel operated by Synovate/IPSOS. A total of 15,770 individual and 26,593 household surveys were completed. The total panel has over one million members and is maintained to be representative of the U.S. population.

Over sampling of ethnic groups took place to boost response from typically under-responding groups. A weighting technique was used to balance the data to reflect the total U.S. population aged six and above. The following variables were used: gender, age, income, household size, region, population density, and panel join date. The total population figure used was 287,138,000 people aged six and above. The report details participation among all Americans, youth, young adults, and adults. From these results, a current and accurate picture of outdoor recreation participation trends can be ascertained. Below are some of the key findings associated with this report.

NATIONAL OUTDOOR ACTIVITY TRENDS ANALYSIS

In 2012, Americans took advantage of the variety and accessibility of the nation's outdoor recreational opportunities. Last year, nearly half (49.4%) of the total population in the U.S. participated in some form of outdoor recreation. From 2011 to 2012, total participants of outdoor recreation increased by approximately 800,000 people, bringing the total to a record high of nearly 142 million people. The total number of outdoor outings in 2012 reached an all-time high of 12.4 billion excursions (up from 11.5 outdoor excursions in 2011). The report also showed that about one-fourth of outdoor enthusiasts participated in outdoor activities at least twice per week.

Walking for fitness was the overwhelming leader in overall participation, with approximately 116.7 million Americans (over 40% of the total population) engaging in the activity. Running/jogging was also very popular, with over 52 million participants, which

represents just over 18% of the total population. Based on 2012 data, the following chart depicts the top ten most popular outdoor recreation activities in terms of total participants. See Figure 7.

An interesting note for many public park and recreation agencies is that the largest areas of overall participation and growth in participation are in outdoor, nontraditional sports and activities. According to the Outdoor participation Report 2013, the most significant growth in participation among outdoor activities from 2011 to 2012 include adventure racing (up 103.76%), nontraditional, off-road triathlons (up 103.39%), and traditional triathlons (up 56.78%). The most rapid declines in outdoor activities from 2011 to 2012 were evident in snowmobiling (down 38.81%), snorkeling (down 14.03%), and jet skiing (down 10.79%). Analyzing trends over the last five years of data (2007-2012), we find participation in adventure racing grew the most with an increase of 210.89%, followed by nontraditional off-road triathlons (up 198.55%), traditional triathlons (up 173.68%), and telemarking (up 135.81%). In the same five-year span, the largest decreases in participation were in snowmobiling (down 40.22%), horseback riding (down 34%), and water skiing (down 24.77%). The following chart depicts participation figures (in thousands) and growth trends over the last five years for each outdoor activity based on results from the Outdoor Foundation's Outdoor Participation Report 2013.

Top Ten Outdoor Recreation Activities – All Persons Aged 6+		
Activity	% of Americans	Total Participants
Walking for Fitness	40.6%	116.7 Million
Running/Jogging	18.2%	52.2 Million
Bicycling (Road/Paved Surface)	13.7%	39.2 Million
Fishing (Freshwater/Other)	13.6%	39.1 Million
Camping (Car, Backyard, RV)	13.3%	38 Million
Hiking	12.0%	34.5 Million
Camping (Within ¼ Mile of Vehicle/Home)	10.4%	30 Million
Wildlife Viewing (>¼ Mile of Vehicle/Home)	8.0%	23 Million
Target Shooting (Handgun)	5.6%	16.1 Million
Hunting (All)	5.1%	14.7 Million

Figure 7 – Top Ten Outdoor and Recreation Activities

Averaging the year-to-year changes in participation for outdoor activities provides a stabilized indicator of how sports are trending over time. From 2009 to 2012, the largest average year-to-year changes in activities were in nontraditional off-road triathlons

(average increase of 40%), adventure racing (average increase of 35%), and traditional triathlons (average increase of 30%). Figure 9 displays the top ten outdoor activities in terms of average year-to-year change in participation.

National Participatory Trends; by Activity - Outdoor Recreation	2007	2008	2009	2010	2011	2012	% Change '11-12	% Change '10-11	% Change '09-10	% Change '08-09	% Change '07-08
Adventure Racing	698	920	1,089	1,129	1,065	2,170	101.76%	62.06%	99.27%	115.87%	210.89%
Archery	5,950	6,409	6,326	6,318	6,623	7,722	16.59%	22.20%	22.07%	20.49%	29.78%
Backpacking (Overnight)	6,637	7,867	7,647	8,349	7,095	8,771	21.62%	5.05%	34.70%	11.49%	37.15%
Bicycling (BMX)	1,887	1,904	1,811	2,369	1,547	2,175	40.59%	-8.19%	20.10%	14.23%	15.20%
Bicycling (Mountain/Non-Paved Surface)	6,892	7,992	7,142	7,161	6,816	7,714	13.17%	7.72%	8.01%	1.61%	11.93%
Bicycling (Road/Paved Surface)	38,940	38,114	40,140	39,320	40,348	39,232	-2.77%	-0.22%	-2.20%	2.93%	0.75%
Birdwatching (>1/4 Mile From Vehicle/Home)	13,467	14,399	13,294	13,339	12,794	14,275	11.58%	7.02%	7.38%	-8.86%	6.00%
Boardsailing/Windsurfing	1,118	1,307	1,128	1,617	1,151	1,593	38.40%	-1.48%	-41.22%	21.88%	42.49%
Camping (Within 1/4 Mile of Vehicle/Home)	31,375	31,686	34,338	30,996	32,925	29,982	-8.94%	-3.27%	-12.69%	-11.00%	-4.44%
Camping (Car, Backyard, RV)	39,836	42,396	44,034	39,909	42,548	38,049	-10.57%	-4.68%	-13.59%	-10.15%	-4.89%
Canoeing	9,797	9,935	10,058	10,553	9,787	9,839	0.53%	-6.77%	-2.18%	-0.97%	0.43%
Climbing (Sport/Indoor/Boulder)	4,514	4,789	4,313	4,770	4,119	4,592	11.48%	-3.73%	6.47%	-3.71%	1.73%
Climbing (Traditional/Ice/Mountaineering)	2,084	2,288	1,835	2,198	1,609	2,189	36.05%	0.41%	19.29%	-4.33%	5.04%
Fishing (Fly)	5,756	5,941	5,568	5,478	5,683	6,012	5.79%	9.75%	7.97%	1.20%	4.48%
Fishing (Freshwater/Other)	43,859	40,331	40,961	38,860	38,868	39,135	0.69%	0.71%	-4.46%	-2.97%	-10.77%
Hiking	29,965	32,511	32,572	32,496	34,492	34,545	0.15%	6.31%	6.08%	6.26%	15.28%
Horseback Riding	12,098	10,816	9,755	9,809	8,861	7,985	-9.89%	-18.00%	-18.14%	-76.17%	-34.00%
Hunting (All)	14,138	13,980	15,273	14,007	14,887	14,705	-1.22%	4.98%	-3.72%	5.19%	-4.01%
Jet Skiing	8,055	7,815	7,734	7,753	7,395	6,597	-10.79%	-14.91%	-14.59%	-15.59%	-18.10%
Kayaking (Recreational)	5,070	6,240	6,212	6,465	8,229	8,144	-1.03%	25.97%	31.10%	30.51%	80.63%
Kayaking (Sea/Touring)	1,485	1,780	1,771	2,144	2,029	2,446	20.53%	14.09%	18.11%	37.42%	64.71%
Rafting	4,340	4,651	4,318	4,460	3,821	3,690	-3.43%	-17.26%	-14.54%	-20.66%	-14.88%
Running/Jogging	41,064	41,130	43,892	49,408	50,713	52,187	2.91%	5.62%	18.90%	26.89%	27.09%
Sailing	3,786	4,226	4,342	3,869	3,725	3,938	6.20%	2.30%	-8.84%	-6.34%	4.54%
Scuba Diving	2,965	3,216	2,723	3,153	2,579	2,982	15.63%	-5.42%	9.51%	-7.28%	0.57%
Shooting (Sport/Clays)	4,115	4,282	4,182	4,399	4,193	4,896	16.77%	11.30%	17.07%	14.34%	18.98%
Shooting (Trap/Skeet)	3,376	3,669	3,368	3,610	3,295	3,886	17.94%	7.65%	15.38%	5.91%	15.11%
Skiing (Cross-Country)	3,530	3,848	4,157	4,530	3,641	3,307	-9.17%	-27.09%	-20.45%	-14.06%	-6.32%
Snorkeling	9,294	10,296	9,358	9,305	9,318	8,011	-14.03%	-11.90%	-14.19%	-22.19%	-13.80%
Snowmobiling	4,811	4,660	4,798	5,116	4,700	2,876	-38.41%	-41.76%	-40.88%	-38.18%	-40.27%
Snowshoeing	2,400	2,922	3,431	3,823	4,111	4,029	-1.99%	5.39%	17.43%	37.89%	67.88%
Stand Up Paddling	N/A	N/A	N/A	1,090	1,242	1,542	24.15%	46.98%	N/A	N/A	N/A
Target Shooting (Handgun)	11,736	13,345	12,473	12,497	14,778	16,059	8.67%	28.30%	28.75%	20.16%	36.84%
Target Shooting (Rifle)	12,436	13,102	12,790	12,544	13,520	14,186	4.93%	13.09%	11.44%	6.27%	14.07%
Telemarking (Downhill)	1,173	1,435	1,482	1,821	2,099	2,706	31.78%	51.89%	86.64%	92.75%	135.81%
Trail Running	4,216	4,857	4,833	5,136	5,610	6,003	7.01%	16.88%	24.21%	21.59%	40.39%
Triathlon (Non-Traditional/Off-Road)	483	602	666	929	709	1,442	103.39%	55.22%	110.52%	139.32%	193.55%
Triathlon (Traditional/Road)	798	1,087	1,208	1,978	1,393	2,184	56.78%	10.41%	80.79%	100.92%	173.68%
Wakeboarding	3,521	3,544	3,577	3,645	3,389	3,348	-1.21%	-8.13%	-6.40%	-5.53%	-4.91%
Walking for Fitness	108,740	111,668	110,095	134,068	111,362	116,695	4.79%	2.30%	5.99%	4.50%	7.32%
Water Skiing	5,918	5,593	4,862	4,836	4,416	4,452	0.82%	-7.94%	-8.43%	-20.40%	-24.77%
Wildlife Viewing (>1/4 Mile of Home/Vehicle)	22,974	24,113	21,296	21,025	21,964	22,999	4.71%	9.39%	8.02%	-4.62%	0.11%

NOTE: Participation figures are in '00s for the US population ages 6 and over.

Legend:	Large Increase (greater than 25%)	Moderate Increase (8% to 25%)	Moderate Decrease (8% to -25%)	Large Decrease (less than -25%)
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Figure 8 – National Participatory Trends

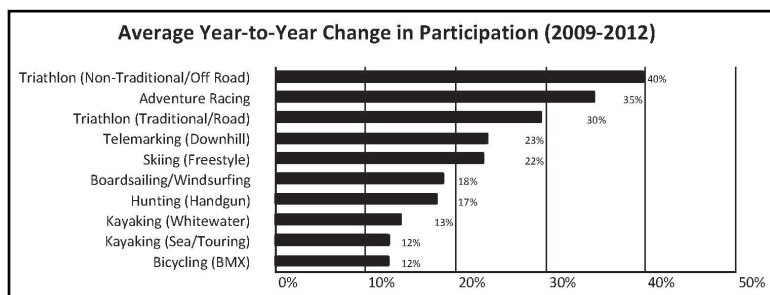


Figure 9 – Average Year to Year Change in Participation

PARTICIPATION IN OUTDOOR ACTIVITIES BY AGE AND GENDER

Participation trends in outdoor recreation, team sports, and indoor fitness activities vary based on age and gender. Outdoor activities are popular among children, especially boys ages 11 to 15. Participation rates in outdoor activities drop for both genders from ages 16 to 20. These rates slightly increase for females in their early 20's and males in their late 20's before gradually declining throughout life. For women age 16 to 20, indoor fitness is the preferred activity and remains the most popular form of activity for the rest of the lifecycle. Males tend to favor outdoor activities until age 66 and older.

The graphs below detail the lifecycle participation in recreational pursuits in both female and male participants, as identified in the Outdoor Industry Foundation's 2013 Outdoor Participation Report. These trends can help to determine which areas of focus and categories of recreational activities are going to appeal best to different age segments by gender among residents of Lucas County.

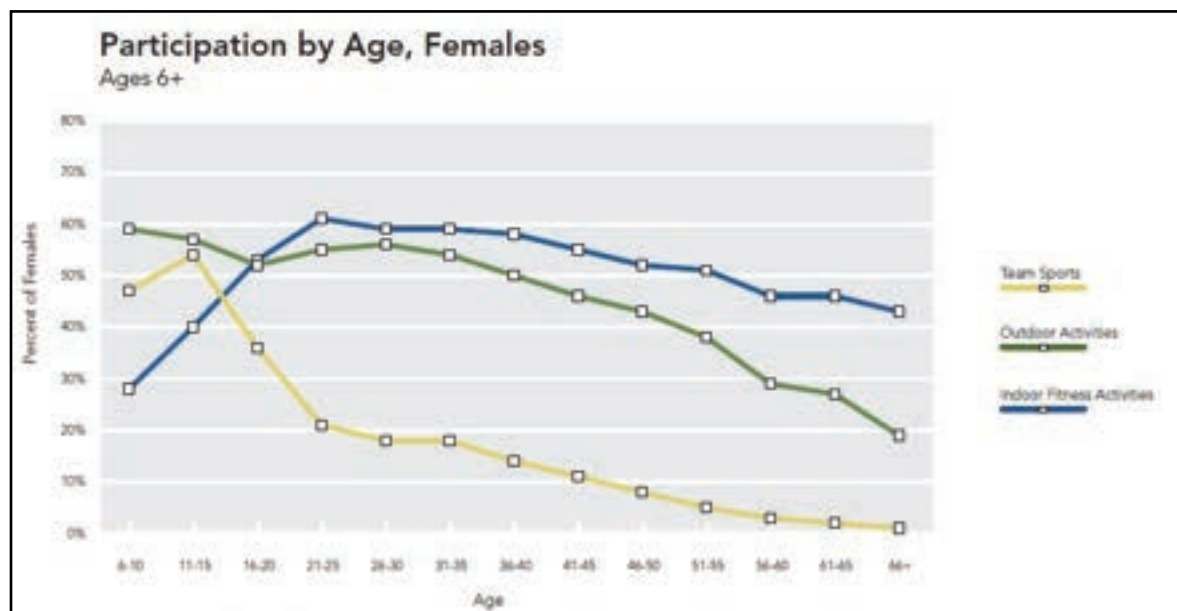


Figure 10 – Participation by Age, Females

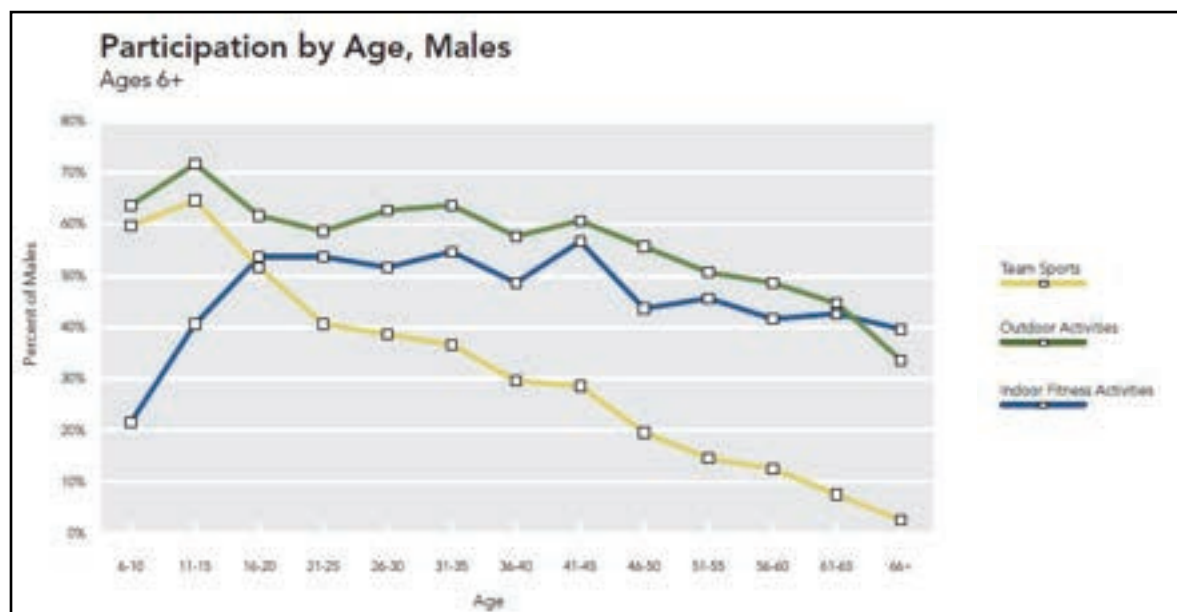


Figure 11 – Participation by Age, Males

LOCAL SPORT AND MARKET POTENTIAL

The following charts show sport and leisure market potential data from ESRI. A Market Potential Data (MPI) measures the probable demand for a product or service in Lucas County. The MPI shows the likelihood that an adult resident of the target area will participate in certain activities when compared to the U.S. National average. The national average is 100, therefore numbers below 100 represent a lower than average participation rate and numbers above 100 represent higher than average participation rate. The county is compared to the national average in two (2) categories – outdoor activity and money spent on miscellaneous recreation. Overall, Lucas County shows low market potential index numbers for both categories.

As seen in the tables below, the following sport and leisure trends are most prevalent for residents within Lucas County. Cells highlighted in yellow indicate the top three scoring activities based on the purchasing preferences of residents.

Participatory Trends; by Activity - Outdoor Activity	Lucas County (MPI)
Participated in Archery	120
Participated in Backpacking/Hiking	88
Participated in Bicycling (mountain)	98
Participated in Bicycling (road)	92
Participated in Boating (Power)	96
Participated in Canoeing/Kayaking	99
Participated in Fishing (fresh water)	105
Participated in Fishing (salt water)	90
Participated in Horseback Riding	99
Participated in Hunting with Rifle	101
Participated in Hunting with Shotgun	110
Participated in Jogging/Running	84
Participated in Target Shooting	100

Figure 12 - Outdoor Activity Market Potential

Participatory Trends; by Activity - Money Spent on Miscellaneous Recreation	Lucas County (MPI)
Spent on High End Sports/Recreation Equipment <\$250	101
Spent on High End Sports/Recreation Equipment >\$250	100
Attend sports event: baseball game	95
Attend sports event: basketball game (college)	101
Attend sports event: basketball game (pro)	97
Attend sports event: football game (college)	101
Attend sports event: football-Monday night game (pro)	98
Attend sports event: football-weekend game (pro)	95
Attend sports event: golf tournament	98
Attend sports event: ice hockey game	99
Attend sports event: soccer game	93
Visited a theme park in last 12 months	90
Visited Disney World (FL)/12 mo: Magic Kingdom	92
Visited any Sea World in last 12 months	81
Visited any Six Flags in last 12 months	81
Went to zoo in last 12 months	99

Figure 13 - Money Spent On Miscellaneous Recreation

APPENDIX B – CORE COMPETENCY



CULTURAL ASSESSMENT

EXECUTIVE MANAGEMENT COMPETENCY DEFINITIONS

The following are the categories of core competencies with an overall description and skills definitions that contribute to each core competency. The Rating Scale provides a numerical value and skill set description to allow each individual the opportunity to assess Importance, Frequency and a Self- Evaluation. The Worksheet allows Specific Competency values to be recorded.



CORE COMPETENCY “BUSINESS ACUMEN”

This core qualification involves the ability to acquire and administer human, financial, material, and information resources in a manner that instills public trust and accomplishes the organization’s mission, and the ability to use new technology to enhance decision-making.

Specific Competencies:

Financial Management - Demonstrates broad understanding of principles of financial management and marketing expertise necessary to ensure appropriate funding levels. Prepares, justifies, and/or administers the budget for the program area; uses cost-benefit thinking to set priorities; monitors expenditures in support of programs and policies. Identifies cost-effective approaches. Manages procurement and contracting.

Human Resources Management - Assesses current and future staffing needs based on organizational goals, strategic plan and budget realities. Using merit principles, ensures staff are appropriately selected, developed, utilized, appraised, and rewarded; takes corrective action.

Technology Management - Uses efficient and cost-effective approaches to integrate technology into the workplace and improve program effectiveness. Develops strategies using new technology to enhance decision-making. Understands the impact of technological changes on the organization.

CORE COMPETENCY “BUILDING COALITIONS / COMMUNICATIONS”

This core qualification involves the ability to explain, advocate, and express facts and ideas in a convincing manner and to negotiate with individuals and groups internally and externally. It also involves the ability to develop an expansive professional network with other organizations and to identify the internal and external politics that impact the work of the organization.

Specific Competencies:

Citizen Participation – Recognizes the right of citizens to influence local decisions and promoting active citizen involvement in local governance; guides citizen participation in public meetings to ensure professional and respectful dialogue.

Influencing/Negotiating - Persuades others; builds consensus through give and take; gains cooperation from others to obtain information and accomplish goals; facilitates “win-win” solutions.

Interpersonal Communication - Considers and responds appropriately to the needs, feelings, and capabilities of different people in different situations; is tactful, compassionate and sensitive, and treats others with respect.

Oral Communication - Makes clear and convincing oral presentations to individuals or groups; listens effectively and clarifies information as needed; facilitates an open exchange of ideas and fosters an atmosphere of open communication.

Partnering - Develops networks and builds alliances, engages in cross-functional activities; collaborates across boundaries, and finds common ground with a widening range of stakeholders. Utilizes contacts to build and strengthen internal and external support bases.

Political Savvy - Identifies the internal and external politics that impact the work of the organization. Approaches each problem situation with a clear perception of organizational and political reality; recognizes the impact of alternative courses of action.

Written Communication - Expresses facts and ideas in writing in a clear, convincing and organized manner appropriate for the intended audience.

CORE COMPETENCY “CONTINUOUS IMPROVEMENT”

This core qualification encompasses the ability to develop and implement an organizational vision that integrates key city goals, priorities, values, and other factors. It also involves the ability to continually strive to improve customer service and program performance within local government framework; to create a work environment that encourages creative thinking; and to maintain focus, intensity and persistence, even under adversity.

Specific Competencies:

Continual Learning - Grasps the essence of new information; masters new technical and business knowledge; recognizes own strengths and weaknesses; pursues self-development; seeks feedback from others and opportunities to master new knowledge.

Creativity and Innovation - Develops new insights into situations and applies innovative solutions to make organizational improvements; creates a work environment that encourages creative thinking and innovation; designs and implements new or cutting-edge programs/processes.

External Awareness - Identifies and keeps up to date on key local, regional, state, and national policies and economic, political, and social trends that affect the organization. Understands near-term and long-range plans and determines how best to be positioned to achieve a competitive business advantage in a global economy.

Vision - Takes a long-term view and acts as a catalyst for organizational change; builds a shared vision with others. Influences others to translate vision into action.

CORE COMPETENCY “LEADING CHANGE”

This core qualification focuses on the ability to balance change and maintain continuity in an ever-changing environment. Inherent in its foundation is the ability to recognize the potential within the workforce and adapt outcomes through the enhancement of individual's strengths.

Specific Competencies:

Flexibility - Is open to change and new information; adapts behavior and work methods in response to new information, changing conditions, or unexpected obstacles. Adjusts rapidly to new situations warranting attention and resolution.

Change Agent – Leads change implementation. Fosters and supports an atmosphere that supports and embraces organizational change.

Resilience - Deals effectively with pressure; maintains focus and intensity and remains optimistic and persistent, even under adversity. Recovers quickly from setbacks.

Strategic Thinking - Formulates effective strategies consistent with the business and competitive strategy of the organization in a global economy. Examines policy issues and strategic planning with a long-term perspective. Determines objectives and sets priorities; anticipates potential threats or opportunities.

CORE COMPETENCY “LEADING PEOPLE”

This core qualification involves the ability to design and implement strategies that maximize employee potential and foster high ethical standards in meeting the organization's vision, mission, and goals.

Specific Competencies:

Coaches/Mentors – Providing direction, support, and feedback to enable others to meet their full potential (requires knowledge of feedback techniques; ability to assess performance and identify others' development needs).

Conflict Management - Identifies and takes steps to prevent potential situations that could result in unpleasant confrontations. Manages and resolves conflicts and disagreements in a positive and constructive manner to minimize negative impacts.

Empowerment – Creating a work environment that grants authority, removes barriers to creativity and encourages responsibility and decision making at all organizational levels.

Leveraging Diversity - Recruits, develops, and retains a diverse high quality workforce. Leads and manages an inclusive workplace that maximizes the talents of each person to achieve sound business results. Respects, understands, values and seeks out individual differences to achieve the vision and mission of the organization. Develops and uses measures and rewards to hold self & others accountable for achieving results that embody the principles of diversity.

Integrity/Honesty/Ethics - Instills mutual trust and confidence; creates a culture that fosters high standards of ethics; behaves in a fair and ethical manner toward others, and demonstrates a sense of corporate responsibility and commitment to public service.

Team Building - Inspires, motivates, and guides others toward goal accomplishments. Consistently develops and sustains cooperative working relationships. Encourages and facilitates cooperation within the organization and with customer groups; fosters commitment, team spirit, pride, trust.

CORE COMPETENCY “RESULTS DRIVEN”

This core qualification stresses accountability and continuous improvement. It includes the ability to make timely and effective decisions and produce results through strategic planning and the implementation and evaluation of programs and policies.

Specific Competencies:

Accountability - Assures that effective controls are developed and maintained to ensure the integrity of the organization. Holds self and others accountable for rules and responsibilities and can be relied upon to ensure that projects within areas of specific responsibility are completed in a timely manner and within budget. Monitors and evaluates plans; focuses on results and measuring attainment of outcomes. Assures that the future needs of the organization will be met and establishes timetables completing current and future projects.

Customer Service - Balancing interests of a variety of citizens; readily readjusts priorities to respond to pressing and changing citizen demands. Anticipates and meets the need of citizens; achieves quality end products; is committed to continuous improvement of services. Creates and sustains an organizational culture which encourages others to provide the highest quality of service for the public.

Decisiveness - Exercises good judgment by making sound and well-informed decisions; perceives the impact and implications of decisions; makes effective and timely decisions, even when data is limited or solutions produce unpleasant consequences; is proactive and achievement oriented.

Entrepreneurship - Identifies opportunities to develop and market new products and services within or outside of the organization. Is willing to take risks; initiates actions that involve a deliberate risk to achieve a recognized benefit or advantage.

Problem Solving - Identifies and analyzes problems; distinguishes between relevant and irrelevant information to make logical decisions; provides solutions to individual and organizational problems.

Quality Assurance – Ensures a high level of quality staff work, operational procedures, and service delivery; leads organizational improvements; sets performance/productivity standards and objectives; measures results.

Technical Credibility - Understands and appropriately applies procedures, requirements, regulations, and policies related to specialized expertise. Is able to make sound hiring and capital resource decisions and to address training and development needs. Understands linkages between administrative competencies and mission needs.

COMPETENCY RATING SCALE

The Consulting Team evaluated six areas. This included the following:

- Business Acumen
- Building Coalitions
- Continuous Improvement
- Leading Change
- Leading People
- Results Driven
- The Department is doing well in the following areas:
 - Written communication
 - Partnering
 - Integrity, honesty, ethics
 - Empowerment
 - Accountability
 - Customer service
 - Problem solving
 - Areas that need more awareness:
 - Financial management
 - Human resource management
 - Citizens participation
 - Visioning
 - Coaching and mentoring of staff

Importance	Frequency	Self-Evaluation
How important is the performance of this competency?	How often is this task performed?	How would you rate your own competence and confidence with this core competency?
1-2 = Not important	1-2 = Every few months to yearly	1-2 = Not Proficient/Competent
3-4 = Somewhat important	3-4 = Every few weeks to monthly	3-4 = Somewhat Proficient/Competent
5-6 = Important	5-6 = Every few days to weekly	5-6 = Adequately Proficient/Competent
7-8 = Very important	7-8 = Every few hours to daily	7-8 = Very Proficient/Competent
9-10 = Extremely important	9-10 = Hourly to many times each hour	9-10 = Expertly Proficient/Competent

CORE COMPETENCY	IMPORTANCE	FREQUENCY	SELF EVALUATION
Business Acumen			
Financial Management	8.73	6.29	6.73
Human Resources Management	8.13	4.43	6.47
Technology Management	7.40	5.57	6.73
Building Coalition/Communications			
Citizen Participation	8.27	4.57	6.60
Influencing/Negotiations	7.93	5.36	7.20
Interpersonal Communication	8.67	7.07	7.33
Oral Communication	8.47	6.57	7.33
Partnering	7.73	4.93	6.73
Political Savvy	7.80	5.29	6.27
Written Communication	8.73	7.79	8.20
Continuous Improvement			
Continual Learning	8.60	4.79	7.27
Creativity and Innovation	8.20	4.93	7.00
External Awareness	7.67	5.14	6.27
Vision	8.33	4.71	6.60
Leading Change			
Flexibility	8.67	6.07	7.40
Change Agent	8.47	5.14	6.93
Resilience	8.40	6.57	7.27
Strategic Thinking	8.33	4.57	6.60
Leading People			
Coaches/Mentors	8.07	5.71	6.60
Conflict Management	8.00	4.86	6.67
Empowerment	8.33	5.50	7.20
Leveraging Diversity	8.13	4.79	7.20
Integrity/Honest/Ethics	9.47	8.00	8.53
Team Building	8.40	6.29	7.27
Results Driven			
Accountability	8.80	7.07	7.87
Customer Service	9.27	7.64	8.07
Decisiveness	8.73	7.50	7.07
Entrepreneurship	7.47	4.57	6.33
Problem Solving	9.00	7.50	8.07
Quality Assurance	8.67	6.79	7.73
Technical Credibility	8.20	6.71	7.33