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# MONTROSE RECREATION DISTRICT STRATEGIC ACTION PLAN 2023



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**December 7, 2022**

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MONTROSE RECREATION DISTRICT

Authored by: STAFF

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# VISION

WHERE we will get to

Be a leader in providing exceptional  
parks and recreation experiences

# Mission

Our WHY

FUNdamentally improving lives by building community in fun,  
engaging ways, and by providing excellent parks and recreation  
facilities, activities and services.

# Values

How we will behave

Community Focused

Inclusive

Innovative

Customer Centric

Stewardship

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## MRD 5 BIG MOVES

1. Plan for Capital Improvements
  - a. Standardize the CIP
  - b. Construct an outdoor aquatic facility
2. Develop strong trails and connections
3. Expand programs and increase program participation to best practice levels
4. Focus on MRD employees – create the “MRD Way”
5. Attain CAPRA Accreditation / National Gold Medal Award

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# FOCUS AREAS

## WHAT WE WILL FOCUS ON TO HELP OUR PROGRESS

**OBJECTIVES:** What we want to achieve

**ACTIONS, TACTICS** How we will achieve those objectives (also think of them as projects)

**KEY PERFORMANCE INDICATORS (KPI)** How will we measure progress, including timelines and key performance metrics

Who is this assigned to?

How much will it cost?

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# PARKS & TRAILS

EXAMPLE

## BUILD CITIZEN ENGAGEMENT THAT EXPANDS PARK AND TRAIL RESOURCES

Organize a citizen action team (CAT) that meets regularly to advise executive team on ways to enhance park and trail spaces.

KPI: CAT involves members of business, government, not-for-profit sectors + private citizens and has met at least 5 times in 2023, creating a documented list of action items that staff has either implemented or scheduled.

MARI, MIGUEL, DEBBY (MEETING HOSTING/ FACILITATING: \$500)

## DEVELOP SITE MASTER PLAN FOR UTE PARK / MCNEIL FIELDS

Work in concert with City of Montrose staff and park designer to include and integrate MRD park spaces with the Master Plan for Baldrige Regional Park.

KPI: MRD performs Use Assessment of Baldrige Regional Park by January 31<sup>st</sup>, 2023, and provides to City / designer; MRD meets regularly throughout 2023 so that Ute/McNeil elements are included and connected with BRP; Ute/McNeil Site Master Plan is completed and adopted by December 31, 2023.

MARI, JUSTIN, WADE COST: STAFF TIME FOR USE ASSESSMENT, + \$60,000 contribution toward BRP MP

## UPDATE THE ADA TRANSITION PLAN ANNUALLY TO CAPTURE PROGRESS ON INCREASED/IMPROVED ACCESSIBILITY

Review Evaluation Summary and Site Assessments to strategize priorities based on location, frequency/severity of infraction. Incorporate plan into MRD Strategic Plan and Capital Improvement Plan.

KPI: Access Committee is established by December 2022, meeting monthly until Transition Plan is finalized into 2023. Access Committee provides quarterly reports to BOD and to staff throughout 2023 at All Staff meetings to collaborate and infuse BOD/Staff priorities into the plan's formation. Provide basic materials for staff on-boarding checklist / knowledge base by end of Q1, March, continuing to build throughout 2023 as needed.

RESPONSIBLE STAFF: ADA ACCESS COMMITTEE

COSTS: \$500 FOR MEETING EXPENSES

## IDENTIFY ENHANCEMENT OPPORTUNITIES TO CREATE/IMPROVE ACCESSIBILITY AND INCORPORATE ADA STANDARDS INTO A TRAIL AND WALKWAY PLAN

ADA Access Committee works with stakeholders and citizens (CAT, possibly) to audit current trail "system" and identify challenges and opportunities. Formalize into a needs assessment report.

KPI: Access Committee to outline strategy to identify engaged stakeholders and citizens by end of Q2 2023 with the intent to perform a trail/walkway audit.

RESPONSIBLE STAFF: Access Committee

COSTS: Internal audit staff costs Meeting and supply expenses \$500. Prepare for 2024 budget.

**FOCUS AREA LEAD: JEREMY**

**WORK GROUP:** James Tanner, Jack Hay, Brad Distel, Miguel Lopez, Greg Trujillo



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# FACILITIES, PROGRAMS & EVENTS

## COMPLETE THE COST RECOVERY AND SUBSIDY INVESTMENT STRATEGY AND INCORPORATE INTO PROGRAMMING PLAN (CAPRA STANDARDS)

Conduct Phase 2 Cost of Service with 110% and recommend / gain approval for specific strategies within the 2023 budget.

Framework of 2023 Programming Plan is established to reflect 2022-2023 subsidy investment goals, and all Coordinators successfully adopt cost recovery adjustments into program and service fee structures.

Key Performance Indicator: All key strategies for fee adjustments are adopted, implemented, and evaluated to ensure positive financial performance, with a year-end report produced; new investment strategies are detailed for 2023-2024.

RESPONSIBLE STAFF: WADE, COST OF SERVICE WORK GROUP COSTS: \$2,500 one time, \$3,600 annual

## UTILIZE FINDINGS IN STATISTICALLY VALID SURVEY TO EXPAND ON PROGRAM OFFERINGS (FITNESS/WELLNESS, NATURE, SENIOR, OUTDOOR ADVENTURE AND ART/DANCE/PERFORMANCES, SPECIAL EVENTS)

Review the Master Plan template to identify all programs offered 2019 through present. Identify the gaps in programs, and identify and plan specific and targeted opportunities to fill those gaps.

Key Performance Indicators:

Increase the number of participants and contact days by 10% each season within those specified program areas.

Increase the number of programs offered by two (2) per activity guide that fall into the following categories: Fitness/Wellness, Nature, Senior, Outdoor Adventure, Special Events, art/dance/performance

RESPONSIBLE STAFF: Wade, Jeremy, Recreation Coordinators COSTS: \$0

## UPDATE PROGRAM ASSESSMENT DATA ANNUALLY TO TRACK THE EVOLUTION OF PROGRAMS AND EVENTS FOR IMPROVED DECISION – MAKING

Define, and agree to, the specific data points that will be tracked consistently within each program and reported, creating a central portal that all Coordinators and Leaders use to help them continue to expand, grow, and manage the recreation program offerings and participation.

Key Performance Indicator: By January 15<sup>th</sup>, define the absolute list of data from each program area that has been agreed to by program staff and approved through the Data Analyst's work products. By January 31<sup>st</sup>, set up the centralized portal to be used every program session by the Coordinators and Leaders. By March 30<sup>th</sup>, draft the system framework that helps Coordinators to identify opportunities and reach decisions about next program offerings.

RESPONSIBLE STAFF: Jeremy, Mari, Recreation Coordinators, Data Analyst COSTS: None Identified

**FOCUS AREA LEADS: WADE AND JUSTIN**

**WORK GROUP: Astro, John, Liz, Abby, Gene**



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# MAINTENANCE, OPERATIONS & STAFFING

## IDENTIFY FOUNDATIONAL KNOWLEDGE NEEDED FOR NEW FULLTIME STAFF, SEASONAL PART-TIME STAFF AND DEVELOP ONBOARDING CHECKLIST

Review and update employee handbook(s) each year among the administration / executive team. Each department will develop and/or update the onboarding checklist, and foundational knowledge descriptive list. Separate the onboarding checklists for full-time and part-time staff implementation.

**KPI:** Create update the orientation PowerPoint by March 30, and coordinators will meet monthly to develop both a key foundational knowledge list and an onboarding checklist. Complete an action plan to communicate, implement and evaluate to ensure foundational knowledge is communicated and understood by all staff.

RESPONSIBLE STAFF: Lisa, Admin Committee staff members, Coordinators

COSTS: Staff Time

## CREATE STANDARD OPERATION PROCEDURES FOR ALL ROUTINE MAINTENANCE, RECREATION, FACILITIES, CUSTODIAL AND CUSTOMER SERVICE (CAPRA STANDARDS)

Follow CAPRA guidelines and standards, defined within Management of Parks and Recreation Agencies 4th edition. Use guidelines to develop and update policies and procedures.

**KPI:** Develop and/or update all policies and procedures following CAPRA guidelines. First draft of all existing written policies, following the standards, by the end of 2023. Provide standards to staff and management for review. Fine tune documents, present to the BOD. Implement and evaluate in 2024. Possibly begin process for accreditation in 2025.

RESPONSIBLE STAFF: Abby, Miguel, Matt, Julie, Justin, Jessica, Debby, Liz, Lisa COSTS: Staff Time/Accreditation Materials

## UTILIZE DATA ANALYST / GRANT SPECIALIST POSITION TO HELP THE DISTRICT GENERATE ADDITIONAL REVENUE AND MAKE BETTER DATA-DRIVEN DECISIONS

Acquire and maintain sound knowledge and understanding of the organization, and use that knowledge and understanding to better comprehend all projects and programs for which grants will be sought and to recommend the seeking of grants. Use and report consistent data in master planning purposes, capital investment decisions, and measuring usage of facilities and participation in programming.

**KPI:** Use data to determine the changes in socioeconomic and demographics of the patrons within the district to see potential changes in programming depending upon those changes (aging population, patron time based availability). Review findings seasonally, during the first two years, (2023-2024) and then biannually after third year (2025, 2027, etc...) Document usage patterns for operations and programming. Collect and report benchmark data for years through 2023. Present findings to staff and Board.

RESPONSIBLE STAFF: Astro, Debby, Mari

COSTS: Staff Time

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**CREATE IN-DEPTH STAFFING PLAN THAT ADDRESSES RECRUITMENT, ONBOARDING, TRAINING, RETENTION, STAFFING LEVELS, SUCCESSION PLANNING, AND A SALARY ANALYSIS**

Develop organizational design and staffing levels/alignment, compare staffing utilization levels against standards desired, and assess staffing pay levels for full-time, part-time, and seasonal staff, Identify partnership/volunteer support and management. Continue to develop incentives programs.

KPI: Develop and distribute RFP, hire consultant to implement compensation survey, analysis, and gain recommendations. Create consistent recruitment operating standards. Develop a specific action-plan to offer competitive, market-driven pay following consultant recommendations/survey. Budget for 2023, create RFP by end of January, selection of consultants by end of February, 2023. Complete audit and survey, prepare future strategies by December 2023.

RESPONSIBLE STAFF: Lisa, Consultant for Salary Analysis

COSTS: \$15,000

**FOCUS AREA LEADS: MIGUEL AND LISA    WORK GROUP: Jessica W., Julie L., Matt I., David V., Lisa L., Miguel L.**

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# FUNDING

## ASSESS CURRENT DISTRICT RENTAL PROGRAM TO IDENTIFY WHAT FACILITIES/AMENITIES CAN OR SHOULD BE ADDED AS "CHARGE FOR SERVICE"

Prepare financial analysis of facility rentals and present fee adjustments in time for the 2023 budget implementation.

KPI: Place all facility rentals onto a single document and review existing fees, clarify philosophy, analyze cost recovery / subsidy achievement. Perform market comparison of the rental fees. Prepare and present adjusted rental program plan as a part of the 2023 budget enhancements. Develop and adjust operating policies as needed by end of Q1 2023.

RESPONSIBLE STAFF: Mari, Jeremy, Debby, Miguel, Justin, Wade

COSTS: Marketing materials for program roll-out \$1,500 (activity guide share, rack cards, etc.)

## INCREASE EXTERNAL FUNDING OPPORTUNITIES

Review and comprehend external funding methodologies outlined within the Comprehensive Master Plan, sharing information with the Board.

KPI: By January 30, 2023, study, research identify potential funding mechanisms, outlining an action plan and funding goals for further development into 2023.

RESPONSIBLE STAFF: Mari, Debby, Astro

COSTS: Staff and research time.

## REVIEW DEBT CAPACITY AND REVENUE PLAN OPPORTUNITIES

Develop a revenue plan 2023 – 2027, to potentially inform a longer-range plan to balance operating costs with achieving future capital plans.

KPI: By January 30, 2023, working in concert with District's bond consultant, create a 5-year revenue plan denoting different revenue scenarios to show possible and future spending plans and priorities, sharing and enhancing understanding and planning with the Board.

RESPONSIBLE STAFF: Mari

COSTS: Staff and research time.

**FOCUS AREA LEAD: MARI**

**WORK GROUP: None**

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# MARKETING & BRANDING

## CALCULATE AND MEASURE MARKETING ROI (RETURN ON INVESTMENT)

Define and record the precise formulas that will define marketing ROI for the MRD, establishing the 2022 benchmark against which all future years and activities can be measured.

KPI: MRD will define the specific rates of return on activities. Record all marketing costs for each year, and potentially by program / activity, as well as total revenue received through fees and charges (removes taxes and other compulsory revenue sources), and potentially by program / activity. Rates of return formulas will be defined and recorded by February 28, 2023, and will be implemented and reported on for end of year 2022 and for each quarter of 2023.

RESPONSIBLE STAFF: Debby, Mari, Wade

COSTS: \$0

## ENSURE CONSISTENCY IN MARKETING APPROACHES AND OUTREACH AND DEVELOP BRAND GUIDELINES AND STANDARDS

Establish consistency in marketing efforts, by defining, using, and reporting on the standards that staff are to use across all facilities and programs.

KPI:

By January 15<sup>th</sup>, 2023: A defining list of all marketing standards will be developed; a defining list of the targeted number of each type of media will be developed; By January 31<sup>st</sup>, each of these will be provided to MRD Coordinators for agreement and implementation. Each quarter of 2023, an accounting of actual uses will compare to the targets and a report generated.

RESPONSIBLE STAFF:

COST: \$610 annually

RESPONSIBLE STAFF: Debby

COSTS: None at this time.

## UPDATE DISTRICT-WIDE MARKETING PLAN TO CAPRA STANDARDS

CAPRA standard 3.4.3 – Marketing Plan: “The agency shall have an established marketing plan, based on market research that is evaluated periodically for effectiveness. The fundamental principle of marketing is to gain an understanding of customer needs, wants, concerns and behaviors. The marketing plan addresses the appropriate mix of communications tools to promote agency programs, facilities, events and services and to provide accurate, timely and useful information to the various segments of the target audience.”

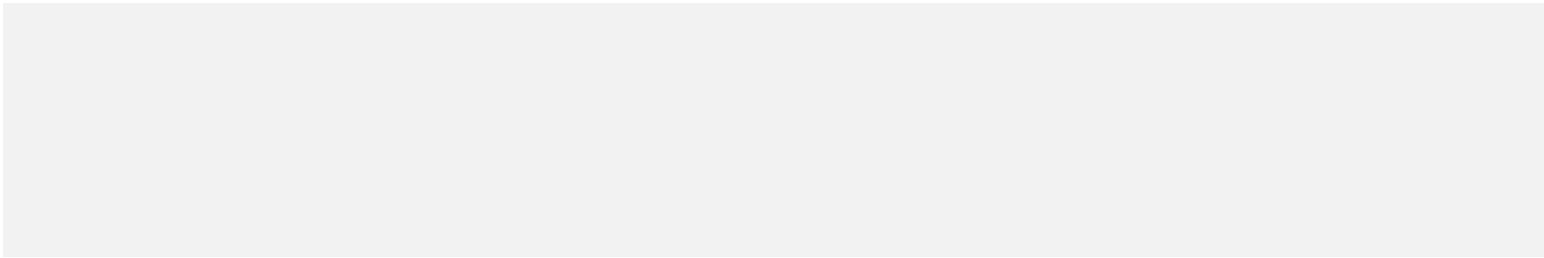
KPI: By June 30, draft a revised and improved, more comprehensive marketing plan than is currently in use by the District. Links to data collection KPI in Facilities, Programs and Events, January 15<sup>th</sup> define the absolute list of data from each program area that has been agreed to by program staff and approved through the Data Analyst’s work products.

Demographic data begins being collected as of January 1, 2023. Develop and implement a survey instrument that can help provide customer perceptions. Survey to be distributed by June 30, 2023, continued annually.

RESPONSIBLE STAFF: Astro and Debby

COSTS: \$5,000.

**FOCUS AREA LEAD: DEBBY    WORK GROUP: Wade, Melissa, David, Astro**



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