



# AGENDA REPORT

BEACHES, PARKS & RECREATION COMMISSION  
Meeting Date: June 14, 2016

Agenda Item 5. B.  
Approvals: \_\_\_\_\_  
Dept. Head ES  
Manager \_\_\_\_\_  
Admin. Asst. N/S

**Department:** Beaches, Park and Recreation  
**Prepared By:** Pamela Passow, Assistant Beaches, Parks and Recreation Director

**Subject:** *BEACHES, PARKS AND RECREATION MASTER PLAN UPDATE PROPOSAL.*

**Fiscal Impact:** No, the \$123,080 proposed to complete the Beaches, Parks and Recreation Master Plan Update is within the \$150,000 currently budgeted for the project.

**Summary:** Pros Consulting is recommended by staff to prepare a Beaches, Parks and Recreation Master Plan to update the Parks and Recreation Master Plan adopted June 2, 1999.

**Background:** The City of San Clemente issued a formal Request for Proposal (RFP) to solicit professional consultants for the preparation of a Beaches, Parks and Recreation Master Plan on March 9, 2016. The City received 6 proposals on April 12, 2016. All proposals were evaluated and four firms were selected for formal interviews. Following the interview process, staff recommends Pros Consulting be selected to prepare a Beaches, Parks and Recreation Master Plan to update the Parks and Recreation Master Plan adopted June 2, 1999.

**Discussion:** The Beaches, Parks and Recreation Master Plan will set the framework for decision makers in the planning, maintenance, and development and/or rehabilitation of San Clemente's beaches, parks, and recreation facilities. Equally important will be that the Plan provide a systematic and prioritized approach to implementation of beaches, parks, and recreation projects based on public desires and available budget.

Pros Consulting is recommended due to their expertise and experience with similar projects which have included Riverside County, Carlsbad, Los Angeles, Malibu, and California State Parks among others. Pros Consulting proposes to perform work including park and facility assessments, programs and services assessments, financial review, levels of service standards, SWOT (strengths, weaknesses, opportunities, and threats) analysis, community needs analysis, demographics and trends analysis, classification of services, needs prioritization, capital improvement planning, maintenance and financial planning, funding and revenue strategies, CIP, and an implementation plan. The proposal also includes extensive community outreach including stakeholder interviews, public forums, a statistically valid survey, online survey, and project website.

## **Recommended**

**Action:** STAFF RECOMMENDS THAT the Beaches, Parks and Recreation Commission recommend the City Council approve the selection of Pros Consulting to prepare a Beaches, Parks and Recreation Master Plan to update the Parks and Recreation Master Plan adopted June 2, 1999.

- Attachments:**
1. Pros Consulting Proposal
  2. Pros Consulting Cost Proposal

**Notification:**

- Pros Consulting
- GreenPlay
- Richard Fisher Associates
- RJM Design Group
- Summers/Murphy & Partners
- SWA Group
- Interested Parties



**Request for Proposal:**  
**Beaches, Parks, and Recreation Master Plan 2016**  
with **Key Strategies for Implementation**

**Presented to The:**  
**City of San Clemente**



**April 12, 2016**

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**MIA LEHRER + ASSOCIATES**  
URBAN DESIGN LANDSCAPE ARCHITECTURE



Prepared By:  
**pros consulting**  
INC



Inspiring  
Communities  
to Lead  
Forward

April 12, 2016

Transmittal Letter

Attn: Joanne Baade, City Clerk  
City of San Clemente  
City Hall  
100 Ave. Presidio  
San Clemente, CA 92672

**RE: RFP – Preparation of a Beaches, Parks, and Recreation Master Plan 2016 with Key Strategies for Implementation**

Dear Ms. Baade and Selection Committee:

PROS Consulting is very excited about the opportunity to partner with the City of San Clemente on the preparation of a Beaches, Parks, and Recreation Master Plan with Key Strategies for Implementation. We are a full-service management consulting and strategic master planning firm focusing on services to government agencies, with specialized experience in parks and recreation, tourism, economic development, sports strategy, marketing and branding, and open space planning.

Our national experience, combined with our extensive work locally in California, specifically ensures that we are able to offer the best of both worlds to help your City achieve its vision and goals as it relates to beaches, parks, recreation facilities, recreation service programs and open space. In summary, we propose a proven approach that can aid the City to:

1. **Engage the diverse San Clemente community**, leadership and stakeholders through innovative public input means to build a shared vision for beaches, parks, recreation, facilities and services.
2. Utilize a **wide variety of data sources and best practices** including a statistically-valid survey to predict trends and patterns of use and how to address unmet needs in San Clemente.
3. **Determine unique Level of Service Standards** to develop appropriate actions regarding beaches, parks, recreation, golf, facilities, and amenities that reflects San Clemente's strong commitment to provide high quality recreational activities for the community.
4. **Shape financial and operational preparedness** through innovative and "next" practices to achieve the strategic objectives and a framework to help decision-makers with planning, maintenance and rehabilitation issues.
5. **Develop a systematic and prioritized strategic approach over 15 years** to ensure a viable, financially sustainable and interconnected plan for City's parks, beaches, recreation programs and open spaces.

We are proud to say that California is in the top 3 states nationwide for the extent of work we have performed over the last several years and with this proposal we sincerely hope for an opportunity to continue our relationship.

Our team is most qualified because we combine our objective, data-driven approach with local familiarity and national experience that will help San Clemente enhance its operational preparedness and meet the community's needs. By triangulating **community input driven needs, planning priorities and the available and potential resources of the City of San Clemente** we will help you **build the organizational and financial capacity** to continue exceeding your organization's goals for the future.

We are pleased to have assembled a local and esteemed and award-winning team for this project, which includes the expertise of our California-based, local partner **Mia Lehrer + Associates**, who offers a wide range of landscape architectural and planning services and will assist in community input, conceptual plans, and site assessments. Also on the team is **ETC Institute**, a nationally renowned survey and market research firm to assist in the statistically-valid community survey development.



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Forward

The Consulting Team does not have any financial, business or other relationships with the City of San Clemente that would have an impact on this contract. The Consulting Team does not have any current clients that would have a financial interest in the outcome of this contract. The Consulting Team does not have any exceptions to the Standard City Contract Agreement and is compliant with the nondiscrimination requirements of the City and Stat pertaining to the development, implementation and maintenance of a nondiscrimination program. The following proposal and cost estimate is good for ninety (90) days.

We are highly committed and energized to work with you if given the opportunity to prepare this Beaches, Parks, and Recreation Master Plan with key strategies for implementation. Our current work in the area (Carlsbad, San Marcos, Chula Vista) will also ensure we are able to pass on economies of scale for regional data analysis and travel / meetings.

If you have any questions or need additional information, please do not hesitate to contact our project lead and Vice-President, Neelay Bhatt at 740.591.0225 or call me at 317.679.5615. Our emails are [leon.younger@proconsulting.com](mailto:leon.younger@proconsulting.com) and [neelay.bhatt@proconsulting.com](mailto:neelay.bhatt@proconsulting.com) respectively.

Sincerely,  
PROS Consulting

Leon Younger  
President

201 South Capitol Avenue  
Suite 505  
Indianapolis, Indiana 46225

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proconsulting.com



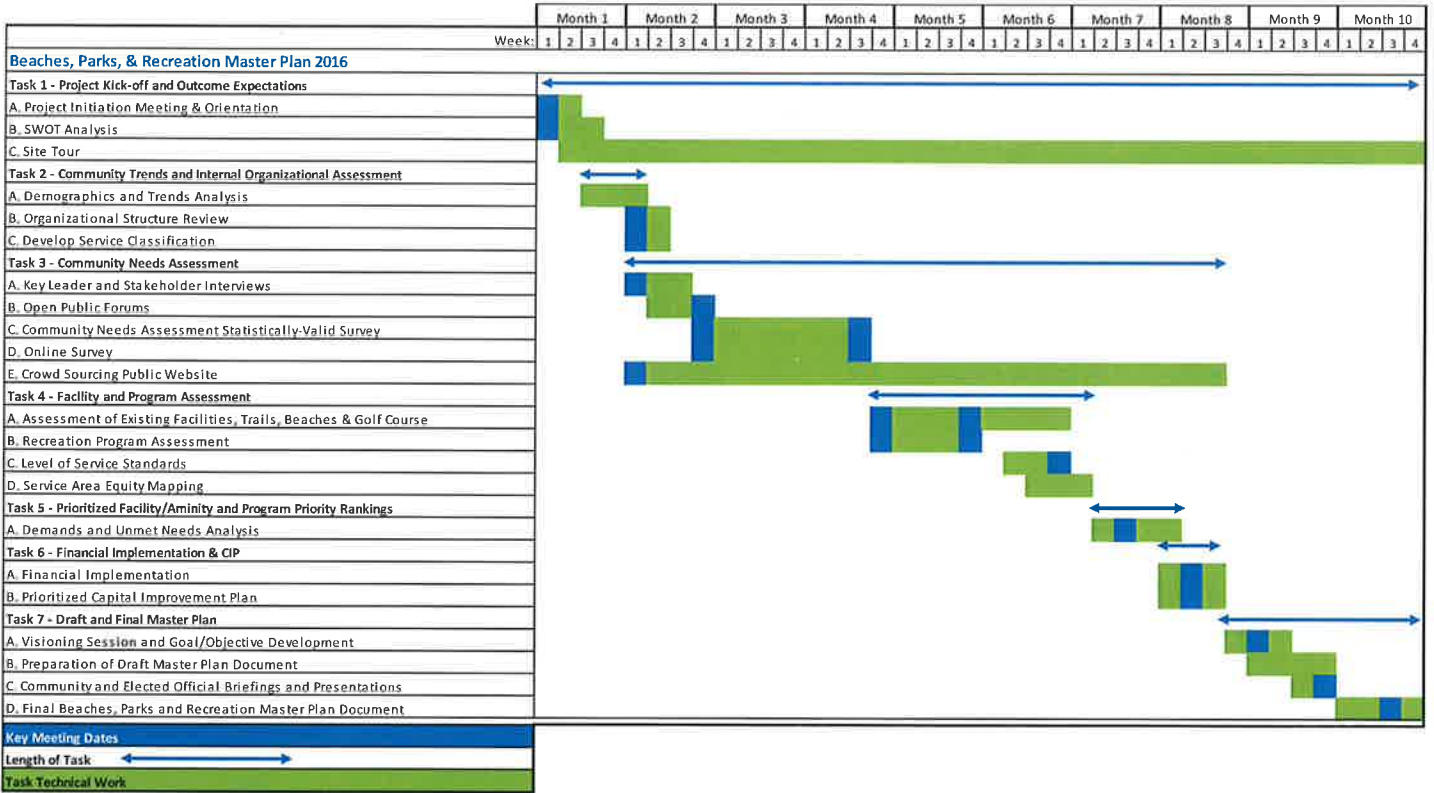
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[Cost Summary Located in Separate Sealed Envelope](#)

## Section C - Work Program Timeline

The project approach and work plan detailed in this proposal can be completed by the PROS Team collaboratively with the City of Sam Clemente. Details of the scope of work and approach are described in detail in **Section G – Work Plan & Scope of Work** of this proposal. PROS can begin the project immediately and has the capability and availability to meet the project timeline described below. Specific dates will be set during the kick-off meeting process and the PROS Team will consider any special requirements by the City in regards to scheduling.





## Section D - Statement of Qualifications & Relevant Experience Who is PROS Consulting

PROS Consulting is a small firm with a big presence in the field of management consulting for public entities and non-profit organizations. With a small team of highly professional and experienced consultants, PROS is a flexible firm that is agile to the evolving dynamics of the social, economic, and political environments our clients operate in. PROS is among only a small handful of firms that have tremendous experience in the field as practitioners and have become nationally recognized for helping to shape and further transform the industry of parks and recreation. The full name and location of the office that will be working on this project are:



- Full Legal Company Name:** PROS Consulting, Inc.
- Years in Business:** 21 (formed in 1995)
- Type of Company:** S-Corporation, Leon Younger and Katherine Younger are the Principals
- Contact Information:** 201 S. Capitol Avenue, Suite 505; Indianapolis, Indiana 46225;  
P: 877.242.7760; F: 877.242.7761
- Contacts:** Leon Younger, President; 317.679.5615; [leon.younger@prosconsulting.com](mailto:leon.younger@prosconsulting.com)  
& Neelay Bhatt, Vice President; 740.591.0225; [neelay.bhatt@prosconsulting.com](mailto:neelay.bhatt@prosconsulting.com)

### PROS Quick Facts

- Since the firm was established in 1995 to uniquely serve the park, recreation and tourism services industry, PROS has completed more than 1,000 projects in over 47 states and numerous projects internationally in seven countries.
- The **PROS Team has worked in highly diverse environments** from the inner cities of Los Angeles, Houston, Atlanta, and Dallas, to remote areas in Appalachia, Montana, and the American West. Our experience includes working with the best-of-the-best, the worst-of-the-worst, and a lot in between.
- Our planning team has great depth of operational experience with **over 100 combined years as former parks and recreation managers**. This perspective of being trained “in the industry” and not just “on the industry” allows us to relate to communities and their residents, recreationalists of all types, and to understand the unique relevance of needs that can be most appropriately served by our clients. In other words, great recreational and park planning is not just collecting surveys and reporting results – it is about **achieving a sustainable balance of services, meeting community needs, and resource protection with community fulfillment**.
- Our approach to planning projects are that we become the **extension of the client’s team** and carry the same accountability as they do in serving their communities.
- This project is not about the PROS Team or what we think is best for your organization and stakeholders, nor do we believe that what works on some parts of the country will work here. This project is about producing **reliable, sustainable, relevant, and innovative outcomes for the City of San Clemente, and the people that live, work and play in the region**.





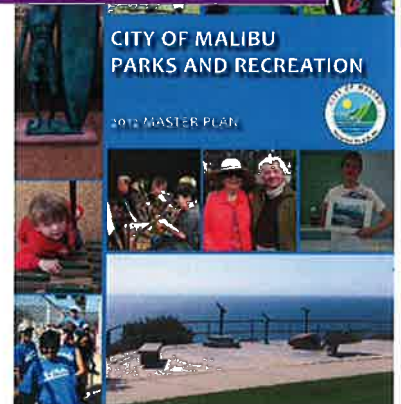
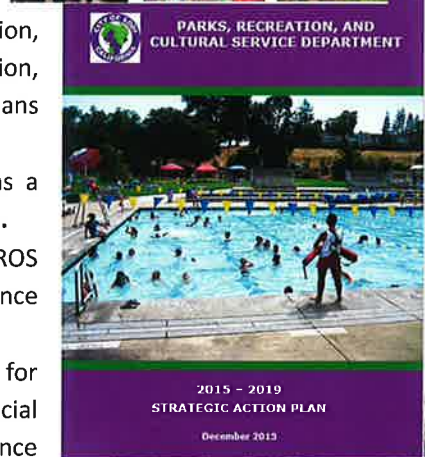
## Firm Qualifications

Management consulting and planning services offered by PROS span the full spectrum of planning needs for public agencies, and are grouped into the following practice areas:

- **Master Planning** – completed over 300 master plans for parks and park systems that have been successfully implemented and driven over \$5 billion worth of capital investment.
- **Strategic Planning** – completed over 300 strategic plans for cities, counties and state agencies to help them become established in their market or to reposition themselves.
- **Programming Analysis** – As part of many of our Master Plans or Strategic Plans, PROS utilizes our PROS Program Positioning Model, or 3PM. The outcome of the process is the creation of a dynamic recreation program plan that results in increased registration, drives customer retention and loyalty, improves customer satisfaction, and increases revenues. We have completed over 300 program plans for systems across the country.
- **Needs Assessment** – completed over 300 needs assessments as a precursor of doing a Master Plan, Strategic Plan or Feasibility Study.
- **Operations, Maintenance and Organizational Development** – PROS has completed over 450 plans that involved operations, maintenance and organizational development components.
- **Financial Planning and Management** – PROS is most renowned for providing the most innovative and proven methods for financial planning and management in the public sector with direct experience with over 150 proven ways to fund public parks and park systems.
- **Feasibility Studies and Business Planning** – PROS has completed over 200 feasibility studies and business plans, often counseling our clients on how they can shape their projects and their vision around the reality of what is feasible and sustainable.
- **Customer Service Training** – completed customer service excellent training for municipalities across the country. The training is customized to each agency's goals and outcomes and range from single day work sessions to multi-year culture change processes.



November 2014  
Parks & Recreation Department  
Park Master Plan Updates



*"PROS was able to reach out to all segments of our community and develop a needs assessment that we were able to base our core programs off of. Its success led to us hiring PROS again for our Parks and Open Space Master Plan and their ability to have an understanding of our community's needs made the overall plan that much stronger."*

*Dave Mickaelian, City Manager, City of Healdsburg, California*

*"The PROS staff was professional and knowledgeable. Their expertise and familiarity with what is happening in the Parks and Recreation profession nationally proved to be invaluable. The Strategic Plan is our guide to providing the best possible services to the community. We live and breathe the Strategic Plan almost daily."*

*Lori Cummings, Assistant Parks and Recreation Director of Everett, Washington regarding the Parks and Recreation Strategic Master Plan*



## Unique Experience Specific to the Project

The Consulting Team features unique experience that can serve the City of San Clemente, including:

- **Recent completion of numerous municipal parks and recreation planning projects** including Riverside, CA; San Francisco, CA; Los Angeles, CA; Carlsbad, CA; Malibu, CA; Pasadena, CA; San Jose, CA; Santa Clara County, CA; Walnut Creek, CA; Roseville, CA; Temple City, CA; Healdsburg, CA; Everett, WA; West Richland, WA; Provo, UT; Glendale, AZ; Scottsdale, AZ among many others

The matrix below illustrates why our Consulting Team is the most qualified in relation to the qualifications requested by City of San Clemente.

Qualifications	PROS Consulting
<b>Experience with parks, recreational facilities, programs and service management</b>	Over 100 years combined experience as practitioners in the parks and recreation industry and as planners
<b>A firm understanding of the work of parks and recreation agencies</b>	Successfully completed over 1,000 planning projects in all levels of the public sector
<b>Familiarity with public sector cost accounting and budgeting</b>	Successfully completed over 150 cost of service, financial management, or revenue enhancement plans for public clients
<b>Knowledge of existing park-centric partnerships throughout the country</b>	Directly assisted over 70 public clients with identifying, establishing, and maintaining innovative partnerships
<b>Experience developing fiscal or financial plans at facility level (park or sector), or system level</b>	Successfully completed over 200 business plans for individual parks and park systems
<b>Public facilitation experience</b>	Facilitated over 4,000 meaningful public meetings and focus groups throughout the United States
<b>Personnel training experience</b>	Organized and facilitated personnel development and training programs for over 10,000 participants in the last 25 years
<b>Familiarity with and experience doing business in California</b>	Completed similar projects in Riverside County, Carlsbad, Los Angeles, Malibu, Lodi, Temple City, Pasadena, Fair Oaks Rec. and Park District, Orangevale Rec. and Park District, Cordova Rec. and Park District, Half Moon Bay, San Mateo, San Francisco, San José, Sonoma County, Roseville and Sacramento, California State Parks and many other parks and recreation agencies across California
<b>Forensic accounting and economic analysis experience</b>	Utilized forensic accounting in all cost of service, business plan projects, and economic impact analysis; former public finance director and CPA on staff
<b>Operational and programming analysis experience</b>	PROS Consulting has completed over 300 operational and programming studies for a wide variety of parks and recreation planning projects on a system-wide level as well as site/facility specific
<b>Statistically-Valid Survey Development and Benchmarking</b>	Members of the project team have completed over 300 statistically-valid surveys on park related projects. Through this work, members of the project team have developed a benchmark of “best practice” agencies across North America

*“PROS Consulting has proved to be responsive, innovative, and sensitive to the unique needs and interests of our community. Based on the recently completed Parks and Recreation Master Plan, I am confident it will provide us a sound framework for decision-making for the next five years and beyond. PROS has assisted us to become the award-winning park system CCPR is today on many planning projects and has played an integral role in CCPR’s planning efforts for nearly two decades.”*

Michael Klitzing, Chief Operating Officer, Carmel Clay, IN Parks & Recreation

## Subcontractors

We have expanded our expertise and capabilities in order to best serve the needs of the City of San Clemente in this project. Our team members have worked with us on similar projects in the past and have a great reputation across the industry, both locally and nationally.

# MIA LEHRER + ASSOCIATES

URBAN DESIGN    LANDSCAPE ARCHITECTURE

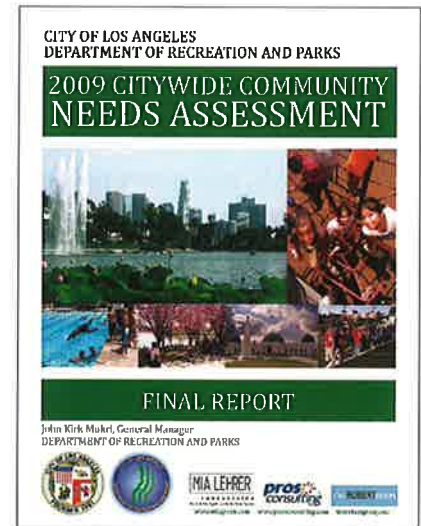
Established in 1997, Mia Lehrer + Associates is a full service, international landscape architecture practice located in Los Angeles, California. Mia Lehrer, FASLA leads a team of talented designers and technically skilled professionals on a wide variety of projects including mixed use development, urban parks, and master plans for highly complex sites.

ML+A is exploring the changing role of landscape in our contemporary urban environments. We are currently seeing a shift in public attitude toward the importance of open space and the desire of communities and governmental agencies to create natural landmarks such as parks, lakes, and rivers. We have involved ourselves in many of the programs and projects that help to propel the movement forward. Mia Lehrer + Associates is a recognized leader in the field of sustainable design and has been responsible for site design on LEED certified projects at all levels. We understand the value of complete, comprehensive construction documents and the parameters of funding guidelines. We pride ourselves on projects that fall within project budgets and goals.

ML+A has a special interest in **master plan** projects where an ambitious, innovative design can enhance the lives of many people, reflect a community identity, and preserve open space and natural habitats. In order to provide the most comprehensive services, ML+A collaborates with highly experienced, multi-disciplinary teams, facilitating a synergistic project vision, developing sustainable design strategies and programming goals, and fostering lasting community bonds. For each project we apply the same level of commitment and approach all with an intense desire to create a meaningful and sustainable place to be.

Working within the historical context of the site, the **Hollywood Park Master Plan** is a mixed use project spanning over 200 acres. With 2,000 housing units ranging from apartments to single family residential this urban planning project includes streetscapes and mixed use as well as a 24 acre open space component. As the Landscape Architect on the **Jordan Downs Master Redevelopment Plan** we are responsible for site analysis, design services for streetscapes and open spaces to meet HACLA's goals for the project. As a consultant for the **Los Angeles River Revitalization Master Plan**, we lead efforts to identify and plan a comprehensive open space network that interfaces with channel restoration and urbanism. The plan, bringing together a diverse group of stakeholders and community members, represents the largest, most ambitious project the city has undertaken in decades.

We do not begin any of our projects with a preconceived notion. Instead we ask questions of ourselves, our client, and our team that informs design and implementation. The diversity of our clients inspires our comprehensive approach, and challenges us to more rigorous and creative analysis, design and problem-solving. No matter the scale or level of complexity, every project benefits from the collective energy of collaboration and innovative landscape design has the power to enhance the livability of a community and heal the land.







### ETC Institute

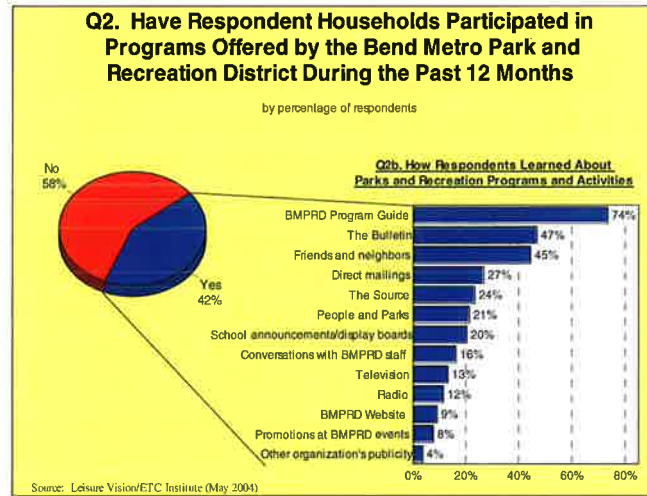
Our ability to Effectively Listen & Involve Citizens and Clients has given ETC Institute a reputation as one of the premier public policy market research firms in the country. ETC Institute’s services focus on involving citizens, users, and stakeholders in the decision making process and developing creative and sustainable funding strategies.



Core services of the firm involve conducting statistically valid phone and mail/phone services and related market research. We have conducted more than 600 surveys for parks and recreation systems in 46 states across the Country for a wide variety of projects including parks and recreation master plans, strategic plans and feasibility studies.

Established in 1992, the principals and associates of ETC Institute helped secure funding for more than \$2 billion of parks and recreation projects.

PROS Consulting and ETC Institute have teamed on more than 300 similar parks and recreation projects.



*“PROS created a practical and thorough Park and Recreation Master Plan for our agency. I was impressed by PROS ability to effectively navigate all sorts of political, environmental, and financial issues unique to our community.*

*Working with PROS really felt like teamwork.”*

*Fred Bremerman, Project Manager Cosumnes Community Services District; Elk Grove, CA*



## California Experience

Currently, PROS Consulting is completing parks and recreation planning projects for the City of San Marcos, City of Carlsbad, City of West Hollywood, City of San Jose, City of Napa, City of American Canyon and the City of Pasadena. Following is a list of parks and recreation planning projects in California conducted by the PROS Team.

- California State Parks Financial and Cost Efficiency Study
- City of Carlsbad Parks and Recreation Needs Assessment and Strategic Action Plan
- City of Carlsbad Parks Master Plan Update
- City of Carlsbad Indoor Recreation Center and Outdoor Adventure Park Feasibility Study (on-going)
- City of Lodi, Parks, Recreation and Cultural Service Department, Strategic Action Plan
- City of Temple City Parks and Open Space Master Plan
- City of San Marcos, Parks Master Plan – Financial Analysis (commencing April 2016)
- City of Chula Vista Cost Recovery, Resource Allocation and Revenue Enhancement Plan (ongoing)
- City of Davis Cost of Service Study
- City of Half Moon Bay Parks and Recreation Program Plan
- City of Malibu Parks and Recreation Master Plan
- City of Oakland Parks and Recreation Revenue Management Plan
- City of Walnut Creek Cost Recovery and Pricing Plan
- City of Napa Senior Center Feasibility Study
- City of Pasadena Pricing and Cost of Service Study; Department-Wide Business Plan; Customer Service Training; Parks Maintenance Plan; Sports Field Study
- City of West Hollywood Park Ordinance Study
- City of San José Parks and Recreation Pricing Philosophy and Revenue Enhancement Plan; Business Plan for Happy Hollow Park and Zoo; Business Plans for Summer Camp, Seven Trees and Edenvale Community Center; Family Camp Feasibility Study; Marketing and Branding Plan
- Cordova Recreation and Park District Park and Recreation Strategic Master Plan
- Cosumnes (Elk Grove) Community Services District, Elk Grove, Parks & Facilities Master Plan
- Fair Oaks Recreation & Park District Parks, Parks, Facilities, & Recreation Services Master Plan
- Golden Gate National Parks Conservancy, Operational Plans & Maintenance Management Plans (The Presidio, Lands End & Crissy Field)
- Healdsburg Parks and Recreation Needs Assessment(2006 & 2014 Update), Saggio Hills Master Plan, Villa Chanticleer Business Plan, Parks and Open Space Plan, and Foss Creek Community Center Business Plan
- Long Beach Parks and Recreation Strategic Plan, Implementation Plan, Restaurant and Golf Feasibility Study
- Los Angeles Parks and Recreation Needs Assessment
- Orangevale Recreation & Park District Parks and Recreation Master Plan
- Riverside County Recreation and Open Space District Strategic Plan
- Roseville Parks and Recreation Strategic Business Plan, Reasons Farm Feasibility Study, Golf Business Plan, Tourism Market Plan, Cost of Service Study
- Sacramento County Golf Business Plans
- San Francisco Recreation Plan, Parks and Recreation Master Plan, Vision Plan, and Golf Course Assessment
- San Mateo Parks, Facilities and Programs Strategic Master Plan
- Santa Clara County Resource Allocation and Pricing Plan
- Santee Parks and Recreation Master Plan
- Sonoma County Regional Parks Management Review Services Assessment

The PROS Team has been responsible for the evaluation of hundreds of park and recreation agencies throughout the United States over the past 21 years. The following pages detail recent and relevant projects conducted by PROS Team members that are of similar characteristics to the City of San Clemente.



## PROS Consulting & ETC Institute Experience

### City of Carlsbad Parks & Recreation Needs Assessment & Comprehensive Action Plan (2013) & Park Master Plans (2014)

#### CARLSBAD, CALIFORNIA

In 2013, PROS Consulting, as well as RHA Landscape Architects-Planners & ETC Institute, completed a Comprehensive Needs Assessment and Action Plan for the City of Carlsbad, California. The plan included extensive community input and analysis.

The body of the report was organized according to the sequence of tasks performed as part of the review process. These tasks included:

- Community Input (Focus Groups, Key Leadership Meetings, Public Forums, Statistically-valid Survey)
- Customized crowdsourcing project website ([www.carlsbadparksplan.com](http://www.carlsbadparksplan.com))
- Demographic and Recreation Trends Analysis
- Park and Facility Assessment / Recreation Program Assessment
- Internal Operational Assessment
- Funding and Revenue Strategies
- Level of Service Standards / GIS Mapping
- Capital Improvement Plan and Priority Rankings
- Detailed Strategic Plan

The needs assessment and action plan outlined a community values driven approach that was realistic but ambitious. Success required a partnership driven approach and a willingness to continue embracing an entrepreneurial mindset, all while keeping the community and its values in mind.

The five year plan provided staff with short term, midterm and ongoing recommendations for day to day operational tactics as well as two signature “ideas” that ushered in an even higher level of customer experience and reinforce Carlsbad’s place as a world class city that drives connectivity and enhances quality of life for everyone.

The plan also has helped the Department successfully become one of the 5 agencies in California to obtain national accreditation through CAPRA (Council for Accreditation of Parks and Recreation Agencies).

Following the Needs Assessment and Comprehensive Action Plan, PROS Consulting and RHA Landscape Architects-Planners were retained to complete three (3) Park Master Plans for the City as a part of the Implementation Plan and these were completed in December 2014 as well. The team is currently working on two feasibility studies (Indoor Recreation Center and Outdoor Adventure Park) as a part of the plan’s implementation.

**Needs Assessment and Strategic Action Plan Link:** <http://carlsbadparksplan.com/pdf/city-of-carlsbad-needs-assessment-and-comprehensive-action-plan.pdf>

**PROS Project Lead – Neelay Bhatt**

**PROJECT REFERENCE:** Mr. Chris Hazeltine, Parks and Recreation Director; 799 Pine Ave., Suite 200; Carlsbad, CA 92008; 760.434.2826; [chris.hazeltine@carlsbadca.gov](mailto:chris.hazeltine@carlsbadca.gov)



## City of Lodi Parks, Recreation, and Cultural Services Strategic Plan (2015)

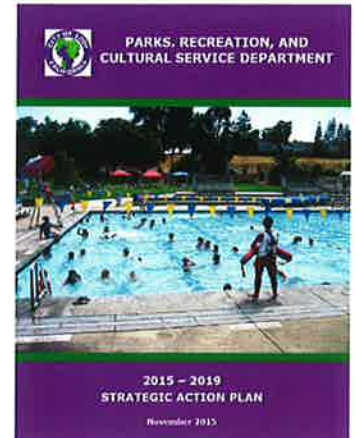
### LODI, CALIFORNIA

The City of Lodi Parks, Recreation, and Cultural Services Department (PRCS) offers quality valued assets and programs to the community through a variety of services that enhance Lodi's quality of life, economic value, and sense of community. The PRCS owns and maintains 372 acres of parkland and over 77,000 square feet of recreation center space. The Department also offers exceptional recreation programming for all ages in the areas of athletics, youth enrichment, and special events.

Developing the 2015 PRCS Strategic Plan helped to ensure the continued success of the Lodi system and community. The Strategic Plan as a critical element in the strategic management of the Department and, when used as a living document, helps guide decisions regarding future parks, open space, recreational facilities, recreation programs, and organizational management over the next ten years. Additionally, the Strategic Plan recommendations and implementation plan contribute to the sustainable operations of Lodi's facilities and services through potential partnerships and administrative enhancements.

PROS Consulting was retained to develop the Strategic Plan built around a series of community and staff values, unmet needs for recreation, parks and cultural services, as well as the operational management of policies, procedures, parks, facilities, programs, and services against best practices in the state and region.

The PRCS Strategic Plan followed an iterative process of data collection, in-person and online public input, innovative crowdsourcing customized project website, on-the-ground study, assessment of existing conditions, market research, and open dialogue with local leadership and key stakeholders. The project process followed a logical planning path, as illustrated below:



Major elements of the Strategic Plan included community engagement, crowdsourcing project website, bi-lingual (English and Spanish) statistically-valid survey a recreation program needs assessment, equity mapping, an operational staff assessment, as well as a maintenance operations review. These assessments offered an analytical perspective of program and service offerings and helped identify strengths, weaknesses, and opportunities regarding their management. The plan also assisted in identifying core programmatic areas, gaps within the community, key system-wide issues, and areas of improvement and in determining future programs and services for residents.

LINK: <http://www.lodi.gov/prcs/pdf/Lodi%20Strategic%20Action%20Plan%202016%2001%2004.pdf>

**PROS PROJECT LEAD – NEELAY BHATT**

**PROJECT REFERENCE:** Mr. Jeff Hood, Director of Parks, Recreation, and Cultural Services; 125 N. Stockton Street, Lodi, CA 95240; (209) 333-6742; [jhood@lodi.gov](mailto:jhood@lodi.gov)





## Riverside County, CA Park and Open Space District Strategic Plan (2011)

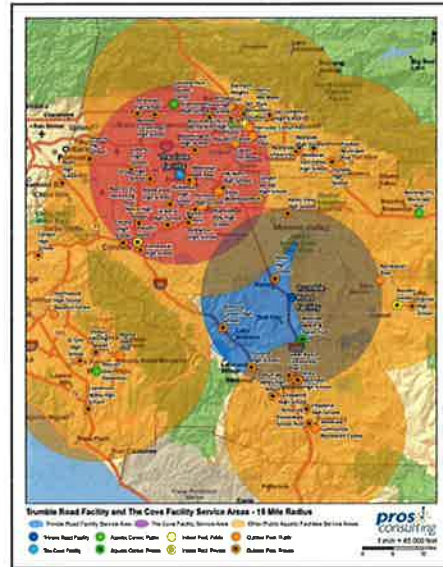
### RIVERSIDE COUNTY, CALIFORNIA

In 2011, PROS Consulting completed a Strategic Plan for the Riverside County Park and Open Space District, which serves over 2 million residents. After considerable review, it was determined that the District would greatly benefit from a strategic planning process, culminating in a 5-year plan. It was paramount that the Strategic Plan included input from the policymakers, residents, stakeholders, support groups, and employees in order to become a comprehensive document.

The final recommendations addressed both the internal operations and management of the District and its external relationship to the region it serves. In addition, it established an overall framework to inform the District's Comprehensive Master Plan and guide the District Board and staff over the next five years. The District staff and District Advisory Commission (DAC) guided the strategic planning process in coordination with the PROS team on development of the Strategic Plan.

The Strategic Plan was developed over a period of 9 months commencing with a kick-off meeting and community input, followed by the technical analysis and benchmark comparisons which ultimately cumulated in the vision and strategic recommendations through the Balanced Scorecard process. The key process steps included:

- Interviews with Key Stakeholders
- Focus Group Meetings and Public Forums held throughout the County
- Staff and Board Interviews
- Demographic and Trends Analysis and Projections
- Tour of the Regional Parks to assess the System
- Recreation Program Assessment
- Operational Assessment
- Benchmark Analysis
- Financial Assessment
- Development of a Balanced Scorecard Input process



The Project was an Award-Winning Strategic Plan at 2012 National Association of County Park and Recreation Officials (NACPRO).

### PROS Project Lead – Leon Younger and Neelay Bhatt

**PROJECT REFERENCE:** Mr. Scott Bangle; General Manager; Riverside County Park & Open Space District, 4600 Crestmore Rd.; Riverside, CA 92509; 951.955.4310; [sbangle@rivcoparks.org](mailto:sbangle@rivcoparks.org)

Agency	City Area (Sq.Miles)	Estimated Population	Pop. per Square Mile	Total Park Acres	Parks			Total Developed Maintained Acres Per 1,000 Pop.
					Total Developed Acres Maintained	Total Lineal Trail Miles	Total Park Acres Per 1,000 Pop.	
Riverside County Regional Park and Open-Space District, CA	7,207	2,100,516	291	71,356	7,437	150	33.97	3.54
Oakland County Parks, MI	910	1,205,508	1,325	6,700	6,700	64	5.56	5.56
Orange County Parks, CA	789	2,997,033	3,797	57,263	2,145	402	19.11	0.72
San Bernardino County Regional Parks Department, CA	20,106	2,017,673	100	8,668	2,690	46	4.30	1.33
San Diego County, CA	4,261	3,200,000	751	45,000	10,000	326	14.06	3.13
San Mateo County, CA	450	703,730	1,565	15,700	2,574	151	22.31	3.66
Santa Clara County Parks Department CA	1,291	1,723,927	1,336	46,423	2,250	313	26.93	1.31
Sonoma County Regional Parks, CA	1,576	462,290	293	8,880	523	125	19.21	1.13



## City of Malibu, CA Parks and Recreation Master Plan (2013)

### MALIBU, CALIFORNIA

The City of Malibu, incorporated in 1991, desired a 10-year Comprehensive Parks and Recreation Master Plan. The previous parks and recreation master plan was completed in 2000. Through the commitment from City Council to provide high quality parks, recreation facilities, and recreation programs for residents, many of the goals set in the previous master plan were achieved.

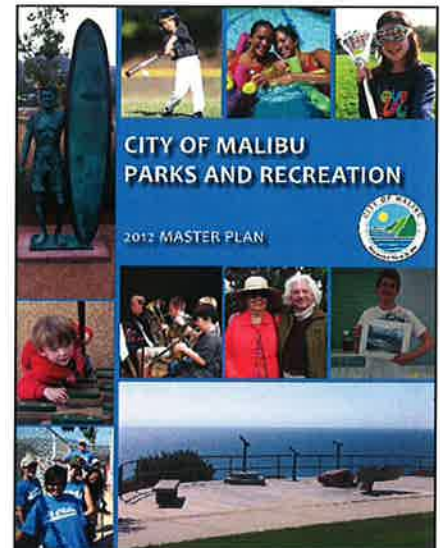
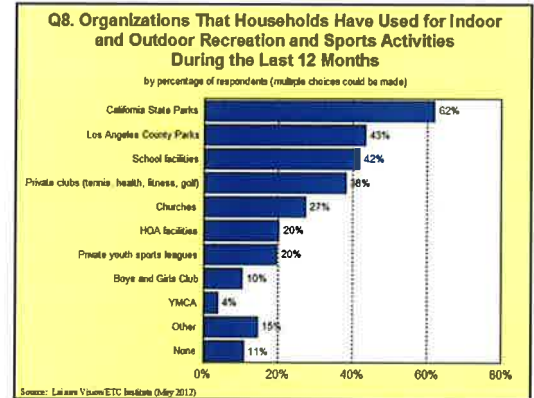
In 2012, PROS Consulting was retained to conduct an updated Parks and Recreation Master Plan to provide direction to City staff, the Parks and Recreation Commission, and the City Council for future development, re-development, and enhancement of the City's park system, open space, trails, recreation facilities, recreation programs, and services.

This Master Plan enabled the City to utilize a living document to guide the City's future parks, open space, and recreational facility needs. Additionally, the plan's recommendations focused on sustainable operations of the City's parks, open spaces and trails, through potential partnerships, revenue generation and grant opportunities. The Master Plan utilized the following process:

- Community input
  - Key leadership and focus group interviews
  - Public forums
  - Statistically-valid community survey (completed by ETC Institute)
- Community profile
  - Demographic and trends analysis
- Site and facility assessment
- Program assessment
- Park, program and facility development plan
  - Level of service standards
  - Program priority rankings
- Funding and revenue strategies
- Vision/mission development and implementation plan

#### PROS PROJECT LEAD — NEELAY BHATT

**PROJECT REFERENCE:** Mr. Bob Stallings, Parks and Recreation Director; 23825 Stuart Ranch Road; Malibu, CA 90265; 310.456.2489; [bstallings@malibucity.org](mailto:bstallings@malibucity.org)





## City of Los Angeles Department of Recreation and Parks Community Needs Assessment and Gap Analysis (2009)

### LOS ANGELES, CALIFORNIA

The City of Los Angeles Department of Recreation and Parks retained the team of PROS Consulting, Mia Lehrer + Associates, and ETC Institute to conduct the Community Needs Assessment and Gap Analysis. The objectives of the overall planning process were to prioritize and address the tremendous needs for additional recreation and park land, to identify existing facilities needing improvements and where there are gaps to meet current and future community facility needs, to identify recreation program needs, to perform demographic analysis, to prevent future maintenance problems, and to offer positive alternatives to an increasingly dense and urbanized population.

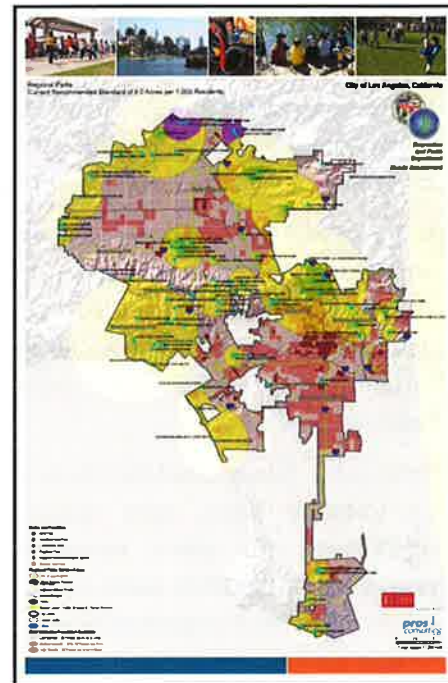
The objective of the Needs Assessment and Gap Analysis was to develop strategies to help prioritize and address the tremendous challenges the Department faced, such as:

- Acquiring additional recreation and park land and finding opportunities for the reuse of land already in the public domain
- Updating of existing recreation facilities requiring improvements as well as where there are gaps in facilities in each planning area based on unmet needs
- Preventing future maintenance problems through effective asset management of public amenities
- Offer positive recreational alternatives to an increasingly dense and urbanized population
- Identify key issues for the Department

The Needs Assessment project was the critical first step in the development of a Citywide Recreation and Parks Master Plan and a Five-year Capital Improvement Plan supporting a new vision for the City of Los Angeles' Recreation and Parks Department. The Needs Assessment served as the foundation for other long range planning initiatives including further development of the Department's Strategic Plan.

The Needs Assessment and Gaps Analysis included a comprehensive community outreach and input process that engaged community leaders, stakeholders and the public across the City through a series of one-on-one interviews, focus groups and community forums followed by a statistically valid, citywide household survey. The overall Needs Assessment and Gaps Analysis process included six data assessment phases targeted at gaining the critical input to identify and prioritize the various facilities, programming, operational and maintenance needs based on the principles and values of a very diverse community, resulting in the framework for a comprehensive and defensible Needs Assessment to serve as a "living document" and decision-making tool for the Department to follow.

**PROS PROJECT LEAD – LEON YOUNGER**



**City of Pasadena Recreation & Human Resources Cost Recovery & Pricing Plan; Department-wide Business Plan; Customer Service Assessment; Park Maintenance Management Plan (2012-Present)**

**PASADENA, CALIFORNIA**

In late 2012, PROS Consulting completed a cost of service and pricing study for the Pasadena Recreation and Human Resources Department. PROS evaluated 15 program areas to determine direct and indirect costs and cost recovery rates for each program area. Each core program area had 5-10 specific programs that was evaluated for true cost of service. Following this analysis, PROS Consulting developed the pricing policy and communication plan for City Council approval. PROS developed the cost of service report, pricing policy and also trained the staff on the cost of service model, which helped to establish the new fee rates and how to communicate these changes to participants. The major areas included in the analysis were the following:

- Jackie Robinson Community Center
- Robinson Park Center
- Victory Park Center
- Villa Parke Community Center
- Adaptive Recreation
- Playgrounds & Special Events
- Day Camp
- Youth Sports
- Aquatics
- Contracts
- Villa Parke Recreation
- Villa Parke Summer Enrichment



The outcome of the plan was the Department gained \$500,000 in new revenue in the first year of implementation.

PROS Consulting has also completed a *Park Maintenance Management Plan* for the Public Works Department, as well as a *Customer Service Assessment* and is in the process of completing a *Citywide Athletic Field Allocation Policy Review and Update*.

**PROS PROJECT LEADS – LEON YOUNGER, NEELAY BHATT AND MICHAEL SVETZ**

**PROJECT REFERENCE:** Mr. Kenneth James, Recreation Supervisor; 2575 Palma St.; Pasadena, CA 91107; 626.744.7500; [kjames@cityofpasadena.net](mailto:kjames@cityofpasadena.net)

Pasadena Human Services & Recreation						
Program	Direct Expenditures	Number of Participants	Revenues	Net Revenues Over (under) Direct Expenditures	Direct Investment Per Participant	Direct Cost Recovery
Jackie Robinson Community Center	\$626,643	61,856	\$6,708	(\$619,935)	\$10.02	1.1%
Robinson Park Center	\$559,261	18,909	\$3,850	(\$555,412)	\$29.37	0.7%
Victory Park Center	\$629,323	12,000	\$9,807	(\$619,516)	\$51.63	1.6%
Villa Parke Community Center	\$694,055	5,352	\$45,457	(\$648,598)	\$121.19	6.5%
Adaptive Recreation	\$229,619	5,021	\$5,565	(\$224,054)	\$44.62	2.4%
Playgrounds & Special Events	\$1,197,849	3,144	\$50,272	(\$1,147,577)	\$365.01	4.2%
Day Camp	\$226,283	480	\$52,381.00	(\$173,902)	\$362.30	23.1%
Neighborhood Park Camp	\$15,560	240	\$0	(\$15,560)	\$64.83	0.0%
Youth Sports	\$291,342	1,600	\$1,045	(\$290,297)	\$181.44	0.4%
Aquatics - General Swim	\$48,225	17,701	\$4,440	(\$43,785)	\$2.47	9.2%
Aquatics - Lessons	\$203,192	3,030	\$75,569	(\$127,623)	\$42.12	37.2%
Contracts	\$230,916	5,087	\$186,943	(\$43,973)	\$8.64	81.0%
Villa Parke Recreation	\$1,053,331	130,849	\$168,606	(\$884,725)	\$6.76	16.0%
Villa Parke Summer Enrichment	\$60,682	100	\$39,000	(\$21,682)	\$216.82	64.3%
Permit/Reservation Desk	\$175,891		\$114,152	(\$61,739)	N/A	64.9%
Other:Department Expenditures	\$1,817,545		\$0	(\$1,817,545)	N/A	0.0%
<b>Total</b>	<b>\$8,059,717</b>	<b>265,369</b>	<b>\$763,794</b>	<b>(\$7,295,923)</b>	<b>\$27.49</b>	<b>9.5%</b>





## Temple City Parks and Open Space Master Plan (2013/2014)

### TEMPLE CITY, CALIFORNIA

The PROS Consulting team was retained by the City of Temple City to prepare the Parks and Open Space Master Plan for the community. The city of 36,000 has only two parks and is fully developed with no additional city owned open space. The team led the community through and extensive community input process that included needs assessment for both facilities and recreation programs. A local realtor was utilized to research properties for sale that might be purchased and converted to open space. Meetings were also held with the school district to further explore the possibilities of joint ventures and financial contributions the city can make to expand the high school renovations that would provide additional recreational opportunities for the community.

The result of the plan was an extensive documentation of the city's existing parks as well as potential sites for future park and open space improvements. This information was documented in hard copy as well as Google Earth to provide a plan that can be easily updated as new properties become available.

An extensive Action Plan Matrix was developed with goals set for 0-2 years, 3-7 years, and 8-20 years.

Funding and Revenue strategies were also developed that included external funding, land leasing, user fees, franchises and licenses, naming rights, crowd funding, and impact and in-lieu fees.

#### PROS PROJECT LEAD – DOUG GROVE AND NEELAY BHATT

**PROJECT REFERENCE:** Ms. Cathy Burroughs, Director, 10144 Bogue Street, Temple City, CA 91780 (626) 285-2171, cburroughs@templecity.us



*Temple City Parks and Open Space Master Plan*

Action Plan Matrix			
Facilities / Amenities	0-2 YEARS	3-7 YEARS	8-20 YEARS
1. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
2. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
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14. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
15. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
16. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
17. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
18. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
19. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.
20. City Maintenance Yard Conversion	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.	Convert City Maintenance Yard to a park area.





## Mia Lehrer and Associates Experience

### City of Los Angeles Department of Recreation and Parks Community needs Assessment LOS ANGELES, CALIFORNIA

The City of Los Angeles Department of Recreation and Parks started the process of developing a citywide park master plan. The first step of this process was to conduct a city-wide recreation facility "Needs Assessment" for the City. ML+A with PROS Consulting were selected to gather, assess and analyze information regarding current and future recreational needs utilizing multiple methods, including a series of 24 community workshops. Key issues affecting park usage were presented in a Final Report which contains detailed recommendations and conclusions.

The objective of the Needs Assessment and the subsequent master planning process is to develop strategies to help prioritize and address the tremendous needs for additional recreation and park land, improvements necessary to existing facilities to meet current and future community needs, prevention of future maintenance problems, and to offer positive alternatives to an increasingly dense and urbanized population.

The issue for park renovation and future development in Los Angeles is only partially the amount of land dedicated to public open space. Although the published park acreage for City of Los Angeles parks is 4.0 acres per 1,000 residents, when one includes other parks and open spaces such as Los Angeles County, State of California, Santa Monica Mountains Conservancy and the National Forest areas, the average park acreage increases to approximately 9.7 acres per 1,000 persons which provides a more accurate picture of available open space resources within a region where residents are accustomed to travelling for work, play and entertainment. With over 1/3 of the park space in the city located in less than a half dozen large parks, some areas of the city lack parklands altogether. Compared to other cities, access to these parks is more limited since they are not located within convenient distances from public transit systems or within comfortable walking distance.

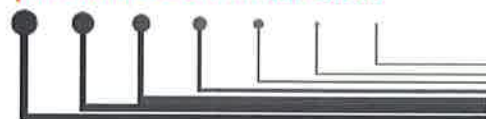
Dates of Service: 2007-2009

**Project Team:** Mia Lehrer, President Jan Dyer, Project Manager

**Project Reference:** Melinda Gejer, Architect ; City of LA, Dept. of Rec & Parks; 213/202-2656



**WHAT IS YOUR VISION?  
¡NECESITAMOS SU PARTICIPACION!**



*Needs Assessment Workshops*



## Hillcrest Park Master Plan

### FULLERTON, CALIFORNIA

Mia Lehrer+Associates provided master planning services for a comprehensive renovation of Hillcrest Park which obtained National Register of Historic Places status in 2004. The master plan and proposes a framework for renovation of the park in a manner that maintains and enhances the park's National Register status. The identification of existing historic features informed a master plan that enhances the history of the site by introducing programs and amenities that will reinforce the original intent of the park, while evolving and responding to current needs.

An extensive community outreach effort enabled the team to incorporate creative solutions to address community vision and concerns. The park was studied from the perspectives of past, present and future which coexist within the park. The historic elements of the park represent the past which will be protected, preserved, and enhanced. The present is represented the programs and amenities that are necessary for the current citizens, including reshaping and scaling amenities up or down. As a future park, the sustainability strategies are addressed for future generations. Drought tolerant planting and state of the art sustainable technologies will make this park a model for future high-performance parks. The Hillcrest Park Master Plan was adopted by the City of Fullerton in 2011.

Size: 35 acres

Completed: 2010

**Project Team:** Mia Lehrer, President; Jeff Hutchins, Project Manager

**Owner:** City of Fullerton

**Contact:** Hugo Curiel, Project Manger; City of Fullerton; 310/732-7664 JRobledo@portla.org





## Pacoima Wash Vision Plan

### PACOIMA & SYLMAR, CALIFORNIA

The Pacoima Wash Vision Plan is funded by the Los Angeles County Department of Public Health through a competitive grant awarded to Pacoima Beautiful in 2008. The Vision Plan focuses on a four-mile stretch of the Pacoima Wash running through the Sylmar and Pacoima neighborhoods of the City of Los Angeles. The goal of the grant is to create both policies and a physical project that improve public health by promoting active living. Pacoima Beautiful partnered with the Mountains Recreation and Conservation Authority (MRCA) and Initiating Change in Our Neighborhoods Community Development Corporation (ICON CDC) to meet the goals of the grant.



The intent of the Pacoima Wash Vision Plan is to generate ideas and community-based action toward the creation of a multi-use path and new recreation amenities along the length of the Pacoima Wash through the communities of Sylmar and Pacoima. The Vision Plan achieves the following: it communicates ideas that emerged from comprehensive dialogue with community leaders and residents for transforming the wash into a vibrant multi-use trail; it provides specific input for the City of Los Angeles which can be incorporated into the Community Plan updates for the communities of Sylmar and Pacoima; and it advances the effort to develop the improvements proposed by the plan. The plan also elaborates on previous plans created for the wash, such as the City of San Fernando Pacoima Wash Greenway Plan, and the Pacoima-Tujunga Watershed plan by specifically focusing on the areas of the wash located within the communities of Pacoima and Sylmar.

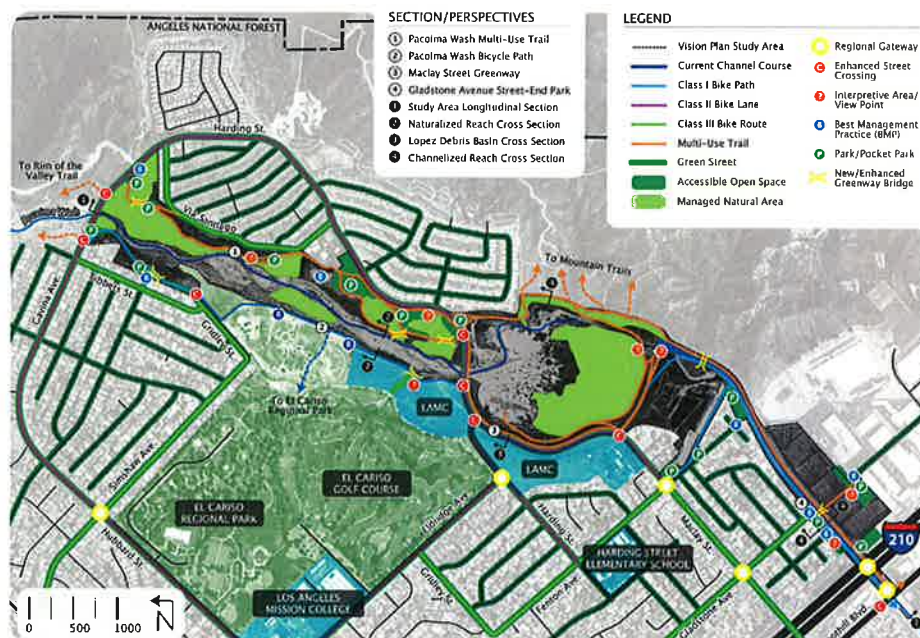
The vision plan takes a systematic, holistic approach to the Pacoima Wash corridor by incorporating and considering movements that occur adjacent to the Wash and throughout the study area. The plan recognizes that a multi-benefit planning and design approach can achieve a variety of goals, including improvements in public health, recreation, wildlife habitat, water quality, transportation, and community building.

**Size:** 4 linear miles

**Completed:** October 2011

**Project Team:** Mia Lehrer, *President*; Jan Dyer, *Project Manager*

**Client:** Pacoima Beautiful; Max Podemski; (818) 899-2454





## Section E - Background & Approach

### Project Understanding

The City of San Clemente desires a comprehensive *Beaches, Parks, and Recreation Master Plan*. The purpose of the Master Plan is to provide guidance to the City Council, Beaches, Parks and Recreation Commission, Golf Committee staff, and to the general public to prioritize and guide future planning, maintenance and development / improvement of all their offerings. The Master Plan will include, but is not limited to, trends, public surveys, conceptual plans and recreation programming recommendations.

**The foundation of the Consulting Team's approach is a creative and comprehensive public participation process.**

It is very important to not only to engage those who typically participate in the planning process but also those who do not. We will identify opportunities that engage people through a variety of community input processes. The information derived by the public's participation in key leadership meetings, focus group meetings, public forums, online and social mediums and citizen-household surveys is important.

However, it is equally important that the information received is applied to the overall planning process to articulate accurately the true unmet needs, address key issues and provide optimal recommendations to move the City's parks, trails, open space and recreation services forward. In summary, we propose a proven approach that can aid the City to:

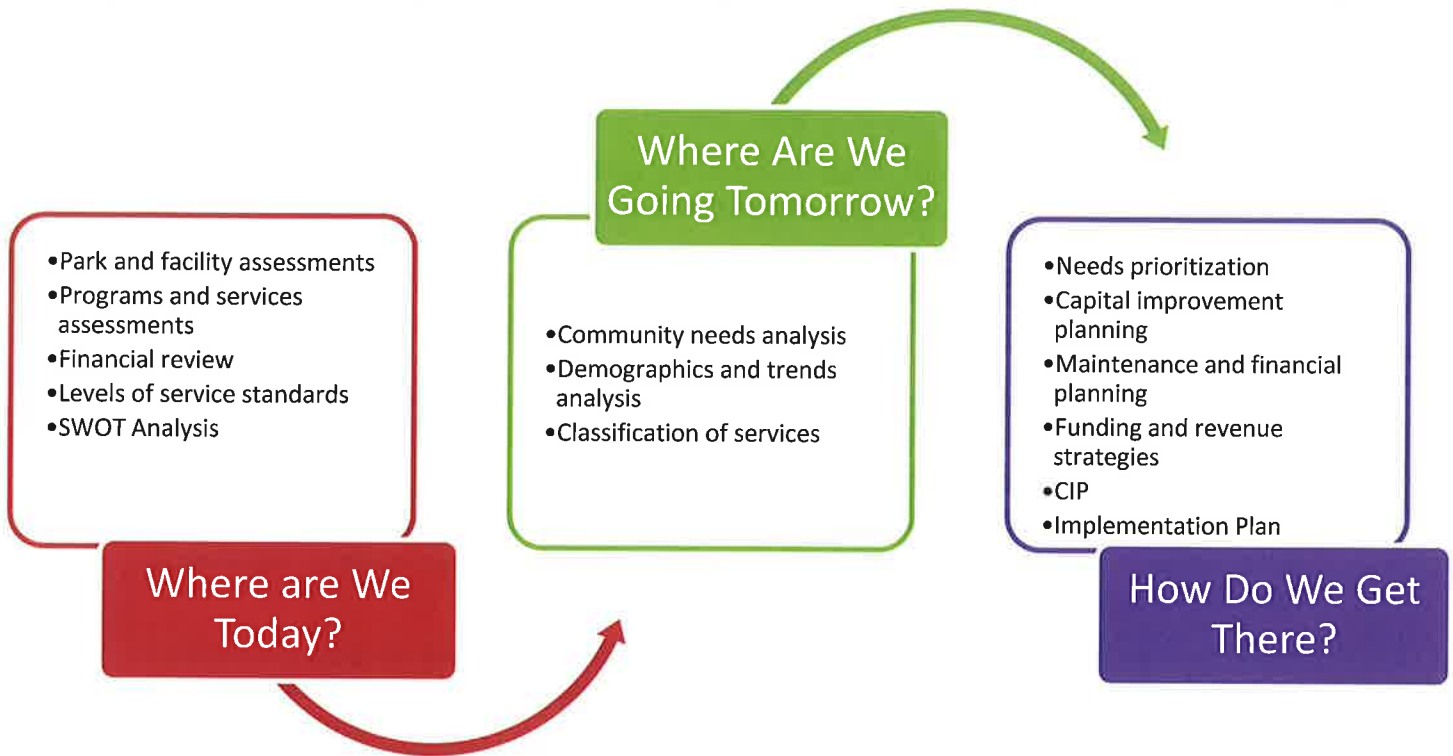
- **Engage the diverse San Clemente community**, leadership and stakeholders through innovative public input means to build a shared vision for beaches, parks, recreation, facilities and services.
- Utilize a **wide variety of data sources and best practices** including a statistically-valid survey to predict trends and patterns of use and how to address unmet needs in San Clemente.
- **Determine unique Level of Service Standards** to develop appropriate actions regarding beaches, parks, recreation, golf, facilities, and amenities that reflects San Clemente's strong commitment to provide high quality recreational activities for the community.
- **Shape financial and operational preparedness** through innovative and "next" practices to achieve the strategic objectives and a framework to help decision-makers with planning, maintenance and rehabilitation issues.
- **Develop a systematic and prioritized strategic approach over 15 years** to ensure a viable, financially sustainable and interconnected plan for City's parks, beaches, recreation programs and open spaces.





## Section F - Methodology

The Master Plan will create a clear set of objectives that will provide direction to City staff and leadership for development, re-development, expansion and enhancement of the City's parks system, beaches, golf course and recreation programs and services for a short-term (2020), mid to long-term (2025) and on-going basis range. There are numerous methodologies in the project, with the following key areas of focus being foundation components. These steps are detailed in Section G – Work Plan & Scope of Work.





## Section G - Work Plan & Scope of Work

The PROS Consulting Team proposes this comprehensive planning approach to address these requirements and will deliver a living and working document that provides guidance for both short-term and long-term goals in a financially sustainable and achievable manner. Following is a detailed approach to develop the *Beaches, Parks, and Recreation Master Plan* and services related to implementing specific action items.

### Scope of Work

#### Task 1 - Project Kick-Off and Outcome Expectations

- A. **Project Kick-off Meeting** – A project kick-off meeting should be attended by key City staff members and PROS Consulting Team members to confirm project goals, objectives, and expectations that will help guide actions and decisions of the PROS Consulting Team. Detailed steps of this task include:
- Confirmation – The project goals, objectives, scope, and schedule will be confirmed.
  - Outcome Expectations – Discuss expectations of the project along with a presentation on different management models.
  - Data Requests - The Consulting Team will work with the City to develop data requests for planning documents and gather information to be used for building the stakeholder and key leader meeting list in the study.
  - Site Tour: The Consulting Team members will tour, with City staff, the golf course, aquatic center, facilities, parks, beaches and programs to identify opportunities to increase revenue generation and reduce operational inefficiencies.
- B. **SWOT Analysis** –Based on meetings with Intra-Department City staff and discussions with key leadership, the Consulting Team will develop a SWOT analysis highlighting existing Strengths, Weaknesses, Opportunities and Threats faced by the City in the years to come.
- C. **Project Team Meetings** -We will be in close and constant contact with your designated project coordinator throughout the performance of the project and the collective consulting team will have at minimum of 10 meetings.

#### Task 2 -Community Trends and Internal Organizational Assessment

- A. **Demographics &Trends Analysis** – The Consulting Team will utilize the City of San Clemente’s projections and supplement with census tract demographic data obtained 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; for comparison purposes data will also be obtained from the U.S. Census Bureau, Capistrano Unified School District, National Recreation and Park Association and California Parks and Recreation Society Standards. This analysis will provide an understanding of the demographic environment for the following reasons:
- To understand the market areas served by the City and distinguish customer groups.
  - To determine changes occurring in the region and assist in making proactive decisions to accommodate those shifts.
  - Identify trends in Beaches, Parks, Recreation, and Golf that may be relevant to San Clemente and the population it serves

The City’s demographic analysis will be based on US 2010 Census information, 2016 estimates, and five-year (2021) and 10-year (2026), and 20 (2036) year projections. The following demographic characteristics will be included: Population Density, Age Distribution, Households, Gender, Ethnicity, and Household Income.

From the demographic base data, sports, recreation, and outdoor trends are applied to the local populace to assist in determining the potential participation base within the community. For the sports and recreation trends, the Consulting Team utilizes the Sports & Fitness Industry Association’s (SFIA) 2015 Study of Sports, Fitness and Leisure Participation, ESRI local market potential, as well as participation trends from the Outdoor Foundation on outdoor recreation trends.

- B. Organization Structure Review** – The Consulting Team will perform an analysis of the current practices of the Department to evaluate its operational situation with an aim to primarily identify future Department organization and staffing needs, improved operational efficiencies, policy development, process improvements, system and technology improvements, and marketing/communication opportunities.

The primary objective is to evaluate the current organizational structure and staff abilities in San Clemente to ensure they can serve the increased level of service and help the successful implementation of the plan.

- C. Develop Service Classification** –PROS will conduct a work session with key management staff on what they consider to be core essential services, important services, and value-added services based on observations, individual interviews, focus group interviews and operating practices. The outcomes of these work sessions will be:

- All services and functions of the agency are classified as (a) Core, (b) important, or (c) Value Added based on definitions and criteria agreed upon with the leadership and staff
- Appropriate ranges of cost recovery for each classification of service will be determined and applied to all functions and services.
- Prioritize existing programs and services offered by Beaches, Parks and Recreation in order to help justify decision-making based on community needs for which programs and services should be kept as-is, modified, expanded, eliminated, or outsourced.
- The Consultant Team will compile the results of the work session into a summary of services and functions by classification. Additionally, broad performance standards for each service and function that align with their classification will be developed. An example of how these performance standards as cost recovery expectations can be applied is illustrated in the table below.

Service Category	Description	Cost-Recovery Expectations
<b>Core</b>	Services the agency <u>must</u> provide to meet its mission, and statutory and/or regulatory obligations; maintains valuable assets and infrastructure investments; essential to protect visitor safety; preserves the integrity of natural and cultural resources; reasonably expected and supported (or demanded) by visitors	Largely supported by taxes with little or no cost-recovery
<b>Important</b>	Services the agency <u>should</u> provide or are important to effectively serve visitors; may expand or enhance provision of core services; broadly supported and utilized by visitors, although support may be conditional upon the perceived benefit, quality, and pricing of the services	Supported by a balance of taxes & earned revenues
<b>Value Added</b>	Services the agency <u>may</u> provide when they are fiscally sustainable through visitor support; add value above and beyond what is required or expected of the agency’s core functions; are easy opportunities to integrate alternative providers and operators into providing services at one or more sites	Heavily or fully supported by earned revenues





### Task 3 - Community Needs Assessment

Given the diverse community in San Clemente, community input will be one the most critical components of this plan.

The Consulting Team will utilize an innovative and multi-media community input process to identify and prioritize what the community desires for their Beaches, Parks, Recreation, Golf, and facilities and their vision for the future. This task will be conducted in a variety of in-person and online forums including in non-English mediums (Spanish if needed). The PROS team will also help with the communications strategy to maximize public input.

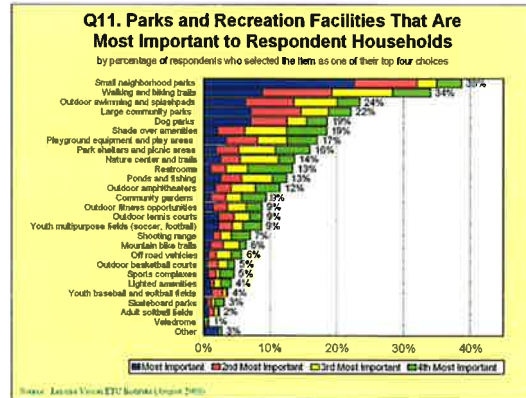
**A. Key Leader and Stakeholder Interviews** — The Consulting Team will conduct at least sixteen (16) key leadership and stakeholder interviews over a period of two days. We will utilize Department staff to identify target focus groups and key leaders—possible focus groups could include teens, young adults, urban or mixed-use area residents, various interest groups, bike and action sports industry stakeholders, public / private partners and particular ethnic groups. The goal is to identify their vision and values and how they translate into future programs and development needs. These will be supplemented by intercept surveys conducted during the park tour.



**B. Open (Bi-Lingual) Public Forums**— They will serve to present information and gather feedback from citizens at large. It will be important to get maximum media exposure to inform citizens of the purpose and importance of the meetings and clearly note time and locations. Our diverse and multi-lingual team offers the capability to conduct these meetings in English and Spanish both if the San Clemente staff believes it would help to expand the community outreach.

We propose to conduct a total of three (3) community meetings: two (2) initial meetings to introduce the project and project goals, gain input for the community’s vision and core values for the City and its beaches, parks, recreation and golf offerings and one (1) follow-up meeting conducted during the final briefings component of the plan. The purpose for these meetings will be to ensure opportunities for the general public to discuss their options and perceptions for future developments and improvements.

**C. Community Needs Assessment Statistically-Valid Survey** – ETC Institute will perform a random, scientifically valid community-wide household to quantify knowledge, need, unmet need, priorities and support for parks, recreation and cultural services. The Consulting Team will administer a statistically valid random sampling Needs Assessment Survey of household surveys in the City of San Clemente. The survey will be administered by phone or by a combination of a mail/phone survey and can have a minimum sample size of 325 completed surveys at a 95% level of confidence and a confidence interval of +/- 5.4%.



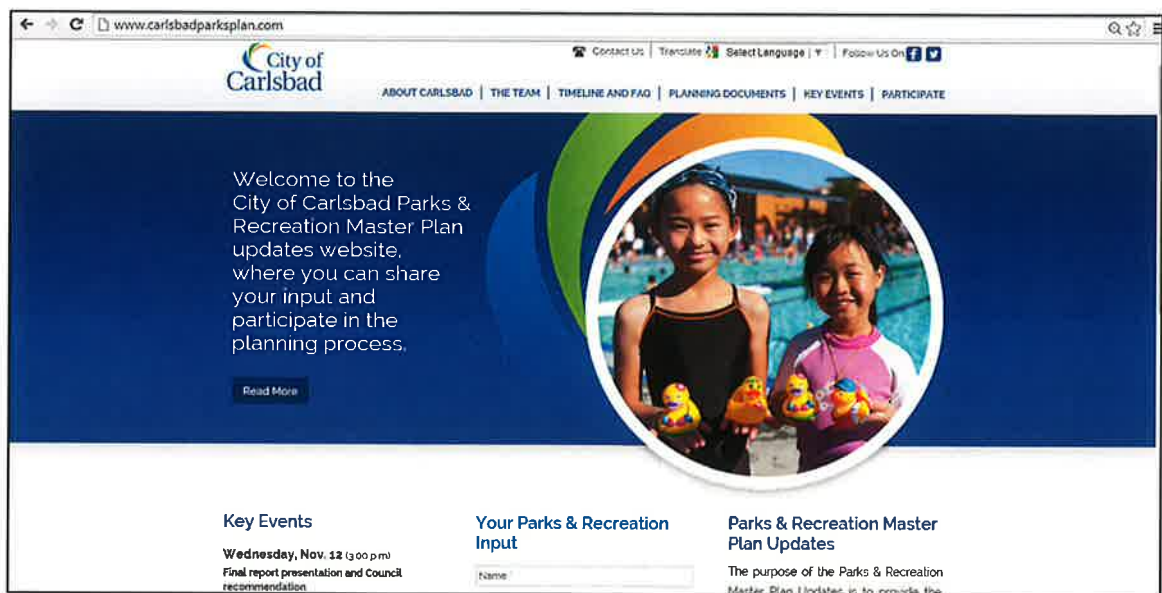
Prior to the survey being administered, the PROS Consulting Team would meet with City of San Clemente staff to review and finalize the agreed upon survey instrument.

**D. Online Survey** –PROS will also conduct an informal online survey to complement the data obtained from the statistically-valid survey. An online survey will be crafted and administered through [www.surveymonkey.com](http://www.surveymonkey.com). It will focus on how users feel about the services provided, needs and importance, issues that need to be addressed and recommendations for change they would like to see the City provide.

- E. **Crowd-Sourcing Project Website** - The Consultant Team will build a customized project website that will provide on-going project updates and will serve as the avenue to crowd-source information throughout the project for the entire community. These websites are responsive design and thus customized to a laptop, tablet or smart phone to maximize user engagement of the millennials and the broader community and customized with translate options to allow for a multilingual use, critical in a City like San Clemente.

Using web analytics, it is also easy to identify the impact of the website and our previous planning websites have been successful in engaging over 7000-8000 users over the course of the planning process – significantly higher than any other outreach medium could achieve.

This could be combined with input through Social Media and could also host videos through a dedicated YouTube Channel and utilize the City’s website. E.g. [www.carlsbadparksplan.com](http://www.carlsbadparksplan.com). It has proven to be a very effective tool in engaging the community on an on-going basis as well as maximizing outreach to an audience that may not traditionally show up at public meetings or choose to respond to a Phone or Mail survey.



**Task 4 - Facility and Program Assessment**

- A. **Assessment of Existing Facilities, Trails, Beaches, Golf Course** –An extensive park and facility tour will be performed with City staff to assess and confirm the inventory and existing conditions, and perform a Supply Analysis to identify existing and potential parks and recreation offerings across the community. This will be supplemented with data from other service providers (private providers, schools, and neighboring jurisdictions such as Mission Viejo, Laguna Niguel, Carlsbad, etc.). We will also review and ensure alignment with the City’s Bicycle Master Plan to ensure synergies and interconnectivity between the various planning documents.





The Consulting team will provide a graphic and written site assessment of existing parks, recreation facilities, trails, beaches, and the golf course in the city. This will also include facilities such as the Ralphs Skate Court and Dog Beach in order to assess and address community issues (e.g. lighting at the Skate Court) for the same.

An aerial photo of each site will be obtained from Google Maps and a list of the existing park facilities and amenities will be listed. A list of all proposed improvements and renovations will also be provided along with identifying facilities and amenities that should not be replaced. Information from this assessment will be used to develop the Levels of Service standards and influence the Capital Improvement Needs for the plan.

Trail summary sheets will also prepared to accurately reflect the goals and costs for the proposed trail improvements.

Future park facilities will also be documented and incorporated into the short, mid, and long term goals of the Master Plan.



We will make recommendations which take into account the current and future needs and condition of existing facilities and develop cost of modifications to determine how to serve the long range needs of the community. This will also include a maintenance priority plan and the Consulting Team will work with San Clemente staff to integrate, Lucy, into the plan as well.

**B. Recreation Program Assessment-** Recreation programs and special events are the backbone of park and recreation agencies. This assessment will review how well the department aligns itself with community needs (utilizing the statistically-valid survey and other community input) and a comparison of how the City’s offerings compare to best practice agencies in California and nationwide.

The goal of this process is to provide recreation program enhancements that result in successful and innovative recreation program offerings. The Consulting Team will provide insight into recreation program trends from agencies all around the country and specifically evaluate gaps and overlaps as it relates to Early Childhood Programs through programming offered at Dorothy Visser Senior Center. The process includes analysis of the following programming aspects:

- Age segment distribution
- Lifecycle analysis
- Core program analysis and development
- Customer feedback
- Marketing and promotions
- Best Practices from similar and comparable agencies
- Similar provider analysis/duplication of services
- Review of program development process
- Program Innovation Cycle
- Standards and Performance Measures



Beaches, Parks, and Recreation Master Plan 2016 with Key Strategies for Implementation

Ultimately, the outcome of the process will be the creation of a dynamic recreation program plan that results in increased registration, drives customer retention and loyalty, improves customer satisfaction, and increases revenues. Additionally, it will help focus staff efforts in core program areas and create excellence in those programs deemed most important by program participants.



C. Levels of Service Standards

The Consulting team will work with the staff to review and confirm, modify or add to existing park classifications and identify preferred level of service standards for all park sites, trails, open space amenities and indoor and outdoor facilities. These classifications will consider size, population served, length of stay, and amenity types/services and will factor in NRPA’s standards as well as California specific ones and are adapted based on the needs and expectations of the community.

This could include the beach acreage, .4.7 miles of trails, combined park acreage of the 20 parks and the indoor recreation square footage as well as the 3 swimming pools.

PARKS: 2013 Inventory - Developed Facilities										2013 Facility Standards		2018 Facility Standards					
Park Type	CCPR Inventory	City/CRC	School District	Dad's Club	HOA	County Parks	Total Inventory	Current Service Level based upon population		Recommended Service Levels: Revised for Local Service Area		Meet Standard/ Need Exists	Additional Facilities/ Amenities Needed	Meet Standard/ Need Exists	Additional Facilities/ Amenities Needed		
Local Parks (1-10 acres)	28.25	-	-	-	-	-	28.25	0.32	acres per 1,000	0.00	acres per 1,000	Meets Standard	-	Acre(s)	Meets Standard	-	Acre(s)
Community Parks (11-100 acres)	169.37	-	-	-	-	63.00	231.37	2.64	acres per 1,000	3.00	acres per 1,000	Need Exists	31	Acre(s)	Need Exists	58	Acre(s)
Signature Parks (100+ acres)	279.22	-	-	-	-	125.00	404.22	4.62	acres per 1,000	4.00	acres per 1,000	Meets Standard	-	Acre(s)	Meets Standard	-	Acre(s)
Undeveloped Parks	13.38	141.20	-	-	-	-	154.58	1.78	acres per 1,000	1.00	acres per 1,000	Meets Standard	-	Acre(s)	Meets Standard	-	Acre(s)
Greenways	51.83	-	-	-	-	-	51.83	0.59	acres per 1,000	2.00	acres per 1,000	Need Exists	123	Acre(s)	Need Exists	141	Acre(s)
<b>Total Park Acres</b>	<b>541.05</b>	<b>141.20</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>188.00</b>	<b>870.25</b>	<b>9.94</b>	<b>acres per 1,000</b>	<b>10.00</b>	<b>acres per 1,000</b>	<b>Need Exists</b>	<b>6</b>	<b>Acre(s)</b>	<b>Need Exists</b>	<b>93</b>	<b>Acre(s)</b>
<b>OUTDOOR AMENITIES:</b>																	
Playgrounds	6.00	-	11.00	-	25.00	2.00	44.00	1.00	structure per 1,991	1.00	structure per 2,500	Meets Standard	-	Structures(s)	Meets Standard	-	Structures(s)
Spray Pads	2.00	-	-	-	-	-	2.00	1.00	structure per 43,794	1.00	structure per 20,000	Need Exists	2	Structures(s)	Need Exists	3	Structures(s)
Picnic Areas/Shellers	14.00	-	-	-	14.00	-	28.00	1.00	structure per 3,128	1.00	structure per 4,000	Meets Standard	-	Structures(s)	Meets Standard	-	Structures(s)
Soccer Field	-	-	-	23.00	1.00	3.00	27.00	1.00	field per 3,244	1.00	field per 4,000	Meets Standard	-	Field(s)	Meets Standard	-	Field(s)
Ballfields	-	-	12.00	11.00	5.00	4.00	32.00	1.00	field per 2,737	1.00	field per 4,000	Meets Standard	-	Field(s)	Meets Standard	-	Field(s)
Multi-Purpose Fields	2.00	-	3.00	14.00	-	-	19.00	1.00	field per 4,610	1.00	field per 4,000	Need Exists	3	Field(s)	Need Exists	5	Field(s)
Basketball Courts	2.00	-	8.00	-	12.00	-	22.00	1.00	court per 3,981	1.00	court per 5,000	Meets Standard	-	Court(s)	Meets Standard	-	Court(s)
Tennis Courts	-	-	37.00	-	50.00	-	87.00	1.00	court per 1,007	1.00	court per 3,000	Meets Standard	-	Court(s)	Meets Standard	-	Court(s)
Multi-Use Trails (Miles)	16.00	-	-	-	-	-	16.00	0.18	miles per 1,000	0.40	miles per 1,000	Need Exists	19	Mill(s)	Need Exists	23	Mill(s)
Amphitheater	1.00	1.00	-	-	-	1.00	3.00	1.00	site per 29,196	1.00	site per 50,000	Meets Standard	-	Site(s)	Meets Standard	-	Site(s)
Skate Park	1.00	-	-	-	-	-	1.00	1.00	site per 87,588	1.00	site per 40,000	Need Exists	1	Site(s)	Need Exists	1	Site(s)
Volleyball Pit	2.00	-	-	-	14.00	-	16.00	1.00	site per 5,474	1.00	site per 20,000	Meets Standard	-	Site(s)	Meets Standard	-	Site(s)
Outdoor Aquatic Center (Square Feet)	48,183.50	-	-	-	-	-	48,183.50	0.55	SF per person	0.50	SF per person	Meets Standard	-	Square Feet	Meets Standard	-	Square Feet
Monon Community Center (Square Feet)	146,225.00	-	-	-	-	-	146,225.00	1.67	SF per person	1.50	SF per person	Meets Standard	-	Square Feet	Meets Standard	-	Square Feet
2013 Estimated Population	87,588																
2018 Estimated Population	96,350																



D. **Service Area Equity Mapping** – The Consulting Team will utilize GIS to perform equity mapping to identify service area analysis for specific facilities and programs. This includes mapping by classification and major amenities by facility standards as applied to population density and geographic areas.

A service area is defined as a circular area around a park or amenity whose radius encompasses the population associated with the appropriate facility standard for each park classification and amenity. Using the facility standards and service areas provided by Consulting Team for each park and major facility type (amenity), a series of maps by each park classification and major amenities will be prepared.

Major parks and facilities to be mapped could include:

- Neighborhood Parks
- Community Parks
- Soccer Fields
- Football Fields
- Baseball Fields
- Softball Fields
- Basketball Courts
- Tennis Courts
- Trails
- Playgrounds
- Picnic Pavilions
- Aquatics/Pools
- Recreation/Community Centers
- Golf Courses

Maps of the entire system will be prepared. This mapping identifies gaps and overlaps in service area. It is assumed that the City will provide base GIS information including inventory and general location of park sites and amenities. The Consulting Team will provide maps in digital format (ARCGIS and Adobe Acrobat PDF format) and hard copy.





### Task 5 - Prioritized Facility / Amenity and Program Priority Rankings

**A. Demands and Unmet Needs Analysis**– Using its proprietary rankings model, the Consulting Team will synthesize the findings from the community input, survey results, standards, demographics and trends analysis, park and facility assessment, recreation services assessment and the service area mapping to create a quantified facility and program priority ranking.

This will provide a defensible and data-driven list of prioritized facility, infrastructure, amenities, and program needs for San Clemente. This priority listing will be compared against gaps or surplus in recreation services, parks, facilities and amenities and thus drive future park and facility / amenity designs and plans.

The Team will conduct a work session with staff to review the findings and make revisions as necessary.

Malibu	
Facility/Amenity Priority Rankings	
	Overall Ranking
Walking, biking trails and greenways	1
Small Neighborhood Parks	2
Indoor Swimming Pools	3
Off-leash dog parks	4
Multi-generational Community Center	5
Community Gardens	6
Outdoor Swimming Pools	7
Adventure Facility (rock wall, ropes course, etc.)	8
Outdoor Tennis Courts	9
Visual / Performing Arts Facility	10
Large Community Parks	11
Small Family Picnic Areas and Shelters	12
Amphitheater	13
Nature Center	14
Skateboard Parks	15
Teen Center	16
Youth Soccer Fields	17
Playground Equipment	18
Outdoor Basketball Courts	19
Multi-purpose Fields (Lacrosse, etc.)	20
Youth baseball and softball fields	21
Disc Golf Course	22
Year-round synthetic fields	23
Large Group Picnic Areas and Shelters (50+)	24
Equestrian Trails	25
Adult Baseball and Softball Fields	26
Youth Football Fields	27
Adult Soccer Fields	28







### Task 6 - Financial Implementation and CIP

**A. Financial Implementation** – The PROS Team will review current financial policies and underlying legislative authorities related to revenue activities. This review will include comparison of current policies with national standards of best practice agencies and will recommend policies and adjustments to current policies where enhancements may be needed or gaps are identified. The Consulting Team will ensure that the Funding and Revenue section emulates Section 6 (Funding and Implementation Strategies) of the Huntington Beach Parks and Recreation Master Plan as well.

A funding strategies and prioritization of public funding work session will be conducted for the Department using PROS' national experience and in conjunction with City staff. The PROS Consulting Team has identified numerous (160) funding methods that can be applied for a variety of projects types from ongoing operations to development, rehabilitation and maintenance of recreation lands and facilities or for funding enhancements or new development as supporting programs and services. These strategies could include:

- Fees and charges
- Endowments/grants
- Sponsorships
- Public / Private / Non Profit partnerships
- Dedicated funding sources

**B. Prioritized Capital Improvement Plan** - Based on all of the data accumulated and analyzed, the Consulting Team will prepare a Prioritized Capital Improvement Plan for the next 15-20 years. The projects will be divided into three goals; 0-5 years, 5-10 years, and 10-20 years. An Action Plan Matrix will be prepared that can be modified and updated as needed by city staff as projects are completed or re-prioritized and the consulting team will work with City staff to ensure the Plan is connected to the City's CIP.

*Tempe City Parks and Open Space Master Plan*

Action Plan Matrix (refer to Chapter 6, Section 6.1 - Funding and Revenue Strategies for potential funding of these goals)				
	ONGOING	0-5 YEARS	5-10 YEARS	10-20 YEARS
Facilities / Amenities	Develop new bicycle racks for use throughout the City Park System	Install new bicycle racks for use throughout the City Park System	Install new bicycle racks for use throughout the City Park System	Install new bicycle racks for use throughout the City Park System
	Develop new picnic tables for use throughout the City Park System	Install new picnic tables for use throughout the City Park System	Install new picnic tables for use throughout the City Park System	Install new picnic tables for use throughout the City Park System
	Develop new playground equipment for use throughout the City Park System	Install new playground equipment for use throughout the City Park System	Install new playground equipment for use throughout the City Park System	Install new playground equipment for use throughout the City Park System
	Develop new dog waste stations for use throughout the City Park System	Install new dog waste stations for use throughout the City Park System	Install new dog waste stations for use throughout the City Park System	Install new dog waste stations for use throughout the City Park System
	Develop new water fountains for use throughout the City Park System	Install new water fountains for use throughout the City Park System	Install new water fountains for use throughout the City Park System	Install new water fountains for use throughout the City Park System
	Develop new benches for use throughout the City Park System	Install new benches for use throughout the City Park System	Install new benches for use throughout the City Park System	Install new benches for use throughout the City Park System
	Develop new shade structures for use throughout the City Park System	Install new shade structures for use throughout the City Park System	Install new shade structures for use throughout the City Park System	Install new shade structures for use throughout the City Park System
	Develop new art installations for use throughout the City Park System	Install new art installations for use throughout the City Park System	Install new art installations for use throughout the City Park System	Install new art installations for use throughout the City Park System
	Develop new lighting for use throughout the City Park System	Install new lighting for use throughout the City Park System	Install new lighting for use throughout the City Park System	Install new lighting for use throughout the City Park System
	Develop new irrigation for use throughout the City Park System	Install new irrigation for use throughout the City Park System	Install new irrigation for use throughout the City Park System	Install new irrigation for use throughout the City Park System
	Develop new landscaping for use throughout the City Park System	Install new landscaping for use throughout the City Park System	Install new landscaping for use throughout the City Park System	Install new landscaping for use throughout the City Park System
	Develop new signage for use throughout the City Park System	Install new signage for use throughout the City Park System	Install new signage for use throughout the City Park System	Install new signage for use throughout the City Park System
	Develop new security for use throughout the City Park System	Install new security for use throughout the City Park System	Install new security for use throughout the City Park System	Install new security for use throughout the City Park System
	Develop new maintenance for use throughout the City Park System	Install new maintenance for use throughout the City Park System	Install new maintenance for use throughout the City Park System	Install new maintenance for use throughout the City Park System
	Develop new parking for use throughout the City Park System	Install new parking for use throughout the City Park System	Install new parking for use throughout the City Park System	Install new parking for use throughout the City Park System

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*Grape Day Park Master Plan*

PEDESTRIAN WALKWAYS & GENERAL PARK IMPROVEMENTS					\$3,289,140
DESCRIPTION	QTY.	UNIT	UNIT PRICE	SUB-TOTAL	TOTAL
<b>OVERHEAD &amp; MOBILIZATION/DEMOBILIZATION</b> \$200,000					
General Overhead & Mobilization/Demobilization Costs (includes temporary construction fence, bonds, insurance, water, cleanup, clean-up, relocation, traffic control and demobilization)	1	LS	\$200,000	\$200,000	
NPDES Permit Compliance	1	LS	\$15,000	\$15,000	
<b>CLAR &amp; GRUB/DEMOLITION</b> \$267,600					
Concrete removal	7,000	SF	\$2.00	\$14,000	
Turf removal	222,000	SF	\$1.00	\$222,000	
Shrub & Groundcover removal	15,000	SF	\$2.00	\$30,000	
Tree removal	5	EA	\$300.00	\$1,500	
<b>GRADING &amp; DRAINAGE</b> \$202,000					
Grading	277,000	SF	\$1.00	\$277,000	
Drainage	1	LS	\$15,000	\$15,000	
<b>ELECTRICAL</b> \$100,000					
Electrical distribution system	1	LS	\$100,000	\$100,000	
Walkway light (poles, fixtures, conduit, wire, pull boxes)	33	EA	\$3,000	\$99,000	
<b>SITE CONSTRUCTION</b> \$594,500					
Concrete Pavers & Stamped Paving (SF)	40,000	SF	\$13.00	\$520,000	
Drinking Fountains	2	EA	\$2,500.00	\$5,000	
Trash Receptacles	20	EA	\$1,200.00	\$24,000	
Benches	15	EA	\$1,500.00	\$22,500	
Exercise / Fitness Stations	4	EA	\$3,500.00	\$14,000	
Information Kiosks	4	EA	\$4,000.00	\$16,000	
Wayfinding Signage	1	LS	\$8,000.00	\$8,000	
Historical Signage	1	LS	\$15,000.00	\$15,000	
Historic Fountain Restoration	1	LS	\$10,000.00	\$10,000	
<b>IRRIGATION</b> \$379,700					
Connection to Existing Irrigation Line at Park	1	LS	\$3,500.00	\$3,500	
Irrigation Controller	2	EA	\$8,000.00	\$16,000	
Turf Irrigation	222,000	SF	\$1.50	\$333,000	
Shrub & Groundcover Irrigation	15,000	SF	\$1.75	\$26,250	
<b>PLANTING</b> \$399,600					
Weed Abatement, Soil Preparation & Fine Grade	227,000	SF	\$0.30	\$68,100	
100 Day Maintenance	227,000	SF	\$0.09	\$20,430	
Sodded Turf	222,000	SF	\$1.00	\$222,000	
Shrubs & Groundcover	15,000	SF	\$4.00	\$60,000	
<b>SUB-TOTAL</b>					<b>\$2,436,400</b>
Design, Project Management and Administration					20% \$487,280
Contingency					10% \$365,460
<b>TOTAL</b>					<b>\$3,289,140</b>

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## **Task 7 - Draft and Final Master Plan**

The overall vision and mission statements will be affirmed or modified, and direction for the Department will be established along with individual action strategies that were identified from all the research work completed. Key recommendations and tactics that support each action strategy to its fullest outcome will be outlined in a strategy matrix with priorities, timelines, measurement, and teams within the Department/City or external partners to focus on during the next 10-15 years. Specific tasks include:

- A. Visioning Session and Goal / Objective Development** – The core values, vision and mission statements will be affirmed or updated with senior Department staff in a work session. Following this effort, goals/objectives and policies will be established and prioritized. A status briefing will be presented to gain input and consensus on direction. The Strategy Matrix will serve as the detailed action plan and implementation tool with goals, objectives, strategies, actions, priorities/timelines, and teams.
- B. Preparation of Draft Master Plan Document** – The PROS Consulting Team will prepare a draft Master Plan with strategies taking into account all analysis performed and consider the fiscal and operational impacts to the City
- C. Community and Elected Official Briefings and Presentations** – The recommendations and prioritization of needs will be reviewed and discussed with the Staff and also in a community meeting as well as with stakeholders and the City leadership. The Draft Document will be up for public review through the City's or the Crowdsourced project website and also discussed in open public meeting for the community to share feedback.  
  
Following that, the PROS team will be involved in presentations and briefings to the Beaches, Parks and Recreation Commission, the Golf Course Committee and the City Council as needed.
- D. Final Beaches, Parks and Recreation Master Plan Document** – Following feedback from the community, staff and the elected officials, the PROS Team will finalize the Master Plan document to be delivered to the City. Ten (10) copies of the final master plan will be included, as well as electronic copies.

The plan will complement and / or ensure integration with other City planning documents including the Centennial General Plan (2014), the City's Comprehensive Plan, current Land Use, and Planning Standards and Ordinances, the City's Zoning ordinances, the 1999 Parks and Recreation Master Plan and individual plans such as Vista Hermosa Sports Park and Forster Ranch among others.



## Section H - Project Organization & Staffing

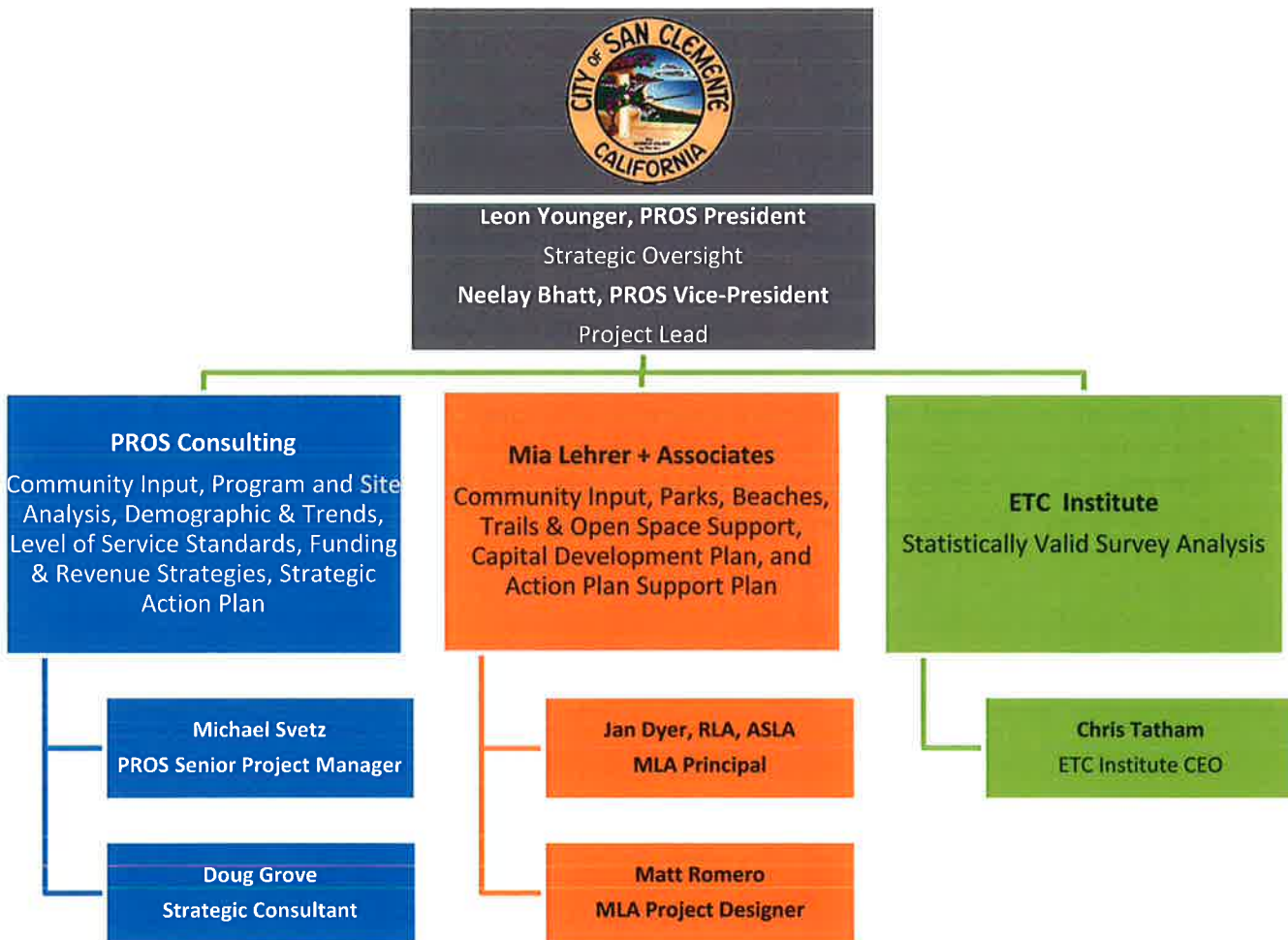
### Project Management

The Consulting Team on this project will be led by PROS Consulting Vice-President Neelay Bhatt with strategic oversight by PROS President, Leon Younger. Central to our project approach is providing a high level of responsiveness to the City of San Clemente staff and maintaining accessibility throughout the project lifespan.

Neelay Bhatt will serve as the principal consultant on all aspects of the plan and with our existing staff and project related presence in California through this entire year, the PROS Team will ensure a timely and effectual response to all needs of the City. Our team is flexible and will work hard to effectively serve as an extension of the City of San Clemente’s project staff.

### Team Organization

The following organizational structure demonstrates how the team will be coordinated by PROS Consulting. This team provides a strong team of national expertise and local insight.





## **Leon Younger**

**PROS Consulting**

**President**

**Education**

M.P.A., University of Kansas, Aug. 1988

B.S., Kansas State University, May 1975

### **Employment History**

President, PROS Consulting, Sep. 1995 to present

Director/Chairman of the Board, Indianapolis Parks and Recreation, Apr. 1992 to Sept. 1995

Executive Director, Lake MetroParks (OH), Jun. 1988 to Mar. 1992

Director, Jackson County (MO) Parks and Recreation, Aug. 1983 to Jun. 1988



### **Certification**

Certified Park and Recreation Professional

### **Professional Experience**

- Founder and President of PROS Consulting
- More than 38 years in parks, recreation, and leisure services
- Recognized leader in applying innovative approaches to managing parks and recreation organizations
- Held positions as Director of Parks and Recreation in Indianapolis, Indiana; Executive Director of Lake Metroparks in Lake County, OH (Cleveland vicinity); and Director of Parks and Recreation in Jackson County, MO (Kansas County)
- Received the 1994 National Recreation and Park Association's Distinguished Professional Award for his progressive and innovative thinking in management of public parks and recreation entities
- Co-creator of the Community Values Model™, a business model that synthesizes public input into a strategic plan
- Regularly addresses sessions at the National Recreation and Park Association conferences and has served as a board member and instructor at the Pacific Revenue and Marketing School in San Diego, California and the Rocky Mountain Revenue and Management School in Colorado
- In 2012, Leon was inducted into the NRPA Legends Hall of Fame

### **Similar Project Experience**

- City of Los Angeles, CA Parks and Recreation Needs Assessment
- Riverside County, CA Parks and Open Space District Strategic Plan
- City of San Jose, CA Pricing Philosophy, Revenue Enhancement, and Organizational Implementation Plan for the Department of Park, Recreation and Neighborhood Services
- City of Roseville, CA Parks and Recreation Business Plan
- City of San Francisco, CA Recreation Plan and Needs Assessment
- City of Healdsburg, CA Parks and Recreation Needs Assessment and Parks and Open Space Plan
- Sonoma County, CA Management Review Services and Implementation Plan
- Fair Oaks Recreation and Parks District, CA Parks and Recreation Strategic Master Plan
- Orangevale Recreation and Park District, CA Parks and Recreation Master Plan
- City of Westerville, OH Parks and Recreation Strategic Master Plan
- Carmel Clay, IN Parks and Recreation Master Plan
- Olathe, KS Parks and Recreation Strategic Master Plan
- City of Charlotte/Mecklenburg County, NC Parks and Recreation Strategic Master Plan
- City of Henderson, NV Parks and Recreation Strategic Master Plan and Financial Cost of Service
- City of Jacksonville, NC Parks and Recreation Strategic Master Plan
- City of Everett, WA Parks and Recreation Strategic Master Plan
- Cleveland, OH MetroParks Strategic Plan



**Neelay Bhatt**

**PROS Consulting**

**Vice President**

**Education**

- M.S., Ohio University 2005
- MBA, Ohio University 2004
- Post Graduate Diploma in Advertising and Public Relations, University of Mumbai, 2003
- B.A., University of Mumbai, 2002



**Employment History**

- PROS Consulting; May 2006 to present
- Disney Sports and Recreation; 2005-2006
- Athens Olympics and Paralympic Games, Greece; 2004
- Medivision Infomedia Pvt. Ltd., India; 2000 - 2002

**Residence**

Indianapolis, Indiana

**Professional Experience**

- Neelay’s career has taken him through three continents and includes experiences with the Super Bowl, Disney and the Summer Olympics and Paralympics Games, besides several years of consulting for master / strategic planning, marketing and branding, facility management and business planning. His educational background includes a Masters in Sports Administration and Facility Management, an MBA and a Masters in Advertising and Public Relations.
- As a speaker and trainer, nationally and internationally, he has been fortunate to learn from and teach students, professionals and executives from China, India and all over the United States. Beijing Sport University, University of Mumbai, Brand-Aid Marketing and Branding Conference (USA), National Recreation and Park Association Congress (USA), Bay Area Revenue Management School (USA) etc. have served as some of the venues.
- Currently, Neelay is serving a three-year term on the National Recreation and Park Association (NPRA) Board of Directors; He is on the Executive Committee and the Chair of the Finance Committee while previous he had led the New Revenue Generation Task Force focused on generating new revenue streams through innovative means, while also serving on the Governance Committee.
- In addition, as the Vice President for Planning and Facilities at PROS Consulting, he has served as project manager / lead consultant on over 100 system-wide and sports facility planning / development projects over several years. These projects have recommended facility infrastructure improvement and development totaling over \$3 billion USD and are helping to shape a better sports and recreation vision for cities all over the world.
- From managing the daily online publication of the Super Bowl (SB XLVI) to leading the City selection process of the inaugural T-20 cricket league in the United States, his approach focuses on innovating and partnering to maximize revenue generation and create a guest experience of the highest quality.

**Similar Project Experience**

- Riverside County Parks and Open Space District, Strategic Plan
- Cordova Recreation and Park District, CA Parks and Recreation Strategic Master Plan
- City of Carlsbad, CA Parks and Recreation Needs Assessment and Action Plan
- City of Malibu, CA Parks and Recreation Master Plan
- Fair Oaks Recreation and Parks District, CA Parks and Recreation Master Plan
- Orangevale Recreation and Park District, CA Parks and Recreation Master Plan
- City of San José , CA
  - Pricing Philosophy, Revenue Enhancement, and Organizational Implementation Plan for the Department of Park, Recreation and Neighborhood Services

- Marketing and Branding Plan for PRNS Department
- Business Planning for Happy Hollow Park and Zoo, Community Centers, Summer Camp and Family Camp
- City of Los Angeles, CA Parks and Recreation Needs Assessment
- City of Temple City, CA Parks and Recreation Master Plan
- City of Charlotte/Mecklenburg County, NC Parks and Recreation Strategic Master Plan
- City of Henderson, NV Parks and Recreation Strategic Master Plan and Financial Cost of Service
- City of Jacksonville, NC Parks and Recreation Strategic Master Plan
- City of Everett, WA Parks and Recreation Strategic Master Plan
- Athens/Clarke County, GA Park and Recreation Strategic Master Plan

## **Michael Svetz**

### **PROS Consulting**

### **Senior Project Manager**

#### **Education**

- B.S., Miami University, 1990
- M.S., Miami University, 1991

#### **Employment History**

- Consultant, PROS Consulting; 2012 to present
- Director of Parks and Recreation, City of Goodyear, AZ; 2009 to 2012
- Director of Parks and Recreation, City of Charlottesville, VA; 2004 to 2009
- Director of Parks and Recreation, City of Strongsville, OH 2000 to 2004
- Assistant Director of Parks and Recreation, City of Strongsville, OH 1997 to 2000
- Recreation Supervisor, City of Brunswick, OH 1991 to 1997)



#### **Professional Experience**

- Michael Svetz has served 24 years in the field of parks and recreation for local governments, the last 15 of which at the executive management level. He has held Director-level positions in Strongsville, Ohio (Cleveland vicinity), Charlottesville, Virginia and most recently for the City of Goodyear, Arizona.
- He has vast experience in developing and applying cutting edge business processes to create self-sustaining operations of multi-million dollar community centers, golf courses, and a Major League Baseball Player Development and Spring Training complex.
- Throughout his career, Mike has successfully developed and implemented strategic master plans for the parks and recreation departments that he led and the city and state associations that he served.
- As a dedicated public servant, Mike developed a deep knowledge of, and sincere appreciation for, organizational development, citizen engagement, board involvement and political acumen, all of which are critical elements in the successful creation and implementation of any parks and recreation plan.
- Since joining PROS Consulting, he has participated in numerous parks and recreation planning projects that include master plans, strategic plans, business planning, and strategic implementation. His project management skills and organization have assisted in the creation of innovative and fiscally sustainable projects across the United States.

#### **Similar Project Experience**

- Santa Clara County, CA Cost Recovery and Pricing Plan
- City of Pasadena, CA Sports Field Strategic Plan and Parks Maintenance Management Plan
- City of West Hollywood, CA Park Ordinance Review
- City of American Canyon, CA Parks and Recreation Master Plan
- City of Napa, CA Senior Center Feasibility Study and Business Plan
- City of Scottsdale, AZ Parks and Recreation Master Plan
- City of Provo, UT Parks and Recreation Master Plan
- City of Aspen, CO Recreation Division Business Plan





## City of San Clemente

- City of Calgary, Alberta, Canada, Park Zero Based Budget Review
- City of Gahanna, OH Cost of Service Study
- Centerville-Washington Park District, OH Cost of Service Study
- City of Centennial, CO Athletic Field Feasibility Study Development
- Muskingum Watershed District, OH Park Business Planning Services
- Cleveland Metropolitan Park District, OH Lakefront Parks Business Planning Services

### Doug Grove, RLA, LEED® AP

**PROS Consulting**

**Strategic Consultant**

**Education**

BS/1985/Landscape Architecture/  
Cal State Polytechnic University, Pomona

**Active Registration**

1987/Landscape Architect/2799/State of California  
LEED Accredited Professional – United States Green Building Council (USGBC)



Mr. Grove is a Principal Landscape Architect and LEED Accredited Professional with RHA LANDSCAPE ARCHITECTS-PLANNERS, INC, as well as a PROS Strategic Consultant. He graduated from California State Polytechnic University, Pomona in 1985 and holds a Bachelor of Science degree in Landscape Architecture. He has more than twenty eight years of experience as a professional Landscape Architect. He brings to the firm a wide range of experience in the public works sector having been personally involved in the design and project management of hundreds of park projects as well as housing development, streetscape, institutional and commercial projects

Mr. Grove serves on the California Park and Recreation Society (CPRS) District 11 Board of Directors as the Development and Operations Section Representative and is the past CPRS State Board of Directors as the Council of Sections Representative and past President of the CPRS State Development and Operations Section. He is also on the Board of Directors for the California Turf and Landscape Foundation at the University of California, Riverside and a past Board Member for the United States Green Building Council – Inland Empire (USGBC-IE). Similar project experience includes:

#### Needs Assessments and Master Plans

- Temple City Parks and Open Space Master Plan City of Temple City
- Carlsbad Needs Assessment and Strategic Action Plan City of Carlsbad
- Ladera Ranch Needs Assessment/Park and Recreation Master Plan Ladera Ranch
- San Jacinto Park and Recreation Master Plan City of San Jacinto

#### Trails Planning

- Orange Blossom Trail – Phases 1 and 2 City of Redlands
- Arroyo Seco Pedestrian and Bicycle Trail City of South Pasadena
- Yucca Valley Trails Master Plan Town of Yucca Valley

#### Historical Parks and Sites

- Founder’s Park City of Anaheim
- Reyes-Adobe Historical Site City of Agoura Hills
- Citrus State Historic Park City of Riverside

#### Community and Sports Parks

- Fergusson Park City of Rialto
- Rancho Jurupa Regional Sports Complex Riverside County EDA
- American Heroes Park City of Lancaster

#### Neighborhood Parks

- Tamarisk, Rimgate, Concourse and Mountain View Parks City of Lake Forest
- Stagecoach Park City of Corona

**Jan Dyer, RLA, ASLA**

**Mia Lehrer + Associates**

**Principal**

**Education**

University of California at Los Angeles, Extension, Professional Designation Certificate, Landscape Architecture, 2006

**Professional Licenses**

California #5623

**Employment History**

2007-present	Mia Lehrer+Associates, Principal
2005-2006	LA Group, Project Manager
2004-2005	James Dean ASLA, Senior Project Manager
1991-2004	Borstein Enterprises, Project Mgr. and Property Mgr.

**Professional Experience**

- With the experience leading many public agency projects Jan Dyer brings perspective to project teams on various watershed, civic master plans, park design and higher education projects.
- Her strengths include the ability to collaborate with diverse stakeholder groups to navigate complicated approval processes through client groups and public agencies, ensuring the successful entitlement and execution of frequently complex and demanding projects.
- She has 18 years of experience and has been responsible for project design through construction administration on a wide range of projects.
- Ms. Dyer provides creative and sustainable leadership in project design and committed to the community design process and has facilitated many outreach meetings for the firm.

**Professional Experience**

- Atwater Multimodal Bridge – Los Angeles, CA
- Avenue Q Improvements – Palmdale, CA
- Biotech Campus Mission Garden – Thousand Oaks, CA
- Biotech Campus Building 21 – Thousand Oaks, CA
- Biotech Campus Parking Structure 8 – Thousand Oaks, CA
- Compton Creek Earthen Bottom Feasibility Study – Compton, CA
- East Los Angeles Transit Oriented District Specific Plan – LA, CA
- Figueroa Hotel – LA, CA
- Grand Hope Lofts – LA, CA
- Jordan Downs Public Housing Master Plan – LA, CA
- La Peer Hotel – West Hollywood, CA
- Los Angeles Dept of Rec & Parks Citywide Needs Assessment – LA, CA
- Los Angeles Football Club – LA, CA
- Los Angeles Mission College East Campus – Sylmar, CA
- Los Angeles Mission College Family Guidance Center – Sylmar, CA
- Los Angeles Mission College Media Arts Center – Sylmar, CA
- Los Angeles World Airports Bradley West Project – Los Angeles, CA
- MetroLink Raymer to Bernson – Encino, CA
- MTA Westside Subway Extension – Los Angeles, CA
- MTA Crenshaw LAX Metro – Los Angeles, CA
- Orange to Green Greening – Orange County, CA
- Owens Lake Dust Mitigation Program Phase 7a – Lone Pine, CA
- Pacoima Bikeway Feasibility Study – Pacoima, CA
- Palmdale Transit Oriented District Plan – Palmdale, CA
- Pitzer College Residential Life Phase II – Claremont, CA



## City of San Clemente

- San Gabriel, Greening the Code – San Gabriel, CA
- Sixth Street Bridge Competition – LA, CA
- Sony Studios, Main Street Schematic Design – Culver City, CA
- Strathmore Multi-Unit Housing at UCLA – Los Angeles, CA
- Television Academy of Arts and Sciences – NoHo, CA
- Thermal Property Master Plan – Indio, CA
- UCLA Teaching and Learning Center for Health Services – LA, CA

### **Matt Romero**

**Mia Lehrer + Associates**

**Project Designer**

#### **Education**

California Polytechnic State University, San Luis Obispo, CA, Bachelor of Landscape Architecture, 2011

#### **Organizations**

American Society of Landscape Architects (ASLA)

#### **Employment History**

2016-Present	Mia Lehrer + Associates, Los Angeles, CA
2012-2016	ValleyCrest Design Group, Santa Monica, CA
2010	Jeffrey Gordon Smith, Los Osos, CA

#### **Professional Experience**

- Matt Romero is a landscape designer with over 4 years of professional experience. He is interested in providing sustainable environments through socially and ecologically sensitive community and urban design. Matt collaboratively works with a team to deliver an intelligent design with new possibilities.
- His resume of work includes a variety of market segments including master planning, parks, residential, mixed use, civic, cemeteries and corporate campuses.
- He is currently working on three mixed use projects in Los Angeles.

#### **Professional Experience**

- Broadway at Fourth Mixed User, Los Angeles, CA
- Dodgers Stadium Improvements, Los Angeles, CA
- Griffith Park Horticultural Center, Los Angeles, CA
- 6th and Alameda, Los Angeles, CA
- 6400 Sunset Mixed User, Los Angeles, CA
- 220 Center St Mixed User, Los Angeles, CA
- Pacoima Wash Bikeway, Los Angeles, CA
- Willow Springs Wetland Restoration, Long Beach, CA
- Wilmington Promenade, Long Beach, CA

#### **Previous Project Experience**

- i|o at Playa Vista, Playa Vista, CA
- Orange County Great Park, Irvine, CA
- Pavilion Park, Irvine, CA
- Beacon Park, Irvine, CA
- Segerstrom Center for the Arts, Costa Mesa, CA
- Irvine Blvd Pedestrian Bridge, Irvine, CA
- Riot Games, Los Angeles, CA
- Sony Studios, Culver City, CA



## **Christopher E. Tatham**

**ETC Institute**

**Chief Executive Officer**

### **Education**

M.B.A., Management, Kansas State University

B.A., Princeton University, Political Science/Economics



### **Professional Experience**

- Mr. Tatham is currently serving as the Chief Executive Officer for ETC Institute. Under his leadership, ETC Institute has become the nation's leading market research firm in the field of community-based research for local governments. The company has extensive research experience with issues that affect local governments including: parks and recreation, transportation, planning and zoning, public safety, and more.
- Mr. Tatham is also considered to be one of the nation's leading authorities on the development of qualitative and quantitative research for state and local governments. In 1999, Mr. Tatham designed ETC Institute's national benchmarking database. He developed the database and supporting analytical tools to give local governments the ability to objectively assess community needs, service delivery, and priorities against regional and national norms. Today, the database is used by leaders in hundreds of communities to assess issues for parks and recreation systems, libraries, public safety providers, utilities, planning organizations, transportation agencies, military installations, and many others.
- Mr. Tatham has served as political advisor and conducted survey research that led to voter approval of projects of sales taxes and bond issues valued at more than \$4 billion during the past ten years. He received an award from the Midwest Region of NRPA for his efforts to help local communities secure funding for parks and recreation system improvements.
- During the past 20 years, he has designed and managed nearly 2,000 community surveys in more than 700 communities, including many of the nation's largest communities

### **Similar Project Experience**

- |                   |                       |
|-------------------|-----------------------|
| • Anchorage, AK   | Las Vegas, NV         |
| • Atlanta, GA     | Miami-Dade County, FL |
| • Austin, TX      | Nashville, TN         |
| • Cleveland, OH   | New York, NY          |
| • Charlotte, NC   | Oklahoma City, OK     |
| • Columbus, OH    | Phoenix, AZ           |
| • Dallas, TX      | Providence, RI        |
| • Denver, CO      | Riverside County, CA  |
| • Des Moines, IA  | San Antonio, TX       |
| • Durham, NC      | San Diego, CA         |
| • Fort Worth, TX  | San Francisco         |
| • Honolulu, HI    | San Jose, CA          |
| • Houston, TX     | Seattle, WA           |
| • Kansas City, MO |                       |



## Section I - Conflict of Interest Statement

PROS Consulting does not have any involvement with the plan/development t projects in the City of San Clemente, nor does any sub-consultants, within the last year.

## Section J - Signature

The proposal and cost estimate are good for ninety (90) days.

Signed: Leon Younger  
By: Leon Younger  
Position: President

## Section K - Reference List

### City of Carlsbad Parks & Recreation Needs Assessment & Comprehensive Action Plan (2013) & Park Master Plans (2014)

CARLSBAD, CALIFORNIA

PROJECT REFERENCE: Mr. Chris Hazeltine, Parks and Recreation Director; 799 Pine Ave., Suite 200; Carlsbad, CA 92008; 760.434.2826; [chris.hazeltine@carlsbadca.gov](mailto:chris.hazeltine@carlsbadca.gov)

### Riverside County, CA Park and Open Space District Strategic Plan (2011)

RIVERSIDE COUNTY, CALIFORNIA

PROJECT REFERENCE: Mr. Scott Bangle; General Manager; Riverside County Park & Open Space District, 4600 Crestmore Rd.; Riverside, CA 92509; 951.955.4310; [sbangle@rivcoparks.org](mailto:sbangle@rivcoparks.org)

### City of Malibu, CA Parks and Recreation Master Plan (2013)

MALIBU, CALIFORNIA

PROJECT REFERENCE: Mr. Bob Stallings, Parks and Recreation Director; 23825 Stuart Ranch Road; Malibu, CA 90265; 310.456.2489; [bstallings@malibucity.org](mailto:bstallings@malibucity.org)

### City of Los Angeles Department of Recreation and Parks Community Needs Assessment and Gap Analysis (2009)

LOS ANGELES, CALIFORNIA

PROJECT REFERENCE: Mr. Mike Shull, Department of Recreation and Parks, Superintendent of Planning and Development, Project Manager; 221 N. Figueroa Street, Suite 1550; Los Angeles, CA 90012; 213.928.9191; [Michael.a.shull@lacity.org](mailto:Michael.a.shull@lacity.org)

### City of Lodi Parks, Recreation, and Cultural Services Strategic Plan (2015)

LODI, CALIFORNIA

PROJECT REFERENCE: Mr. Jeff Hood, Director of Parks, Recreation, and Cultural Services; 125 N. Stockton Street, Lodi, CA 95240; (209) 333-6742; [jhood@lodi.gov](mailto:jhood@lodi.gov)

### Temple City Parks and Open Space Master Plan (2013/2014)

TEMPLE CITY, CALIFORNIA

PROJECT REFERENCE: Ms. Cathy Burroughs, Director, 10144 Bogue Street, Temple City, CA 91780; (626) 285-2171, [cburroughs@templecity.us](mailto:cburroughs@templecity.us)

## Section L - Cost Summary

Per the Request for Proposal directions, this section is included under separate sealed and labeled envelope.

## **Section M - Statements of Compliance and Signed Addendum**

### **Statement of Compliance**

PROS Consulting is in strict compliance with the Request for Proposal and Draft Agreement, and no exceptions to either are proposed.

### **Fair Hiring Practices**

PROS Consulting agrees that in carrying out its responsibilities under this agreement, and in particular with regard to the employment of persons and sub-consultants working on the project, it will not discriminate on the basis of race, color, creed, national origin, religion, sex, age, or handicap. In the event of the work performed by consultant hereafter is sub-contracted to another person or firm (with approval of the City as required herein), sub-contract shall contain a similar provision.

### **Record Retention**

PROS Consulting agrees to retain records for inspection by the City and State or their duly authorized representatives for at least three years after the final payment.

### **Compliance with the Law**

PROS Consulting will comply with all Federal, State and Local laws and ordinances applicable to the work performed. This includes compliance with prevailing wage rates and their payments in accordance with California Labor Code Section 1775.

### **Insurance Coverage**

Prior to the commencement of any project activities, PROS Consulting will secure worker's compensation insurance, so as to be in compliance with State statutes, as well as comprehensive general liability insurance, including auto and contractual liability coverage, in amount of not less than \$1 million. Endorsement forms will be required from the PROS Consulting's insurer, naming the City of San Clemente as additional insured.





**pros**   
consulting  
INC



## Proposal Sheet

The following fee breakdown is based on the project approach described in the **Work Plan** for the *Beaches, Parks, and Recreation Master Plan 2016 with Key Strategies for Implementation*. The PROS Team has based this fee on our current understanding of the City's goal for the project. We would appreciate the opportunity to meet and discuss the project approach and fees to ensure they are consistent with the expectations of the City of San Clemente.

This fee is a not-to-exceed amount and includes all costs, both direct and indirect, including any reimbursable expenses.

<b>Task 1 - Project Kick-off and Outcome Expectations</b>	
A. Project Initiation Meeting & Orientation	\$ 2,320
B. SWOT Analysis	\$ 1,940
C. Site Tour	\$ 3,120
<b>Subtotal Dollars</b>	<b>\$ 7,380</b>
<b>Task 2 - Community Trends and Internal Organizational Assessment</b>	
A. Demographics and Trends Analysis	\$ 2,400
B. Organizational Structure Review	\$ 4,820
C. Develop Service Classification	\$ 4,500
<b>Subtotal Dollars</b>	<b>\$ 11,720</b>
<b>Task 3 - Community Needs Assessment</b>	
A. Key Leader and Stakeholder Interviews	\$ 5,800
B. Open Public Forums	\$ 5,440
C. Community Needs Assessment Statistically-Valid Survey	\$ 12,620
D. Online Survey	\$ 2,000
E. Crowd Sourcing Public Website	\$ 10,000
<b>Subtotal Dollars</b>	<b>\$ 35,860</b>
<b>Task 4 - Facility and Program Assessment</b>	
A. Assessment of Existing Facilities, Trails, Beaches & Golf Course	\$ 8,000
B. Recreation Program Assessment	\$ 5,760
C. Level of Service Standards	\$ 3,160
D. Service Area Equity Mapping	\$ 4,800
<b>Subtotal Dollars</b>	<b>\$ 21,720</b>
<b>Task 5 - Prioritized Facility/Aminity and Program Priority Rankings</b>	
A. Demands and Unmet Needs Analysis	\$ 7,080
<b>Subtotal Dollars</b>	<b>\$ 7,080</b>
<b>Task 6 - Financial Implementation &amp; CIP</b>	
A. Financial Implementation	\$ 6,280
B. Prioritized Capital Improvement Plan	\$ 3,640
<b>Subtotal Dollars</b>	<b>\$ 9,920</b>
<b>Task 7 - Draft and Final Master Plan</b>	
A. Visioning Session and Goal/Objective Development	\$ 9,220
B. Preparation of Draft Master Plan Document	\$ 7,780
C. Community and Elected Official Briefings and Presentations	\$ 7,760
D. Final Beaches, Parks and Recreation Master Plan Document	\$ 4,640
<b>Subtotal Dollars</b>	<b>\$ 29,400</b>
<b>TOTAL DOLLARS</b>	<b>\$ 123,080</b>