

Livermore Area Recreation and Park District

Staff Report

TO: Chair Furst and Board of Directors

FROM: David Weisgerber, Community Outreach Supervisor

PREPARED BY: Linda VanBuskirk, Executive Assistant to the General Manager

DATE: March 27, 2024

SUBJECT: STRATEGIC PLAN

RECOMMENDATION: That the Board of Directors review the draft Strategic Plan and consider approval of the final version.

BACKGROUND: At its February 28, 2024 Board meeting, the Board discussed the Strategic Plan generally and agreed to send in any additional critiques, questions, clarifications, or suggested changes to Staff. After gathering the edits, a redlined and clean version will now be presented to the Board for its consideration.

Attachments: Draft Strategic Plan – redlined version with changes
Draft Strategic Plan – clean version



2023 STRATEGIC PLAN

LIVERMORE AREA RECREATION AND PARK DISTRICT
Prepared by: Rauch Communication Consultants Inc.



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Board of Directors

James E. Boswell, Chair

David Furst, Vice Chair

Jan Palajac

Philip Pierpont

Maryalice Summers Faltings

District Management Staff

Mathew Fuzie, General Manager

Fred Haldeman, Parks & Facilities Manager, and Building Maintenance

Jeff Schneider, Business Services Manager

Jill Kirk, Community Services Manager

Michelle Kleman, Human Resources Officer

David Weisgerber, Community Outreach Supervisor

Linda Van Buskirk, Executive Assistant to the General Manager

Consultant

Martin Rauch, Managing Consultant

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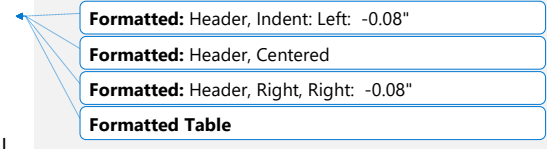
Our Commitment to the Communities We Serve

This Strategic Plan (Plan) is the culmination of a review of all aspects of the District. It includes an evaluation of current and forecast challenges, ~~and~~ opportunities, and potential responses.

The Plan provides long-range policy direction to guide the District over the next three years. A detailed work plan was developed to implement this policy guidance. The Plan is designed to be dynamic and be updated to meet evolving challenges, opportunities, and community needs and expectations.

The strategic planning process and the District's other activities demonstrate our continued commitment to providing excellent and innovative recreation and park services to our community.

The Board of Directors of Livermore Area Recreation and Park District



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Introduction

Planning is strategic when it helps move an organization forward from its current situation to its desired future.

Purpose of the Plan

This three-year Strategic Plan is Livermore Area Recreation and Park District's (District's) highest-level planning document and represents the Board's and Staff's direction for the future. The Plan identifies the District's mission, vision, and core values while providing a set of goals and objectives that serve as a framework for decision-making.

The Plan is also a practical working tool that provides clear direction to the Staff regarding the Board's goals and objectives. It includes a work plan developed by the Staff to meet those goals and objectives. The Board and Staff will regularly refer to it as a guide to the District's actions during the period covered.

Plan Development

Background Research. The consultants began by holding discussions with the General Manager.

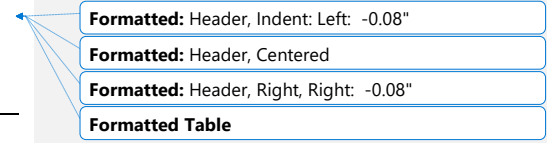
Confidential Interviews. This was followed by a series of confidential interviews by the consultant. The goal was for the interviewees to candidly express their interests and perspectives on the District and its priorities. The interviewees included the Board of Directors.

Strategic Planning Workshop. The interviewees also participated in a workshop. At the workshop, the group reviewed the results of the interviews, undertook [a number of several](#) exercises to examine the current state of the District, identified issues and opportunities expected to confront the District in the future, and discussed priorities.

Staff and Board Work. The consultant, General Manager and Core Team developed a draft strategic plan based on the interviews, workshop, and other information.

Second Strategic Planning Workshop. The draft was distributed to the Board and Core Team. At a second workshop, the participants reviewed, discussed, and refined the draft plan, including mission, vision, and values, and provided direction for additional changes.

Staff Work Plan. The management team and consultant developed a staff work plan designed to meet the mission of the District and strategic goals and objectives.



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District Overview

We are an independent local government agency focused on providing a wide range of recreational and park programs and facilities for the 97,000 people of our service area.

An Independent Local Government Formed by a Vote of the Public in 1947

Livermore Area Recreation and Park District was created in 1947 by a vote of the public. The District is governed by an elected, five-person Board of Directors.

Serving Most of Alameda County to the East and South of Livermore.

The District provides recreation and park services for the 243.5-square-mile area formed by Livermore and bounded by Contra Costa County to the north, San Joaquin County to the east, Santa Clara County to the south, and the cities of Pleasanton and Dublin to the west.

Providing Fun, Educational, and Sporting Facilities and Programs.

Below is a brief sample of the many programs offered by Livermore Area Recreation and Park District

Adult & 50+	Adult Sports	Aquatics
Camps	Open Space	Preschool/ Early Childhood
Volunteers	Youth Sports	Youth & Teen Classes

64 Parks and Facilities to Meet Every Need

The District maintains a rich set of parks, including community and neighborhood parks, sports fields, open space parks, trails, dog parks, and areas for hikers, bikers, and equestrians.

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Strategic Framework

Livermore Area Recreation and Park District built the Strategic Plan from a series of logical and integrated components, described below.

Mission. The mission statement explains why the organization exists. It articulates the organization's essential work in a brief sentence or two.

Vision. The vision articulates what the organization will become at a given time in the future. It is the strategic target that, when achieved, fulfills the organization's mission. As such, it is at the heart of the strategic planning process.

Values. Values provide guidance when an organization is faced with challenging decisions that require trade-offs, help govern attitudes and behaviors, and generally remain constant over time. The Board sets values.

Priorities (Areas of Emphasis). [The core priority of this plan is to identify the District's long-term needs, the cost to meet those needs and then plan to obtain the needed funding.](#)

Goals. Goals describe broad, primary areas of management, operations, and planning that must be addressed to accomplish the mission. Goals are not connected to timelines.

Objectives. Objectives are specific directions established by the Board, which expand upon and refine the goals. There may be multiple objectives for each goal. Objectives are related to goals but more specific, measurable, attainable, and have a time frame.

Implementation Plan. The Implementation Plan contains actions required to accomplish the mission, goals, and objectives. The actions in the plan are assigned to members of the Core Team and have timelines. There may be multiple tasks for each objective.

Monitoring/Oversight. Actions developed will be taken by the Board, Core Team, and Staff to ensure that the plan is implemented and updated over time.



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Mission, Vision, and Values

~~Updated Draft~~ Mission

The Board updated the mission statement during the strategic planning process.

The mission of Livermore Area Recreation and Park District is to provide the people of the Livermore Area Recreation and Park District's ~~s~~Service ~~a~~Area with outstanding recreation programs and a system of parks, trails, and facilities that enhance the quality of life.

Vision

The Board updated the vision statement during the strategic planning process.

~~Five~~ **Three** years from now, Livermore Area Recreation and Park District will be:

Fully funded to meet the community's long-term needs.

Fully staffed with excellent, well-trained people who ~~understand~~ understand their roles and are supported in developing their careers.

Recognized for its excellence by users of LARPD facilities, and services, the wider community, and within our industry and as an independent special district.

Viewed as a leader and collaborative partner by local governments, non-profits, and the business community.

Known for its high-quality, innovative programs and excellent facilities that serve a diverse community with varied and evolving needs.

User Friendly. The District utilizes modern technology and effective and flexible administration that makes it easy for customers to engage with the District and results in efficient service.

Effectively meeting changing community needs and varying circumstances through proactive and flexible planning.

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Values

~~The Board updated a new values statement during the strategic planning process.~~
~~NOTE: THIS IS UPDATED TEXT REVIEWED FOR REVIEW BY THE BOARD~~

In our actions and decisions, we prioritize:

Integrity: ~~Serving the public is the reason we exist. Therefore, The District exists to serve the public. it is critical that we have i~~ Integrity is critical to guide our actions and decisions with unwavering honesty, transparency, and ethical behavior.

Diversity: ~~We value d~~ Diversity ~~is a cherished value in the District.~~ We celebrate and respect the unique perspectives, backgrounds, and abilities of our community ~~members,~~ fostering an inclusive environment that promotes collaboration, equity, and unity. The District will continue to consider programs and services that support all the citizens in the Livermore Area Recreation and Park District's service area.

Quality: Our services exceed our constituents' expectations. When people talk about the programs at LARPD, they are delighted. ~~Our customer service is impeccable in every way, from the front desk to our open space.~~

Adaptability: We embrace change ~~and respond to new needs and~~ We address challenges with a focus on continuous improvement. ~~Flexibility~~ Adaptability is essential to address the evolving needs of our service area. ~~This includes including~~ being open to new ideas, approaches, and technologies to enhance the District's reach and impact.

Collaboration~~ve~~: We work with our community partners to enrich the lives of the people of the Livermore Area Recreation and Park District's service area. We establish partnerships with various stakeholders, including community members, businesses, government agencies, and other relevant organizations. Working together, we provide vital services, expertise, and enrichment to the community.

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Priorities (Areas of Emphasis)

~~While there are a number of important goals, objectives, and work items identified in this plan, the core priority is described below.~~

LARPD is a large and well-run Independent Special District. It maintains extensive and varied facilities and wide-ranging programs that are very popular. Most programs are, in fact, perpetually over-subscribed, and there is more demand than can be met.

The Board and staff are experienced and seek to expand, update and further improve the recreation and park programs and facilities. The key impediment is funding. While the District's finances are currently strong, funding is inadequate to meet long-term maintenance, upgrade, and replacement needs. ~~What's more, f~~Funding is also insufficient to develop new parks and facilities to meet the growing and changing needs of the community.

The core priority of this plan is to identify the District's long-term needs, the cost to meet those needs and then plan to obtain the needed funding.

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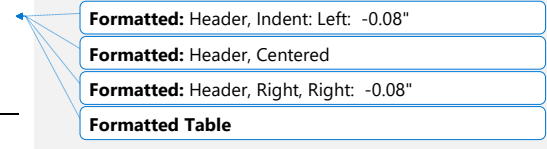
Goals, Objectives, and Implementation Plan

The following pages contain goals and objectives for the next three years. Staff developed a work plan to fulfill these Board-level goals and objectives.

Key Areas of Change. This strategic **business** plan focuses only on critical areas where there is a change or a desire for additional clarity of direction. Numerous existing and ongoing initiatives, programs, and actions are not incorporated into this [plan](#).

The goals and objectives are presented on the following pages. They, along with the mission, vision, and values, represent the core strategic direction provided in this plan.

Note on Timing. Work plan elements marked ‘annually’ or ‘ongoing’ will be reported at least once each year in January when the General Manager provides a report on the progress of the strategic business plan.



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Goal 1. FACILITIES: High-quality, well-planned facilities meet community needs

Strategic Challenge. The District owns and/or maintains over 64 properties and facilities comprising an excellent system that serves the community well. However, there are numerous facility-related challenges. Many are aging, and others are no longer optimal to meet current and future needs. Some require an upgrade or replacement to meet ADA and other requirements. In addition, new facilities will be needed to meet the growing and changing needs of our community, including more capacity. In addition, some parts of the service area are underserved and require new parks and facilities. Substantial additional revenue is needed to meet all these needs. Limited open space provides another challenge. Properties need to remain relevant. Facilities may need to be repurposed to meet future needs. Where properties are not updated, there may be outside pressure to convert them to other purposes.

Strategic Response. The Board seeks to understand all needed and desired facilities and prioritize a path forward. There will be a need to quantify what it will take to achieve those priorities over the long term so that funding and support can be addressed.

Therefore, it is critical to have long-term facility plans, as well as agreed-upon standards and priorities for facilities maintenance, upgrades, replacements, and new construction.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 1.1 Long-term property and facility maintenance, upgrades, replacement, and new construction needs are identified and planned (including financing).**
- OBJECTIVE 1.2 Properties and facilities are attractive, safe, and meet identified and approved standards and needs.**

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Goal 2. PROGRAMS: Diverse programs meet customer needs

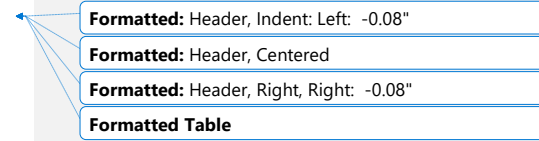
Strategic Challenge. District programs are meeting the varied needs of a diverse population. These wide-ranging and creative programs are one reason that the District continues to be a leader and innovator in recreation and parks. As a result, the greatest challenge related to programs is meeting the demand ~~that when it~~ exceeds District capacity. The most important shortfalls ~~being are~~ limited staff and ~~limited~~ facilities. The cost of a larger staff to meet increased demand may require additional revenue. There is a competing need for substantial additional revenue to meet facility maintenance needs and the cost of new facilities.

Strategic Response. The District staff is creative and designs many popular and beneficial programs. The key limiting factors with programs are staffing to carry them out and facilities to house them. The Board seeks to consciously prioritize what programs to pursue over time and the needed staffing, facilities, costs, etc., to meet those desired programs. This will require that all the resource needs be aligned.

Therefore, the District will develop a long-term yet flexible plan of programs and quantify the costs, staffing, and facilities to support it to meet the evolving and growing demand for park and recreation services.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 2.1** Clearly identified program needs for the future are in place, including plans for funding and implementation.
- OBJECTIVE 2.2** Wide-ranging programming meets the diverse needs of the community.
- OBJECTIVE 2.3** The District tracks evolving trends, needs, and demographics and creatively evolves its programs and services over time.
- OBJECTIVE 2.4** The District is represented in parks and recreation organizations for the purposes of networking and leading in the industry.



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Goal 3. A motivated, high-performing, well-supported staff

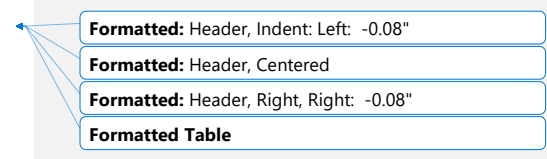
Strategic Challenge. The staff is lean, experienced, motivated by the District’s mission, and performing well. However, there are challenges in hiring and retaining staff in the current highly competitive post-COVID environment. The lean staffing increases the importance of succession planning and results in a decreased capacity to overcome the loss of staff, meet unexpected challenges, etc. Also, as a large District, there are challenges with staff development and providing opportunities for advancement.

Strategic Response. As a service organization, the Board recognizes that the quality of the district’s performance is dependent on an excellent staff. The Board also recognizes that staffing and administration are the sole purview of the General Manager. In this document, the Board, therefore, focuses on policy-level objectives needed to ensure that there are succession, knowledge transfer, and other appropriate policies in place.

Therefore, the Board will continue to support the manager with the appropriate resources to recruit, develop, and retain excellent staff and ensure that appropriate policies are in place.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 3.1 The District is at all times prepared to maintain the staffing needed to effectively carry out all planned District services.**
- OBJECTIVE 3.2 A complete and up-to-date set of operational policies helps guide staff actions.**
- OBJECTIVE 3.3 Critical knowledge is identified, compiled, and available without dependence on individuals.**
- OBJECTIVE 3.4 Emergency management systems and training are in place to mitigate unplanned events.**



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Goal 4. FINANCE: Funding sources meet all identified long-term needs

Strategic Challenge. The District’s finances are well managed, with timely, understandable, and useful reporting. The District ~~does an excellent job of offering offers~~ programs at fair market value and earns substantial revenue through user fees (about 50% of the budget). However, development in the area has slowed considerably, cutting developer fees, and other revenue sources aren’t growing fast enough to meet long-term funding needs. As a result, there is a need for additional funding to cover the costs of long-term maintenance, upgrades, and replacements of the district’s extensive properties and facilities. Funding is also needed to pay for future facilities and staff for expanded programs.

Strategic Response. The District will expand its planning ~~in order to to~~ clearly identify its long-term staff, facility, and program needs and the funding needed to pay for each of them over time. It will also identify and obtain new and reliable sources of future funding to meet these needs.

Therefore, we will complete the planning needed to identify long-term revenue needs and identify the sources of revenue to meet those needs.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 4.1 Long-range financial models aid in long-range planning and decision-making.

OBJECTIVE 4.2 Investment strategies are periodically assessed and updated to maximize returns while maintaining safety and liquidity.

OBJECTIVE 4.3 When considering changes to long-term financial management, the Board will receive alternatives to consider and, when appropriate, input on financial best practices from outside experts.

OBJECTIVE 4.4 Internal financial reporting is periodically assessed and updated to provide timely and actionable information to management.

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Goal 5. ENGAGEMENT: The public understands and supports LARPD as a Special District.

Strategic Challenge. Those who use District services ~~appear to~~ generally view the District positively. However, it is believed that only a small percentage understand that LARPD is an independent special district. Helping the public more fully understand the District may be necessary ~~in order to~~ serve the most people and develop public support. Also, increased collaboration with other local governments, non-profits, and business is critical ~~in order to~~ continue to serve the public effectively.

Strategic Response. The Board seeks to increase public understanding and support and expand collaboration with other local governments, non-profits, and businesses.

Therefore, the District will increase its efforts to communicate effectively with the public and its partners and continue to engage widely with other local governments, businesses, and non-profits.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 5.1 The Livermore Area Recreation and Park District is user-friendly.

~~Note to be reflected in the work plan: u~~User-friendly includes: the District is transparent; the public understands how to access, sign up for, and use our facilities and programs; the public understands how to provide input on services and facilities; citizens remain the top line in the LARPD Organizational Structure.

OBJECTIVE 5.2 The District's high profile as a California Special District is supported with public outreach.

OBJECTIVE 5.3 The Livermore Area Recreation and Park District is viewed as the Park and Recreation expert in the community. Livermore Area Recreation and Park District successfully voices the community's park and recreation needs as it engages with all partner organizations.

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Goal 6. GOVERNANCE: A high-performing board working effectively with its general manager.

Strategic Challenge. The District has a dedicated, well-informed, and committed board with a variety of skills. However, their experiences in how boards function and expectations about the roles and relationships of the Board and General Manager vary. The questions raised by the Board include: what is the Board's role in interacting with staff? What are the managers' authorities? What are Directors' proper role in the community? How can the Board optimize the quality and clarity of its decision-making and more.

Strategic Response. It is of core strategic importance for the Board to come to a clear and shared understanding of its role, the role of the General Manager and staff, and how to maintain a productive relationship that respects these roles.

Therefore, the Board will work closely with the General Manager to develop a clear and detailed understanding of the optimal roles for the Board and General Manager and how to maintain an effective relationship and memorialize it in the form of a clear, new written policy.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 6.1 The Board's role, the General Manager's role, and best practices for maintaining a respectful and productive relationship are documented and clearly understood by the Board and General Manager.

~~Action 6.1.1: Hold a workshop to clarify Board/mgr. roles and relationships (Mar, June 2023)~~

OBJECTIVE 6.2 A complete and up-to-date policy is always in place documenting all aspects of board manager roles and relationships and is clearly understood by the Board and General Manager

OBJECTIVE 6.3 A complete and up-to-date set of Board policies is always in place and is clearly understood by the Board and General Manager.

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Monitoring and Oversight

Below are the actions that will be taken by the Board, Core Team, and Staff to ensure that the plan is monitored, implemented, and updated over time.

Communicate and Lead

The Core Team will meet to review the plan so that everyone understands the overall plan, the parts they are responsible for, and the timing.

Publish the Mission, Vision, Values, Goals, and Objectives on posters, and handouts, and display them where visible.

Incorporate the Mission, Vision, Values, Goals and Objectives into the Employee Handbook and orientation and training materials for new employees and Board and Committee members.

Clarify Roles and Expectations

The accomplishment of strategic priorities will be built into the performance evaluation of the General Manager and Core Team members.

Cascade the Plan

Strategic objectives and initiatives will cascade from the District-wide level to department to individuals. Each will identify ways to contribute to the strategic initiatives, objectives, and goals by answering the question: how do I and my department/unit support the Goals and Objectives?

Allocate Resources to Meet Strategic Objectives

The budget will be reviewed each year by the Core Team and Board to ensure that it reflects the strategic goals and objectives.

Before a decision to hire is made, the General Manager will ensure that it appropriately reflects strategic goals and objectives.

Board Oversight and Monitoring

Staff will reference Strategic Plan items on Board meeting agendas as appropriate.

The Board and Board committees will consider the Strategic Plan when deliberating.

Staff will provide a comprehensive report to the Board on the progress of the strategic ~~business~~ plan annually early in the budget development process.

Update the Plan

An interim review and update of goals and objectives will be undertaken by the Board every year or two.

Staff will update the Implementation Plan as appropriate over time.

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Appendix 1: Expectations

~~Early in the first workshop, the participants were asked to share their expectations for the strategic planning process. Below is a summary of their responses.~~

~~NOTE: AT THE FINAL BOARD REVIEW WE WILL CHECK TO SEE IF WE MET THE ORIGINAL EXPECTATIONS AND THEN THIS WILL BE DELETED~~

~~Board and staff align on vision, values, and goals.~~

~~Evaluate challenges and different directions, and develop board and staff alignment on goals, objectives, vision, and values for the District. Develop a plan that provides a “trail map” that provides clear directions to guide us from where we are now and where we would like to be in the coming years.~~

~~Clear definitions of board and manager roles and responsibilities.~~

~~Clear definitions of Roles and Responsibilities of Board and Staff, which are communicated so everyone knows what is expected of the roles. Written clarification on relationship between a) Board and Staff; b) Chair and Board, and c) Board and GM, so we understand authority and how projects are initiated.~~

~~Ensure adequate long-term resources.~~

~~The District needs additional revenue to meet the long term needs of the community, clear up the maintenance backlog, and fund future programs and facilities. We need a plan for obtaining that revenue.~~

~~Position LARPD to be the industry leader in parks and recreation.~~

~~Position LARPD to be the industry leader in Parks and Recreation.~~

~~Raw Data: Note that the raw data is a summary of comments on expectations from Workshop 1. It is just for reference to check on the content above and in the event it stimulates some ideas. It will be deleted later.~~

~~ON-BOARD AND STAFF ALIGN ON VISION, VALUES, AND GOALS~~

~~Board and staff — align on medium term (5-10) goals, objectives and values for the district~~

~~Define the agreed upon direction of the district so we can plan longer range for that. Best organizational structure~~

~~A “trail map” so to speak of where we are at with District Goals — and where we’d like to go this year and beyond x-2~~

~~Unity — board and staff as a whole~~

~~Preliminary strategic Plan — discuss different directions we could go, pros and cons of each; seek agreement on which one(s) we want to pursue~~

~~Develop clear expectations for the organizations; agree!~~

~~Establish a common vision for the board and the staff of LARPD; develop a better understanding of core values; create an actionable set of goals and objectives;~~

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Clear direction (and hopefully consensus) for future goals and news for the district in both the short and long term.

Learning what the Board's vision is and where do they see the district's future

Also team/BOD unity

Recognize change and figure out how to evolve, pros & cons of various directions, alternatives)

ON CLEAR DEFINITIONS OF ROLES AND RESPONSIBILITIES

Everyone understands their own role and how they add value

That we will have a clear view of the District's strategic direction that helps me to understand how my team and I will contribute. Perhaps highlighting potential resources needs for us, but at least knowing what is expected of us so we can adequately plan.

To learn more specific information to help me better support Board and Staff and Public

Clearly define role of board, role of staff, role of GM, and how they interact

clarify roles and responsibilities; appreciate everyone's roles/contributions.

Return formality to the governance process of work

A more fully understood (written) relationship between: (1) Board and Staff; (2) Chair and Board (3) Board and GM (related to power, authority, and initiation of projects etc.)

ENSURING ADEQUATE LONG TERM RESOURCES

Perhaps highlighting potential resource needs for us, but at least knowing what is expected of us so we can adequately plan.

Learning what the priorities are for resources as we move forward.

A specific plan to successfully deal with our unfunded liabilities.

Help us identify revenue sources so we can get ourselves back to our pre-pandemic state.

Pathway to strong revenue

POSITION LARPD TO BE THE INDUSTRY LEADER IN PARKS AND RECREATION

Position LARPD to be the industry leader in Parks and Recreation.

Create a paradigm shift using technology and how services and parks are delivered.

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Single-Page View of the Core Elements of the Strategic Plan

MISSION	To provide the people of the Livermore Area Recreation and Park District's service area with outstanding recreation programs and a system of parks, trails, recreation areas, and facilities that promote the enjoyment, lifelong learning, and healthy, active lifestyles <u>enhance the quality of life.</u>					
VISION	Fully Funded Viewed as a Leader & Collaborative Partner	Fully Staffed Known for High-Quality, Innovative Programs and Excellent Facilities	Recognized for its Excellence	User Friendly Effectively Meeting Changing Community Needs		
VALUES	Integrity	Diversity	Quality	Adaptability	Collaboration ve	
GOALS	1. High-quality, well-planned facilities meet community needs	2. Diverse programs meet customer needs	3. A motivated, high-performing, well-supported staff	4. Funding sources meet all identified long-term needs	5. The public understands and supports LARPD as a special district	6. A high-performing board working effectively with its manager

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BOARD OF DIRECTORS
James E. Boswell, Chair
David Furst, Vice Chair
Jan Palajac
Philip Pierpont
Maryalice Summers Faltings

Prepared by:



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2023 STRATEGIC PLAN

LIVERMORE AREA RECREATION AND PARK DISTRICT

Prepared by: Rauch Communication Consultants Inc.



Board of Directors

James E. Boswell, Chair

David Furst, Vice Chair

Jan Palajac

Philip Pierpont

Maryalice Summers Faltings

District Management Staff

Mathew Fuzie, General Manager

Fred Haldeman, Parks & Facilities Manager, and Building Maintenance

Jeff Schneider, Business Services Manager

Jill Kirk, Community Services Manager

Michelle Kleman, Human Resources Officer

David Weisgerber, Community Outreach Supervisor

Linda Van Buskirk, Executive Assistant to the General Manager

Consultant

Martin Rauch, Managing Consultant

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Our Commitment to the Communities We Serve

This Strategic Plan (Plan) is the culmination of a review of all aspects of the District. It includes an evaluation of current and forecast challenges, opportunities, and potential responses.

The Plan provides long-range policy direction to guide the District over the next three years. A detailed work plan was developed to implement this policy guidance. The Plan is designed to be dynamic and be updated to meet evolving challenges, opportunities, and community needs and expectations.

The strategic planning process and the District's other activities demonstrate our continued commitment to providing excellent and innovative recreation and park services to our community.

The Board of Directors of Livermore Area Recreation and Park District

Introduction

Planning is strategic when it helps move an organization forward from its current situation to its desired future.

Purpose of the Plan

This three-year Strategic Plan is Livermore Area Recreation and Park District's (District's) highest-level planning document and represents the Board's and Staff's direction for the future. The Plan identifies the District's mission, vision, and core values while providing a set of goals and objectives that serve as a framework for decision-making.

The Plan is also a practical working tool that provides clear direction to the Staff regarding the Board's goals and objectives. It includes a work plan developed by the Staff to meet those goals and objectives. The Board and Staff will regularly refer to it as a guide to the District's actions during the period covered.

Plan Development

Background Research. The consultants began by holding discussions with the General Manager.

Confidential Interviews. This was followed by a series of confidential interviews by the consultant. The goal was for the interviewees to candidly express their interests and perspectives on the District and its priorities. The interviewees included the Board of Directors.

Strategic Planning Workshop. The interviewees also participated in a workshop. At the workshop, the group reviewed the results of the interviews, undertook several exercises to examine the current state of the District, identified issues and opportunities expected to confront the District in the future, and discussed priorities.

Staff and Board Work. The consultant, General Manager and Core Team developed a draft strategic plan based on the interviews, workshop, and other information.

Second Strategic Planning Workshop. The draft was distributed to the Board and Core Team. At a second workshop, the participants reviewed, discussed, and refined the draft plan, including mission, vision, and values, and provided direction for additional changes.

Staff Work Plan. The management team and consultant developed a staff work plan designed to meet the mission of the District and strategic goals and objectives.

District Overview

We are an independent local government agency focused on providing a wide range of recreational and park programs and facilities for the 97,000 people of our service area.

An Independent Local Government Formed by a Vote of the Public in 1947

Livermore Area Recreation and Park District was created in 1947 by a vote of the public. The District is governed by an elected, five-person Board of Directors.

Serving Most of Alameda County to the East and South of Livermore.

The District provides recreation and park services for the 243.5-square-mile area formed by Livermore and bounded by Contra Costa County to the north, San Joaquin County to the east, Santa Clara County to the south, and the cities of Pleasanton and Dublin to the west.

Providing Fun, Educational, and Sporting Facilities and Programs.

Below is a brief sample of the many programs offered by Livermore Area Recreation and Park District

Adult & 50+	Adult Sports	Aquatics
Camps	Open Space	Preschool/ Early Childhood
Volunteers	Youth Sports	Youth & Teen Classes

64 Parks and Facilities to Meet Every Need

The District maintains a rich set of parks, including community and neighborhood parks, sports fields, open space parks, trails, dog parks, and areas for hikers, bikers, and equestrians.

Strategic Framework

Livermore Area Recreation and Park District built the Strategic Plan from a series of logical and integrated components, described below.

Mission. The mission statement explains why the organization exists. It articulates the organization's essential work in a brief sentence or two.

Vision. The vision articulates what the organization will become at a given time in the future. It is the strategic target that, when achieved, fulfills the organization's mission. As such, it is at the heart of the strategic planning process.

Values. Values provide guidance when an organization is faced with challenging decisions that require trade-offs, help govern attitudes and behaviors, and generally remain constant over time. The Board sets values.

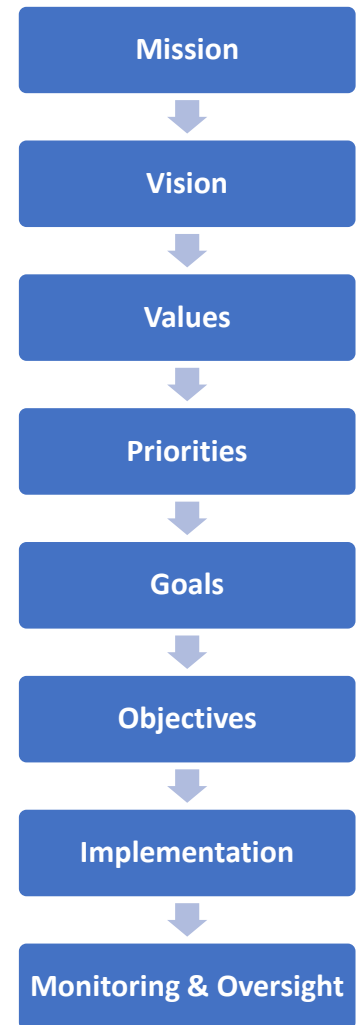
Priorities (Areas of Emphasis). The core priority of this plan is to identify the District's long-term needs, the cost to meet those needs and then plan to obtain the needed funding.

Goals. Goals describe broad, primary areas of management, operations, and planning that must be addressed to accomplish the mission. Goals are not connected to timelines.

Objectives. Objectives are specific directions established by the Board, which expand upon and refine the goals. There may be multiple objectives for each goal. Objectives are related to goals but more specific, measurable, attainable, and have a time frame.

Implementation Plan. The Implementation Plan contains actions required to accomplish the mission, goals, and objectives. The actions in the plan are assigned to members of the Core Team and have timelines. There may be multiple tasks for each objective.

Monitoring/Oversight. Actions developed will be taken by the Board, Core Team, and Staff to ensure that the plan is implemented and updated over time.



Mission, Vision, and Values

Mission

The mission of Livermore Area Recreation and Park District is

to provide the people of the Livermore Area Recreation and Park District's service area with outstanding recreation programs and a system of parks, trails, and facilities that enhance the quality of life.

Vision

Three years from now, Livermore Area Recreation and Park District will be:

Fully funded to meet the community's long-term needs.

Fully staffed with excellent, well-trained people who understand their roles and are supported in developing their careers.

Recognized for its excellence by users of LARPD facilities, and services, the wider community, and within our industry and as an independent special district.

Viewed as a leader and collaborative partner by local governments, non-profits, and the business community.

Known for its high-quality, innovative programs and excellent facilities that serve a diverse community with varied and evolving needs.

User Friendly. The District utilizes modern technology and effective and flexible administration that makes it easy for customers to engage with the District and results in efficient service.

Effectively meeting changing community needs and varying circumstances through proactive and flexible planning.

Values

In our actions and decisions, we prioritize:

Integrity: The District exists to serve the public. Integrity is critical to guide our actions and decisions with unwavering honesty, transparency, and ethical behavior.

Diversity: We value diversity. We celebrate and respect the unique perspectives, backgrounds, and abilities of our community, fostering an inclusive environment that promotes collaboration, equity, and unity. The District will continue to consider programs and services that support all the citizens in the Livermore Area Recreation and Park District's service area.

Quality: Our services exceed our constituents' expectations. When people talk about the programs at LARPD, they are delighted.

Adaptability: We embrace change. We address challenges with a focus on continuous improvement. Adaptability is essential to address the evolving needs of our service area including being open to new ideas, approaches, and technologies to enhance the District's reach and impact.

Collaboration: We work with our community partners to enrich the lives of the people of the Livermore Area Recreation and Park District's service area. We establish partnerships with various stakeholders, including community members, businesses, government agencies, and other relevant organizations. Working together, we provide vital services, expertise, and enrichment to the community.

Priorities (Areas of Emphasis)

LARPD is a large and well-run Independent Special District. It maintains extensive and varied facilities and wide-ranging programs that are very popular. Most programs are, in fact, perpetually over-subscribed, and there is more demand than can be met.

The Board and staff are experienced and seek to expand, update and further improve the recreation and park programs and facilities. The key impediment is funding. While the District's finances are currently strong, funding is inadequate to meet long-term maintenance, upgrade, and replacement needs. Funding is also insufficient to develop new parks and facilities to meet the growing and changing needs of the community.

The core priority of this plan is to identify the District's long-term needs, the cost to meet those needs and then plan to obtain the needed funding.

Goals, Objectives, and Implementation Plan

The following pages contain goals and objectives for the next three years. Staff developed a work plan to fulfill these Board-level goals and objectives.

Key Areas of Change. This strategic plan focuses only on critical areas where there is a change or a desire for additional clarity of direction. Numerous existing and ongoing initiatives, programs, and actions are not incorporated into this plan.

The goals and objectives are presented on the following pages. They, along with the mission, vision, and values, represent the core strategic direction provided in this plan.

Note on Timing. Work plan elements marked ‘annually’ or ‘ongoing’ will be reported at least once each year in January when the General Manager provides a report on the progress of the strategic business plan.

Goal 1. FACILITIES: High-quality, well-planned facilities meet community needs

Strategic Challenge. The District owns and/or maintains over 64 properties and facilities comprising an excellent system that serves the community well. However, there are numerous facility-related challenges. Many are aging, and others are no longer optimal to meet current and future needs. Some require an upgrade or replacement to meet ADA and other requirements. In addition, new facilities will be needed to meet the growing and changing needs of our community, including more capacity. In addition, some parts of the service area are underserved and require new parks and facilities. Substantial additional revenue is needed to meet all these needs. Limited open space provides another challenge. Properties need to remain relevant. Facilities may need to be repurposed to meet future needs. Where properties are not updated, there may be outside pressure to convert them to other purposes.

Strategic Response. The Board seeks to understand all needed and desired facilities and prioritize a path forward. There will be a need to quantify what it will take to achieve those priorities over the long term so that funding and support can be addressed.

Therefore, it is critical to have long-term facility plans, as well as agreed-upon standards and priorities for facilities maintenance, upgrades, replacements, and new construction.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 1.1 Long-term property and facility maintenance, upgrades, replacement, and new construction needs are identified and planned (including financing).**
- OBJECTIVE 1.2 Properties and facilities are attractive, safe, and meet identified and approved standards and needs.**

Goal 2. PROGRAMS: Diverse programs meet customer needs

Strategic Challenge. District programs are meeting the varied needs of a diverse population. These wide-ranging and creative programs are one reason that the District continues to be a leader and innovator in recreation and parks. As a result, the greatest challenge related to programs is meeting the demand when it exceeds District capacity. The most important shortfalls are limited staff and limited facilities. The cost of a larger staff to meet increased demand may require additional revenue. There is a competing need for substantial additional revenue to meet facility maintenance needs and the cost of new facilities.

Strategic Response. The District staff is creative and designs many popular and beneficial programs. The key limiting factors with programs are staffing to carry them out and facilities to house them. The Board seeks to consciously prioritize what programs to pursue over time and the needed staffing, facilities, costs, etc., to meet those desired programs. This will require that all the resource needs be aligned.

Therefore, the District will develop a long-term yet flexible plan of programs and quantify the costs, staffing, and facilities to support it to meet the evolving and growing demand for park and recreation services.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 2.1** Clearly identified program needs for the future are in place, including plans for funding and implementation.
- OBJECTIVE 2.2** Wide-ranging programming meets the diverse needs of the community.
- OBJECTIVE 2.3** The District tracks evolving trends, needs, and demographics and creatively evolves its programs and services over time.
- OBJECTIVE 2.4** The District is represented in parks and recreation organizations for the purposes of networking and leading in the industry.

Goal 3. A motivated, high-performing, well-supported staff

Strategic Challenge. The staff is lean, experienced, motivated by the District’s mission, and performing well. However, there are challenges in hiring and retaining staff in the current highly competitive post-COVID environment. The lean staffing increases the importance of succession planning and results in a decreased capacity to overcome the loss of staff, meet unexpected challenges, etc. Also, as a large District, there are challenges with staff development and providing opportunities for advancement.

Strategic Response. As a service organization, the Board recognizes that the quality of the district’s performance is dependent on an excellent staff. The Board also recognizes that staffing and administration are the sole purview of the General Manager. In this document, the Board, therefore, focuses on policy-level objectives needed to ensure that there are succession, knowledge transfer, and other appropriate policies in place.

Therefore, the Board will continue to support the manager with the appropriate resources to recruit, develop, and retain excellent staff and ensure that appropriate policies are in place.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

- OBJECTIVE 3.1** The District is at all times prepared to maintain the staffing needed to effectively carry out all planned District services.
- OBJECTIVE 3.2** A complete and up-to-date set of operational policies helps guide staff actions.
- OBJECTIVE 3.3** Critical knowledge is identified, compiled, and available without dependence on individuals.
- OBJECTIVE 3.4** Emergency management systems and training are in place to mitigate unplanned events.

Goal 4. FINANCE: Funding sources meet all identified long-term needs

Strategic Challenge. The District’s finances are well managed, with timely, understandable, and useful reporting. The District offers programs at fair market value and earns substantial revenue through user fees (about 50% of the budget). However, development in the area has slowed considerably, cutting developer fees, and other revenue sources aren’t growing fast enough to meet long-term funding needs. As a result, there is a need for additional funding to cover the costs of long-term maintenance, upgrades, and replacements of the district’s extensive properties and facilities. Funding is also needed to pay for future facilities and staff for expanded programs.

Strategic Response. The District will expand its planning to clearly identify its long-term staff, facility, and program needs and the funding needed to pay for each of them over time. It will also identify and obtain new and reliable sources of future funding to meet these needs.

Therefore, we will complete the planning needed to identify long-term revenue needs and identify the sources of revenue to meet those needs.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 4.1 Long-range financial models aid in long-range planning and decision-making.

OBJECTIVE 4.2 Investment strategies are periodically assessed and updated to maximize returns while maintaining safety and liquidity.

OBJECTIVE 4.3 When considering changes to long-term financial management, the Board will receive alternatives to consider and, when appropriate, input on financial best practices from outside experts.

OBJECTIVE 4.4 Internal financial reporting is periodically assessed and updated to provide timely and actionable information to management.

Goal 5. ENGAGEMENT: The public understands and supports LARPD as a Special District.

Strategic Challenge. Those who use District services generally view the District positively. However, it is believed that only a small percentage understand that LARPD is an independent special district. Helping the public more fully understand the District may be necessary to serve the most people and develop public support. Also, increased collaboration with other local governments, non-profits, and business is critical to continue to serve the public effectively.

Strategic Response. The Board seeks to increase public understanding and support and expand collaboration with other local governments, non-profits, and businesses.

Therefore, the District will increase its efforts to communicate effectively with the public and its partners and continue to engage widely with other local governments, businesses, and non-profits.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 5.1 The Livermore Area Recreation and Park District is user-friendly.

User-friendly includes: the District is transparent; the public understands how to access, sign up for, and use our facilities and programs; the public understands how to provide input on services and facilities; citizens remain the top line in the LARPD Organizational Structure.

OBJECTIVE 5.2 The District's high profile as a California Special District is supported with public outreach.

OBJECTIVE 5.3 The Livermore Area Recreation and Park District is viewed as the Park and Recreation expert in the community. Livermore Area Recreation and Park District successfully voices the community's park and recreation needs as it engages with all partner organizations.

Goal 6. GOVERNANCE: A high-performing board working effectively with its general manager.

Strategic Challenge. The District has a dedicated, well-informed, and committed board with a variety of skills. However, their experiences in how boards function and expectations about the roles and relationships of the Board and General Manager vary. The questions raised by the Board include: what is the Board’s role in interacting with staff? What are the managers’ authorities? What are Directors’ proper role in the community? How can the Board optimize the quality and clarity of its decision-making and more.

Strategic Response. It is of core strategic importance for the Board to come to a clear and shared understanding of its role, the role of the General Manager and staff, and how to maintain a productive relationship that respects these roles.

Therefore, the Board will work closely with the General Manager to develop a clear and detailed understanding of the optimal roles for the Board and General Manager and how to maintain an effective relationship and memorialize it in the form of a clear, new written policy.

The objectives and work plan projects below must be consistently carried out to achieve the goal above.

OBJECTIVE 6.1 The Board’s role, the General Manager’s role, and best practices for maintaining a respectful and productive relationship are documented and clearly understood by the Board and General Manager.

OBJECTIVE 6.2 A complete and up-to-date policy is always in place documenting all aspects of board manager roles and relationships and is clearly understood by the Board and General Manager

OBJECTIVE 6.3 A complete and up-to-date set of Board policies is always in place and is clearly understood by the Board and General Manager.

Monitoring and Oversight

Below are the actions that will be taken by the Board, Core Team, and Staff to ensure that the plan is monitored, implemented, and updated over time.

Communicate and Lead

The Core Team will meet to review the plan so that everyone understands the overall plan, the parts they are responsible for, and the timing.

Publish the Mission, Vision, Values, Goals, and Objectives on posters and handouts, and display them where visible.

Incorporate the Mission, Vision, Values, Goals and Objectives into the Employee Handbook and orientation and training materials for new employees and Board and Committee members.

Clarify Roles and Expectations

The accomplishment of strategic priorities will be built into the performance evaluation of the General Manager and Core Team members.

Cascade the Plan

Strategic objectives and initiatives will cascade from the District-wide level to department to individuals. Each will identify ways to contribute to the strategic initiatives, objectives, and goals by answering the question: how do I and my department/unit support the Goals and Objectives?

Allocate Resources to Meet Strategic Objectives

The budget will be reviewed each year by the Core Team and Board to ensure that it reflects the strategic goals and objectives.

Before a decision to hire is made, the General Manager will ensure that it appropriately reflects strategic goals and objectives.

Board Oversight and Monitoring

Staff will reference Strategic Plan items on Board meeting agendas as appropriate.

The Board and Board committees will consider the Strategic Plan when deliberating.

Staff will provide a comprehensive report to the Board on the progress of the strategic plan annually early in the budget development process.

Update the Plan

An interim review and update of goals and objectives will be undertaken by the Board every year or two.

Staff will update the Implementation Plan as appropriate over time.

Single-Page View of the Core Elements of the Strategic Plan

MISSION	To provide the people of the Livermore Area Recreation and Park District’s service area with outstanding recreation programs and a system of parks, trails, and facilities that enhance the quality of life.					
VISION	Fully Funded Viewed as a Leader & Collaborative Partner		Fully Staffed Known for High-Quality, Innovative Programs and Excellent Facilities		Recognized for its Excellence User Friendly Effectively Meeting Changing Community Needs	
VALUES	Integrity		Diversity		Quality	
GOALS	1. High-quality, well-planned facilities meet community needs	2. Diverse programs meet customer needs	3. A motivated, high-performing, well-supported staff	4. Funding sources meet all identified long-term needs	5. The public understands and supports LARPD as a special district	6. A high-performing board working effectively with its manager

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