

## ATTACHMENT C

# Milwaukee County Parks Department Comprehensive Parks System Master Plan Scope of Work

### Project Understanding

The Milwaukee County Department of Parks, Recreation, and Culture (DPRC) is preparing a Milwaukee County Park System Master Plan, and an update and extension to the year 2050 of the Milwaukee County long-range Park and Open Space Plan. The scope of work outlines the work effort and deliverables necessary to prepare for the Milwaukee County Park System Master Plan in accordance with the Commission of Accredited Park and Recreation Agencies (CAPRA) standards. The Park System Master Plan will have a 10-year timeframe.

The foundation of the Consulting Team's approach is a creative and comprehensive public participation process. It is very important to not only 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, 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 the greatest recommendations, and strategies to move the Milwaukee County Department of Parks, Recreation, and Culture (DPRC) parks, trails, open space and recreation services forward for optimum results.

PROS Consulting is serving as the prime consultant responsible for directing all activities of work and leading the overall performance of the project. The PROS Team includes the following sub consultant firms: ETC Institute for the household survey and P3 Development Group who will be responsible for stakeholder, focus groups and public forums as part of the work to be completed.

### Project Scope of Work

#### Task 1 - Project Management, Progress Reporting & Data Review

The kick-off meeting should be attended by key staff members, appropriate DPRC staff members, and PROS Team members to confirm the work plan, project goals, objectives, and expectations that will help guide actions and decisions of the PROS Team. Detailed steps of this task include:

- A. Kick-off Meeting** – A kick-off meeting should be attended by the key DPRC staff and Consulting Team members to confirm project goals, objectives, and expectations that will help guide actions and decisions of the Consulting Team. Detailed steps of this task include:
  - Confirmation – The project goals, objectives, scope, and schedule will be confirmed.
  - Outcome Expectations – Discuss expectations of completed project components
  - Communications – Confirmation on lines of communication, points of contact, level of involvement by DPRC leaders, and staff, as well as other related project management details. Protocols and procedures for scheduling meetings should also be agreed to at this time.
  - Final Work Plan – The Final Work Plan will be prepared and presented with a detailed schedule to complete the project.
  - Staff will provide a updated Status Report on what the Department has accomplished over the last five years as an introduction into the Master Plan
  
- B. Data Collection/ Cataloging** – The PROS Team will collect, log and create electronic copies as appropriate (MS Word/Excel and Adobe Acrobat) of key data and information to facilitate

dissemination and assimilation of information. PROS Consulting will provide their work in narrative format. SEWRPC will incorporate PROS Consulting data into geospatial data for GIS maps.

- C. Progress Status Reports** – The PROS Team will have a monthly progress meeting and a monthly written progress status reports to the DPRC. More importantly, we will be in close and constant contact with your designated project coordinator throughout the performance of the project. PROS will take meeting minutes from update progress meetings and send those out to the staff and project team leaders working on the plan.

## Task 2 - Community Profile

- A. Demographic & Trends Analysis** – The Consulting Team will utilize the SEWRPC long term population 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 obtained from the U.S. Census Bureau. This analysis will provide an understanding of the demographic environment for the following reasons:

- To understand the market areas served by the park and recreation system and distinguish customer groups.
- To determine changes occurring in the County and the region, and assist in making proactive decisions to accommodate those shifts.
- Provide the basis for Equity Mapping and Service Area Analysis

DPRC’s demographic analysis will be based on US 2000 base line Census information, 2016 updated projections, and 5 (2021) and 10 (2026) year projections. The following demographic characteristics will be included:

- Population density
- Age Distribution
- Households
- Gender
- Ethnicity
- Household Income

From the demographic base data, health / wellness, diversity, 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 and National Recreation and Park Association (NRPA) information.

- B. Benchmark Analysis** – A benchmark analysis will compare the DPRC to five (5) other relevant peer agencies. The Consultant Team will work with the DPRC to identify the 15 key metrics to be surveyed and analyzed, as well as the benchmarked communities. Suggested agencies include , Five Rivers Park District in Ohio, Oakland County Parks in Michigan, Chicago Park District, Lake County Forest Preserve in Illinois, and Cleveland Metroparks in Ohio; however, other accredited gold medal and accredited agencies can be benchmarked if desired by the County.

## Task 3 - Operational and Financial Assessment

- A. Operational and Staffing Plan** – The Consulting Team will perform an analysis of the current practices of the DPRC to evaluate its operational situation. This analysis will identify future organization and staffing

needs, improved operational efficiencies, policy development, process improvements, system and technology improvements, and marketing/communication opportunities. This task will include recommendations in a comprehensive manner. This will include data collection, analysis and on-site observations of key organizational functional components in the following areas:

- Inventory of services, programs and operations
- Maintenance and Operating Standards
- Organizational Structure and Staffing
- Customer service
- Staffing levels
- Field equipment/resources
- Existing policy and procedures management
- Performance measures and indicators
- Information systems and technology
- Fiscal management and budgeting
- Marketing and communications
- Identify and expand partnerships/volunteer support for facilities and services
- Review and suggest new rules and regulations related to parks

**B. Functional Organizational Structure Review** – The Consulting Team will evaluate governance and functions in the overall structure with recommendations on how to operate in the most effective functional and efficient manner. The Consulting Team 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 focus will be on whom the services are provided to, for what purpose, for what benefit, and for what cost. The organizational structure will be compared to other best practice agencies as it applies to local government on a regional basis.

**C. Financial Analysis** – The Consulting Team will perform analysis to document the financial situation of the DPRC. The financial analysis will look at the budget, pricing policy, user fees, current and other revenue generating opportunities, grant opportunities, and the revenue forecast over the last 10 years if available. This analysis will identify the financial situation of the DPRC with these primary goals:

- Current and trending sources of revenue
- The impact of deferred maintenance and capital requirements
- Understand the financial dynamics to further advance the understanding of operations gained through the work described above including a five and ten year projection of costs versus revenue
- Review funding and accounting practices with an objective of accurate financial fund tracking and the ability of the DPRC to have more useful financial information for strategic decision-making
- Seek opportunities to improve the financial sustainability of the DPRC including evaluating expenditures and increasing current and new sources of revenue
- A high level cost analysis based on data provided by the County for cost per square foot, cost per natural area, cost per acre, and cost per mile of trail based on PROS national costing data

This review will include comparison of current policies with national standards of best practice agencies. The Consulting Team will recommend policies and adjustments to current policies where enhancements may be needed or gaps are identified. PROS will also evaluate operational changes that will aid the Department to operate more efficiently.

**D. Funding and Revenue Strategies** – Funding strategies will be developed based in part to PROS review and analysis of the parks and facilities as well as the national experience brought by the Consulting Team.

The Consulting Team has identified over 160 funding options that can be applied to the Master Plan based on the community values. The funding strategies to be evaluated for recommendations and how to use these sources include at a minimum:

- Fees and charges options and recommendations
- Endowments/Non-profits opportunities for supporting operational and capital costs
- Sponsorships to support programs, events, and facilities
- Partnerships with public/public partners, public/not-for-profit partners and public/private partnerships
- Dedicated funding sources to support land acquisition and capital improvements
- Development agreements to support park acquisition, open space and park and facility development
- Earned Income options to support operational costs
- Land or facility leases to support operational and capital costs
- Identify grant opportunities and resources to construct parks and facilities identified in the Master Plan including suggested timelines

#### **Task 4 - Community / Stakeholder Input**

The foundation of this project will be based on community and stakeholder input. The DPRC will utilize contacts and relationships to identify stakeholders, partners and leaders to gather input and disseminate information to help gain consensus on key strategies. This process has to be broad, gathering both qualitative and quantitative information from which strategies will be developed. Specific tasks include:

**A. Key Leadership/Focus Group Interviews** – The Consulting Team will perform focus groups and key leadership interviews in the community to evaluate their vision for the DPRC in the community. Eight (8) focus group meetings and key leadership interviews with the County Executive, the County Board of Supervisors and other key leaders (up to 15) will be held over a two-day period. During these interviews/focus groups, the Consulting Team will gain an understanding of the community values, as well as determine the priority for recreation facilities and programming, parks, trails and open space development needs of the DPRC. The following list of potential interviewees will be used to select the final list in conjunction with the DPRC:

- Various Advisory/Committee Board Members
- Select County Staff Members and Department-heads
- Sports/Special Interest Groups
- Key Partners, Regulatory Agencies and other local providers
- Concessionaires
- Education (Public School Districts, Private Schools, etc.)
- Youth (junior and senior high)
- Seniors
- Volunteer and Friends Groups
- Special Event Providers
- Other Service Providers
- Environmental Groups
- Special/Interest Advisory Councils
- Staff focus groups
- Elected Officials
- Key Business Leaders
- Conservation Groups
- County Board of Supervisors
- Users and non-users of the parks and recreation system

- Outdoor recreation users
- Special event providers

**B. Public Forums/Workshops** – Public forums will serve to present information and gather feedback from citizens at large. It is important to have initial meetings early in the process and follow-up meetings during the final plan development process. 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. We propose to conduct a total of three (3) public forums: two (2) initial public forums to introduce the project and project goals, gain input for the community’s vision and core values for the DPRC, and one (1) as a final briefing and input opportunity on the draft plan. The purpose for these meetings will be to ensure opportunities for the general public to discuss their priorities and perceptions surrounding the parks and recreation system. The forums will also afford the opportunity to subtly educate the public on the opportunities, benefits, and constraints of the DPRC system.

**C. Statistically-Valid Needs Analysis Survey** – The Consulting Team will perform a random, scientifically valid community-wide household to quantify knowledge, need, unmet need, priorities and support for system improvements including facility, programming, parks, trails and open space development needs of the DPRC.

The Consulting Team will administer a statistically valid random sampling Needs Assessment Survey of household surveys in Milwaukee County. The survey will be administered by phone or by a combination of a mail/phone survey. Prior to the survey being administered, it will be reviewed by staff, the County Executive and the Board of Supervisors. The survey will be administered by phone or by a combination of a mail/phone survey and will have a minimum sample size of 600 completed surveys at a 95% level of confidence and a confidence interval of +/- 4%.

**D. Community Values Model Development** – After completion of the initial community and stakeholder input and survey results, the PROS Team will synthesize and organize the community values and principles into the Community Values Model. This will entail all key team members that participated in the community/stakeholder input sessions to work together to assimilate the collected information. The Community Values Model will be presented to the DPRC in detail through a workshop format to confirm and gain consensus. The completed Community Values Model will provide the basis for development of the Master Plan.

The PROS Consulting Team proposes to utilize its Community Values Model as the foundation of the Plan. The Community Values Model is an innovative process to utilize comprehensive public input and insight in a meaningful way. Input, guidance and values from key community leaders, stakeholders, and the general public are used to create overall guiding principles and values of the community related to the delivery of parks and recreation services. The Community Values Model is then used as the basis for developing or reaffirming the vision, mission and strategic objectives for the Master Plan. The strategic objectives address six unique areas of strategic planning including:

Community / Mandates / Priorities	Standards	Levels of Services	Financial / Revenue	Partnerships	Governance / Organization
<ul style="list-style-type: none"> <li>• Health &amp; Wellness</li> <li>• Principles of Community</li> <li>• Mandatory Elements for Facilities, Programs &amp; Services</li> </ul>	<ul style="list-style-type: none"> <li>• Land and Open Space</li> <li>• Facilities</li> <li>• Programs</li> <li>• Maintenance</li> </ul>	<ul style="list-style-type: none"> <li>• Levels of Service Delivery</li> <li>• Core Services</li> <li>• Role in Delivery vs. Other Service Providers</li> </ul>	<ul style="list-style-type: none"> <li>• Funding Mechanisms to Support Operations &amp; Capital</li> </ul>	<ul style="list-style-type: none"> <li>• Public/Public</li> <li>• Public/Not-for-Profit</li> <li>• Public/Private</li> </ul>	<ul style="list-style-type: none"> <li>• Design/Align Organization to Support Vision and Values to Community</li> </ul>

## Task 5 - Parks, Facilities, Open Space and Program Analysis

**A. Parks and Facilities Inventory and Existing Conditions Assessment** – The Consulting Team will provide an electronic form for the DPRC staff to use in completing acreage and facility inventory of park property and facility/amenity inventory. A park and facility tour will be performed with the DPRC staff, Operations and Maintenance staff, and Programming staff to confirm and modify any additional information to the inventory form, as well as perform a Supply Analysis to identify existing and potential parks and recreation resources, and facilities provided across the community. During this tour, general observation of park and recreation facilities will include:

- Photographs along with text to illustrate key environmental features in the County
- General state and condition
- Lifecycle assessment of age and condition
- Compatibility with neighborhoods and usage trends
- Compatibility of amenities offered through the County
- Aesthetics/Design
- Safety/security
- Public Access
- Connectivity to the surrounding neighborhoods through non-motorized travel
- Program capacity and compatibility with users
- Partnership opportunities
- Revenue generation opportunities
- Inventory existing miles of trails locations and destinations

The findings from this review will be documented in a prepared data collection form. Analysis will be performed from this review, and incorporated into an *Assessment Summary Report*. SEWRPC will incorporate into GIS mapping format for the Department

**B. Capital Improvement Plan** – Another element of the Master Plan is the preparation of a 10-year Capital Improvement Plan (CIP). The CIP will provide the recommendations of the Master Plan, and will identify the capital projects proposed for implementation over the first 5 years of the CIP, and the second 5 years of the CIP.

Cost estimates will be prepared for each CIP project, and 5 year, 10 year, and annual funding requirement estimates will be prepared. The annual total funding requirement estimates will be compared to current and recent DPRC budget allocations for capital projects. The CIP will attempt to eliminate deferred maintenance, while keeping estimated annual funding requirements within current and recent DPRC budget allocations for capital projects. To the extent possible, projects identified as desirable additions or expansions from the Level of Service Analysis, review of national best practices, and public survey and outreach will be also considered for inclusion in the CIP. Also, based on the survey of best national practices, potential options for alternative funding will be explored and potentially recommended, including naming rights, sponsorships, and partnerships. Divestment of assets may also be considered. For any new, improved, or expanded facilities, the associated marginal annual maintenance and operation costs of such facilities will be identified. PROS will introduce the **Capital Improvement Cost Benefit Formula** for the Department to use to prioritize capital improvements as part of the process. PROS will develop equipment standards for the DPRC for fleet, and heavy equipment.

The outcome is to determine the true costs to update the systems capital asset needs through an evaluation and priority process, as well as the maintenance costs to maintain assets in a well-managed position for the future.

- C. Natural Resource Management Plan** – Actions and costs attendant to the maintenance of the natural resources within the County Parks System will be identified. The scope will include determining costs from other local government agencies, not-for-profits and vendors that conduct specified natural resource management activities. PROS will evaluate their methodology for assessment of costs including interviews with resource management staff to define resource management activities and goals including establishing unit costs to verify a standard in best practices. The categories to be reviewed include, resource (plant, animal), landscape inventory and planning costs, non-native invasive species control, deer management based on a standard of 15 deer per square mile or cost per deer and land management cost for mowing, tree clearing, burning, chemical applications bluff stabilization, fish passage improvements, dredging, lagoon conversions to wetlands and water management, costs based on survey methods and necessary equipment, cost per acre of restoration. For the Forked Aster Hiking Trail system (installation and maintenance) of costs per linear foot or other appropriate unit, costs for structures and sustainability. For Green infrastructure (rain gardens, bios wale, pollinator gardens), including appropriate warranty monitoring and maintenance.
- D. Park Classifications and Level of Service Standards** – The Consulting Team will work with the DPRC to review and confirm, modify or add to existing park classifications, and preferred facility standards for all park sites, trails, open space amenities including common areas and indoor and outdoor facilities. These classifications will consider size, population served, length of stay, and amenity types/services. Facility standards include level of service standards and the population served per recreational facilities and park amenities. Any new or modified classification or standard will be approved as required. These are based on regional, statewide or nationally accepted parks and recreation standards, as well as the Consulting Team’s national experience and comparison with peer/survey agencies. These standards will be adapted based on the needs and expectations of the DPRC. A level of service (LOS) analysis will be prepared for each, and the composite, of approximately 30 types of key park and recreation facilities in Milwaukee County. This mapping analysis will identify those areas of Milwaukee County which are within a desirable level of accessibility for each facility type, and for the composite of all approximately 30 facilities (including facilities provided by both Milwaukee County and County municipalities). The analysis will also distinguish between accessibility to facilities in good-to-excellent condition and those in fair-to-poor condition. Population density maps for the year 2010 will be compared to the composite and individual LOS maps, to identify specific areas which both lack the desired park and recreation facilities and warrant consideration of development based on existing population density.
- E. Equity Mapping and Service Area Analysis** – The Consulting Team will work with the County to determine appropriate GIS mapping. The Consulting Team can utilize GIS to perform a geographical 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.
- This mapping identifies gaps and overlaps in service area. It is assumed that the County 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.
- F. Prioritized Facility and Program Priority Rankings** – 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 into a quantified facility and

program priority ranking. This priority listing will be compared against gaps or surplus in recreation services, parks, facilities and amenities. This will list and prioritize facility, infrastructure, amenities, and program needs for the parks and recreation system and **provide guidance** for the Capital Improvement Plan. The analysis will include probable future parks, recreation facilities, open spaces and trail needs based on community input, as well as state and national user figures and trends. Also, a set of prioritized recommendations for maintenance and renovation of parks, trails and recreation facilities will be developed. The Team will conduct a work session with staff to review the findings and make revisions as necessary.

### **Task 6 - Comprehensive Master Plan Development**

The Master Plan will be framed and prepared through a series of workshops with the DPRC staff. The overall vision and mission statements will be affirmed or modified, and direction for the DPRC 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 DPRC or external partners to focus on. Specific tasks include:

- A. Finalize Strategy Matrix/Action Plan** – Upon consensus of all technical work, the remaining action plan will be completed with supporting strategies, actions, responsibilities, and priorities/timelines and cost estimates. These strategies will be classified as short-term, mid-term or long-term strategies and priorities. This will be reviewed with senior DPRC staff in a half-day workshop. The Consulting Team will propose a prioritization schedule and methodology used on successful plans across the United States from their work. The implementation plan will incorporate recommendations for organizational changes, level of service standards and citizen input.
- B. Draft Report Preparation and Briefings**– The 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 DPRC. The recommendations and prioritization of needs will be reviewed and discussed with the County Executive, the County Board of Supervisors and the DPRC staff on schedules to finalize proposals, projects and timelines.
- C. Final Master Plan Presentations, Preparation, and Production** – Upon comment by the DPRC staff, the County Executive, the Board of County Supervisors, and the community, the Consulting Team will revise the Draft Master Plan to reflect all input received. Once the draft Master Plan is approved by the DPRC, the Consulting Team will prepare a final summary report and present to the County Executive and the County Board of Supervisors for final approval and adoption. The final plan will be prepared with a Summary Report that is professionally laid out delivered along with associated appendices (technical reports). Ten (10) bound copies, one electronic copy of the Final Plan will be delivered. PROS will also develop a four page leave behind color document that outlines the key strategies for the Department to print and use for the next five years.