



PROPOSAL

Rim of the World Recreation and Park District

User Fees and Cost Recovery
Policy and Analysis

BerryDunn


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Proposal Submitted On:
November 30, 2023

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1. Transmittal Letter

November 30, 2023

Rim of the World Recreation and Park District
Attn: Jenny Hueter, GM
26577 State Highway 18, PO Box 8
Rimforest, CA 92378

Dear Jenny Hueter:

On behalf of Berry, Dunn, McNeil & Parker, LLC (BerryDunn), thank you for the opportunity to submit this proposal in response to the Rim of the World Recreation and Park District's (the District's) Request for Proposals (RFP) for User Fees and Cost Recovery Policy and Analysis.

BerryDunn is an independent management and consulting firm that has experienced sustained growth throughout its 49-year history. **Focused on inspiring clients to transform and innovate, we formed a specialized practice dedicated to serving the needs of clients in the parks, recreation, and libraries industry.** BerryDunn's Parks, Recreation, Libraries Practice provides cost of service analysis, fee analysis, operational and management analysis, feasibility studies, pro forma development, programming and financial analysis, master and strategic planning, and more—offering clients deep expertise built upon decades of experience working in and with agencies on comparable projects. We deliver exceptional experiences to organizations like the District as they seek to achieve their visions, offer innovative services and facilities to their constituents, and determine the actions necessary to make consistent progress toward desired outcomes.

As the District seeks to determine full costs of service for its park and recreation programs, services, and facilities, BerryDunn will help establish a solid foundation for understanding the District's costs to provide services and help ensure associated fees for services reflect the appropriate level of cost recovery. We have had the privilege of providing fee study and cost recovery services to public-sector organizations throughout the country. As a result of the breadth and depth of our experience, we bring unique insights related to reviewing user fees for services like those in-scope for the District and can effectively drive project success on the District's requested effort.

No matter how many parks and recreation districts and departments we assist, we will always tailor the experience to the nuanced needs and resources of our clients. We appreciate the opportunity to submit this proposal, and we look forward to working with you on this important initiative.

As a principal in our Local Government Practice Group, I am authorized to bind BerryDunn to the commitments made herein. We have read the RFP and understand the conditions it contains. Our proposal is a firm and irrevocable offer valid for 120 days following the submission deadline of November 30, 2023. ***If you have any questions regarding our proposal or updates during the evaluation process, please consider me the District's primary point of contact and contact me directly.***

Sincerely,



Chad Snow, PMP® | Principal and Chief Operating Officer
4722 North 24th Street | Phoenix, AZ 85016
207-541-2379 | csnow@berrydunn.com

2. Descriptions and Qualifications of the Firm

2.1. Firm Organization

BerryDunn is a nationally recognized independent management and IT consulting firm. As a Limited Liability Company formed in 1974 with 65 principals and 34 owners, BerryDunn employs more than 850 staff across eight offices.

Our Consulting Services Team has been serving state, local, and quasi-governmental agencies for over 30 years and includes more than 325 staff members. From extensive project experience for more than 600 state, local, and quasi-governmental agencies, our team brings valuable perspectives to every engagement. Our firm provides a full range of professional services that supports our ability to complete tasks outlined by the District.

Additionally, our team members have prior experience leading state and local government agencies, providing them with an in-depth understanding of government operations, staffing needs, budgetary constraints, and the business processes required to provide necessary services to the internal divisions and the constituents the District serves.

Figure 1 illustrates the overall organization of BerryDunn's Local Government Practice Group. We provide unparalleled expertise and unique insights across these practices, supporting our clients in solving some of their biggest challenges and addressing opportunities to improve and plan.

Company Name Berry, Dunn, McNeil & Parker, LLC (BerryDunn)
Founded and Incorporated 1974 in Maine
Locations Arizona Connecticut Maine Massachusetts New Hampshire Puerto Rico West Virginia
Employees 850+ nationwide
Website www.berrydunn.com

Figure 1: Local Government Practice Group Specialization



2.2. Introducing our Parks, Recreation, Libraries, Practice

BerryDunn's Parks, Recreation, Libraries Practice offers clients expertise in parks, recreation, open space, and natural areas built upon decades of experience working in and with agencies on:

- ▶ Cost Recovery
- ▶ Financial Analyses
- ▶ Fee Studies
- ▶ Needs Analyses
- ▶ Feasibility Studies
- ▶ Quality Assessments
- ▶ Master Planning
- ▶ Strategic Planning

All our Parks, Recreation, Libraries consultants are former industry practitioners and seasoned advisors, and our proposed project team consists of professionals with many years of experience operating the assets the District manages. Collectively, our team of more than 20 professionals have completed over 650 related planning projects, working with local, state, and national government agencies and private-sector organizations as they seek to transform and innovate.

Looking beyond the industry, we strive to deliver high-quality services by understanding expectations up front, developing a reasonable and achievable project approach, gaining concurrence on project tasks and timing, and using appropriate staff for each engagement. Supported by a wider team of over 325 consultants dedicated to serving nearly all aspects of local and state government, we offer a holistic approach to the District’s initiative. It is through our firsthand experience in parks and recreation and our broader team’s well-rounded perspective that we bring tailored insights and firsthand perspective related to the government operations and community needs that impact every project.

How Do We Share Ideas?

Our Parks, Recreation, Libraries team is dedicated to the industry, regularly learning about and sharing trends and relevant information at conferences and events. Our commitment to the industry includes involvement with the National Recreation and Parks Association (NRPA). Through this, we stay apprised of trends and best practices at the local, regional, and national levels and share them with our clients to promote industry alignment and innovative thinking.

We attend and often speak at NRPA’s annual conference, as well as local and regional events. Some of our most recent NRPA speaking sessions include:

- ▶ *“The Case of Cost Recovery: Why, How and Does It Work?”*
- ▶ *“Impact Fees and Cost of Service”*
- ▶ *“Measuring Operational Performance”*
- ▶ *“How Parks and Recreation Can Support Mental Health Challenges”*
- ▶ *“Leading to Create Organizational Excellence”*
- ▶ *“Engage the Silent Voices”*
- ▶ *“A Racially Just Future: 2021 NCAA Basketball Final Four Talks”*
- ▶ *“Successfully Implementing a Strategic Plan”*

2.3. Relevant Experience

Local Government Finance from Multiple Perspectives

In Table 1, we provide a representative sample of our team’s experience conducting fee study, cost recovery, and cost allocation planning projects for various local government departments across the country. Many of these projects were completed as components of larger parks and recreation master plans. This well-rounded perspective will bring value to the District as it strategically plans for the coming years. BerryDunn’s holistic approach will center both the District personnel and the constituents you serve.

Table 1: Sample Experience of Services Provided Across Departments


Department/Service Area	Client	Work Performed
Parks and Recreation	Cattail Cove State Park, AZ	Parks and Recreation Master Plan
	Charleston County, SC	Cost of Service and Fee Study
	City of Avondale, AZ	Parks and Recreation Master Plan
	City of Bozeman, MT	Recreation Cost of Service Study
	City of Cape Coral, FL	Comprehensive Fee Study
	City of Jefferson City, MO	Cost Recovery Study/Plan
	City of Ferguson, MO	Cost of Service Analysis

Department/Service Area	Client	Work Performed
	City of Gilbert, AZ	Parks, Recreation, and Open Space Master Plan
	City of Glendale, AZ	Parks and Recreation Master Plan
	City of Grapevine, TX	Cost Recovery, Fee Study, and Resource Allocation Plan
	City of Lynchburg, VA	Cost of Service Analysis
	City of Mesa, AZ	Cost of Service Analysis
	City of Mobile, AL	Cost Recovery Analysis
	City of Pflugerville, TX	Cost of Service and Fee Study
	City of Raleigh, NC	Cost of Service and Fee Study
	City of Sanibel Island, FL	Cost of Service Analysis
	City of Tampa, FL	Fiscal Analysis
	City of Tempe, AZ	Parks and Recreation Master Plan
	City of University Park, TX	Cost of Service Consulting
	Coconino County, AZ	Parks and Recreation Master Plan
	Granville County, NC	Parks and Grounds Cost of Service Analysis
	Howard County, MD	Fiscal Analysis
	Jackson County, MS	Cost of Service Analysis
	Town of Crestwood, CO	Cost of Service Analysis
	Town of Florence, AZ	Parks and Recreation Master Plan
	Town of Fountain Hills, AZ	Parks and Recreation Master Plan
	Town of Queen Creek, AZ	Cost of Service and Fee Study
Wilmette Park District	Cost of Service Analysis	
Community Development and Utility Operations	Alachua County, FL	Building and Fire Permit Fee Study
	City of Bozeman, MT	Community Development Fee Review Study
	City of Gainesville, FL	Building Permit Fee Study
	City of Gainesville, FL	Fee Schedule Update
	City of Dallas, TX	Comparative Building Permit Fee Study
	City of Fernandina Beach, FL	Building Division Fee Study
	City of Homestead, FL	Workflow and Comparative Fee Analysis
	City of Largo, FL	Building Permit Fee Study

Department/Service Area	Client	Work Performed
	City of Tucson, AZ	Cost of Service Study and Fee Schedule Redesign
	Manatee County, FL	Building and Development Services Fee Study
	Sonoma County, CA	Fee and Cost Recovery Peer Comparison
	Town of Longboat Key, FL	Comprehensive Fee Study
	Town of Smithfield, RI	Water Rate Study
	Town of Smithfield, RI	Sewer Rate Study
	Travis County, TX	Development Review Process and Fee Study
Information Technology (IT)	City of Irving, TX	IT Department Cost Allocation Plan
Citywide	City of Villa Park, CA	Fee and Rates Charges Study

2.4. Our Commitment to the State

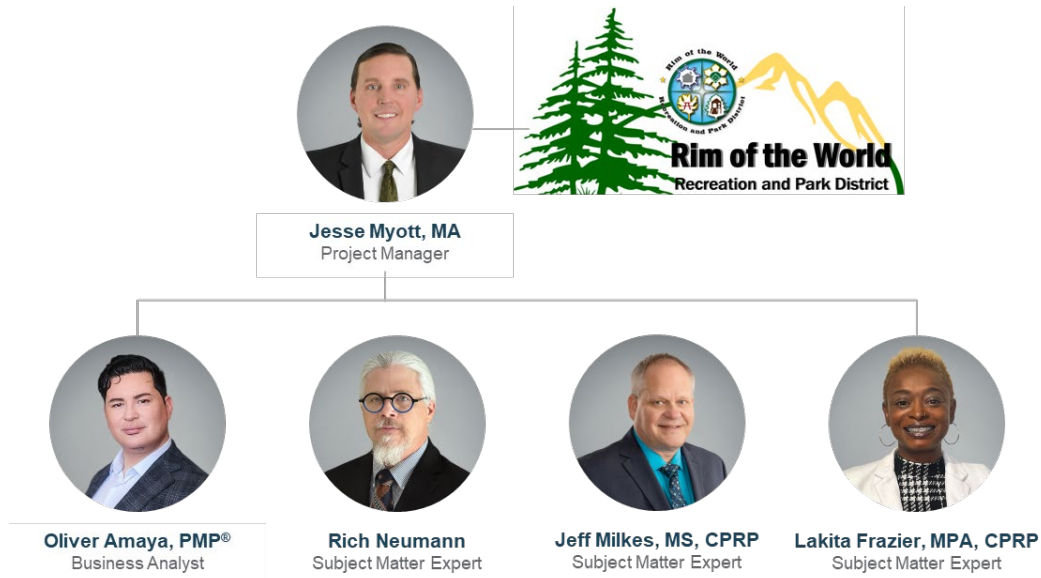
With BerryDunn, the District will be served by a firm and project team members who have **demonstrated their commitment to the State** through consulting engagements with the clients listed below. We have extensive experience regionally throughout the Southwest as well.

- 
- ▶ Bay Area Air Quality Management District
 - ▶ California State University
 - ▶ California Western School of Law
 - ▶ City of Alameda
 - ▶ City of Belmont
 - ▶ City of Coronado
 - ▶ City of Fountain Valley
 - ▶ City of Irvine
 - ▶ City of La Mesa
 - ▶ City of Livermore
 - ▶ City of Long Beach
 - ▶ City of Menifee
 - ▶ City of Modesto
 - ▶ City of Monterey Park
 - ▶ City of Novato
 - ▶ City of Oxnard
 - ▶ City of Palmdale
 - ▶ City of Redding
 - ▶ City of Redlands
 - ▶ City of San José
 - ▶ City of San Leandro
 - ▶ City of Santee
 - ▶ City of Simi Valley
 - ▶ City of Villa Park
 - ▶ Mt. San Antonio College
 - ▶ Oceanside Public Library
 - ▶ Sacramento Municipal Utility District
 - ▶ San Diego Air Pollution Control Districts
 - ▶ Santa Clara County
 - ▶ Santa Monica College
 - ▶ Sonoma County
 - ▶ Sonoma Resource Conservation District
 - ▶ South Pasadena Public Library
 - ▶ Southern California Library Cooperative

3. Staffing

Our team members bring valuable perspectives from their experiences providing project planning, project management, fee studies, stakeholder engagement, business process improvement services, and more. Figure 2 illustrates our team organization and leadership.

Figure 2: BerryDunn Team Organization



3.1. Roles, Responsibilities, and Qualifications

Below and on the following pages, we provide details of our project team members’ roles, responsibilities, and qualifications as it relates to the requested User Fees and Cost Recovery Policy and Analysis. **Our project team members’ full resumes are included in Appendix A for the District’s further review and consideration.**



Jesse Myott, MA | Project Manager

Jesse is a manager in our Local Government Practice Group. He has over 12 years of public-sector experience, focusing on supporting local governments with operating and capital improvement budget development and management; special fund accounting, revenue and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Prior to joining BerryDunn, Jesse served as a financial analyst for the City of South San Francisco, California and as a management analyst for the City of Daly City, California. He is a former member of the California Society of Municipal Finance Officers (CSMFO).

Jesse has led multiple cost of service and cost allocation projects for local governments across the country. He specializes in conducting similar initiatives for parks and recreation, public works, and planning and permitting functions. He has conducted fee studies for such departments in the City of Tucson, Arizona; City of Bozeman, Montana; Travis County, Texas; and the Cities of Fernandina Beach, Largo, and Gainesville, Florida.

As the **project manager**, Jesse will:

- ▶ Build and maintain a productive relationship with the District
- ▶ Serve as the District's primary point of contact
- ▶ Lead our work and perform day-to-day project management and staff oversight
- ▶ Lead the analysis and development of project deliverables
- ▶ Develop and maintain the Project Work Plan and Schedule
- ▶ Provide subject matter expertise



Oliver Amaya, PMP® | Business Analyst

Oliver is a consultant with BerryDunn's Parks, Recreation, and Libraries Practice. Before joining our team, he worked with the City of Corpus Christi, Texas Parks and Recreation Department as a special projects manager. In this role, he participated in a parks and recreation fee study for residential developers and another for the City's tennis center. He conducted research and benchmarking for both projects. Oliver is fluent in both Spanish and Portuguese, and since joining BerryDunn, he has contributed to multilingual community engagements efforts for several communities, including for Adams County, Colorado; Hyland Hills Parks and Recreation District, Colorado; Jurupa Area Recreation and Park District, California; and Oceanside Public Library, California.

As the **business analyst**, Oliver will:

- ▶ Support the development of project deliverables, lead the review of existing documents and data, and synthesize findings
- ▶ Leverage his prior public-sector experience to support fee study, community engagement, and project management best practices
- ▶ Provide Spanish language translation and interpretation as needed



Rich Neumann | Subject Matter Expert

Rich is a senior consultant in BerryDunn's Parks, Recreation, Libraries Practice. He specializes in parks, recreation, and cultural arts marketing, communications, and branding. He leverages his skills in these areas to connect with community members, staff, and partner agencies. He leads community engagement efforts that are nuanced and sensitive to the diverse needs of those involved. He has extensive public-sector experience, including, most recently as marketing and cultural affairs manager for the City of Westminster, Colorado. He is currently assisting with the Town of Gilbert, Arizona's Parks, Recreation, and Open Space Master Plan.

As a **subject matter expert**, Rich will:

- ▶ Leverage his parks and recreation marketing and communications experience to build awareness for the project and help engage the public and appropriate external stakeholders



Jeff Milkes, MS, CPRP | Subject Matter Expert

Jeff is a senior consultant in BerryDunn's Parks, Recreation, Libraries Practice. He is a successful parks and recreation professional with over 35 years of progressively responsible experience with municipalities, special districts, and military recreation organizations. His work has focused on long-term strategic planning, leadership development, performance management, non-traditional financing opportunities, and the provision of athletic and special events. Jeff brings extensive experience managing aquatic and recreation facilities, sports and fitness programs, and park maintenance. He is passionate about developing community offerings with a high level of creativity and imagination.

As a **subject matter expert**, Jeff will:

- ▶ Leverage his extensive parks and recreation management, strategic planning, and financial analysis experience to help ensure a holistic approach to the cost recovery plan and policy development



Lakita Frazier, MPA, CRPR | Subject Matter Expert

Lakita is a senior consultant in BerryDunn’s Parks, Recreation, Libraries Practice. Prior to joining BerryDunn, she served as executive director for the Richland County Recreation Commission for nearly four years and as director of parks and recreation for the City of Suffolk, Virginia for 15 years. In these roles, she was responsible for long-range planning, preparing and managing annual departmental and division budgets, recommending capital improvement projects and related funding mechanisms, managing grant research, proposals, and funding, and various other tasks related to financial management. Lakita is highly involved in the parks and recreation industry. She is currently a member of the National Recreation and Park Association (NRPA) board of directors, a fellow with the American Academy of Parks and Recreation Administration, a member of the National Association of Park Foundations board of directors, and a member of the International City/County Management Association. She is committed to promoting diversity, equity, and inclusion (DEI) in the parks and recreation industry and leads Women in Parks and Recreation.

As a **subject matter expert**, Lakita will:

- ▶ Help develop and administer the customized Social Pinpoint site, which will serve as a virtual stakeholder engagement and project hub
- ▶ Leverage her decades of parks and recreation operations and management experience



Additional Support | The BerryDunn Network

BerryDunn’s Consulting Services Group includes more than 325 consultants who specialize in supporting public-sector clients. As needed, our project team will draw on the support of our vast pool of business analysts and subject matter experts. These consultants will provide in-depth knowledge of various aspects of local government and support the project team with efforts related to fact-finding, research, and deliverable development.

4. References

Town of Gilbert, Arizona

Parks and Recreation Master Plan Update

Robert Carmona, Parks and Recreation Director
480-503-6200 | robert.carmona@gilbertaz.gov

The Town of Gilbert partnered with BerryDunn, J2 Design, MakPro, and Design Lab to update to the Town's current Parks and Recreation Master Plan. Extensive engagement was conducted throughout the community to gain input into the recreation needs of the Town. This plan will evaluate the existing parks infrastructure and provide recommendations for future improvements. The plan will help the Town achieve Commission for Accreditation of Park and Recreation Agencies accreditation. The plan will provide goals and action items for the Town to follow through the next several years as they reach build-out.

09/2022 – Present

City of Mesa, Arizona

Parks, Recreation, and Community Facilities Comprehensive Plan

Tammy Davenport, Senior Fiscal Analyst
480-644-5012 | tammy.davenport@mesaaz.gov

The City of Mesa partnered with BerryDunn to develop a Parks, Recreation, and Community Facilities Comprehensive Plan. Select elements of the Plan assisted with the prioritization of capital improvement funds and provided a framework for equitable distribution of park and recreation resources, helping ensure that funding will be directed where it can have the most impact. To help accomplish this, BerryDunn reviewed activity and program fees and charges and associated revenues and expenses for each of the City's recreation core service categories. The focus of the analysis was to review all revenue generated from user fees for recreation programs and services provided by the City and the identified expenses associated with providing all services. The results of this analysis allowed the City to make informed policy decisions at the aggregate level as well as on each individual program or service regarding fee levels and revenue generation.

05/2021 – 10/2022

Town of Queen Creek, Arizona

Cost of Service Analysis and Fee Study

Adam Robinson, Deputy Director Community Services
480-353-3715 | adamrobinson@queencreekaz.gov

The Town of Queen Creek partnered with BerryDunn to prepare a Parks and Recreation Cost of Service Analysis and Fee Study. The focus was to provide the Town with an overview of its current parks and recreation fees and charges environment and associated revenues and expenses for each activity, permit, and service the Town provides. The study also documented the estimated percentage of full costs recovered delivering specific services at current fee levels, which allowed Town officials to make informed policy decisions regarding adjustments to fees and charges to satisfy revenue requirements.

04/2023 – Present

5. Scope of Work

5.1. Understanding the District's Needs

For nearly 40 years, the District has been providing quality programs, parks, and facilities to the Rim of the World mountain communities. With a mission to **“help enrich and fulfill the lives of the citizens through the provision of facilities and programs that will provide and enhance creative, wholesome and imaginative leisure time living patterns,”** the District offers community centers, dog parks, lighted ball fields, picnic pavilions, outdoor fitness equipment, basketball courts, play equipment, and a community garden. The District encompasses approximately 110 square miles, or more than 70,000 acres.

The District has never conducted a holistic fee study, and it is now looking to develop a cost recovery model that will provide a framework for future planning, budgeting, pricing, and resource allocation. The District seeks a holistic approach to help ensure that cost recovery policies align with its goals, mission, and vision. The fees and policies must also balance appropriate levels of service, fiscal stewardship, and industry best practices. The District would like to center equity and transparency, involving internal and external stakeholders as appropriate.

How BerryDunn Can Help

BerryDunn has the experience, qualifications, and strong desire to support the District on this important initiative. In particular, we would like to highlight the key qualifications offered by BerryDunn as described below.



Our extensive experience conducting fee studies for parks and recreation departments

We have had the privilege of providing fee study and cost recovery services to comparable parks departments throughout the country, including a Recreation Fee Study for the Town of Queen Creek, Arizona, and our team members have spoken at industry conferences on the topic of parks and recreation cost recovery. As a result, we understand the many factors and perspectives that must be considered when reviewing parks and recreation user fees as well as industry best practices and local and national trends. We also understand the importance of transparency and equity in both the fee study and cost of service analysis and the resulting policies.



Our parks and recreation-specific engagement expertise

Dynamic stakeholder engagement is a core service of our Parks, Recreation, Libraries Practice and a central focus of each project we complete. As a result, we have a proven track record of developing effective strategies for communities considering fee increases. From campaign brands to supporting collateral, we are skilled at navigating the delicate balance between education, advocacy, and predicting consumer behavior in a challenging economic climate. Our outreach efforts will provide the District with the insight you need to determine residents' willingness to pay for services and the need for financial assistance such as scholarships and fee reductions or waivers.



Our commitment to State and region

Our work on this project will be strengthened by our experience working with city, county, and state agencies throughout the State. BerryDunn has worked with more than 30 cities, counties, and colleges throughout the State. Our project manager, Jesse Myott, previously held finance and management positions for two cities in the State and is a former member of the California Society of Municipal Finance Officers. Additionally, we have completed parks and recreation projects throughout the Southwest, from the City of Perris, California to the Cities of Reno and Winnemucca, Nevada; City of Mesa, Arizona; Towns of Gilbert, Florence, and Fountain Hills, Arizona; and the City of Pflugerville, Texas. In 2014, we opened an office in Phoenix to support our growing local workforce and to better serve clients throughout the Southwest.



Our team members' experience as former parks and recreation department directors

The District will benefit from our team members' relevant, firsthand experience as parks and recreation directors for governments throughout the country. We understand your goals, objectives, challenges, and daily commitments because we have served in similar roles. In particular, our project manager, Jesse Myott, has more than a decade of direct local government experience related to municipal finance and parks and recreation service delivery. Collectively, our team members have conducted numerous comparable cost of service and fee studies, prepared annual budgets, managed capital improvement funding, and more. This commitment to the industry and understanding of the programs, services, and facilities the District provides will help our team develop user fee and cost recovery policies that align with the District's goals, mission, and vision.



Our understanding that fees have real-world financial impacts to customers

We understand the importance of setting fee levels accurately to fund service delivery. At the same time, we balance this consideration with an understanding of the real-world implications that fees can have on external customers. With this in mind, we use standard cost accounting, activity-based costing, resource allocation methodology, weighted averages, and other standard analytical tools to determine the full cost of providing specific services. Additionally, our approach allows us to provide recommendations that allow for the entirety of fees to be adjusted at one time or for fees to be adjusted and assessed individually.

5.2. Work Plan Overview

BerryDunn strives to be flexible when it comes to developing and executing an effective work plan. We understand that no two projects are exactly alike, and our past clients have appreciated our willingness to adapt to their needs. This mindset plays a foundational role in how we measure the success of our portfolio of similar projects.

Our approach to preparing the District's User Fee and Cost Recovery Policy and Analysis is outlined below and designed to incorporate consistent project management best practices with each of the District's key deliverables and tasks. Our intent is to work with staff to help ensure we make the best use of your time. Ultimately, consistent collaboration can help promote buy-in and understanding for final recommendations.

You can expect our approach to include the following attributes:

- ▶ A methodology based on our extensive experience conducting similar building permit cost of service, cost recovery, and fee studies
- ▶ Quality assurance (QA) processes that incorporate the District's review and approval of all deliverables
- ▶ Built-in project management best practices that focus on keeping the project on time, on budget, and progressing at a healthy pace for the District's stakeholders to give input in the information gathering and fact-finding process and understand final recommendations

Figure 3 presents an overview of our proposed approach to completing the District's desired scope of work.

Figure 3: BerryDunn's Proposed Approach



5.3. Work Plan Details

Project Initiation and Management

To establish a strong foundation for the project and help ensure a high level of quality and communication throughout the engagement, we will use project management best practices based on the Project Management Institute®'s A Guide to the Project Management Body of Knowledge and our experience conducting similar projects with parks and recreation systems nationwide.

The District can expect our team to complete the following project activities:

- ▶ **Conduct thorough project planning.** This will include an initial planning teleconference between BerryDunn's team and the District project team to confirm project goals, objectives, and expectations.
- ▶ **Facilitate a virtual kickoff meeting.** Following the initial planning call, we will conduct a virtual kickoff meeting with the District project team and identified stakeholders to discuss in greater detail the relationship of the current fees and charges environment, current cost recovery levels and revenue requirements, and the District's goals, mission, and vision. Our project team will also use this meeting to identify initial staff and stakeholder groups, advisory committees, governing bodies, and community stakeholder groups to include in our community engagement efforts.
- ▶ **Develop a Project Work Plan and Schedule.** This will outline our communication plan and scope, review a timeline to schedule project meetings, and identify engagement groups. In addition, the Project Work Plan will outline the major tasks, timelines, and identified milestones and will incorporate agreed-upon procedures between BerryDunn and the District project team related to project control, including quality management and deliverable submission/acceptance management.
- ▶ **Review existing data and documentation.** One of the most important elements of this process will be our team's ability to gain a breadth of knowledge about plans, structure, and operation of the District as well as the community of users. To start the process, we will submit an information request to the District project team to gather applicable documents and data including but not limited to current fee schedules, lists of existing permit and service types and associated annual volumes, revenue and expenditure budgets and reports, reserve balance reports (if applicable), detailed revenue reports by program, permit, and/or service type, staffing rosters, personnel salary and benefit data, facility operations, maintenance, and capital costs, and other documentation deemed important to the study.
- ▶ **Lead Biweekly Project Status Meetings.** These meetings will describe activities and accomplishments for the reporting period, risk mitigation, deliverable reviews, scheduling discussions, and more.

Deliverable 1. Project Work Plan and Schedule

Deliverable 2. Biweekly Project Status Meetings

Phase 1. Engagement

We recognize that the District seeks to answer questions including:

- ▶ Are programs fairly and equitably priced for the District and region?
- ▶ Is the District accommodating all who wish to access our services?

Phase 1. Engagement

- ▶ Is there a methodology that addresses scholarships, fee reductions, or fee waivers to serve the community holistically?
- ▶ Does the way the District charges for services (facilities, programs, etc.) support the Departmental values, vision, and mission?

To answer these questions, the District must seek out and incorporate the perspectives of internal stakeholders, such as leadership and staff, and external stakeholders, including both users and non-users of the District's programs and facilities.

The District can expect our team to complete the following project activities:

- ▶ **Analyze demographics and population projections.** To provide insight into the potential market for the District parks system, we will conduct a demographic analysis and market profile of the District. Our team will utilize all information available from previous planning efforts, the U.S. Census Bureau, Esri, and other national and local sources. We will analyze demographic characteristics of the District's users, including current and projected data on:

Population trends and five-plus-year projections	Race and ethnicity over time	Education
Health metrics	Income	Transportation access
Household makeup	Housing status	Access to technology

We will summarize our findings in a Community Research and Analysis Report, which we will review in draft form with the District's project team before finalizing.

Deliverable 3. Community Research and Analysis Report

- ▶ **Develop a Customized Project Website and Engagement Portal.** We will work with the District project team to create a project website via Social Pinpoint that will keep the community informed of the project. The District's Social Pinpoint site will also provide community members with a means to share valuable input. This interactive online tool helps strengthen the District's relationship with its system users and stakeholders, resulting in a diverse collection of feedback and better-informed planning outcomes. We will collaboratively determine which Social Pinpoint tools will best serve the desired outreach outcomes. We anticipate that the District will see value in utilizing Social Pinpoint's survey, mapping, forums, and ideas wall, and we look forward to discussing and customizing this site to reflect the needs and desires, goals and objectives, and community.

Note: Our team will maintain the project website throughout the planning process to keep residents and staff up to date on project progress and promote any participatory events.

Deliverable 4. Customized Project Website and Engagement Portal

- ▶ **Conduct internal leadership and staff engagement.** We will conduct internal engagement that will include virtual interviews and focus groups with District leadership, management, and staff. These fact-finding activities will focus on programs, services, and facility operations. These meetings will provide internal leadership and frontline staff an opportunity to provide input related to the District parks' improvements and needs. Staff perspectives are extremely important, and our approach intentionally involves staff throughout the entire process as they will have responsibility for implementing the recommendations.

Phase 1. Engagement

- ▶ **Host public input sessions.** Our team will facilitate virtual public focus groups to collect input from key community stakeholders. We will seek input from businesses, nonprofits, public agencies, and volunteer partners as well as any neighborhood alliances and representatives. Further, we will routinely reach out to representatives of identified underrepresented population groups and engage them in the assessment and recommendations development process, helping to ensure an inclusive and equitable engagement process.

Our team aims to anticipate obstacles to participation, which might include technology barriers, special needs, childcare, language barriers, and work schedules. Additionally, we will leverage Social Pinpoint's language feature to provide multiple language options on the project site.

- ▶ **Prepare an Engagement Feedback Summary.** Our team will provide a summary of insights gleaned throughout the engagement process. Key findings generated from the demographics analysis, staff engagement, and community engagement activities will be assessed in relationship to each other. We will identify the common themes woven throughout the meetings, electronic engagement tools, and potential service gaps as well as any pertinent observations garnered through the feedback. This assessment of community needs will help inform recommendations, especially related to fee levels and pricing methodologies.

Deliverable 5. Engagement Feedback Summary

Phase 2. Cost of Service Analysis and Fee Study

During Phase 2, our project team will virtually interview staff and stakeholders directly involved in the District's fiscal planning and management efforts and review applicable fee schedules and budgets. We will use this information to assess the District's current fees and charges environment. We will examine the customer service culture, perform a personnel review, and develop an initial cost of service model. Our goal will be to identify key direct and indirect resources related to the District service delivery. We will then project total cost and calculate cost recovery per permit and/or service category, per permit and/or service type, and where applicable, as the data allow, for each specific permit and/or service the District provides. We will develop recommendations and recommend fees consistent with identified revenue requirements, cost recovery targets, reserve fund balance levels (if applicable), and policy elements.

The District can expect our team to complete the following project activities:

- ▶ **Virtually interview District staff and stakeholders.** Our team will meet with applicable District staff directly involved in the District's fiscal planning and management efforts. We will also seek stakeholder input related to fee tolerances and community buy-in.
- ▶ **Review the District's current fiscal environment.** Our team will review applicable fee schedules, operating and capital budgets, revenue and expenditure reports (actuals), personnel budgets, and any other financial source documents deemed vital to the study.
- ▶ **Project the full cost for providing services.** Using the information gathered to date, we will project the full cost for providing services by specific service category, specific service type, and/or specific service.
- ▶ **Recommend methodologies for calculating fees.** We will then recommend methodologies

Phase 2. Cost of Service Analysis and Fee Study

for calculating fees and cost recovery ranges for core service categories needed to satisfy revenue requirements, business operational needs, reserves (if applicable), and specific policy elements. We will provide recommendations where it is not feasible to recover the full cost of provide a service and identify those instances where full cost recovery is attainable. Where applicable, we will recommend fees for services the District is currently providing but for which no fee is currently assigned.

Deliverable 6. Cost of Service Analysis Model and Fee Study

Phase 3. Cost Recovery Policy, Financial Assistance, and Peer Comparisons

Utilizing the Engagement Feedback Summary and the Cost of Service Analysis Model and Fee Study completed in Phase 1 and Phase 2, respectively, our project team will discuss cost-recovery philosophy in coordination with District staff and review industry standards, best practices, and current trends for similar agencies. We will evaluate the District's current policies and will provide recommendations for developing a cost recovery policy to align with the financial needs and goals of the District. We will evaluate and propose recommendations for improving financial assistance programs and policies, such as scholarships and fee waivers, to help mitigate financial barriers to access and participation.

Leveraging BerryDunn's extensive understanding of parks and recreation service delivery, we will identify and prioritize necessary changes to fee calculation methodologies and fee schedule structure and outline any additional, applicable areas where improvements should be considered. We will review findings, priorities, and recommendations with District staff and stakeholders during two virtual workshops.

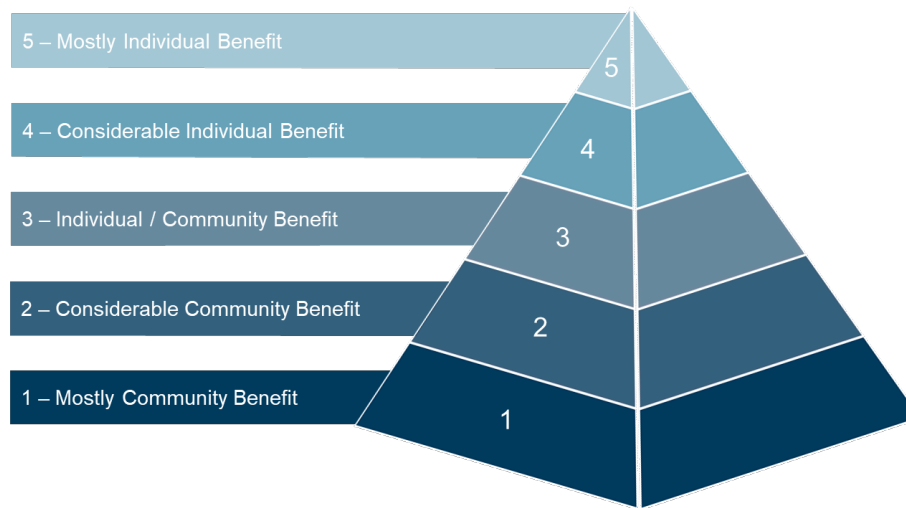
The District can expect our team to complete the following project activities:

- ▶ **Facilitate virtual workshops.** We will lead two virtual workshop sessions with the District staff and stakeholders. We will use these visioning sessions to confirm our understanding of the District's fiscal environment to help ensure that proposed prices are fair and equitable both to users of the system and non-users who may not use the system but support it through other means (taxpayers).

Figure 4, on the following page, illustrates the pyramid model (beneficiary model) BerryDunn will use to assess and prioritize the impact of various program fees. We will use this information to help inform the subsequent development of cost recovery targets and further assess the impact of potential fee adjustments on willingness to pay and ability to pay.

Phase 3. Cost Recovery Policy, Financial Assistance, and Peer Comparisons

Figure 4: BerryDunn's Cost of Service Pyramid Methodology



- ▶ **Develop cost recovery targets.** We will combine all staff, stakeholder, and community feedback, as well as demographic and trend data, to inform targets for generating revenue, recovering costs, and managing the District's operations.
- ▶ **Validate and review findings.** We will validate fee schedule structure, fee calculation methodology, and full cost and revenue allocation methodology. We will also review willingness to pay methodologies and work with the District project team to recommend the most appropriate model. Where appropriate, we will contribute recommendations related to best practices and methodologies related to service delivery. As part of this process, we may identify other deficiencies and areas for improvement.
- ▶ **Review and recommend performance measures.** We will review the District's current performance measures and recommend any necessary additional performance measures that will help the District monitor progress toward cost recovery goals, financial stability, and equitable access.
- ▶ **Develop Fee Schedule Updates and Recommendations.** Our team will develop initial Fee Schedule Updates and Recommendations for the District's review. This will include priorities and implementation strategies as well as any additional appropriate consultative recommendations. We will leverage our project team's prior experience working with similar agencies throughout the country to compile options for cost recovery targets and policy development. Furthermore, fee level recommendations will incorporate applicable community engagement feedback gathered in Phase 1 related to willingness/ability to pay.
- ▶ **Perform Peer Comparisons.** We will survey up to three comparable agencies to assess current and recommended fee levels related to similar core services peers provide as well as current cost recovery levels.

Deliverable 7. Cost Recovery Policy Recommendations, Financial Assistance Recommendations, and Peer Comparisons

Phase 4. Draft Findings and Recommendations

We will prepare a Draft Cost of Service and Fee Study Report, which we will share with the District project team and applicable stakeholders as directed. We will solicit feedback and discuss, document, and include desired modifications. The report will include executive summary, synthesis of findings and recommendations, and a cost recovery policy and cost of service model. We find that by sharing our initial findings and report with leadership, staff, and stakeholders, we can establish consensus, build buy-in, and promote the long-term success of the recommendations and changes. Additionally, we will provide the District with the draft cost of service model in an easily accessible Microsoft Excel format.

The District can expect our draft findings and recommendations to include the following:

- ▶ **Conduct a virtual review session.** We will meet virtually with the District project team and other identified staff to provide an overview of the full User Fee and Cost of Service Policy and Analysis. This will include a review of current revenue and expense allocations, revenue requirement estimates and revenue projections for five fiscal years (five-year financial forecast), expense requirement estimates, and expense projections for five fiscal years (five-year financial forecast).

We will discuss cost recovery targets, performance measure recommendations and examples, updated cost recovery and user fee policy(ies), and additional, applicable findings and recommendations.

- ▶ **Develop Draft Cost of Service and Fee Study Report.** We will summarize these discussion topics and our findings to date in a Draft Cost of Service and Fee Study Report. We will share this with the District project team for review.

Deliverable 8. Draft Cost of Service and Fee Study Report

Phase 5. Final Recommendations

As final project closeout and knowledge sharing activities, we will apply edits to the Draft Cost of Service and Fee Study Report and Final Cost of Service Model, incorporating the District's feedback. We will review final project deliverables with staff and applicable stakeholders as directed. We find that involving staff in preparation of the final documents helps transfer knowledge and helps ensure the successful implementation of the final recommendations.

The District can expect our team to complete the following project activities:

- ▶ **Develop the Final Cost of Service and Fee Study Report.** We will incorporate the District's input and requested revisions to the Draft Cost of Service and Fee Study Report and update the Report to final form.
- ▶ **Finalize the Cost of Service Model.** Additionally, we will develop the Final Cost of Service Model and provide both a single PDF file of the report and a Microsoft Excel version of the model. This will help ensure the District can easily adjust the model and fees, as needed, going forward.
- ▶ **Facilitate Final Presentations.** We will develop and deliver virtual presentations of the final deliverables to District leadership and appropriate staff. We find that these final presentations allow attendees to ask our team any final questions, help to generate buy-in for

Phase 5. Final Recommendations

recommendations, and promote the long-term success of the study.

Deliverable 9: Final Cost of Service and Fee Study Report

Deliverable 10: Final Cost of Service Model

Deliverable 11: Final Presentations

5.4. Anticipated Timeline

Table 2 provides a high-level overview of our anticipated project timeline. We will work with the District's project team to set mutually agreed-upon dates for key meetings and deliverables during the Project Initiation and Management phase.

Table 2: BerryDunn's Anticipated Schedule

Phase / Month	1	2	3	4	5	6	7	8
Project Initiation and Management	●	●	●	●	●	●	●	●
1. Engagement	●	●	●					
2. Cost of Service Analysis and Fee Study		●	●	●	●			
3. Cost Recovery Policy, Financial Assistance, and Peer Comparisons				●	●	●		
4. Draft Findings and Recommendations							●	
5. Final Findings and Recommendations								●

6. Project Budget and Other Financial Information

6.1. Disclosures

BerryDunn does not have any alleged, significant prior or ongoing contract failures, nor any civil or criminal litigation or investigation pending which involves the firm or in which the firm has been judged guilty or liable within the last five (5) years.

6.2. Fixed-Fee Proposal

BerryDunn's fixed fee for conducting the District's requested User Fee and Cost of Service Policy and Analysis is **\$63,400**. Table 3 presents a breakdown of our proposed fees by project phase. We have proposed a fully remote project approach, and as such, we have not included travel estimates. Should the District desire on-site work, we can provide per-trip travel estimates which would be billed only as incurred.

Our proposed fee reflects the level of effort we believe is required to complete the requested scope. Other factors that contributed to this fee include:

- ▶ Our staffing plan and resource allocation, which provides the District with the appropriate number of resources and level of expertise to complete the tasks defined in the scope of work
- ▶ Our experience conducting projects of similar scope and size
- ▶ Our proposed team's experience working together on similar projects

Table 3: BerryDunn's Proposed Fees by Phase and Deliverable

Phase	Cost
Project Initiation and Management	\$6,500
1. Engagement	\$12,000
2. Cost of Service Analysis and Fee Study	\$19,000
3. Fee Schedule Updates, Recommendations, and Peer Comparisons	\$9,300
4. Draft Findings and Recommendations	\$6,800
5. Final Findings and Recommendations	\$9,800
Total	\$63,400

Our fee proposal assumes that satisfying a deliverable is based on the District's signed acceptance. We will work with the District project manager to update our deliverables as required until they are accepted by the District. The District will not incur any additional costs associated with the process of reaching deliverable acceptance.

6.3. Hourly Rates

Table 4, below, provides hourly rates for our proposed team members. That said, we are pleased to propose a fixed-fee approach, as detailed above.

Table 4: BerryDunn's Hourly Rates

Team Member	Hourly Rate
Jesse Myott, Project Manager	\$250
Oliver Amaya, Business Analyst	\$200
Rich Neumann, Subject Matter Expert	\$220
Jeff Milkes, Subject Matter Expert	\$220
Lakita Frazier, Subject Matter Expert	\$220

6.4. Conflicts of Interest

BerryDunn does not have any personal, professional, or financial relationships with any officer and/or employee of the District.

Appendix A. Resumes



Jesse Myott, MA

Project Manager

EDUCATION AND CERTIFICATIONS

Master's, History, San Francisco State University

Bachelor's, History, University of Rhode Island

Associate's, Champlain College

MEMBERSHIPS

California Society of Municipal Finance Officers (CSMFO) (former)

Municipal Management Association of Northern California (MMANC) (former)

PUBLICATIONS AND PRESENTATIONS

Massachusetts Recreation and Park Association (MRPA) Annual Conference Speaker 2015 – Cost Recovery Methods

Jesse Myott is a manager in our Local Government Practice Group. He brings over a decade of public-sector experience, focusing on supporting municipalities with operating and capital improvement budget development and management; special fund accounting, revenue, and expenditure forecasting; customer valuation; and cost of revenue analyses for municipal programs and services. Jesse has led multiple cost of service and fee study projects for local governments across the country.

RELEVANT EXPERIENCE–

Fee Studies: Jesse has authored highly complex and sensitive fee studies, created detailed subsidy analyses, and developed cost recovery models as well as water and sewer rate setting models for municipalities across the country, most recently for the City of Bozeman, Montana; City of Raleigh, North Carolina; Town of Smithfield, Rhode Island; the Cities of Gainesville and Largo, Florida; and the Counties of Alachua and Manatee, Florida.

Process Analysis and Improvement: Jesse is an experienced municipal finance and management professional with over a decade of experience serving in many areas of local government both as an analyst and in senior management roles. His municipal business process knowledge extends through city administration, public works, water delivery and waste collection services, solid waste collection, public safety, economic development and redevelopment, library and recreation services, human resources, capital improvement program development, facility planning, compensation and benefits analysis, and citywide operating budget planning, monitoring, and delivery.

Finance: Jesse brings over a decade of public-sector experience. In addition to being an adept municipal finance professional, Jesse is particularly accomplished in the areas of parks and recreation and public works operating and capital budget development and delivery.

REPRESENTATIVE CLIENTS

- ▶ City of Bozeman, MT
- ▶ City of Jefferson, MO
- ▶ City of Mobile, AL
- ▶ City of Pflugerville, TX
- ▶ City of Raleigh, NC
- ▶ City of University Park, TX
- ▶ Peninsula Metro Park District, WA
- ▶ Town of Queen Creek, AZ
- ▶ Wilmette Park District, IL



Oliver Amaya, PMP®

Business Analyst

EDUCATION AND CERTIFICATIONS

BS, Liberal Arts, Excelsior
College

Associate of Applied Science,
Information Resources
Management, Cochise College

Associate of Science,
Language, Excelsior College

Certified Project Management
Professional® (PMP®)

Customer Recovery Certification

Business Administration and
Leadership Certification

Oliver Amaya is a consultant with BerryDunn’s Parks, Recreation, Libraries Practice. Before joining our team, he worked with the City of Corpus Christi, Texas Parks and Recreation Department as a special projects manager where he helped the department execute initiatives based in community development, operational improvement, and increased connectivity.

Oliver’s experience serving in the U.S. Army also honed his ability to balance complex projects, work in complex environments, solve difficult challenges, and make effective decisions. His fluency in Spanish and Portuguese, in addition to English, enables him to reach diverse groups and listen to their input.

RELEVANT EXPERIENCE–

Project Management: Oliver brings six years of experience directing new projects, managing various contracts, instituting cost and schedule controls, and establishing best practices. He is effective in leading and directing various projects from inception to completion. He has 12 years of progressive management experience and repeated success in developing project initiatives, directing project plans, achieving performance targets, managing budgets, and monitoring project costs.

Cost Recovery: While serving as special projects manager for the City of Corpus Christi, Texas Parks and Recreation Department, Oliver participated in a parks and recreation fee study revision related to residential development as well as a fee study for the City’s tennis center. Oliver participated in research and peer benchmarking for both fee studies.

Project Coordination: Oliver has performed administrative duties for projects while working closely with project management, subcontractors, and clients. His experience includes organizing subcontractors while staying within budget limitations, preparing work orders and expense reports, translating Spanish and Portuguese documents and conversations into English, optimizing revenue by developing cost-reduction activities via efficient supplier development and resourcing, and collaborating with other administrative staff on projects and initiatives.

REPRESENTATIVE CLIENTS

- ▶ Ada County, ID
- ▶ Adam's County Riverdale Park, CO
- ▶ City of Bangor, ME
- ▶ City of Irving, TX
- ▶ City of Novato, CA
- ▶ Hyland Hills Parks and Recreation, CO
- ▶ Jurupa Area Recreation & Parks District, CA
- ▶ Oceanside Public Library, CA
- ▶ Town of Gilbert, AZ



Rich Neumann

Subject Matter Expert

EDUCATION AND CERTIFICATIONS

B.S. Communications/B.S. English; James Madison University, Harrisonburg, VA

Publications and Presentations

Outrageous Events—Incredible Results! Michigan Recreation and Parks Association Annual mParks Conference, Virtual Session, February 2021

Marketing Strategy: From Practical to Practically Insane, North Carolina Recreation & Park Association Annual Conference, Winston-Salem, NC, October 2018 / National Recreation and Parks Association Annual Conference,

Caution: Extreme Marketing Ahead, Colorado Parks and Recreation Association Marketing Workshop, Erie, CO, November 2016

Rich Neumann is a senior consultant in BerryDunn's Parks, Recreation, Libraries Practice. He is a recognized public-sector industry leader in marketing, communications, and branding as well as a wildly creative cultural arts professional. He has a proven success in community engagement, special events, strategic planning, marketing, public relations, sponsorships/fundraising, and arts administration. His additional strengths include media and community relations, creative and technical writing, branding, volunteer management, and presentational speaking.

RELEVANT EXPERIENCE—

City of Westminster, CO (2016 to 2023): Rich managed the City's arts and culture efforts, including special events, public art, cultural heritage initiatives, and historic preservation. He led master planning processes, including facilitation of robust community engagement outreach. He led the City's creative services team, including management of communications, marketing, graphic design, and event professionals. He has been tasked with developing and executing marketing and engagement strategies in support of city branding initiatives. Accomplishments include increasing special event revenues by >850%; expanding event attendance by 300%; designing and implementing an event sponsorship program with contracts exceeding \$200K per year; growing social media audiences by 500%; and generating more than 17 million marketing impression per year.

Adams County, CO (2013 to 2016): Rich managed all internal and external communications for Adams County government. He also managed and led the county's first visual arts and cultural venues task force and helped coordinate the distribution of funds via the county's cultural council. He developed strategic communication plans; provided proactive media relations and issues management; oversaw digital content (social media, intranet, website); performed community outreach; supported executive staff and elected officials with media training and policy advisement; helped launch major policy initiatives; assembled and led a team of communication professionals. He was chosen by county leadership to serve on the county's first Innovation Academy sponsored by the Alliance for Innovation and Arizona State University.

REPRESENTATIVE CLIENTS

- ▶ Adams County, CO – Riverside Regional Park
- ▶ City of Commerce City, CO
- ▶ City of Greeley, CO
- ▶ City of Pflugerville, TX
- ▶ Hyland Hills Parks and Recreation District, CO
- ▶ Lexington Public Libraries, KY
- ▶ Town of Erie, CO
- ▶ Town of Gilbert, AZ



Jeff Milkes, MS, CPRP

Subject Matter Expert

EDUCATION AND CERTIFICATIONS

M.S., Recreation and Resource Development, Texas A&M University, 1987

B.S., Recreation & Park Management, University of Oregon 1985

Certified Park & Recreation Professional (CPRP)

MEMBERSHIPS AND AFFILIATIONS

Member Virginia Recreation, Parks, Society (VRPS)

Board Member for Leadership Training Institute (LTI)

Jeff Milkes is a senior consultant in BerryDunn’s Park, Recreation, Libraries Practice. Based locally in Oregon, he is a successful parks and recreation professional with over 35 years of progressively responsible experience with municipalities, special districts, and military recreation organizations. His work has focused on leadership development, performance management, non-traditional financing opportunities, and the provision of athletic and special events. Jeff brings with him extensive experience managing aquatic and recreation facilities, sports and fitness programs, and park maintenance. He is passionate about developing community offerings with a high level of creativity and imagination.

During his long and successful career, Jeff has served in a variety of capacities in the parks & recreation field. He worked his way up from recreation coordinator, sports director, community center manager, aquatics facility manager, recreation and parks manager to director of parks and recreation. He has delivered recreation services in small, mid-sized and large communities in Oregon and California. Jeff’s professional view of the field and judgement are often seen through the unique lens of an individual who has spent over 15 years working overseas, supporting our active-duty military and their family members.

RELEVANT EXPERIENCE

Organizational Assessment: Jeff led a data driven operational restructuring of parks and recreation services for one of the country’s premier parks agencies in Portland, Oregon, serving as SE Services Manager from 2005 — 2016. He was responsible for neighborhood engagement and policy development to bring all recreation services and parks assets in east Portland under one organization. He managed seven community centers and more than 100 parks.

Master Plans: Jeff has worked on more than a dozen parks and recreation master plan projects for communities such as the City of Canby, Oregon; City of Chelan, Washington; Town of Fountain Hills, Arizona; Greater Vallejo Recreation District, California; City of Kirkland, Washington; City of Montebello, California; City of Moses Lakes, Washington; City of Perris, California; and City of Umatilla, Oregon, among others.

REPRESENTATIVE CLIENTS

- ▶ City of Montebello, CA
- ▶ City of Newport, OR
- ▶ City of Perris, CA
- ▶ City of Umatilla, CA
- ▶ City of Windsor, CO
- ▶ City of Winnemucca, NV
- ▶ Greater Vallejo Recreation District, CA



Lakita Frazier, MPA, CPRP

Subject Matter Expert

EDUCATION AND CERTIFICATIONS

Master of Public Administration,
Liberty University

Bachelor of Social Work, Norfolk
State University

Certified Parks and Recreation
Professional (CPRP)

MEMBERSHIPS AND AFFILIATIONS

Member, Board of Directors,
National Recreation and Parks
Association (NRPA), 2020 to
Present

Instructor, Co-Chair, National
Recreation and Parks
Association Directors School,
2022

Regent/Instructor, National
Recreation and Parks Revenue
Development and Management
School, 2019 to Present

Member, Board of Directors,
National Association of County
Park Officials, 2018 to 2022

President, National Recreation
and Parks Ethnic Minority
Society, 2019 to 2021

Lakita Frazier is a senior consultant in our Parks, Recreation, Libraries Practice. She has more than 20 years of parks and recreation leadership experience within county and municipal agencies, including as executive director for Richland County Recreation Commission, South Carolina and as director of parks and recreation for the City of Suffolk, Virginia. She is an expert in developing high-performance teams, designing programs through community engagement and partnership, and managing public-sector organizations. Lakita is an active member of the industry, holding leadership roles with organizations including NRPA, American Academy of Parks and Recreation Administration, National Association of Park Foundations, and more.

She also has experience in fiscal management, public/private sector alliances, and personnel management, along with proven success in special event planning and community service through solid communication and exceptional supervisory/interpersonal skills.

RELEVANT EXPERIENCE

Organizational Development: Lakita has assisted numerous parks and recreation agencies as they address organizational issues and needs, including those related to human resources and diversity, equity, and inclusion (DEI). She is skilled at working with management and staff to understand their goals, challenges, and requirements for capacity building. She excels at establishing long-term relationships with staff at all levels to achieve performance and productivity. She has managed teams with as many as 200 full-time employees and 600 part-time employees, volunteers, and contractors, and developed and implemented compensation and job classification plan to create equity in pay.

Strategic Planning: Lakita specializes in helping parks and recreation agencies develop and implement strategic initiatives. She understands what is required to align long-range recreation program and facility development with anticipated community growth; how to develop capital improvement programs and related funding mechanisms; and how to analyze departmental programs, facilities, and services to measure effectiveness. As an instructor and co-chair of the NRPA Directors School, she is well-versed in industry best practices and emerging trends.

Cost Recovery: Lakita's public-sector parks and recreation background includes formulating and managing a \$25 million budget. She is skilled in financial management and in developing partnerships and securing grants to support programs and services. She has served as an instructor for the National Recreation and Parks Revenue Development and Management School since 2019.

REPRESENTATIVE CLIENTS

- ▶ Ada County, ID
- ▶ City of Pflugerville, TX
- ▶ City of Raleigh, NC