



CITY OF LODI

COUNCIL COMMUNICATION

AGENDA TITLE: Agreement for Preparation of Comprehensive Parks and Recreation and Open Space Master Plan

MEETING DATE: March 18, 1992

PREPARED BY: Public Works Director

RECOMMENDED ACTION: That the City Council authorize the City Manager to execute an agreement with the firm of Callander Associates for the preparation of the Parks, Recreation and Open Space Master Plan, appropriate \$118,000 for the study and appoint a Master Plan Review Committee.

BACKGROUND INFORMATION: As part of the General Plan and Development Impact Mitigation Fee study, the City established a parks and recreation facility standard (and corresponding impact fee) based on matching existing facilities. The #1 implementation program item under the Parks, Recreation and Open Space element of the General Plan was the preparation of the Master Plan. The location and size of future parks was only roughly indicated on a map contained in the fee study. Other facilities, mainly community recreation buildings, were unspecified. The estimated cost of consulting services for the plan was included in the impact fee program (\$50,000 in 1990 dollars).

Selection Process

In 1991, after the adoption of the General Plan, the Parks and Recreation Department started on the plan. Recognizing that this significant effort would require outside help, the department contacted consultants and other cities that recently had Master Plans prepared. We received examples of "Requests for Proposals" (RFP), Master Plans and general comments on the process. Over thirty letters were sent to consultants asking for comments and interest. Based on that input, an RFP was developed which was mailed to nine firms. A copy of the RFP is attached as Exhibit A. The RFP included a requirement for attendance at a pre-proposal meeting in December which seven firms attended. Proposals were received from five firms on January 17, 1992. The proposals were reviewed by a committee consisting of two members of the Parks and Recreation Commission, the Parks and Recreation Department management staff and two persons from the Public Works and Community Development departments' staff. Based on qualifications, responsiveness of the proposal and background checks with other cities, three firms were selected to make an oral presentation to the committee.

APPROVED

THOMAS A. PETERSON
City Manager

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Oral presentations were made on February 14. The **committee** interviewed the firms of:

- Callander Associates **from** San Mateo and their three subconsultants - The Sports Management Group (recreation program); Moore, Iacofano. **Goltsman** (**community** survey, input and workshops); and **Kreines & Kreines** (general plan, zoning and environmental analysis).
- J. C. Draggoo & Associates from Portland
- Royston **Hanamoto** Alley & Abey from Mill Valley and their subconsultants - Moore, Iacofano, **Goltsman** (**community** input and workshops) and **Walp & Moore** (**community** survey and recreation program).

The estimated budget for each firm, assuming comparable graphics and printing costs, and selecting comparable options (**if** offered) is:

Callander Associates	\$118,000
J. C. Draggoo & Associates	\$ 61,000
Royston, et al.	\$116,000

The **committee** majority selected the team led by Callander Associates as their **recommendation** to the City Council. This **recommendation** has also been reviewed by the full Parks and Recreation Commission. Advantages and strong points of this team included:

- size of the firm - they have sufficient resources to carry the project in the event of **unforeseen** difficulties.
- knowledge of California **Environmental** Quality Act (CEQA) requirements - they were the only firm that pointed out this "project" is subject to CEQA and offered, at nominal cost, to prepare the report in a format that will allow relatively easy environmental review.
- impact fee considerations - since most of this study and a major portion of the projects that will come out of the study are being funded by impact mitigation fees, **it** is important that the work and its conclusions comply with applicable State law. This team appeared to have the best knowledge in this area.
- **community** input - the Callander team offered a wide **range** of **community** input options which are discussed below.

Study Options/Cost

The recommended appropriation for this plan includes the following:

Consultant's services	\$ 89,700
Reports and graphics	7,000
Public notices (mailings, advertisements)	1,000
Contingencies	9,800
Subtotal	\$107,500
Recommended options:	
ADA Workshop	2,000
Spanish translation of survey	1,500
Youth involvement program	6,000
CEQA format	1,000
Subtotal	\$ 10,500
Total	\$ 118,000

The consultant's team and services are briefly described in Exhibit B. Exhibit C is the detailed work plan which includes some options. The schedule is shown in Exhibit D. Staff is recommending that a telephone survey with bilingual (Spanish) capability be performed rather than a door-to-door survey which would cost an additional \$4,200.

The ADA (Americans with Disabilities Act) Workshop is described in Exhibit E. The City has assembled a staff committee to work with this issue and this on-site training may be more cost effective than additional out-of-town workshops. Since the ADA program is still relatively new, staff recommends that this item be included in the project budget but that authorization to proceed on this item remain with the City Manager. This will allow time for staff to work with the consultants and to determine if we should take advantage of this specialized workshop or not and make a recommendation to the City Manager.

The "Children and Youth Involvement" option is described in Item 9.02 on the last page of the consultant's Proposed Scope of Services (Exhibit C). Staff feels this should also be included in the budget. However, a decision to proceed on this task should not be made until staff has received a commitment from the Lodi Unified School District. We would arrange a meeting among City, consultant and LUSD staff to discuss the program and whether it is feasible given the timing of our work, school schedules, class time availability, etc.

Master Plan Review Committee

All of the consultants strongly recommended that the City establish a formal review committee to work with the consultant. This committee would meet several times during the course of the study to review intermediate reports and guide future work. For example, a decision regarding the format of public input workshops is needed. Should they be focused on geographic subareas of the City or on specific topics such as youth and adult activities? (The basic budget provides for three such workshops and additional could be funded out of the contingencies.) Staff and the consultant recommend that the committee consist of:

- a City Council representative
- a Planning **Commission representative**
- one or two members of the Parks and **Recreation Commission**
- a Booster of Boys and Girls Sports Organization **representative**
- an **Adult Sports Advisory Board representative**
- a representative from the Senior Citizen Commission
- a Nature Area Advisory **Committee representative**
- an Arts **Commission representative**
- a **Lodi Unified School District representative**
- two to four "at large" members

There should also be a staff **committee to review** the consultant's work and work with the review **committee**. City Parks and Recreation, **Community Center**, **Community Development**, Finance, Administration and Public Works staff should be included. The overall **project** will be coordinated by the Parks and Recreation Director. Staff **recommends** that the Council direct the City Manager on forming these **committees**.

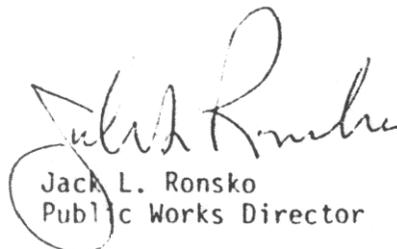
FUNDING: As stated earlier, the **recommended** budget for this project is **\$118,000**. While this is a significant expenditure, in **light** of the overall Parks and Recreation program and the General **Plan**, the amount is relatively small. This plan will be the basis for over \$18 million in **new** parks and recreation facilities as identified in the Impact Fee study. **An undertaking** of this magnitude should not be undertaken without significant public input and careful planning. The plan will also provide operation and maintenance standards and costs which will be needed to evaluate whether or not the City can afford to run the new facilities.

The **majority** of this plan can be paid for out of the Parks and Recreation Impact Mitigation Fund. Since this is the first project for the fund (which already has a \$10,000 balance) and additional revenue will be coming with new development this **summer, borrowing** from the General Fund should be minimal. However, since some of the work will involve analysis of existing parks and their deficiencies, a portion of the funding should be from the General Fund. Based on the consultant's **cost breakdown for inventory** of existing facilities and other work regarding deficiencies, staff **recommends** that **\$10,000** be appropriated from the Capital Outlay Fund. The remaining **\$108,000** should be appropriated from the Parks **Impact Mitigation Fee Fund**.

\$ 10,000 COF (121.0)
\$108,000 Parks, IMF (60.7)



Ron Williamson
Parks and Recreation Director



Jack L. Ronsko
Public Works Director

Prepared by Richard C. Prima, Jr., Assistant City **Engineer**

JLR/RCP/1m

Attachments

Lodi Parks & Recreation Department

125 NORTH STOCKTON STREET • LODI, CALIFORNIA 95240

TO:

FROM: Ronald W. Williamson, Director of Parks and Recreation
DATE: December 23, 1991
SUBJECT: Request for Proposal for a Comprehensive Parks, Recreation and Open Space Master Plan for the City of Lodi

The City of Lodi is requesting proposals from selected professional consulting firms with experience in the development of a Comprehensive Parks, Recreation and Open Space Master Plan.

Interested consulting firms **are** invited to submit proposals **no** later than 5 p.m., **FRIDAY, JANUARY 24, 1992.**

I. PROJECT DESCRIPTION AND BACKGROUND

In 1991 the City of Lodi completed its **General Plan** to include the Parks, Recreation and Open Space element. **The Plan called** for the following three implementation programs.

1. The City shall prepare and periodically update a Parks Division plan identifying **goals**, policies, and standards for the improvement of existing parks and the development of future parks.
2. The City shall adopt and periodically review a fee ordinance for park acquisition, development, **as well as** special needs facilities, and revise it as **necessary**.
3. The City shall revise zoning ordinance to provide more **open** space within multi-family developments by requiring wider setbacks and greater building separation.

The current General Plan addresses Lodi at 52,000 population, with build-out to the year 2007 of a population of 76,000. The citizens, City Council and Plan support a 2% population growth limit per year through a growth management plan.

Lodi is located 15 miles north of the City of Stockton (which has a population of 200,000) and 35 miles south of the City of Sacramento and its metropolitan area (1,000,000+ population). In addition, Lodi is 85 miles east of the San Francisco Bay area and 35 miles west of the Mother Lode Gold Country. The city is transforming from a rural (agricultural) small town into a moderate sized, suburban city, becoming more commercial and industrialized.

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As to our basic Parks and Recreation Department operations, the City currently operates **24** parks, consisting of 276 developed and 75 undeveloped acres. Major facilities include Lodi Lake Park, a 114-acre regional park; the Grape Bowl, a municipal football/softball/special events facility; Zupo Field, a professional level baseball park; two (2) baseball/softball/soccer complexes; three (3) city pools (one of which is indoor) and a lake beach area; an arts/seniors complex of community buildings (Hutchins Street Square); a golf driving range; and many other parks areas that address community active needs and green belt open spaces. Additionally, the Parks Division mows City school play fields, which adds another 100+ acres of responsibility.

To handle the Parks' side responsibilities, the City employs 25 full-time and **12** part-time personnel to do related administrative and park labor tasks. Two (2) full-time park rangers, three (3) seasonal rangers/gate attendants presents a total staff of 27 full-time/16 part-time personnel. This division operates and funds its activities with a budget of \$1.5 million.

On the Recreation side the City provides a full and varied schedule of programs, special events, playgrounds "after school" (6 sites), camp child care, special interest classes, youth and adult sports and aquatic activities. This division employs six (6) administrative and two (2) general full-time staff, 150 part-time seasonal employees and coordinates the assistance of hundreds of volunteers.

Lodi is one of the few cities in California that coordinates and directs all national-level youth teams sports. As such, athletics play a major role in youth programs and activities and impacts all parks and school facilities. Known also for having one of the State's outstanding adult sports programs, with higher per capita participation than 80% of all cities in California. Lodi serves as the site, annually, of district, state, regional and world series level events and tournaments. The Recreation Division has a \$1.1 million dollar budget and makes the most of every dollar available.

With the growth the City is experiencing, the demand for parks, recreation and open space is, and will continue to be, high. We are hopeful that the Master Plan will provide needed direction for park/recreation facility development and a supporting action plan that will address capital improvements, plus establishing a financing plan that will support or enhance the recently approved development impact mitigation fee.

This will be Lodi's first complete city-wide Parks and Recreation Master Plan. Up to this point development was directed by the old General Plan mandates, where parks have been established as drainage basin facilities primarily and active parks secondarily, or parks were encouraged by developers for enhancement of various City areas. The 1991 General Plan update and Development Impact Mitigation Fee Program provides for new drainage basins that may be used for recreation but also provides for additional facilities solely for recreation. The Parks and Recreation and Open Space Master Plan, therefore, when adopted, shall serve as a guide for orderly planned development of our parks, recreational facilities, open space areas and recreation programs.

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II. SCOPE FOR COMPREHENSIVE MASTER PLAN

The Comprehensive Parks, Recreation and Open Space Master Plan should include the following elements.

The first phase of the Comprehensive Parks, Recreation and Open Space Master Plan will be assessment of demands based upon a review of the existing parks and recreation system including the following elements.

- A. Inventory and analysis of existing parks, recreational facilities, recreation programs and open space areas. Analyze potential for development of existing City parks and public land including Lodi Lake Park area as well as park sites that have been identified in the various Specific Plans but are currently undeveloped.
- B. Identification of deficiencies in existing parks, recreation facilities, and recreation programs.
- C. A demand analysis for parks and recreation facilities, and recreation programs, as well as open space. This demand analysis should consider demographic trends and projections, as well as an analysis of present programs. The use of surveys to determine recreational demand should be included in the proposals. This analysis should also consider planned long term development of Lodi through the year 2007. The analysis should also include identification of the relative demand from non-City residents and possible changes in this demand based on the San Joaquin County Draft General Plan.
- D. Quantify standards for parks and recreational facilities. Determine the existing service standard plus a "desired" standard and compare to national standards. Include indoor and other major facilities as well as parks.
- E. Determination of future demands for parks and recreational facilities.
- F. Recalculation of relative service demand from various land use types. This to refine or replace the work done as part of the Development Impact Mitigation Fee Program.
- G. Address opportunities to create community open space areas, including access to such areas as the Mokelumne River (North Bank) and greenbelt corridors or zones as addressed in the General Plan. This task will not include plans, cost estimates or inclusion in the impact fee program at this time.

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- H. Analyze and develop maintenance/operation standards for current parks/facilities and project these standards for the proposed facilities. Include maintenance costs per acre, equipment and personnel needs.

...
Phase II

The second phase of the Master Plan should be an Action Plan with the following elements and shall have at least two alternatives based on the standards developed in Phase I, D.

- A. Recommended goals and policies that will guide the City in the orderly development of parks, recreation facilities, recreation programs and community open space. Include recommendations for changes in the zoning code pertaining to open/recreational space within multi-family developments. Also include recommendations for possible use of potential surplus school sites.
- B. Specific recommendations regarding the Department's services and programs should be included in the Action Plan.
- C. The Action Plan should include a Development Plan (Capital Improvements Program) which addresses the deficiencies in the present system, as well as recommendations to address future needs (new parks and/or facilities). The development plan is to include costs to be used for future funding requests as well as staging for the implementation of the plan, similar to that done for the Development Impact Mitigation Fee Program. (We will also need general requirements of neighborhood, community and/or regional parks/facilities as to location, size, activity areas, etc. in each park.) (Land costs will be provided by the City.)
- D. This Comprehensive Park, Recreation and Open Space Master Plan will serve as an update to the Recreation Element of the General Plan. Therefore, the Master Plan should address the City's General Plan and should present recommendations based upon and within the framework of the City's General Plan.
- E. The City will need a funding plan to address existing needed improvements to current parks/facilities, development of new parks and facilities and suggestions or a plan to handle maintenance and operation of the City's facilities. The City has adopted an Impact Fee Schedule, which should be incorporated in all planning and/or action directed to this area of this Master Plan. It is not intended that the consultant recalculate the impact fee but will provide the project cost, staging and relative demand factors (RAF's) in order for the City to recalculate the fee.

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III. SCOPE OF CONSULTANT SERVICES

The consultant shall be responsible for the completion of all work outlined in Section II, Scope for Comprehensive Master Plan with specific attention to the items listed below. (Additional work needed and not addressed herein should be discussed at the pre-proposal meeting.)

- A. Complete review of the City General Plan and its **park**, recreation and **open** space elements and a consistent tie to the **General Plan** and its findings shall be presented. Consultant should likewise review and be familiar with the City's Development Impact Mitigation Fee Program.
- B. Conduct public opinion surveys, gather statistical demographics and analyze results with respect to **trends**, current **needs**, and potential deficiencies in Lodi parks, recreation facilities/program and open space. The proposal may describe **a range** of possible or alternate methods to obtain the **necessary** information.
- C. **Work** to include review of facilities in terms of the ADA (Americans With Disabilities Act).
- D. **Conduct** at least three to five neighborhood/geographical public meetings to solicit citizen input **on** parks, recreation and **open** space planning.. Active citizen participation will be required while **preparing** the Action Plan, and a citizen participation format will be approved by City staff to insure compliance with this **goal**.
- E. Interview department staff who will provide insights and operational data to make the Master Plan factual and functional.
- F. The **consultant** must make presentations of each major submittal **to** the Master Plan Review Committee and two (2) presentations each to the Parks and Recreation Commission and City Council. Additionally, final proposals for approval will **go** to the Parks and Recreation Commission and City Council. (City/Consultants will discuss plan review needs to achieve mutual agreement on same.)

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- G. The consultant will be accountable for all work of subcontractors and shall supervise same. A list of subcontractors shall be furnished at time RFP submitted. The City reserves the right to select individual firms (subcontractors) from the various teams in order to assemble the most qualified team.
- H. The consultant shall prepare status reports on a bi-weekly basis. A formal report is not required; notes written on the project schedule indicating percent completion or other status information will be sufficient (10 copies).
- I. Completion of this project will not exceed six (6) to eight (8) months from date of contract award.
- J. Upon completion of the Master Plan, all final technical printed material shall be submitted in an 8 1/2" x 11" format that can be duplicated on City duplication equipment (b & w). 25 copies. (Said material shall be in an indexed three-ring binder with titles on outside front cover and some renderings of a typical park area and facilities must be included with the documents as to park type, location, suggested size and areas, etc., (color parks/facilities and graphics.) In addition to the final technical report, we would request 150 summary reports, done in color, including major findings and recommendations.
- K. The Master Plan text must also be submitted on MS DOS compatible 3 1/2" floppy disks that can be used on departmental IBM personal computers and word processors for future additions, deletions, or corrections. (Describe your firm's capabilities in this area.)
- L. At the completion of the Master Plan, in addition to the documentation addressed above, the City will require two (2) wall maps of the park/facility areas in color, designating current parks and new park areas and/or facilities. They will be covered with acetate and trimmed on edges. (If AutoCAD maps can be prepared, please indicate. The City can furnish base maps in AutoCAD format.)

IV. CONFLICT OF INTEREST

Proposal should include a statement disclosing any past or ongoing involvement in the City of Lodi by the consulting firm. The City of Lodi reserves the right to reject any proposals that have the potential for conflict of interest.

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v. PRE-PROPOSAL MEETING (FRIDAY, JANUARY 3, 1992)

The Parks and Recreation Department will Conduct a "Pre-Proposal Meeting" on FRIDAY, JANUARY 3, 1992, at 10a.m. at the City of Lodi, Carnegie Forum, 305 W. Pine Street. to review the Request for Proposal and answer questions on the proposal and the project. Attendance at this meeting is mandatory for qualification of prime consultants and their proposals. However, attendance at the meeting does not infer an invitation for a presentation of a consultant's final proposal.

VI. LIMITATION ON PROPOSALS

This request for proposals does not commit the City of Lodi to award a contract or to pay any costs incurred in the preparation of a proposal in response to this request. At this time, there is no commitment on the part of the City of Lodi to award a contract for consulting services for this Comprehensive Master Plan. However, upon selection of a consulting firm, the Department will request that City Council approve the selection of the firm and award the contract for the Master Plan.

VII. CITY'S RESPONSIBILITY/CITY STAFF INVOLVEMENT

The City will be responsible for all required public notices and advertising for public meetings. The City will also make available to the consultant selected the existing Park and Recreation-Element of the City's General Plan, Impact Mitigation fee document and background material, parks lists, current recreation program, capital improvement project lists, statistical profile, and whatever other material readily available that will assist the consultant and the planning process.

VIII. SELECTION PROCEDURE AND CRITERIA

This "Request for Proposals" is being submitted to several qualified professional consulting firms. After all the proposals have been received, they will be reviewed by a staff committee and narrowed to three (3) firms who will be invited for on-site interviews/presentations to the committee. (These interviews will be at the expense of the individual firms and shall include project manager and the major subconsultants.) This committee will make a recommendation to the Parks and Recreation Commission, who in turn will make a recommendation to the City Council, for a final decision.

The selection for the consulting firm will be based upon the following criteria:

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- A. The proven experience of the firm to **successfully** complete projects of a similar nature with other cities within an established time frame which adequately and accurately addressed the project scope of services.
- B. The qualification and experience of the project manager and other staff who are designated to be assigned to this project. (The City will want to know what percentage of the plan will be done by the project manager and that of his internal and external staff.)
- C. The consulting firm's understanding of the work to be completed in the project based upon the proposed methodology to complete the work. (A planning process chart will be **needed** here for the selection committee to visually view the flow and committed tasks/dates of the project.) It is imperative to stay within a 6-8 month time frame for completion of the plan.
- D. The ability to produce a final plan consistent with the City's available funding.

IX. **SUBMISSION FORMAT (DUE FRIDAY, JANUARY 24, 1992)**

- A. **Scope of Consultant Services.** As outlined in Section III of this "Request for Proposals", to be completed with the study format and methodology proposed for addressing each component of the Comprehensive Master Plan.
- B. **Fee Schedule. (In a separate envelope)** Proposals should include a total cost of the services to be provided by your firm. The costs should be **broken** down by major tasks, as follows:
 - 1. Hourly rates on informational and interview meetings with City staff.
 - 2. Hourly rates on meetings with Master Plan Committee, Recreation and Parks Commission and City Council.
 - 3. Hourly rate of neighborhood public meeting.
 - 4. Estimated graphics costs.

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5. Estimated printing costs.
6. Information gathering costs including public surveys, opinion polls, public mailings, and statistical demographic analysis.
7. Master Plan analysis and preparation.

- C. General Work Program and Time Table of Completion. Proposals should include an outline of the major tasks with projected timetables to reach various phases or benchmarks in the project. The proposals should show a realistic projected timetable to complete the project **and** should identify City review time.
- D. Personnel and Professional Qualifications/Experience. Proposals should identify key personnel that would be assigned to this project. Resumes for these key personnel should be included **as well as** identification of their responsibility in each task performed. (Submit samples of a minimum of three (3) completed (final document) master plans and **general** reference of (5) cities where consultant has done a completed plan - name of city, primary contact person, address and telephone number).
- E. Draft of Consultant Contract. For City Attorney review.
- F. Submit seven (7) copies of Proposal by 5:00 p.m. on FRIDAY, JANUARY 24, 1992, to the Lodi Parks and Recreation Department, Attention: Ron Williamson, 125 N. Stockton St., Lodi, CA 95240.

X. FINAL INTERVIEW AND PRESENTATION BY QUALIFYING CONSULTANTS

FRIDAY, FEBRUARY 14, 1992 (TENTATIVE) - Qualifying consultants will be contacted and requested to appear before Master Plan Committee **to** make formal presentation on February 14, 1992 (tentative). Appointment times will be set up for each consulting **firm**.

After the interviews, the selection committee will ask one consultant to attend a "Clarification of Scope" meeting (before the contract) with departmental staff prior to presentation to the Recreation Commission and City Council. A detailed project schedule, scope of work and cost will be developed after this meeting. Additional request/requirements of City staff involvement and/or material needed to be furnished must be stated in order to determine our abilities to honor such request/requirements.

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XI. INFORMATION

A. Any questions regarding this proposal or requests for materials should be addressed to:

**Ron Williamson, Director
Lodi Parks and Recreation Department
125 N. Stockton Street
Lodi, CA 95240
Telephone(209) 333-6742**

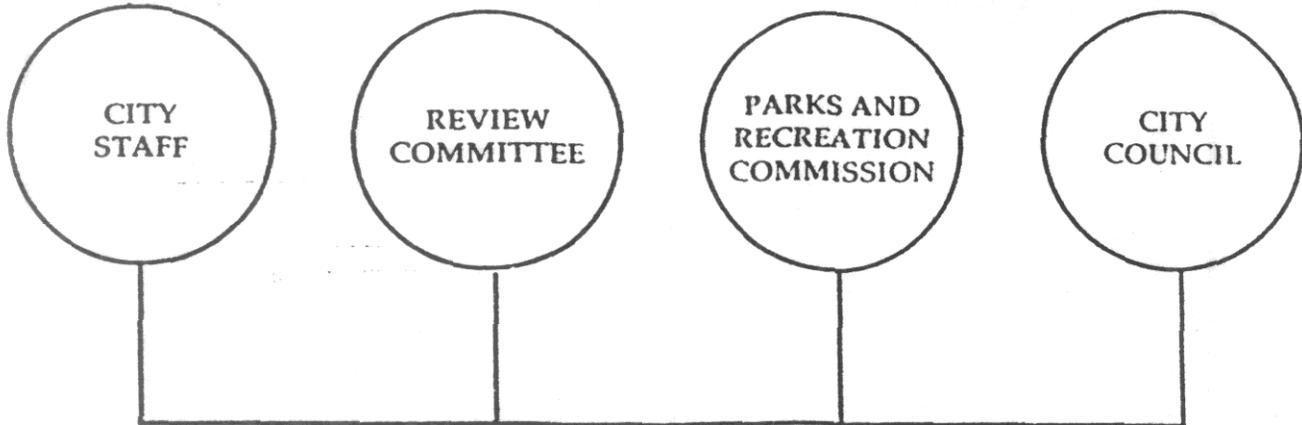
The City appreciates your firm's thoughtful consideration of this project and looks forward to receiving your proposal.

Sincerely,

**Ronald W. Williamson
Director
Parks and Recreation**

RWW:srb

THE MASTER PLAN TEAM



CALLANDER ASSOCIATES **LEAD CONSULTANT**

William Harris, Project Manager
Peter Callander, Supporting Principal

- PROJECT LEADERSHIP
- FACILITIES PLANNING
- DOCUMENT PRODUCTION
- MEETING FACILITATION
- ACTION PLAN
- FUNDING PLAN

THE SPORTS MANAGEMENT GROUP

Lauren Livingston

- RECREATION PLANNING
- OPERATIONS
- SERVICE LEVELS & STANDARDS

MOORE, IACOFANO, GOLTSMAN

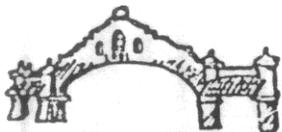
Daniel Iacofano

- PUBLIC PARTICIPATION
- DEMAND ANALYSIS
- COMMUNITY SURVEY

KREINES & KREINES

Ted Kreines

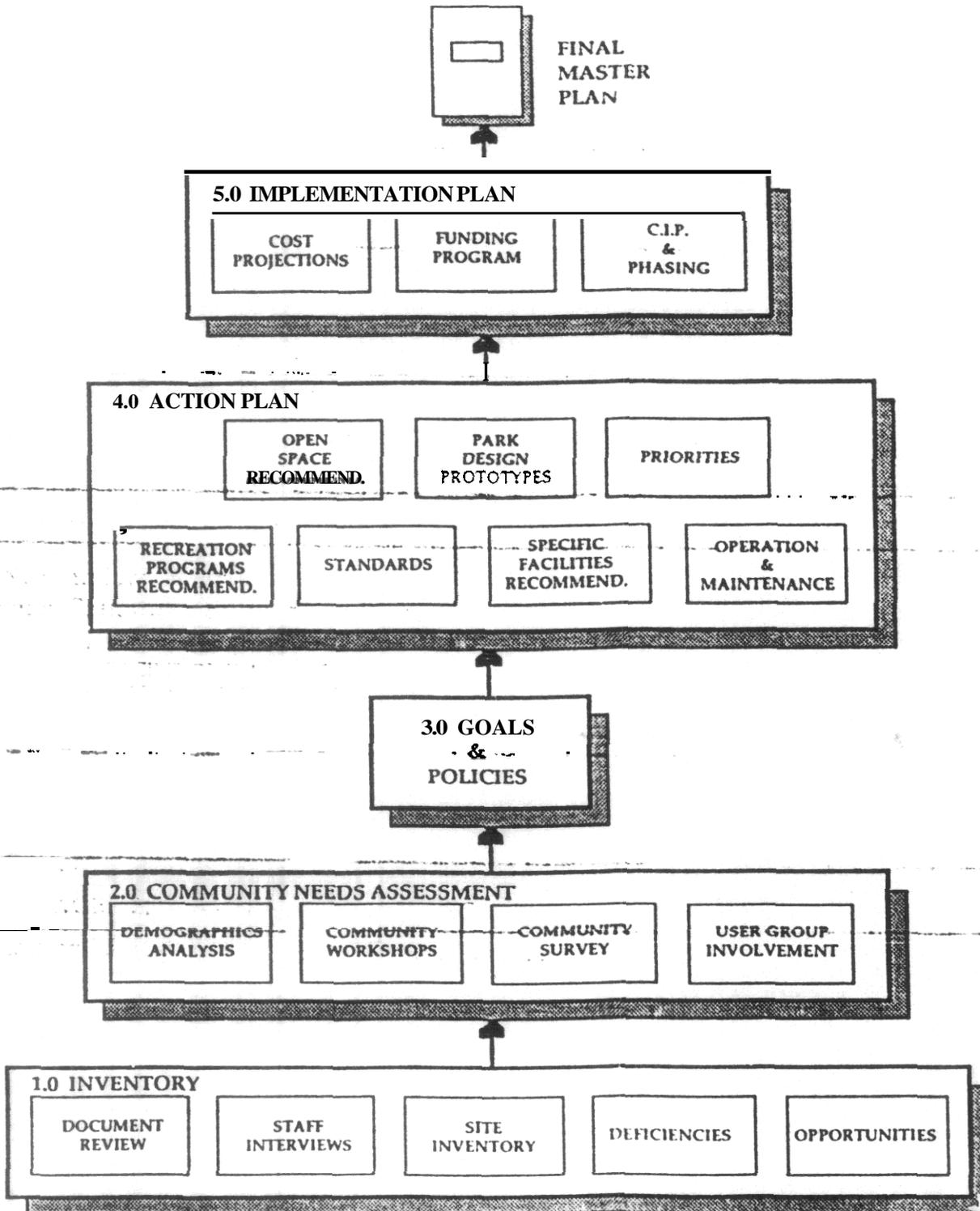
- OPEN SPACE PLANNING
- RAE RECALCULATION
- CEQA
- GENERAL PLAN/ZONING



Callander Associates

LODI PARK, RECREATION, & OPEN SPACE MASTER PLAN

BUILDING A MASTER PLAN



Callander Associates

LODI PARK, RECREATION, & OPEN SPACE MASTER PLAN

Proposed Scope of Services

Callander Associates' goal is to develop a Master Plan which is clearly achievable and fundable, **vet** is forward-looking, open to a full range of possibilities, and responsive to the desires and needs of the community. The Master Plan must do the following things to be successful:

- Determine user demands and **prefer**
- Analyze context
- Inventory existing facilities and recreation programs
- Define park and recreation types and categories
- Establish facilities standards
- Develop realistic policies and long-range **goals**
- **Prioritize** acquisition, development and improvement projects
- Provide accurate cost projections
- Create a financial plan to achieve the desired **goals**
- Develop a plan for **short** and long-term maintenance
- Reflect the **desires, dreams** and concerns of the community

Callander Associates' experience and qualifications are well-suited to the development of a long-range vision for the community which **has flexibility** to respond to changing conditions and community goals. The following scope of work is proposed:

0.0 Pre-Contract Phase

- 0.01 Clarification of Scope Meeting: Review project scope, schedule, and **cost** with City staff. Discuss optional/alternative **scope** items and associated fees. **Verify** City staff scope requirements versus consultant **scope** items.
- 0.02 Develop draft **scope** and schedule and consultant contract for City review.
- 0.03 Revise, as necessary; prepare final **scope**, schedule, and contract for City processing. Receive notice to proceed.

1.0 Inventory

- 1.01 Collect and review **General Plan**, Development Impact Fee Study, School District Agreements, background data, previous reports, and all related information from the City, including aerial photos and **base** maps; collect same from County staff where applicable.
- 1.02 Research and prepare written draft outline of the proposed objectives and scope of the plan; prepare outline of the planning process as a graphic and scheduling tool.
- 1.03 Staff Interviews: **Meet** with Parks and Recreation Director, Assistant City Engineer, and appropriate staff members. Discuss parks operation and maintenance, recreation programs, open space issues, and current and historical departmental operating budget and funding sources.
- 1.04 Existing Facilities Inventory: Review the list of existing facilities and landholdings from the City and School District. Visit each site and prepare outline-type inventory of existing facilities. Describe deficiencies, unique qualities, opportunities and constraints. Review any current plans for expansion and improvements. Prepare "Existing Facilities" map to document location and characteristics of all developed park and open space facilities. Evaluate

distribution of existing parks relative to population. Identify neighborhoods that are underserved.

- 1.05 **Opportunity Analysis:** Conduct inventory of existing undeveloped land within City sphere of influence; analyze suitability for park development or open space preservation; discuss opportunities and constraints. Prepare Opportunities- diagram to document potential new park, recreation, and open space development sites, and potential improvements to existing areas.
- 1.06 **Recreation Programs Analysis:** Document existing park and recreation programs, participation, user demand, user profiles, unmet program needs, current and future trends. Compare existing facilities and space inventory with program requirements and identify key deficiencies. Provide information regarding local and national recreation standards.
- 1.07 **Report of Findings:** Document above information in an Existing Conditions Report complete with text, graphs, and matrix graphics. Circulate to Staff and Review Committee.
- 1.08 **Review Committee Meeting:** Present results of phase 1.0 to Master Plan Review Committee. Take comment. Discuss strategy and schedule for public participation component, including neighborhood workshops, and content of community survey. Discuss overall project schedule.

Demand Analysis

- 2.01 **Demographic Analysis:** Conduct a demographic search using our on-line demographic database service and prepare a demographic profile of City and nearby County residents for both the current year and for the year 1997, with rough projections for 2007. Obtain other available demographic data regarding growth trends and projections for both population and business development. Develop projected City demographics including population, population profiles, population location profiles and business development population profiles. Highlight important changes expected in the demographic composition of City and nearby County residents and of the business/industrial population. Draw conclusions and discuss implications for future recreation programs, facilities, and open space areas.
- 2.02 **Community Survey:** The purpose of the survey is to measure users' opinions regarding park and recreation services and open space in the City of Lodi in order to determine recreational demand. The survey will also identify residents' current use patterns and their willingness to pay for services and improvements. Using one of two methods, the survey will gather the opinions of a representative cross-section of the City and adjacent area residents:

Option A: Door—Door Interview

A random survey using in-person interviews at residents' homes has the following advantages and disadvantages:

Advantages

- Ensures an accurate geographically distributed survey sample
- Allows use of maps and other visual aids during the survey
- Allows face-to-face interaction with the respondent.

Disadvantages

- *More expensive.
- More time-consuming.
- Interview hours restricted to daylight hours.

Option B: Telephone Interview

A **random** survey using telephone interviews has the following advantages and disadvantages.

Advantages

- Less expensive.
- ~~Less time-consuming.~~
- Allows foreveining interviews after sundown.

Disadvantages

- Restricts **survey** length.
- Disallows **use** of graphics.
- Disallows **face-to-face** Interaction.

The community **survey** will involve the following subtasks:

Survey Issues Identification Meeting

Meet with City staff and Review Committee **to** identify topic areas and issues **to be addressed in the survey.**

Survey Instrument Design

Translate topic areas **and** issues identified into questionnaire format **and** prepare draft **of the** survey instrument. Refine and finalize **survey** instrument after City review. **Transmit** to City staff for final comments, review, **and** approval.

Survey Pilot

A **pilot survey** will be conducted **to** test survey length, question phraseology and **response** quality. The final **survey** instrument will then **be** developed with project team and City **staff** input and approval.

Survey Sample Selection

A random stratified sample based on ethnic background, owner/renter status, **geographical location**, gender and age will be **devised** to ensure balanced community representation and **gernalizability** of survey findings.

Survey Administration and Management (Option A)

Survey will be administered 'door-to-door' to a stratified sample **of** community residents using face-to-face interviews. **The** estimated sample size is **350**. The **survey** will consist of **twenty to twenty-five (20-25)** dosed- and open-ended questions and will take approximately fifteen to twenty (15-20) minutes to administer. **(As an option, a special effort can be made to solicit the opinions of Spanish-speaking residents. The survey instrument can be translated into Spanish and bilingual field staff can be available to conduct survey interviews.)**

Survey Administration and Management (Option B)

Survey will be administered by telephone **to a** stratified sample **of** community residents. The sample size, questionnaire length, and spanish language option would be as described for the door-to-door Option A.

Survey Analysis and Reporting

Completed surveys will be computer tabulated **and** up to three crosstabulations of the data performed. Survey findings will be presented in the Community Needs Assessment Report using text, graphs, and **tables**. The report will include **an** executive summary **of** key survey findings.

- 2.03 Neighborhood Workshops: Organize and conduct three (3) neighborhood workshops to supplement the data gathered through the survey and to provide an open, public forum for discussion. The workshops will be held in locations throughout the City to facilitate participation of residents from each neighborhood of the City and nearby County area.
- 2.04 Community Needs Assessment Report: Prepare Community Needs Assessment Report presenting the findings from the demographic analysis, the community survey and neighborhood workshops. Summarize results in text, graphs and tables, including photo-reductions of wallgraphics produced during the workshops. Forward to Staff and Review Committee.
- 2.05 Review Committee Meeting: Present results of Demand Analysis to committee. Discuss implications for goals, policies, recreation programs, and parks and facilities development in Lodi. Take comment and develop consensus for proceeding with Action Plan.

3.0 Goals and Policies

- 3.01 Early-on in the planning process, develop draft outline of goals and policy statements that will guide the City in the orderly development of the system. Circulate to Staff and Review Committee. At a minimum, address the following subject areas.
- Park system development and maintenance.
 - Open space areas.
 - Standards.
 - Recreation Programs.
 - School District cooperation.
 - Private open space and recreation.
 - Operation and maintenance.
 - Funding.
 - A.D.A. compliance.
- 3.02 Revise goals and policies as necessary. Include as a separate chapter in the Draft and Final Master Plan Documents to be reviewed and approved by Staff, Review Committee, Commission, and Council.
- 3.03 General Plan Review: Review General Plans for any outdated information or conflicts as regards the Parks, Recreation, and Open Space Master Plan goals and policies. Determine impact of General Plan on the Master Plan. Issue a technical memorandum to City staff recommending changes to the General Plan to ensure consistency with City's Master Plan goals and policies.
- 3.04 Review Lodi Zoning Ordinance. Recommend appropriate revisions to indicate where setbacks, sideyards, and other legislated "open space" could be mandated to provide passive or active functional open space.

M Action Plan

- 4.01 Standards: Provide recommended quantified standards for park acreage and park and recreation facilities. Recommended standards will be based on an analysis of existing standards, actual current service levels, comparisons to national standards, our data bank on California cities' standards, and the demographic and demand analysis. Develop detailed matrix for proposed facilities standards and circulate to Staff and Review Committee for comment.

- 4.02 **Facilities Program:** Apply recommended standards to projected demographic trends and community references. Develop detailed matrix for proposed facilities and space requirements broken down by geographical service area.
- 4.03 **Facilities Development Plan:** Describe each proposed park and recreation facility acquisition and development project in detail. Include recommendations for both improvements to existing facilities and development of new facilities. Describe specific facility components (e.g., ballfields, restrooms, indoor spaces, etc.) for each project. Produce "Master Plan Diagram" to illustrate proposed system, utilizing City provided base map.
- 4.04 **Recreation Services and Programs:** Based upon earlier analysis of program offerings, existing resources and unmet need, recommend any changes regarding current program offerings and/or modifications in service level that may mitigate negative impacts on programs or program demand. Describe relationship between programs/services and the Facilities Development Plan to support the recreation program.
- 4.05 **Open Space Recommendations:** Identify areas with open space potential to meet current and proposed City objectives, including opportunities for public access to the north bank of the Mokelumne River, and creation of "community separators" or greenbelts. Include recommendations in Goals and Policies section of the Master Plan. Document recommendations graphically on an "Open Space Opportunities" Diagram.
- 4.06 **Facilities Requirements and Concept Plans:** For each facility category (e.g., neighborhood park, community center, etc.) develop itemized description of typical components, size requirements, location, service area, sports facilities, character, parking, access, and other applicable standard characteristics. Produce schematic concept plan diagrams for each category to illustrate typical configurations and spatial relationships.
- 4.07 **Capital Improvement Plan:** Develop priorities for all proposed facility development projects. Group priorities into three phases to be used in the Implementation Plan. Priorities will be developed based on existing C.I.P., demand analysis, demographic projections, community goals, public participation, and interaction with the staff, Review Committee, Commission and Council. It is expected that priorities will evolve throughout the process prior to finalization in the Capital Improvement Plan.
- 4.08 **Operations and Maintenance Plan:** Analyze and develop maintenance and operations standards for current parks and facilities. Apply standards to proposed facilities.
- 4.09 **Review Committee Meeting:** Present draft progress findings, discuss and take comment. Develop consensus on Action Plan recommendations.

5.0 Implementation Plan

- 5.01 **Cost Estimates:** Develop cost projections for acquisition and development of capital improvement projects. Utilize per-acre cost projections and refine to a greater degree of detail to reflect any unique components of proposed projects. Land acquisition costs will be provided by the City.
- 5.02 **Operations and Maintenance Costs:** Develop forecast of operations and maintenance costs utilizing the standards developed in the Operations and Maintenance Plan. Costs to be expressed per-acre for parks and per-square foot for indoor facilities, and to include personnel, equipment and materials.

5.03 Funding Plan: Develop a comprehensive plan to indicate **sources** and amounts of funding for all capital improvements, and operations and maintenance costs. Utilize results of City Development Impact **Fee** Program and User **Fee** Program as a starting point. Include recommendations for other funding sources such as assessment districts, bonding, grants, and others. **It is the intent of this task to tie recommended funding sources to the Capital Improvement Plan; therefore, any revision of the impact or user fee program (other than as described below for item 5.04) is beyond the scope of this proposal.**

5.04 Impact Fee Review: Review current park development impact **fee** program and recommend revisions to the Residential Area Equivalent (RAE) factors in order to assist the City formulate a **revised schedule of development impact fees** for parks and recreation. The following factors will be considered:

- Population density per land use.
- Relative frequency of use.
- Hours of potential occupancy per land use.
- Jobs/housing ratio of Lodi employers to employed residents
- Added payment of storm drainage fees.
- Interviews of employers and City departments

6.0 Draft Master Plan

6.01 Assemble findings of above phases into Draft Master Plan document (8-1/2 x 11 format); circulate twenty (20) copies to Staff and Review Committee.

6.02 Review Committee Meeting: Present findings to committee, facilitate discussion, develop **consensus for proceeding to Commission.**

6.03 Parks and Recreation Commission Meeting: Revise draft to **reflect** Committee's concerns, forward ten (10) copies to Director for distribution to Commission. Present findings to Commission; facilitate discussion; record Commission and public comment.

6.04 City Council Meeting: Revise draft, as necessary, to incorporate public and Commission comment. Forward ten (10) copies to Director for distribution to Council. Present findings to Council, facilitate discussion, record Council and public comment. Receive authorization to **finalize** the Master Plan document.

7.0 Final Master Plan

7.01 Revise Draft Master Plan based on public comment and Council direction.

7.02 Prepare Final Master Plan document in 8-1/2 x 11 format, to include text, graphics, and reduced maps and plans. Forward ten (10) copies to Director for submittal to Commission.

7.03 Commission Meeting: Present Final Master Plan to Commission. Take public and Commission comment. Receive direction to proceed to Council.

7.04 Revise Final Master Plan as directed by Commission. Forward ten (10) copies to Director for submittal to Council.

7.05 City Council Meeting: Present Final Master Plan to Council for approval

8.0 Final Documentation

- 8.01 **Summary Report:** Produce executive summary report, in 8-1/2 x 11 format, up to fifteen (15) pages in length. Submit draft for Department review. Revise, as necessary, and produce 150 copies, including color graphics, and submit to Department.
- 8.02 **Final Technical Report:** Produce comprehensive technical report, black and white, to include all background data, studies, reports, and results of all phases. Package in 8-1/2 x 11.3-ring binder, and submit twenty-five (25) copies to Department.
- 8.03 **Master Plan Text:** Submit text on MS DOS compatible 3-1/2" discs for future revisions.
- 8.04 **Wall Maps:** Submit two color copies of the Master Plan Diagram, plastic laminated, at a suitable scale for wall mounting. AutoCad preparation can be provided as an additional service, if requested.

9.0 Optional Tasks

- 9.01 **A.D.A. Training Workshop:** Conduct Workshop as described in "A.D.A. Review" section of this proposal.
- 9.02 **Children and Youth Involvement** As an additional service to assess the recreational needs of children and to encourage their involvement in planning for their city's parks and recreation facilities and programs, MiG will design and produce a children's curriculum and poster kit for use by Lodi teachers in their classrooms. The curriculum will be designed for maximum ease of use by teachers and will provide brief, fun exercises to gather information on children's recreational needs and preferences. Children will be invited to contribute their ideas for the Master Plan by drawing their favorite parks, fields, play equipment, and ideal play spaces. These posters would be available for public display in the city as a "Gallery" of children's ideas and visions for Lodi's parks. The gallery would be a visible way for young people to feel involved in the Master Plan process and could also be a valuable resource for older citizens who wish to see their city from a different perspective.

To reach Lodi's young adults and to develop a profile of youth perceptions, needs, and preferences for parks and recreation, MiG will organize and facilitate a youth workshops. The workshop will be held at a high school or park as a forum for Lodi's teenagers to voice their opinions related to the Parks, Recreation and Open Space Master Plan. The workshop will be designed to encourage active participation and could potentially contribute to development of a youth entry (or entries) in the Gallery mentioned above. Results will be summarized in the community Needs Assessment Report.
- 9.03 **Additional Neighborhood Workshops:** Callander Associates has budgeted for three workshops. Should the City desire additional public meetings, for example to focus on specific user groups or geographical areas other than the three basic areas, these would be provided as additional services.

THE PLANNING PROCESS

TIMELINE IN MONTHS:

1	2	3	4	5	6	7	8
INVENTORY 1.0 							
COMMUNITY NEEDS ASSESSMENT 2.0  							
		GOALS & POLICIES 3.0 					
		ACTION PLAN 4.0 					
			IMPLEMENTATION PLAN 5.0 				
MILESTONES:					DRAFT MASTER PLAN 6.0  		
 REVIEW COMMITTEE  PUBLIC WORKSHOPS  PARK AND RECREATION COMMISSION  CITY COUNCIL						FINAL MASTER PLAN 7.0  	



Callander Associates

LODI PARK, RECREATION, & OPEN SPACE MASTER PLAN

Exhibit D

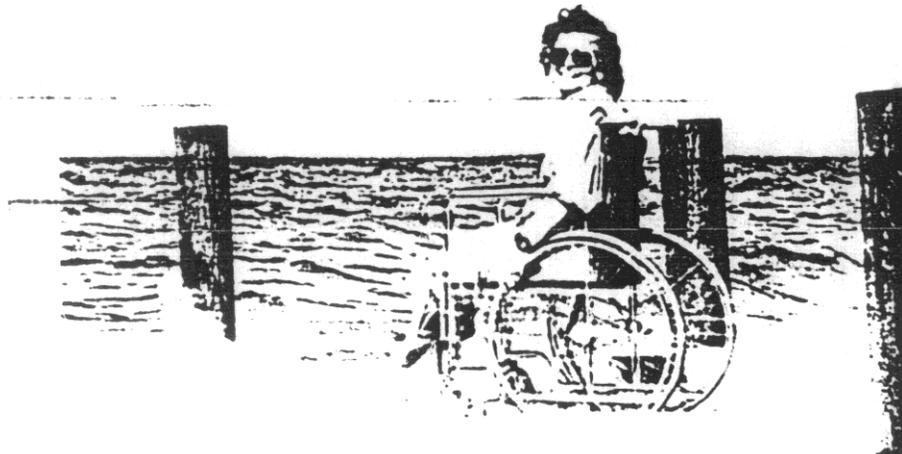
A.D.A. Review

Disabled Compliance is not a new issue to the planning team. Both Callander Associates and MIG have developed innovative solutions for disabled access well in advance of mandating legislation. Callander Associates has routinely incorporated whole access provisions into playgrounds and park development projects throughout the 1980's, including the access ramp into San Francisco Bay at Coyote Point, unique in the nation. Susan Goltsman, principal of MIG, is a nationally-recognized authority and lecturer on the A.D.A.

Due to the legal requirements of the ADA, it would be a disservice to the City to propose a 'review of facilities in terms of the ADA' as requested in the Request for Proposal, without allocating a significant services budget for that effort. We feel the magnitude and importance of such a task calls for a separate study.

Callander Associates proposes to address the ADA legal requirements with appropriate Master Plan goal and policy statements. As an option, we will assist the City with the required self-assessment and transition plan through the facilitation of a training workshop.

The optional workshop would provide the most value at the least cost. MIG will organize and conduct an all-day A.D.A. Compliance training workshop for appropriate City of Lodi staff members (up to 10 people). This hands-on work session will be held at a park site in Lodi (one that is fairly typical in size and number of facilities), and will provide step-by-step training in how to conduct a complete accessibility survey of park facilities and environments, and how to translate survey findings into a transition plan to achieve full compliance with the A.D.A. law. MIG has recently published a two volume facility checklist to assist in the systematic evaluation of parks and recreation facilities, which will be made available. The training will also cover methods of assessing recreation program accessibility and will include information on current federal and state codes for buildings as well as exterior facilities.



Callander Associates incorporates whole access provisions such as this access ramp at Coyote Point Regional Park.