

City Council

Special Meeting Agenda

Tuesday, January 24, 2023
Council Chambers
749 Main Street
6:00 PM

Members of the public are welcome to attend and give comments remotely; however, the in-person meeting may continue even if technology issues prevent remote participation.

- You can call in to **+1 408 638 0968 or 833 548 0282 (Toll Free)**, Webinar ID **#876 9127 0986**.
- You can log in via your computer. Please visit the City's website here to link to the meeting: www.louisvilleco.gov/council

The Council will accommodate public comments during the meeting. Anyone may also email comments to the Council prior to the meeting at Council@LouisvilleCO.gov.

1. CALL TO ORDER & ROLL CALL

2. DISCUSSION/DIRECTION – PARKS GENERAL MAINTENANCE MANAGEMENT PLAN

- Consultant Presentation
- Public Comments (Please limit to three minutes each)
- Council Questions & Comments
- Action

3. DISCUSSION/DIRECTION – OPEN SPACE & PARKS SALES TAX RENEWAL

- Staff Presentation
- Public Comments (Please limit to three minutes each)
- Council Questions & Comments
- Action
-

4. ADJOURN

Citizen Information

If you wish to speak at the City Council meeting in person, please fill out a sign-up card and present it to the City Clerk at the meeting; if you are attending remotely, please use the "raise hand" icon to show you wish to speak in public comments.

Persons planning to attend the meeting who need sign language interpretation, translation services, assisted listening systems, Braille, taped material, or special transportation, should contact the City Clerk's Office (303.335.4536 or 303.335.4574) or ClerksOffice@LouisvilleCO.gov. A forty-eight-hour notice is requested.

Si requiere una copia en español de esta publicación o necesita un intérprete durante la reunión del Consejo, por favor llame a la Ciudad al 303.335.4536 o 303.335.4574 o email ClerksOffice@LouisvilleCO.gov.

**SUBJECT: DISCUSSION/DIRECTION – PARKS GENERAL MAINTENANCE
MANAGEMENT PLAN**

DATE: JANUARY 24, 2023

**PRESENTED BY: ADAM BLACKMORE, DIRECTOR OF PARKS, RECREATION &
OPEN SPACE
ABBY MCNEAL, PARKS SUPERINTENDENT**

SUMMARY:

In late 2021 the City awarded a contract to Studio CPG & Facility Engineering Associates (FEA) to review the Parks Division maintenance and operating practices. This process was conducted throughout 2022 and included reviews of service models, resource allocations, staff and elected official survey and/or interview feedback, best management practices and day-to-day operating procedures.

The methodology, findings and recommendations are presented by the contracted consultants and City Staff for City Council review and discussion.

FISCAL IMPACT:

There is no fiscal impact with the presentation of this report. Future fiscal impacts would result from policy or operational directives to enhance maintenance practices or adjust staffing resources per the presented findings and recommendations.

PROGRAM/SUB-PROGRAM IMPACT:

Adjustments or revised maintenance procedures will have an impact on Parks Maintenance Operations.









RECOMMENDATION:

Review and discuss It is recommended that through discussion, directions and review that the City Council accept the materials and recommendations provided by Studio CPG, FEA and City Staff.

ATTACHMENT(S):

1. General Maintenance Management Plan Summary of Findings
2. Presentation

STRATEGIC PLAN IMPACT:

<input checked="" type="checkbox"/>	 Financial Stewardship & Asset Management	<input checked="" type="checkbox"/>	 Reliable Core Services
<input type="checkbox"/>	 Vibrant Economic Climate	<input checked="" type="checkbox"/>	 Quality Programs & Amenities
<input type="checkbox"/>	 Engaged Community	<input type="checkbox"/>	 Healthy Workforce
<input type="checkbox"/>	 Supportive Technology	<input type="checkbox"/>	 Collaborative Regional Partner

General Maintenance and Management Plan

Summary of Findings



January 16, 2023

Acknowledgements

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Facility Engineering Associates, P.C. (FEA)

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Note: The General Maintenance and Management Plan includes two documents: the Summary of Findings and Annual Work Plan Template. The Summary of Findings includes an executive summary and recommendations, as well as a series of appendices. The Annual Work Plan Template is currently being used by Parks Superintendent Abby McNeal to develop an approach to tracking tasks and functions of Parks. The Annual Work Plan Template also includes as appendices a series of tools to assist in the inventory of all assets and in monitoring targeted levels of service for each asset.

Executive Summary and Key Recommendations

The City of Louisville parks system is continually cited by local residents as one of the most cherished assets of the city. The system includes a complex range of amenities available to Louisville residents, including over 300 acres of dedicated park land, playgrounds, athletic fields, recreation amenities including an outdoor swimming pool and splash pad, the cemetery, the 18-hole municipal golf course, and civic facilities. Each of these amenities contributes to the quality of life of Louisville residents. The City of Louisville initiated the 2022 General Maintenance and Management Plan to ensure that Parks assets are thoughtfully maintained and managed, and that funding allocations and annual budgets meet the needs of the department.

Guiding each decision is the City of Louisville Vision Statement:

Established in 1878, the City of Louisville is an inclusive, family-friendly community that manages its continued growth by blending a forward-thinking outlook with a small-town atmosphere which engages its citizenry and provides a walkable community form that enables social interaction. The City strives to preserve and enhance the high quality of life it offers to those who live, work, and spend time in the community. Louisville retains connections to the City's modest mining and agricultural beginnings while continuing to transform into one of the most livable, innovative, and economically diverse communities in the United States. The structure and operation of the City will ensure an open and responsive government which integrates regional cooperation and citizen volunteerism with a broad range of high-quality and cost-effective services.

The City has adopted the following **Core Community Values** that serve as the foundation for all decisions and actions, including the maintenance and management of the City's park system:

A Sense of Community . . . where residents, property owners, business owners, and visitors feel a connection to Louisville and to each other, and where the City's character, physical form and accessible government contribute to a citizenry that is actively involved in the decision-making process to meet their individual and collective needs.

Our Livable Small Town Feel . . . where the City's size, scale, and land-use mixture, and the government's high-quality customer service encourage personal and commercial interactions.

A Healthy, Vibrant, and Sustainable Economy . . . where the City understands and appreciates the trust our residents, property owners, and business owners place in it when they invest in Louisville, and where the City is committed to a strong and

supportive business climate, which fosters a healthy and vibrant local and regional economy for today and for the future.

A Connection to the City’s Heritage . . . where the City recognizes, values, and encourages the promotion and preservation of our history and cultural heritage, particularly our mining and agricultural past.

Sustainable Practices for the Economy, Community, and the Environment . . . where we challenge our government, residents, property owners, and our business owners to be innovative with sustainable practices so the needs of today are met without compromising the needs of future generations.

Unique Commercial Areas and Distinctive Neighborhoods . . . where the City is committed to recognizing the diversity of Louisville’s commercial areas and neighborhoods by establishing customized policies and tools to ensure that each maintains its individual character, economic vitality, and livable structure.

A Balanced Transportation System . . . where the City desires to make motorists, transit customers, bicyclists, and pedestrians of all ages and abilities partners in mobility, and where the City intends to create and maintain a multimodal transportation system to ensure that each user can move in ways that contribute to the economic prosperity, public health, and exceptional quality of life in the City.

Families and Individuals . . . where the City accommodates the needs of all individuals in all stages of life through our parks, trails, and roadway design, our City services, and City regulations to ensure they provide an environment which accommodates individual mobility needs, quality of life goals, and housing options.

Integrated Open Space and Trail Networks . . . where the City appreciates, manages, and preserves the natural environment for community benefit, including its ecological diversity, its outstanding views, clear-cut boundaries, and the interconnected, integrated trail network which makes all parts of the City accessible.

Safe Neighborhoods . . . where the City ensures our policies and actions maintain safe, thriving, and livable neighborhoods so residents of all ages experience a strong sense of community and personal security.

Ecological Diversity . . . where the City, through its management of parks and open space and its development and landscape regulations, promotes biodiversity by ensuring a healthy and resilient natural environment, robust plant life, and diverse habitats.

Excellence in Education and Lifelong Learning . . . where the City allocates the appropriate resources to our library services and cultural assets and where the City actively participates with our regional partners to foster the region’s educational excellence and create a culture of lifelong learning within the City and Boulder County.

Civic Participation and Volunteerism . . . where the City engages, empowers, and encourages its citizens to think creatively, to volunteer, and to participate in community discussions and decisions through open dialogue, respectful discussions, and responsive action.

Open, Efficient, and Fiscally Responsible Government . . . where the City government is approachable, transparent, and ethical, and our management of fiscal resources is accountable, trustworthy, and prudent.

The City of Louisville parks system includes several components that are unique to Louisville and not features or assets that are traditionally maintained by parks departments. The following items summarize several unique attributes that have a direct impact on departmental budgets and staffing needs:

- Parks is responsible for the day-to-day maintenance of grounds adjacent to civic facilities, including irrigation systems, turf lawns, and ornamental planting beds.
- Parks assumes responsibility for the day-to-day maintenance of sections of public right-of-way, including medians, which are labor intensive and require significant traffic control measures to ensure the safety and well-being of maintenance staff.
- Parks assumes responsibility for the day-to-day maintenance of entry features, open lands, and passive-use areas that are typically maintained by individual Homeowners Associations (HOAs).
- Parks assumes responsibility for the day-to-day operations of the City of Louisville cemetery. Parks maintenance staff is responsible for burials, for the clean-up of debris/food left after family gatherings, and for maintenance of items that the bereaved have installed at individual grave sites such as benches, paving, trees, etc. Currently, there are regulations regarding permissible and non-permissible items and improvements; however, there are several items in the cemetery that were installed prior to the adoption of current regulations, which require additional time and maintenance. Over 50% of the rows in the cemetery contain obstacles that prevent use of standard mowers and require more involved, detail-oriented care. The cemetery also contains an abundance of mature trees that require ongoing maintenance by the arborist and, if not regularly maintained, also impede mowing regimens.
- Parks maintenance staff is responsible for the day-to-day maintenance of the irrigation system, planting beds, and all trees at the Coal Creek Golf Course.
- The City has made the Forester available to residents and property owners for consultations of trees located on private property. This is not typically a service that local municipalities provide and is deemed the responsibility of the homeowner/property owner to hire an arborist for private consultations.
- There is significant pressure from residents to initiate and incorporate sustainability into parks operations and maintenance. Parks supports the sustainability initiatives. A few of the programs such as composting, dog waste composting, pollinator gardens, and integrated pest/weed management are labor intensive to fully implement. While these items are often integrated into urban/suburban parks and infrastructure systems, each new program requires a unique maintenance and management regime that impacts maintenance and operations budgets. The City has been open to expanding services based on requests from residents, but it should be noted that these programs are often offshoots of services typically provided by municipalities with significantly larger populations and resources.

Recognizing that the integrity of the City’s parks system relies on the ability of the City to manage and maintain each component of this cherished system, the City embarked on the development of the General Maintenance and Management Plan to identify strategies and tools to identify assets and maintenance needs of each asset. The General Maintenance and Management Plan is organized into three deliverables:

1. **Summary of Findings:** Includes an overview of initial research, including staff interviews that were used to inform the targeted Levels of Service in response to expectations of City residents and elected/appointed officials.
2. **Annual Work Plan:** Includes specific steps and tasks necessary to inventory and manage existing assets and maintenance tasks.
3. **Appendices:** Supporting documentation, including interim tools, to document and expand the City’s inventory in preparation for the transition to utilizing management software.

The General Maintenance and Management Plan will assist Parks in tracking specific assets and the maintenance required to care for those assets in preparation for annual budget requests and capital improvement plans.

Overall Assessment of Park Maintenance Operations

The goal of this project is to improve maintenance planning and operations and guide Parks toward higher performance. To achieve that, the consultant team performed a review of maintenance planning processes and Parks operations. The result of data and document reviews, interviews, and analyses indicate that there is a consistent approach to park operation and maintenance within Parks, but the process is not formal or documented. Overall, Parks maintenance organization is functioning at a maturity level between “Initial/Ad Hoc” (Level 1) where processes are minimally controlled and mostly reactive and “Repeatable (Level 2),” where processes are generally understood but not always documented. Some areas are functioning at a higher level, such as snow removal, where there is a strong emphasis on providing access to the park assets during inclement weather. In addition, the sense of teamwork and pride in making the City a better place to work and live was evident. Amongst department leadership, there is a strong recognition of the need and a desire to think strategically about park maintenance.

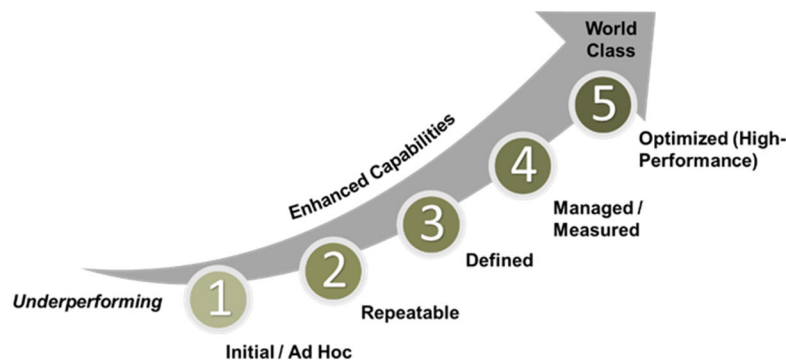


Figure 1. Capability Maturity Model Levels

Parks maintenance organization currently has 23.5 FTEs that have primary responsibility for grounds maintenance. Parks is supplemented by contractors, but the FTE equivalent of the contractors is not able to be determined using current contract data. As shown in Table 1, a comparison of the APPA (Association of Physical Plant Administrators, now more commonly referred to as Leadership in Educational Facilities) maintenance staffing benchmarks indicates that with current in-house staffing, it would be feasible for Parks to consistently deliver grounds maintenance services between APPA.

level 4 (Moderately Low-level) and level 3 (Moderate level) across its roughly 356-acre portfolio. With additional data to evaluate the outsourcing influence on the staffing levels, the level of service could be closer to APPA level 2 (High-level). Using this benchmark as guideposts, a strategic staffing plan and measurement and monitoring of outcomes can make future staffing adjustments to staffing levels more consistent, defensible, and directly linked to service level and stakeholder needs. For more discussion of APPA and the levels of service, refer to the benchmarking section later in this report.

	State-of-the-Art Maintenance Level 1	High-Level Maintenance Level 2	Moderate Level Maintenance Level 3	Moderately Low-Level Level 4	Minimum-Level Maintenance Level 5
Total Recommended Grounds FTEs	62	40	29	14	7
Square Feet per Grounds FTE	250,914	387,899	538,656	1,078,899	2,095,486
Acres per Grounds FTE	5.76	8.90	12.37	24.77	48.11

Table 1. APPA’s service level model for maintenance staffing

In addition, the consultant team reviewed Parks data against National Recreation and Parks Association (NRPA) 2022 benchmarks, as shown in Figure 2. Using the NRPA benchmarking data, Parks is in line with their peers on staffing levels based on population. However, Parks maintains significantly more acreage of parkland than its peers that reported data to NRPA, which must be taken into account when considering staffing levels. Another notable item from the NRPA benchmarks is that the City provides more park acreage per resident than its peers and has a smaller residents per park and playground ratio.



Figure 2. City of Louisville Comparison to NRPA Benchmarks

Based on our assessment of Parks maintenance functions as they are currently configured, a priority recommendation of this report is the development of a maintenance program that includes strategic planning, process improvement, and continual measurement and monitoring. Alignment to a standard, such as the NRPA's Commission for Accreditation of Park and Recreation Agencies (CAPRA) standard, will enable Parks to build a program that is rooted in strategic alignment, repeatable and defensible processes, and a focus on continual improvement. The CAPRA standard provides an authoritative assessment tool for park and recreation agencies to demonstrate they have the operational capacity to deliver programs, facilities, and services at a high level of quality. Using the CAPRA standard as a guiding framework enables the City to build and sustain the long-term change Parks is seeking.

Further, a structured maintenance program that includes maintenance and capital planning functions facilitates several positive outcomes:

- Reduction in life cycle cost
- Reduced risk of failure of critical systems
- Increased customer satisfaction, both internal and external
- Improved asset reliability and performance
- More effective preventative and corrective maintenance programs
- Decrease in emergency repairs, outages, and response requirements

The advantages of a well-documented maintenance function will be alignment of Parks Department maintenance function with the City's strategic objectives, more streamlined operations, consistent application of maintenance practices to optimize asset life cycle, effective use of in-house and outsourced resources, a work and career development environment for Parks employees, and long-term reduction in the cost of the maintenance and capital renewal.

Key Findings and Recommendations: The primary objective of the General Maintenance and Management Plan is to provide guidance and feedback to both management and staff involved in the daily maintenance of parks and Parks assets. The plan includes detailed inventory data and analysis to better understand the costs associated with specific tasks and identifies targeted Levels of Service that identifies specific maintenance regiments for each asset. The following recommendations identify specific areas of concern that would improve efficiency and allow for more accurate cost assessments related to maintenance and management.

1. Implement and document consistent maintenance processes, levels of service, and customer expectations.
2. Develop a preventative maintenance plan and a documented inspection process.
3. Adopt Lucity software to manage maintenance workflow.
4. Implement a staffing plan consistent with the benchmarking data. This plan should include a more detailed labor needs analysis to determine specific staff types and ratios based on the desired levels of service.
5. Develop a system to document and track actual staff task time. Use this data to inform an Annual Work Plan for routine maintenance and contingency plans for corrective maintenance.
6. Complete inventory of assets, refine accuracy of data, and add the data to Lucity.
7. Conduct Parks-specific resilience planning that includes security, emergency preparedness, and continuity of operations.
8. Implement a performance management system with consistent asset facilities-related key performance indicators (KPIs) that accurately measure the effectiveness of asset maintenance.

Scope of Work

The process for the development of the General Maintenance and Management Plan for Parks consisted of the following tasks:

- A. **Review of Organization Data:** Extensive data was provided to the consultant team by the City, which included the following information:
 - 1. City of Louisville Values, PROST Goals, Key Performance Indicators
 - 2. City Council Input: Survey
 - 3. Management and Parks staff interviews
 - 4. Inventory of Parks assets
 - 5. Financial Information: Parks budgets
 - 6. Operational Information: Organization chart, outsourcing

- B. **Analysis of Data:** Parks and their levels of service and operations were evaluated and assessed using available data. The analysis focused on existing levels of service, staffing, city council and community expectations, current management practices and organizational structure as well as internal communication and task distribution methodology. Additionally, there are other factors both quantifiable and qualitative that informed the analysis:
 - 1. City Values and Expectations
 - 2. Levels of Staff: Full Time and Seasonal
 - 3. Operations: Task Distribution, Communication, and Prioritization
 - 4. Outsourced Contracts: Frequency of Services and Term of Contract
 - 5. Maintenance Standards
 - 6. Costs: Staffing, Equipment (Fleet and Facilities were excluded from the analysis)

The development of Parks General Maintenance and Management Plan included several tasks as identified in the contracted Scope of Services, including:

Internal Surveys and Staff Interviews

In conjunction with City staff, the consultant team prepared and distributed a survey to City Council and the Parks & Public Landscaping Advisory Board (PPLAB) to gauge understanding of parks maintenance roles, responsibilities, and satisfaction with current maintenance levels of service and activities. The consultant team also facilitated a series of staff interviews to ascertain current understanding of roles, responsibilities, communication procedures, efficiencies/inefficiencies, and day-to-day decision making.

Staffing Assessment

Using NRPA benchmarks, the team reviewed staffing levels to understand staffing as a percentage of the overall operational budget and to identify potential gaps based on desired Level of Service.

Asset Inventory

Data assembly is a critical component to understanding the extent of existing asset inventory information, including the number of parks, playgrounds, recreation amenities, rights-of-way, medians, etc. A detailed asset inventory is included in the Annual Work Plan template and Appendix D. After assembling and reviewing existing data, including inventory and budget line items, the consultant team

identified existing data gaps and made recommendations for expanding categories that could be linked to future task order assembly and distribution.

Performance Standards and Measures

To evaluate the current state of parks from a broad perspective, the consultant team used a framework for high-performance that is based on the Malcolm Baldrige quality management framework and the NRPA national accreditation standards. The use of the NRPA standards allows us to analyze Parks overall park management practices and provide qualitative performance measures.

Service Contracts and Partnership Agreements

The consultant team reviewed budget information related to existing year-round and seasonal service contracts and identified impacts on current staffing levels and performance standards. Data from partnership agreements between Parks and HOAs was not currently available, but the consultant team discussed the need to better understand and track partnership agreements that impact maintenance operations.

Recommendations and Implementation: Annual Work Plan

Using the assessments and findings generated to date, the consultant team developed an Annual Work Plan (AWP) template and identified opportunities for outsourcing. The Annual Work Plan is set up as a plan from Parks perspective that summarizes strategy, key maintenance processes, and metrics. The plan will serve as a tool for Parks to determine staffing needs and projections related to specific tasks. The template will need to be completed by City staff as more information is collected and gaps are eliminated.

The Annual Work Plan is supplemented by an inventory of data that was assembled previously as part of the PROST Atlas and supplemented by an expanded inventory which is detailed in AWP Appendix B. These appendices include information regarding methodology and how to apply the data to inform the Annual Work Plan.

Maintenance, Management, and Labor Needs for New Amenities

The Annual Work Plan is a tool for anticipating how Parks will accommodate and service landscape and infrastructure capital improvement projects. As data from Parks daily operations is expanded to collect detailed task data, Parks will have an increasingly accurate understanding of costs of routine maintenance for a given asset and level of service. Parks can use this information to accurately predict how capital improvements will impact routine maintenance programs, and proactively adjust their departmental FTEs to accommodate new and/or improved assets.

Summary of Existing Data

Existing Data

At the kickoff of the project, the consultant team presented the City with an extensive list of a wide range of data and information about Parks operations. Through March and April of 2022, Parks provided information ranging from GIS data and park inventories to master plans, biennial budgets, and codes, to whiteboard snapshots and screen captures of irrigation maintenance software. Additionally, members of Parks staff were made available for interviews. The team was provided with an in-depth perspective of the processes and procedures that allow Parks to supply the services that the community so greatly values. In the initial review of existing data, it was determined that to quantify the staffing needs of the Maintenance Department more fully, additional data in the form of an expanded inventory would be necessary. Existing data and additional data collected during this effort is identified and detailed in Appendix D Asset Classification. It should be noted that there will continue to be a need for Parks staff to both maintain and add to the inventory database to ensure that all assets and tasks are accounted for. The list of data provided by the City is listed under Appendix C Data Sources.

Known Data Gaps

When generating an Annual Work Plan, it is important to note that many tasks are dependent on the availability of existing data. This report recommends more comprehensive data collection regarding specific tasks that are unique to maintenance operations, and the time it takes to complete each task. Parks staff is aware that they currently do not collect all pertinent data necessary to establish a systems-based approach to operations management. The following list of missing data was generated in-house by Parks staff to supplement the data provided to the consultant team in the initial data assembly tasks.

1. **Plant Material Data.** Parks estimates that there are 10,000 trees that are publicly maintained, and it does not currently track data on the quantity of shrub bed area. It should be noted that Parks maintains a significant number of medians in the right-of-way, but total square footage maintained by Parks staff has not been tabulated and should be a priority moving forward in the expansion of the existing data inventory.
 - a. **Forestry** is a city-wide operation where much of the work occurs at sites not considered to be parks, such as private property, open space, in ditches, rights-of-ways, etc.
 - b. **Planted Beds** (annual, perennial, pollinator, shrubs) are the most expensive square-footage to maintain; additionally, the City's policy to control weeds without the use of herbicides using manual methods has a significant impact on horticulture services.
2. **Athletic Permitted Use Support.** Parks staff supports the permitted uses at the athletic fields, including ballfield lining and dragging, and soccer field line painting. The actual task time and resources are not tracked, including tasks and events that require Parks staff to work overtime and/or outside of normal work schedules.
3. **Permits.** Special Use Permits, shelter rentals, City special events, Access Permits, Rights-of-Way Permits, etc. all require staff time to review and process. Cemetery staff often perform reviews and processing, as there is no dedicated staff for these administrative tasks. Additionally, Parks staff have responsibilities surrounding these events, including preparing the site and marking utilities, staffing and access during the event, and site cleanup and waste removal services afterwards. The labor and resources required for this work is not tracked.

-
4. **Parks Board.** The time required to prepare packets of information to assist the PPLAB review and decision-making process is not currently tracked and requires the input of the Parks maintenance staff, as well as supervisors. Time allocation for administrative tasks should be tracked and should be construed as a critical task necessary to keep PPLAB apprised of ongoing maintenance activities.
 5. **Code Enforcement / Private Issues.** There is ambiguity in Parks regarding the maintenance of rights-of-way, HOA entries and pocket parks, Special Districts, etc. While there is significant time spent discussing, researching, and potentially performing work that is typically the responsibility of the HOA based on the original development agreement, there is little available documentation to confirm HOA roles and responsibilities of common areas. Additionally, Parks irrigation staff is often the first call made by concerned residents and other departments and often responds to leaks in irrigation systems on private property. Parks often assumes responsibility for shutting the water off and notifying the property owner. However, during the busiest maintenance season, this work goes undocumented and impacts the on-going maintenance workflow.
 6. **Maintenance Responsibility / GIS Definition.** Parks currently does not leverage the City's existing GIS database, which could assist in both establishing and documenting limits of responsibility. This can benefit staff by reducing the time spent discussing various interpretations or recollections of outdated agreements, as well as establishing parameters for on-going maintenance.
 7. **Cemetery Administration.** The time spent between the key staff members involved in the administration and unique maintenance needs of the cemetery is not well-documented or tracked, and results in a gap that impacts staffing needs for this unique asset.
 8. **"Other Duties as Assigned" / In-House Projects.** Due to the size of the work group, Parks is asked to assist with city-wide projects and duties that are not typically associated with parks. This ranges from overseeing construction projects, to staffing City events, and to waste removal at City facilities. The Department is responsive to these requests, but the time spent is not specifically tracked, nor built into on-going maintenance plans.

Asset Inventory/Categorization

The most current GIS data was collected during the 2012 master plan process. The data includes boundary data for all areas that Parks currently maintains, as well as point data for a variety of components. However, the data has not been updated, as Parks has added assets in the past decade. Refer to Appendix B in the Annual Work Plan for asset inventory data including additional assets added since 2011. Refer to Appendix D for a detailed list of parks.

The components tracked in GIS provide the greatest window into the on-going maintenance tasks for which Parks is responsible. However, the GIS data provides no sense of quantity of the tracked component: Bluegrass turf is a component, but overall acreage is not captured; trailheads are tracked as a component, but trail length is not captured; waste receptacles are not captured. Each of these components require on-going maintenance, and the extent of the maintenance (i.e., assigned task-hours) is determined by the quantity of the component.

Currently the PROS department categorizes the parks and open spaces within the master plan into one of nine Ownership Categories:

1. Louisville: 118 sites, 1,157.33 acres
2. Joint Ownership: 11 sites, 1,060.2 acres
3. Other: 13 sites, 1,298.5 acres
 - a. Boulder County Parks & Open Space: 1 site
 - b. Boulder County: 2 sites
 - c. Boulder Valley School District: 1 site
 - d. City of Boulder: 3 sites
 - e. City of Lafayette: 3 sites
 - f. PSCOC: 1 site
 - g. CDOT: 2 sites

While these categories serve to illustrate the areas owned by different entities, they are not helpful in determining on-going maintenance needs or anticipated levels of care for individual sites, especially as it relates to Parks services, which occur across all facility ownerships and types.

The second level of categorization provided in the Master Plan is by Class, of which there are five categories.

1. Golf Course: 1 site, 154 acres
2. Open Space: 47 sites, 2,871.75 acres
3. Open Space, Other: 2 sites, 3.0 acres
4. Parks: 66 sites, 406.28 acres
5. Parks, Other: 26 sites, 81.0 acres.

Again, these categories are sufficient to provide a secondary summary of the ownership of the assets, however they fall short of grouping sites or summarizing areas of varying maintenance needs. For example, the “Parks” and “Parks, Other” assets vary from a regional athletic complex to an undeveloped neighborhood pocket park, or a highway right-of-way to a destination playground.

The current asset inventory does not reflect day-to-day operations of Parks. Parks with playgrounds do not have the same maintenance requirements as undeveloped pocket parks; back-of-lot trail corridors do not have the same maintenance requirements as CDOT rights-of-way. Parks should track how those assets and components drive the Annual Work Plan. To this end, the Annual Work Plan template submitted along with the Summary of Findings builds upon the inventory of 2011 and expands the number of inventoried components in the overall asset database. Data sheets have been developed that compile and organize this new data for improved labor and task tracking in preparation of the Annual Work Plan.

Service Contracts

Currently, Parks contracts out several on-going maintenance tasks. These tasks include turf maintenance, downtown flower planting, downtown tree lighting, and horticultural bed care. Parks has spent an average of \$342,000 annually on contracted maintenance services in the past three years.

no	DEPT / FUND	CONTRACT	2019 CONTRACT VALUE	2020 CONTRACT VALUE	2021 CONTRACT VALUE
1	STREETSCAPE	Prof Serv - Other	\$720.26	\$1,980.00	\$2,194.83
2	STREETSCAPE	Prof Serv - Mowing	\$43,708.39	\$44,440.73	\$42,246.54
3	STREETSCAPE	Prof Serv - Pest Control	\$1,290.24	\$1,410.57	\$1,441.26
4	STREETSCAPE	Prof Serv - Weed Control	\$0.00	\$0.00	\$0.00
5	STREETSCAPE	Prof Serv - Landscape Maintenance	\$7,214.46	\$3,284.00	\$1,160.75
6	STREETSCAPE	Prof Serv - Tree / Hort Maintenance	\$20,527.50	\$16,167.00	\$22,760.00
7	STREETSCAPE	Prof Serv - Conc / Sidewalk / Trail	\$1,777.04	\$1,777.04	\$1,777.04
1	PARKS	Prof Serv - Custodial	\$15,031.60	\$22,823.31	\$42,900.00
2	PARKS	Prof Serv - Branch Site Grinding	\$21,161.25	\$12,500.00	\$12,500.00
3	PARKS	Prof Serv - Other	\$3,881.00	\$1,686.00	\$4,950.01
4	PARKS	Prof Serv - Mowing	\$97,710.76	\$93,252.22	\$88,478.19
5	PARKS	Prof Serv - Pest Control	\$3,010.56	\$3,291.33	\$3,362.95
6	PARKS	Prof Serv - Weed Control	\$0.00	\$0.00	\$0.00
7	PARKS	Prof Serv - Landscape Maintenance	\$9,433.18	\$8,520.70	\$72,589.08
8	PARKS	Prof Serv - Tree / Hort Maintenance	\$15,900.00	\$13,387.50	\$16,689.52
9	PARKS	Prof Serv - Conc / Sidewalk / Trail	\$12,235.88	\$17,999.99	\$15,000.00
10	PARKS	Prof Serv - Tennis Court Repairs	\$52,802.00	\$0.00	\$0.00
1	CEMETERY	Prof Serv - Investment Fee	\$21.46	\$9.39	\$22.40
2	CEMETERY	Prof Serv - Bank Charges	\$2,478.81	\$3,008.50	\$4,431.28
3	CEMETERY	Prof Serv - Other	\$2,420.00	\$2,420.00	\$2,650.00
4	CEMETERY	Prof Serv - Mowing	\$24,241.37	\$32,327.45	\$30,731.32
5	CEMETERY	Prof Serv - Landscape Maintenance	\$928.34	\$0.00	\$0.00
6	CEMETERY	Prof Serv - Tree / Hort Maintenance	\$900.00	\$0.00	\$0.00
1	ATHLETICS	Prof Serv - Custodial	\$400.00	\$0.00	\$0.00
2	ATHLETICS	Prof Serv - Other	\$6,587.70	\$12,620.00	\$17,641.88
3	ATHLETICS	Prof Serv - Landscape Maintenance	\$1,992.98	\$1,644.40	\$1,553.97
1	TOTAL	Sum: Mowing	\$165,660.52	\$170,020.40	\$161,456.05
2	TOTAL	Sum: Pest Control	\$4,300.80	\$4,701.90	\$4,804.21
3	TOTAL	Sum: Land. Maint.	\$19,568.96	\$13,449.10	\$75,303.80
4	TOTAL	Sum: Tree / Hort Maint.	\$37,327.50	\$29,554.50	\$39,449.52
5	TOTAL	Sum: Conc / Sidewalk / Trail	\$14,012.92	\$19,777.03	\$16,777.04

Table 2. Existing Outsourced Contract Data

Parks does not maintain records of contract performance for the tasks that are outsourced, which creates a gap in understanding what efficiencies are gained with the City's current service contracts.

Service contracts are valuable to an organization like Parks in two ways. Specialized skills and resources that are not available within the organization can be found in the private sector. A current example in Louisville is the downtown flower planting program. Urban annual flowers add color and celebration in a downtown setting but require watering and care multiple times per week. Rather than delegate a single, specialized staff person to this task, Parks could provide oversight requiring a fraction of the time and outsource this task to a private individual or business.

Conversely, the turf maintenance program requires significant labor, but the tasks require little specialized skills. In these instances, Parks can lean on the labor pool of the private sector, which is able to handle the ebb and flow of seasonal labor more efficiently than the public sector. Turf maintenance is an example of Parks focusing the staff's time on oversight and review, while allowing private companies to collect the person-power necessary to maintain bluegrass on a weekly basis.

Based on 2022 data from the City of Louisville Human Resources Department, the median total compensation value (salary plus retirement and benefits) for Parks employees was approximately

\$84,000. If \$84,000 is used as an estimate for the cost of a new Parks employee (FTE), based on the average annual contract amount of \$342,000, Parks could hire four additional employees for approximately the same cost. Parks would need to determine if those four new employees could accomplish everything done under the existing contracts.

The Inter-Government Agreements (IGAs) that govern the maintenance of the Open Space assets under varying ownerships were not provided and, by nature of being under the authority of Open Space, were excluded from the scope of this report. However, the tasks that Parks performs at these locations (flower bed maintenance, snow removal, pest management, etc.) impact the overall staff and resource needs of Parks. Tracking the tasks specifically required through these IGAs will allow Parks to capture some of the labor and data that currently is unrecorded.

Software

The City's Public Works department has adopted the Lucity city management software platform as a means of gaining departmental operational efficiencies. The department uses it to prepare on-going maintenance schedules, track asset lifecycles, record work performed, track performance measures, and create reports.

The Parks irrigation team currently utilizes GIS-based software to maintain an inventory of irrigation system data throughout the City. Independent of the rest of Parks, the irrigation team members have catalogued the irrigation system at every site they maintain, including capturing lifecycle information, preventative maintenance schedules, and labor requirements.

Benchmarking Analysis

Benchmarking can be an effective tool to identify costly or inefficient practices within the organization. The consultant team utilized the following industry benchmark reports to provide Parks with industry standards on maintenance costs and staffing levels:

- Association of Higher Education Facilities Officers (APPA) Operational Guidelines for Educational Facilities, Maintenance (2nd edition), and Custodial (third edition)
- National Recreation and Park Association (NRPA) Agency Performance Review, Park Facilities, Programming, Responsibilities and Staff, 2022

For the benchmark analysis, the following data was provided by the City:

Data Description	Quantity
Number of Parks	37
Overall acreage/square footage	355.83 AC / 15,549,955 SF
Number of Residents living in Louisville (US Census 2020)	21,226
Maintenance budgeted amount of expenses (2022)	\$2,837,320
Revenue	\$1,311,680
Maintenance Staff (Filled and Vacant Positions)	23.5
Number of playgrounds	16
Deferred Maintenance	Not provided
Number of Basketball Courts	7
Number of athletic fields	14

Table 3. Summary of Benchmarking Data

Grounds Staffing and Level of Service

A detailed labor-needs analysis was not within the scope of this project and would require a consolidated staff assignment matrix and work order analysis that is currently not available. However, we made a high-level comparison of current staffing to industry benchmarks to gain a general sense of Parks staffing levels. Benchmarking is useful for making relative comparisons but should not be considered definitive for developing staffing levels.

Data provided by Parks showed that there were 23.5 FTE (22.31 Parks and 1.19 cemetery) staff members that are currently identified as having primary responsibility for grounds maintenance. Although the function of the dedicated grounds maintenance personnel varied, and included some unique responsibilities, these individuals were responsible for carrying out the grounds functions. In addition, Parks staff are supported by contractors. Contracts currently do not mandate the number of employees or the amount of time a contractor is required to perform the tasks associated with grounds maintenance.

Table 4 represents a comparison of Parks staffing levels (not including contractors) against APPA's service level model for grounds staffing.

	State-of-the-Art Level 1	High-Level Level 2	Moderate Level Level 3	Moderately Low-Level Level 4	Minimum-Level Level 5
Total Recommended Grounds FTEs:	62	40	29	14	7
Square Feet per Grounds FTE:	250,914	387,899	538,656	1,078,899	2,095,486
Acres per Grounds FTE:	5.76	8.90	12.37	24.77	48.11

Table 4. APPA's service level model for grounds staffing

The advantage of looking at staffing through the lens of the APPA staffing model is that service level is considered, and staffing levels are linked to service level desired and/or provided.

A comparison of the APPA grounds staffing benchmarks indicates that with current in-house staffing, it would be feasible for Parks to consistently deliver grounds maintenance services between APPA level 4 (Moderately Low-level) and level 3 (Moderate level) across its roughly 356-acre portfolio. With additional data to evaluate the outsourcing influence on the staffing levels, the level of service could be

closer to APPA level 2 (High-level). Using this benchmark as guideposts, a strategic staffing plan and measurement and monitoring of outcomes can make future staffing adjustments to staffing levels more consistent, defensible, and directly linked to service level and stakeholder needs. Based on our discussions with staff, there are additional maintenance duties performed by Parks employees for the open space areas of the City, but the areas and amount of time associated with this effort is not included in the analysis.

NRPA Agency Performance Review Benchmarks

This high-level analysis provides an indication of where Parks metrics as compared to other agencies who report data to the NRPA agency performance review database. This analysis does not account for any overlapping community population or shared resources within Parks. Data associated with Open Space has not been included with any of the analysis.

Cost of Parks grounds maintenance was calculated using the 2021 budget in select categories of maintenance and operations using the NRPA agency review performance indicators. Table 5 summarizes our analysis of NRPA Park Metrics Review based on the budgeted expenditure data provided by Parks and shows for one of the metrics that, on a per capita basis, the average annual spending on Parks maintenance function fell above NRPA all agency average and the reporting agencies with less than 20,000 residents.

NRPA Benchmark	City of Louisville	NRPA 2022			
		Population Less than 20,000	Population 20,000 to 49,999	All Agencies (median)	Colorado reported (median)
Residents Per Playground	1415	1986	3111	3750	2809
FTE's per 10,000 residents	11	11.3	11.1	8.9	69
Operating Capital Per Capita	\$134.00	\$117.00	\$110.00	\$93.00	\$249.00
Acres of parkland per 1,000 residents	17	12.9	10.6	10.4	24.8
Residents per park	574	1233	1941	2323	1798
Revenue to Operating Expenditures	46.23%	25.00%	25.00%	24.00%	26.90%
Annual Operating Expenditures	\$ 2,837,320	\$ 1,200,000	\$ 3,500,000	\$ 5,079,256	Not Available

Table 5. NRPA Benchmarks Review

Using the NRPA benchmarking data, Parks is in line with their peers on staffing levels and has a higher operating budget per capita. However, the City maintains significantly more acreage of parkland than its peers that submitted to the NRPA database. Utilizing peer data for benchmarking is informative at a high level, but reporting peers could be understaffed, skewing the data. Using the APPA analysis, which includes a level of service, is a standard to compare versus looking at peer reporting. However, there is a large difference with the APPA analysis, showing the Department is significantly understaffed for the levels of service Parks is providing. If data can be provided to the consultant team on the FTE equivalent for contractors and ensure that we have accounted for all seasonal employees, we can provide a better comparison to APPA standards.

Other notable items from the NRPA benchmarks, Parks provides more parkland per resident than its peers and has a smaller residents-per-park-and-playground ratio. The included Colorado benchmarks include two entities that reported information to NRPA. However, the size of those entities is not known.

Performance Standards Analysis

To evaluate the current state of parks from a broad perspective, the consultant team used a framework for high-performance that is based on the Malcolm Baldrige quality management framework and the National Recreation and Parks Association (NRPA) national accreditation standards. The use of the NRPA standards allows us to analyze Parks overall park management practices and provide qualitative performance measures. The evaluation includes a review through the lens of a high-performance organization which assesses maturity from several perspectives and emphasizes long term planning and alignment with industry best practices. High performance organizations are those that are skilled at developing a strategy, implementing a plan to follow that strategy, operating with an effective performance management system, and continuously reassessing and adjusting their plan to meet a changing environment and maintain continual improvement.

Using this approach provides a multi-faceted understanding of Parks current maintenance and management planning and establishes a roadmap to move forward. The framework considers these dimensions, as shown in Figure 3. However, this scope of work was limited to maintenance and management planning which is primarily from the process management perspective. As we aligned the framework with NRPA standards, we also included some areas of the performance categories of workforce development, and measurement and analysis.



Figure 3. High-Performance Categories

The consultant team utilizes this framework to develop a roadmap for continuous improvement. Using this high-performance framework allows for continuous monitoring of performance to achieve the operational results that Parks is looking to achieve. We assess the performance of the organization and make recommendations for improvement by:

- Evaluating key characteristics of how the organization functions
- Evaluating the quantitative and qualitative measures currently in place
- Comparing existing processes and practices to industry best practices
- Identifying strengths and weaknesses
- Outlining a process for continuous improvement

Through this framework, we evaluated the current Parks maintenance and management planning. We are providing recommendations that detail specific and realistic ways Parks maintenance planning can incorporate strategic planning, align the strategy with the City's strategic initiatives, improve business processes, optimize its maintenance structure, become more effective and efficient with its resources, and deliver on its organizational objectives. We also developed an Annual Work Plan that is provided as

a separate deliverable that serves as the template for which Parks leadership can integrate the goals and strategies within NRPA into their own maintenance management plan.

Strategic Planning & Alignment to Standards

The development of a maintenance program that includes strategic planning, process improvement, and continual measurement and monitoring is crucial to effective Parks operations. Alignment to a standard such as the CAPRA standard will enable Parks to build a program and not just a plan. A program is a system rooted in strategic alignment, repeatable and defensible processes, and a focus on continual improvement. Using the CAPRA standard as a guiding framework enables Parks to build and sustain the long-term change the City is seeking.

In addition to the specific items in our scope of work, high-level planning items from the CAPRA standard are important to consider as Parks continues to mature the maintenance program. This includes utilizing a performance management system that enables Parks to collect the right data, formulate that data into business information, and consider that business information in determining the efficiency and effectiveness of Parks operations and maintenance.

An effective maintenance program will:

1. Include an organizational structure that is tailored to the needs and requirements of the organization
2. Contain goals and objectives that align with City goals
3. Use time, personnel, equipment, and materials effectively
4. Include work schedules based on established policies and priorities
5. Emphasize preventive maintenance
6. Ensure adequate resources
7. Incorporate environmental stewardship
8. Assume responsibility for visitor and employee safety
9. Ensure compliance with federal, state, and local laws and regulations
10. Make maintenance a primary consideration during design and construction

Organizational Structure

The current organization chart is organized by asset type, similar to the PROST Atlas: cemetery, athletic fields, natural areas. This is beneficial for cataloging areas and prioritizing departmental specialties, but this method is limiting given that many of Parks' tasks are performed at sites all across the City, not specific or limited to parks, or even open space sites. The services provided throughout the City by Forestry, Horticulture, Irrigation, Turf Maintenance, and Snow & Ice Removal inform public perception of Parks and have safety and welfare implications.

We recommend the organization of Parks establish service departments (forestry, irrigation, etc.) at the same leadership level as the site departments (cemetery, parks, etc.). Organizing Parks with service departments represented at the leadership level will provide those departments with the opportunity to contribute to overall Parks resource and maintenance planning, as well as establish their own strategic plans, and their own measuring and monitoring standards, specific to their service departments. Each of these service departments works across the City to maintain the overall civic campus of the City of

Louisville, in order to prioritize needs and requests from throughout the City, and to balance Parks overall FTE's against the growing needs of the site departments.

Another opportunity to improve the function of Parks through organization is to collect the administrative functions of Marketing, Volunteer Coordination, Information Technology, and Administrative Tasks directly under the Director. Marketing and volunteer coordination responsibilities occur in most other City departments, and in each of the sub-departments within Parks. These efforts can then be better coordinated with city-wide resources and prevent the duplication of efforts by multiple departments within Parks.

Finally, the organization structure should reflect the full staff build-out of each sub-department under Parks, based on the Annual Work Plan. As sites are assigned levels of service, and areas totaled, labor hours required for routine maintenance will determine the requisite number of staff. The organization chart should show the number of staff necessary to maintain the desired level of service at all sites throughout the City.

Organizing Parks with an emphasis on service departments will help Parks prepare accurate and executable strategic plans, with the ability to develop productive measures and standards, while monitoring their process improvement.

Maintenance Process Management

Operations and maintenance of parks ensures Parks assets are maintained appropriately and Parks operations provide a satisfactory environment to meet the community's needs. In this assessment we focused on maintenance processes, asset management processes, grounds, sustainability, and business resilience. Effective maintenance operations lead to enhanced recreational experiences, increased efficiency, reduced liability, and improved public image.

The following sections of the NRPA CAPRA standard (Sixth Edition 2019) were reviewed as part of this scope of work:

- 7.5 Maintenance and Operations Management Standards
 - 7.5.1 – Facility Legal Requirements
 - 7.5.2 – Preventative Maintenance Plan
- 7.10 – Maintenance Personnel Assignment Procedures
- 4.2 Staff Qualifications
- 4.3 Job Analyses for Job Descriptions

Current State

Operations and maintenance duties and responsibilities are known well within Parks due to the longevity of the employees, and the overall operation is consistent. Documented processes are typically a whiteboard with monthly/daily tasks with no computerized tracking system. Maintenance tasks are assigned and completed regularly, but the processes for assignment, completion, and when to utilize contractors are not consistent or documented. Contracts do exist for contractors, but the documentation of maintenance performance is not standardized.

Based on our discussions, Parks staff indicated that they currently operate at the following APPA levels of service:

Area	Score	Existing Level of Service
Turf care –	2.5	Grass cut between 5 and 10 days
Fertilizer –	2/4	2 for Turf: Healthy and growing vigorously; 4 for Shrubs: Not fertilized
Irrigation -	1	Automatically controlled
Litter -	3	Two to three times a week on average, depends on park use.
Pruning -	4	At least once per season
Disease -	4	When noticeable damage observed, and sustainability requirements dictate control
Snow	2	Removed by noon the next day
Surfaces -	3	Repaired when appearance have noticeably deteriorated
Repairs -	2	Done whenever safety is a concern
Inspections -	4	About once per month
Flowering -	3	Only perennials

Scoring: (1) – Showpiece facility; (2) - Comprehensive stewardship; (3) – Managed Care; (4) – Reactive Management; (5) Crisis Response.

Table 6. Estimate of Levels of Service Based on Data Collected and APPA Scores

Asset Data

Currently, the City holds some asset information in GIS-based point data about parks, open spaces, civic facilities, and rights-of-way. The primary data collected was the location of each area within the City where Parks has ownership and/or work requirements, and the overall acreage. Within this data, available components are listed, such as athletic fields, picnic shelters, or trailheads. Based on field review and staff accounts, the data is accurate but lacks assets that the City added in the past ten years. The asset data also lacks information about components that drive maintenance tasks. However, this existing asset data provides a framework to incorporate additional component data, and this report provides recommendations on how Parks completes the physical asset inventory.

To determine the appropriate inventory level or groups of assets, the following elements should be considered:

1. Maintenance requirements
2. Portable vs. fixed systems
3. Financial cost of the asset
4. Criticality (impact to mission if it fails)
5. Preventative maintenance labor required
6. Life safety/regulatory requirements with record-keeping and inspection
7. Commonality of preventative maintenance tasks
8. Similar schedules of preventative maintenance

The consultant team recommends a new asset classification system based on landscape management type (listed in Appendix D) that includes additional classification layers beyond the “ownership” and “class” categories originally assigned in the Atlas. The asset data should be organized to align with Lucity’s data management and organizational structure capabilities. These new landscape management type classifications are necessary because maintaining one acre of right-of-way is not the same as maintaining one acre of park. The acres of “parks” does not reflect the breadth of scope that Parks is

required to maintain; and sites that are not really “parks” require Parks maintenance and time (flower beds at the police department site; or tree pruning at the library). Each landscape management type classification has a set of tasks associated; based on the frequency and detail of those tasks, a level of service will be achieved (or: assigning a Level of Service will dictate the frequency / detail of the tasks). Cumulating all the sites that Parks has task-responsibilities and understanding the level of service desired at each site, will provide Parks with a framework for the necessary funding to achieve the community’s goals.

To better understand the maintenance needs (tasks) for each site, the sites were divided into seven landscape management type classes, which consider similarities of components, on-going maintenance tasks, preventative maintenance tasks, and use. The division of sites by landscape management type classification will help Parks assign levels of service to each site. For example, Parks may determine that they would like the Louisville Sports Complex to be a Level of Service 1 and the athletic fields at Miner’s Park may be a Level of Service 3. This will translate not only into greater frequency of fertilization, mowing, or turf care at the Sports Complex, but also greater frequency of waste removal, urgency of irrigation repairs, and more frequent maintenance of the shrub and perennial beds at these parks.

The categorization of assets into the landscape management type classification categories reveals Parks tasks across other non-park areas of the City such as the police facility, rights-of-way, and developed neighborhood entries. Especially revelatory is the Forestry, Irrigation, Horticulture, Turf Maintenance, and Snow & Ice tasks across all landscape management type classification categories. By assigning the Level of Service to sites in the Annual Work Plan, a more complete picture of required maintenance will be captured. Additional task time can be summarized in reports to City Council requesting resources. See Table 7 below for an example of task lists provided in the AWP, Appendix C.

Facilities

Sheet Last Updated ____

The Facilities Landscape Type applies to sites that Parks performs tasks and services, but are otherwise owned and managed by another City department. From the public perspective, these sites represent the City and reflect civic pride.



Grounds Categories

		QTY	LOS 1 (Best)	LOS 2	LOS 3
1	TURF	SF	Bluegrass mowed every 3 to 5 working days; Aeration 4 times per year; Reseed/sod as necessary; Less than 1% of turf area has weeds present.	Bluegrass mowed once every five working days. Aeration carried out not less than two times per year. Reseeding or sodding done when bare spots are present. Weed control when there is a visible problem or when weeds represent 5 percent of the turf surface.	Bluegrass mowed every ten working days; no aeration, or only when fertilizing; Reseed/sod when bare spots appear; Weed control measures when 50% of small areas, or 15% of turf area has weeds present.
	Bluegrass Turf				
2	FERTILIZATION	SF	Adequate fertilization according to optimum species requirements. NPK ratios to follow local guidance; application rates and frequency should ensure an even supply of nutrient for the entire year.	Adequate fertilizer level to ensure all plant materials are healthy and growing vigorously. Rates should correspond lowest recommended rates. Nitrogen, phosphorus, and potassium percentages follow local recommendations. Trees, shrubs, and flowers receive fertilizer to ensure optimum growth.	Applied only when turf vigor is low; application once per year at one-half recommended amount.
	Bluegrass Turf				
	Flower & Perennial Beds				

Table 7. Sample Portion of a Task List by Landscape Management Type

The core of this revelation is that Parks serves as the grounds maintenance team for the entire City of Louisville. A part of this is a reflection on the magnificent performance of Parks: their reliability and professional execution have made them the go-to department for many “outside” challenges the City

encounters. Irrigation and forestry both have obligations to private residents; Parks has played a strong role in snow removal throughout the City and has taken a lead with the Fire Recovery response.

However, a combination of asset areas and community expectations has left Parks staff under-resourced to cover the day-to-day maintenance of assets. Once Parks is able to track the actual time spent within these different landscape type categories, on specific components, there will be a realization of the real costs to Parks for assets beyond the listed acreage of “parks.” As Parks develops a system of tracking this data, Parks will be able to produce accurate, timely, and straightforward reports.

Maintenance and Operations Recommendations:

Maintenance

1. Develop a preventative maintenance plan to provide periodic, scheduled inspections, assessment and repair, and replacement of infrastructure, systems, and assets. This includes certifying, checking, or testing for optimum operation based on applicable industry standards, local guidelines, City requirements and/or manufacturer’s recommendation for maintenance and replacement of parks, with the intent to ensure that park assets are maintained for optimum use and safety and have the ability to reach or extend its full life cycle and expected return on investment.
 - a. Establish specific maintenance goals and objectives to focus maintenance planning. Recommended goals are included in the Annual Work Plan.
 - b. Develop work schedules based on established policies and priorities.
 - c. Workflow and prioritization of the work needs be established for each classified task. Tasks within the workflow for each work order can include automatic scheduling (backflow preventer certification), who gets the work assignment, equipment and material needed to complete the work, lock out/tag out procedures, and the buildings’ point of contact.
2. Establish and implement a workflow process that recognizes needs, responsibilities, and response time requirements for daily maintenance tasks, capital renewal, preventative maintenance (PM), and corrective maintenance. Provide operational responsibilities that aligns with the staffing structure.
3. Develop service level agreements (SLA) for maintenance functions between departments and outside agencies (such as HOAs, CDOT, etc.) that clearly delineate what maintenance functions are completed by each organization, timeframes, and other expectations. Formalizing service level agreements between departments and outside agencies would clarify expectations and start eliminating confusion. These can be updated once core maintenance functions are clearly defined for Parks.
4. Develop and implement a documented inspection process to inspect work performed by in-house and contracted staff. A quality assurance plan should be developed to define the required quality of work, the process used to evaluate the quality of work performed, and the process that should be followed when the quality of work does not meet the requirements. When developing the plan, first determine reasons why quality assurance problems may occur or have occurred in the past. Some reasons may include worker productivity, lack of necessary resources, lack of supervision, project is not appropriately

-
- staffed, or the project duration was not accurately estimated. After the reasons have been identified, document a process to resolve each within the quality assurance plan. While writing the plan, determine which reasons will likely have the largest impacts on the organization and determine a strategy to prioritize them.
5. Consolidate maintenance and capital renewal planning under the Lucity platform for major assets across Parks. For specific operational needs, continue to support and integrate workforce skills/training between major maintenance functions and operational functions.
 6. Update the asset inventory within Lucity to include the integration of the water systems, park assets, park infrastructure, and recurring maintenance plan. As the inventory information develops, refinement of the data will occur. For example, area calculations of the overall park area include the baseball/softball fields as they are generated through GIS. A double counting exists of the square footage /acreage of the fields. These should be subtracted from the overall park area. Additional park assets will require the cleaning of the data to ensure accurate data.
 7. Create a plan to improve the effectiveness of updating asset and equipment records and implement it. Be sure to track the process during implementation to help reach the goal of developing a more effective process.

Grounds

8. Identify desired service levels for grounds functions across Parks. Determine the level of service expected for each park space type. This will ensure that visitors experience a similar level of service across all City parks and will allow you to further refine your staffing needs.

Sustainability

9. Establish a sustainability policy on environmental sustainability that is aligned with the Louisville Sustainability Action Plan. The policy should address sustainable product purchasing, reduction and handling of waste, wise use and protection of land, air, water, and wildlife, and sustainable design/construction of buildings. Include Parks natural resource management plans and other areas of sustainability already implemented. Note: CAPRA strives for a zero-waste plan.
10. Develop an implementation plan based on the sustainability policy.
11. Review Parks Integrated Pest Management (IPM) strategy and on-going IPM operations, balancing the labor-intensive work against community expectations. Continue to support and revise Parks IPM program based on industry best practices.
12. Develop water conservation strategies based on CAPRA best management practices, regional successful low impact development strategies, and appropriate planting palettes.

Resilience

13. Conduct Parks specific resilience planning that includes security, emergency preparedness and continuity of operations. Once this planning process is in place and plans are developed, there will be tactical operational items to consider such as routinely reviewing these plans, conducting after action reports, and continual improvement in these areas. Specific short-term recommendations that could be implemented prior to the planning process include:

-
- a. Conduct physical security assessments of all parks. This assessment will provide a means of understanding risks and vulnerabilities, prioritizing needs and solutions, and creating a long-term, sustainable safety and security plan.
 - b. Develop Parks specific emergency preparedness plans and ensure staff receives the required training.
 - c. Communicate and educate personnel on existing procedures through drills, tabletop exercises, and other engagement activities.

Regulatory Compliance

14. Conduct a regular review of legal requirements related to facilities, such as licenses, sanitary regulations, fire laws, and safety measures, and inspections of adherence thereto.
15. Continue to work towards ADA compliance. It is our understanding recommendations are in place and the City is working towards compliance.
16. See security, emergency preparedness, and continuity of operations recommendations above.

Measurement and Analysis

17. Develop a consistent performance management process. A high-performance organization will transform data into metrics to help make proactive decisions. Performance metrics are a measure of an organization's activities and performance. It is essential for organizations to identify their strategic plans, translate their strategy into operational targets, and develop a metrics program to measure and manage their performance. Metrics are among the most valuable tools available for prioritizing work and demonstrating value to the overall organization.
 - a. Review current metrics and ensure the key performance indicators (KPIs) are effective for decision-making. The KPIs should be a small number of the most valuable metrics that will help Parks leadership measure the overall effectiveness and efficiency of the delivery of services. Focus Parks KPIs on outcomes, not activities. Strive for Parks KPIs to not include any check-the-box type of metrics. A 2020 KPI refinement report for the City identified the average number of metrics reported by peer communities to be sixty-six and at the time, the City had 547 metrics; too many metrics will result in overburdening Parks, rather than creating understanding. The December 2020 KPI list provided to our team included 13 KPIs that seemed directly related to Parks and three KPIs related to maintenance and management of parks. Note, the Annual Work Plan includes a suggested list of KPIs for Parks maintenance.

Information Management and the Use of Work Management Technology

18. Integrate the use of work management technology, such as the Lucity software currently utilized by the City. Use of technology is an important tool in managing maintenance workflow. A major factor in maintenance workforce efficiency is clearly defining the workflow and the use of technology to guide the organization and staffing of the ground's maintenance function. Although different technologies were in use to guide the maintenance function across the department, it is our understanding that Lucity is an available software application. Lucity, when used to its

fullest potential, as identified in our recommendations below, should meet the needs of Parks. Work order development can include preventative maintenance, corrective maintenance, capital improvements, and Parks own customized work types. As Parks implements the recommendations and moves toward consistency, service level agreements, and documented maintenance processes, the full value of the Lucity software will be recognized. With Lucity's existing use by the City, the implementation process will have resources available, and Parks staff will have a network of people to learn from.

- a. Incorporate the role of Lucity Administrator. At least one employee should be responsible for administration of the Lucity program that involves primary job duties of management of data, workflow processes, work order processes, KPI reports, and continuous improvement of the system. This position should also be given the full administration of the software application with the goal of the position to include improving Parks management communication between all customers and the department. However, the cybersecurity requirements should be kept in the IT department. Note, the City has a contract with a third party that is currently performing Lucity administrator functions.
- b. Develop and utilize a consistent work order process. This includes developing and utilizing consistent configuration codes, such as work type, priority, and status codes and definitions and how data is entered into and reported from Lucity. Attention should be paid to the priority and status codes from the customer standpoint. As an example, work is created (new), assigned, in progress, on hold (various potential reasons including waiting for parts, access, approval, customer, etc.), completed, and closed. Well defined codes can provide a means of communicating expectations and tracking the timely performance of work.
 - i. **Work Type Categories** - The work type and category codes are important to organize the data in Lucity to enable consistent reporting of metrics. The recommended work type and category codes provide an organized accounting of work performed if it is recorded and entered in Lucity.
 - ii. **Priority Codes** - Well defined priority codes can provide a means of communicating expectations and tracking the timely performance of work. Each priority code should have a description of the work, target response times, and relevant examples.
 - iii. **Work Order Status Codes** - A variety of work order status codes should be implemented to allow for better tracking and communication with customers.

Workforce

Effective workforce development planning includes understanding the knowledge, skills, and competencies required to accomplish the work and developing a training plan that will fill or enhance those competencies. This will help ensure that staff are qualified to perform their job duties and operate programs and services in the furtherance of goals and objectives.

Current State

Parks has a start to creating comprehensive job descriptions for all positions available in the Department. It can be challenging to align the proper requirements, skill sets, and compensation into each job description, but this is a critical step to maintaining qualified employees to produce the level of quality that customers have come to expect.

- Parks should maintain a current job description for each unique position and for each “tier” of employment below the management level.
- Job descriptions should be specific to the unique position or tier level on the organization chart. Vague language can be beneficial for the City to allow unforeseen tasks to be assigned to the most available employee; but consideration should be taken regarding job expectations, labor time, and employee skill sets when assigning tasks extraneous to the positions scope.

Deploying an effective workforce starts with a clear understanding of the knowledge, skills and competencies required to accomplish the work and meet stakeholder needs. Workforce development tools such as labor needs analysis and competency development plans can lead to a highly skilled workforce and workforce strategies that balance in-house capabilities with outsourced services that are aligned and optimized to deliver the service levels needed. An effective process to optimize workforce development includes these key steps: alignment, assessment, and development of a roadmap.

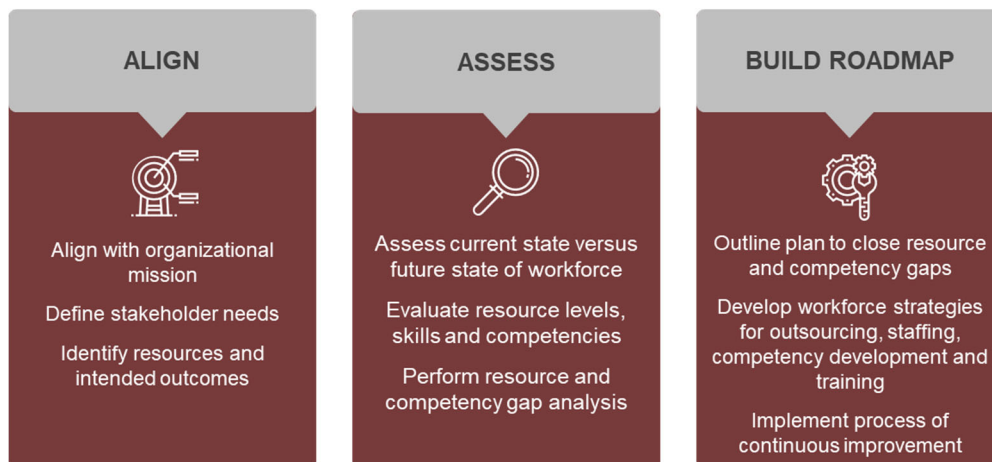


Figure 4. Steps in the development of a workforce development plan

Workforce Recommendations:

1. Develop and implement a workforce development program using the process described above. This process focuses on identifying what knowledge and skills are needed for each position (job analysis), assessing the skill level of personnel, and identifying training that will best fill any competency gaps.
 - a. Based on the Asset Management Classification Task List, Parks can create a list of skills required to keep up with routine maintenance, as well as specialized skill sets that are necessary to plan and manage the technical aspects of Parks operations.
2. Implement a staffing plan consistent with the benchmarking recommendations. This plan should include a more detailed labor needs analysis to determine specific staff types and ratios based on the desired levels of service.
3. Ensure job descriptions are based on job needs and include:
 - a. Duties of each position
 - b. Responsibilities of each position
 - c. Tasks of each position; and
 - d. Minimum level of proficiency necessary in the job-related skills, knowledge, abilities, and behaviors (See recommendation below)

While understanding the complete maintenance needs of Parks is critical to on-going success, to begin completing the job descriptions, Parks could start with the least-skilled job descriptions for each sub-area (Forestry, Irrigation, Horticulture, etc.), then develop job descriptions for the positions requiring the most technical skill sets (the Forester, Playground Inspectors, Department Heads, etc.). As the department matures, there will be a need to create job descriptions for additional layers of labor and management.

4. Implement a succession planning process that builds off Parks workforce development plan. This process can help develop and sustain a workforce that embodies the knowledge, skills, and organizational capabilities required to effectively manage Parks in the future. The succession plan should utilize the workforce development plan to build your workforce for the future. Succession plans should start with the end in mind when considering training plans.

Appendix A: Survey Summary

To kick-start the planning process, City staff and the consultant team developed a survey that was electronically distributed to City Council and the Parks and Public Landscapes Advisory Board (PPLAB). Although not all members completed the survey, the answers to the survey provided the consultant team with a snapshot of existing perceptions and expectations. The following information contains a consolidated summary of survey findings:

1. The number of parks and amount of space is the most compelling attribute of the City's park system.
2. Lack of systematic maintenance is a concern, as well as some concern about ensuring that trained people are engaged in specific maintenance tasks.
3. Mowing is a concern: some residents would like to see more, and some residents would like to see less.
4. There is a desire/need to address and implement water conservation measures by reducing need for irrigation (xeriscaping).
5. The need for a management and maintenance plan is apparent and desired.
6. PPLAB would like more information regarding budgets allocated to parks maintenance.
7. There are differing views regarding current maintenance of parks, which range from "great" and "fantastic" to "not meeting expectations."
8. There is a desire/need for reporting of standardized Key Performance Indicators (KPIs).



Who We Are



History of successful collaborations with municipalities including cities, school districts, and the National Park Service.



Provide progressive and innovative solutions to shape the future of how facilities are managed, operated, and maintained.



Overview

- Project Timeline
- Parks Department Background
- Capability Maturity Model
- Performance Standards Analysis
- Plan for Improvement

Project Timeline

Our Process

- **Q4 2021:** Project Awarded
- **Q1 2022:** Kick –Off/City Council & PPLAB Survey; Conducted Staff Interviews
- **Q3/Q4 2022:** Draft Report/Summary of Findings/ Work Plan
- **Q4 2022/Q1 2023:** Finalize Report/PPLAB Presentation/City Council Presentation

Department Background



Parks



Athletic Fields



Irrigation



Grounds



Playgrounds



Basketball Courts



Urban Canopy



Cemetery



Other

Staff Engagement



- Parks department staff was involved in the planning process
- Staff interviews were conducted in Spring 2022
 - Staff Interviews Included:
 - ✓ Parks Operations Staff
 - ✓ Athletics Staff
 - ✓ Cemetery Staff
 - ✓ Irrigation Staff
 - ✓ Forestry & Horticulture Staff
- The same questions/topics were posed to each staff member:
 - ✓ Staffing
 - ✓ Equipment
 - ✓ Expectations
 - ✓ Responsibilities
 - ✓ Events
 - ✓ Operations

A Path Forward



How Do You Get There? ---- > This project is the foundation and lays out a roadmap

Performance Standards Analysis

FEA Organization Assessment Framework:

Based on Malcolm Baldrige quality management framework and aligned with NRPA CAPRA:

- Evaluates key characteristics of how the organization functions.
- Evaluates the quantitative and qualitative measures in place.
- Compares existing processes and practice to industry best practices.
- Identifies strengths and weaknesses.
- Outlines a process for continuous improvement.



Capability Maturity Model

Overall, the organization is functioning at a maturity level between:
level 1 (Initial-Ad Hoc) and level 2 (Repeatable)



GMMP Purpose

Current Department Practices

- Basic maintenance data is tracked regarding parks, and assets, and staff hours.
- Facility Asset Inventory exists at a marginal level.

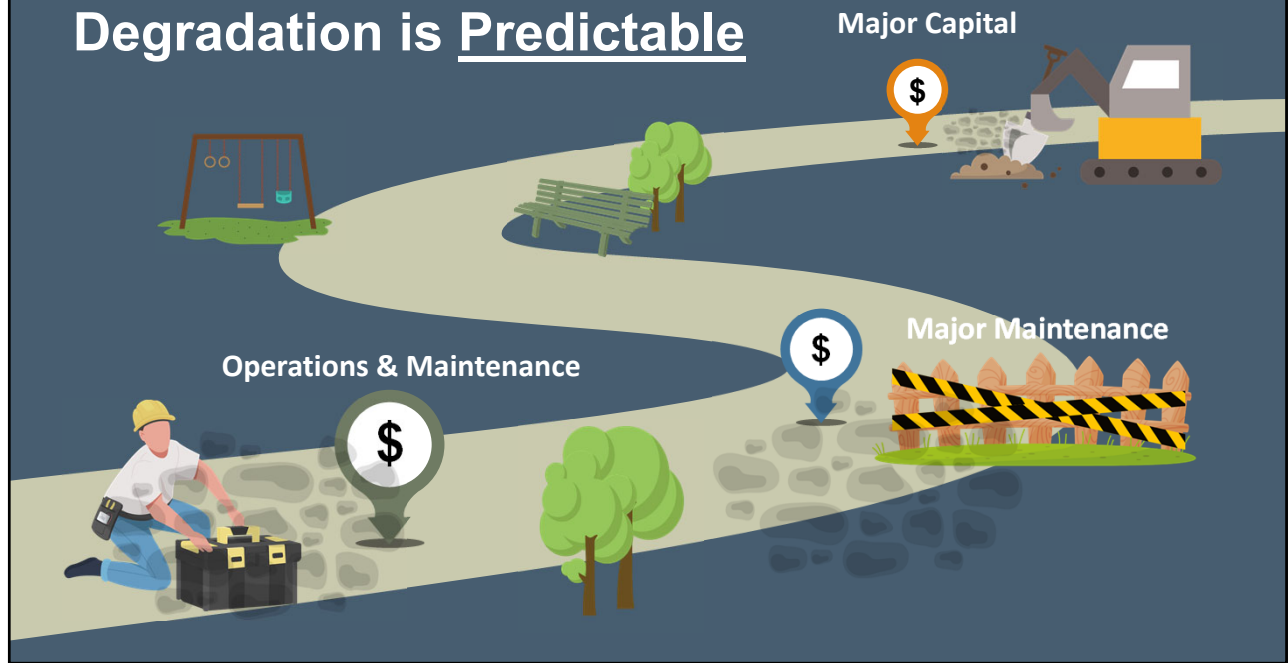
What's Missing?

- Data driven decisions require consistent data.
- A thorough asset inventory, is crucial to understand the scope of Parks maintenance

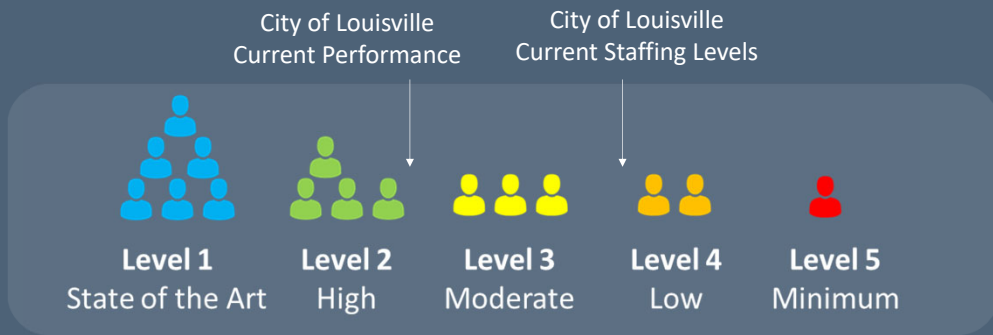
GMMP Benefits

- Make data driven investment decisions.
- Ensure proper asset maintenance is being performed
- Playbook/workplan for asset maintenance
- Maximize existing resources

Degradation is Predictable

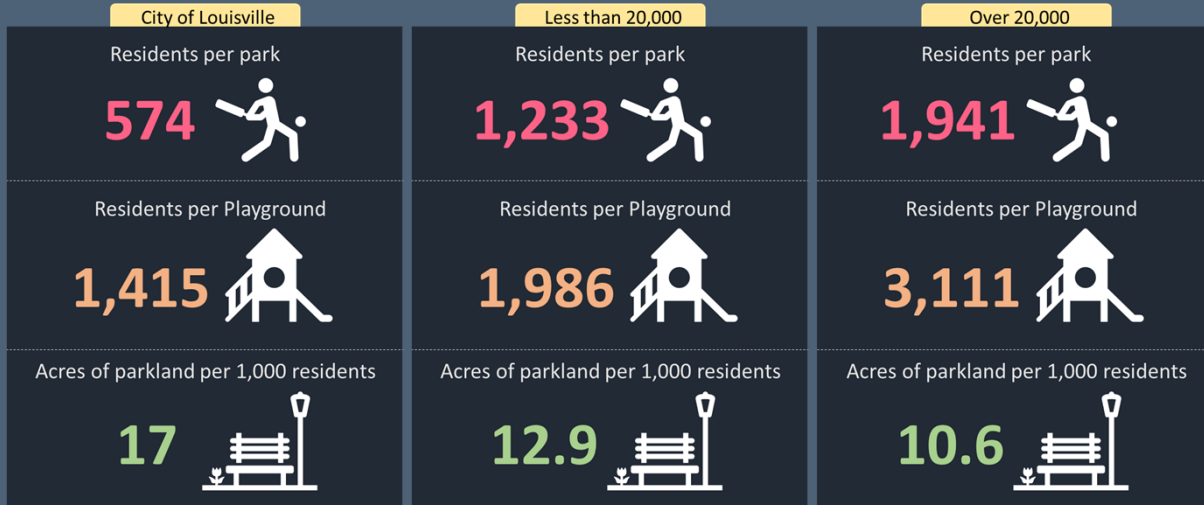


Current Performance



**# of contracted services FTE unknown*

Benchmarking – NRPA



Plan For Improvement

Recommendations:

1. Implement **Consistent Maintenance Processes**, Levels of Service, and Customer Expectations
2. Develop a **Preventative Maintenance Plan**
3. Adopt software to **manage maintenance workflow** (Lucity)
4. Implement a **staffing plan** consistent with benchmarking data
5. Develop a system to document and **track actual staff task time**
6. Complete the **inventory** of assets, refinement of accuracy of data
7. Conduct parks and recreation specific **resilience planning**, that includes security, emergency preparedness, and continuity of operations.
8. Implement a **performance management system** using KPI'S

Plan For Improvement - CAPRA

CAPRA Standards Achieved by Plan Implementation:

- Staff Qualifications
- Job Analyses for Job Descriptions
- Maintenance and Operations Standards
- Facility Legal Requirements
- Preventative Maintenance Plan
- Maintenance Personnel Assignment Procedures
- Budget Recommendations
- Environmental Sustainability
- Recruitment Process
- Staff Qualifications
- Job Analyses for Job Descriptions
- Community Involvement





**SUBJECT: DISCUSSION/DIRECTION – OPEN SPACE & PARKS SALES
TAX RENEWAL**

DATE: JANUARY 24, 2023

**PRESENTED BY: ADAM BLACKMORE, DIRECTOR OF PARKS, RECREATION &
OPEN SPACE
MEGAN DAVIS, DEPUTY CITY MANAGER**

SUMMARY:

The existing Open Space & Parks 10-year 3/8% sales and use tax, approved in its current form in 2012 by Louisville voters, will expire at the end of 2023. This sales and use tax, originally implemented for the acquisition of land in and around the City of Louisville for Open Space and Parks, has been in place since 1993. The tax was modified in 2002 to allow the tax revenues to be used for the operation and maintenance of open spaces and parks; the percentage and length of term remained the same. This same percentage, term, and purpose was approved again by the Louisville voters in 2012 via Ballot Measure 2A.

The Parks, Recreation & Open Space Department, in coordination with the Finance Department and City Manager's Office, requests City Council consideration and direction regarding the "sunsetting" of this sales and use tax, and any subsequent actions needed for 2023 ballot resolution consideration.

FISCAL IMPACT:

The sales and use tax funds are the primary funding source for Open Space and Parks operations, including staffing, maintenance, purchasing, and service agreements. The funds are also allocated to land acquisition reserves and capital projects.

PROGRAM/SUB-PROGRAM IMPACT:

As the primary funding source for Open Space and Parks Operations, all maintenance & operational programs for Open Space and Parks are significantly impacted by decisions regarding this tax.

Funds are distributed across all aspects of Open Space and Parks and therefore impact all program and subprogram areas associated with Open Space and Parks operations and improvements. The tax revenues are utilized for capital projects and equipment, such as playgrounds, picnic tables, irrigation, fencing, and equipment replacements for wood chippers, aerator, plow blade, utility cart, and, mowing deck. They also support the staff that oversees and conducts the maintenance and management work.

Tax revenue is also used for volunteer and educational programs such as, Fishing Frenzy, Farm Day, and Astronomy, all programs that help to facilitate and maintain a

relationship with the residents of Louisville. Revenue also supports Open Space & Parks investments in non-traditional methods of vegetation control, such as implementing the use of goats to mitigate weeds on Open Space and Park lands.

If the tax is not renewed, other sources of funding would need to be identified in order to continue these projects and support capital maintenance/replacement needs.









RECOMMENDATION:

It is recommended that through discussion, the City Council provide direction to staff and/or the relevant Advisory Boards and Committees on how to move this topic forward.

ATTACHMENT(S):

1. 2002 Ballot Issue 2D referencing current Sales & Use Tax language (and voting margin)
2. 2012 Coordinated Election Statement & Certificate of Determination
3. Ordinance 1617 Series 2012
4. 2012 City Manager e-mail: Open Space Revenue & Expenditures 2002-2011
5. 2014 City Manager OSAB presentation regarding Sales & Use Tax
6. Recommended (adopted) Parks & Open Space Budget 2023-2024
7. Public Comments: E-mail from Jessamine Fitzpatrick

STRATEGIC PLAN IMPACT:

<input checked="" type="checkbox"/>	 Financial Stewardship & Asset Management	<input type="checkbox"/>	 Reliable Core Services
<input type="checkbox"/>	 Vibrant Economic Climate	<input checked="" type="checkbox"/>	 Quality Programs & Amenities
<input type="checkbox"/>	 Engaged Community	<input type="checkbox"/>	 Healthy Workforce
<input type="checkbox"/>	 Supportive Technology	<input type="checkbox"/>	 Collaborative Regional Partner

**COORDINATED MAIL BALLOT ELECTION
STATEMENT AND CERTIFICATE OF DETERMINATION
OF A SPECIAL ELECTION HELD IN LOUISVILLE, COLORADO
ON TUESDAY, NOVEMBER 5, 2002**

BALLOT ISSUE 2A

SHALL CITY OF LOUISVILLE DEBT BE INCREASED \$23,100,000, WITH A REPAYMENT COST OF \$39,500,000, AND SHALL CITY OF LOUISVILLE TAXES BE INCREASED \$1,975,800 ANNUALLY, OR BY SUCH LESSER AMOUNT AS MAY BE NECESSARY TO PAY SUCH DEBT; SUCH DEBT AND TAXES TO BE FOR THE PURPOSE OF CONSTRUCTING, EXPANDING, AND RENOVATING RECREATIONAL AND CULTURAL FACILITIES OF THE CITY CONSISTING OF THE LOUISVILLE LIBRARY, THE LOUISVILLE RECREATION/SENIOR CENTER, AND OUTDOOR POOL FACILITIES, TO INCLUDE ALL NECESSARY LAND, EQUIPMENT, FURNISHINGS, IMPROVEMENTS AND INCIDENTALS FOR SUCH FACILITIES; SUCH DEBT TO BE EVIDENCED BY THE ISSUANCE OF BONDS OR BONDS ISSUED TO REFUND SUCH BONDS; SUCH TAXES TO CONSIST OF AN ADDITIONAL AD VALOREM PROPERTY TAX MILL LEVY NOT TO EXCEED 5.340 MILLS BEGINNING JANUARY 1, 2003 AND CONTINUING FOR TWENTY YEARS THEREAFTER FOR THE PURPOSE OF REPAYMENT OF SUCH DEBT; SUCH BONDS TO BE SOLD IN ONE SERIES OR MORE IN AN AGGREGATE AMOUNT NOT TO EXCEED THE MAXIMUM AUTHORIZED PRINCIPAL AMOUNT AND REPAYMENT COSTS, ON TERMS AND CONDITIONS AS THE CITY COUNCIL MAY DETERMINE, INCLUDING PROVISIONS FOR THE REDEMPTION OF THE BONDS PRIOR TO MATURITY WITH OR WITHOUT PAYMENT OF PREMIUM; AND SHALL THE PROCEEDS OF ANY SUCH DEBT AND TAXES, AND ANY INVESTMENT INCOME THEREON, BE COLLECTED AND SPENT AS A VOTER-APPROVED REVENUE CHANGE AND AN EXCEPTION TO LIMITS WHICH WOULD OTHERWISE APPLY UNDER ARTICLE X, SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES 3,497
NO 4,165

BALLOT ISSUE 2B

SHALL CITY OF LOUISVILLE TAXES BE INCREASED \$450,000 IN 2003 AND THEN ANNUALLY BY WHATEVER ADDITIONAL AMOUNTS ARE RAISED THEREAFTER FROM THE LEVY OF AN ADDITIONAL SALES AND USE TAX OF 0.140 PERCENT BEGINNING JANUARY 1, 2003 AND CONTINUING THEREAFTER, WITH SUCH TAX TO BE IMPOSED ONLY IF REFERRED MEASURE 2A, REFERRED TO REGISTERED ELECTORS OF THE CITY AT THE NOVEMBER 5, 2002, SPECIAL ELECTION, IS APPROVED BY A MAJORITY OF SUCH ELECTORS; WITH THE NET PROCEEDS OF SUCH SALES AND USE TAX TO BE COLLECTED, RETAINED AND SPENT FOR OPERATING AND MAINTAINING RECREATIONAL AND CULTURAL FACILITIES OF THE CITY AND FOR ANY OTHER LAWFUL MUNICIPAL PURPOSE AND SHALL THE CITY BE PERMITTED TO COLLECT, RETAIN AND EXPEND ALL REVENUES DERIVED FROM SUCH SALES AND USE TAX AS A VOTER APPROVED REVENUE CHANGE AND AN EXCEPTION TO LIMITS WHICH WOULD OTHERWISE APPLY UNDER ARTICLE X, SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES 2,996
NO 4,382

BALLOT ISSUE 2C

SHALL CITY OF LOUISVILLE TAXES BE INCREASED \$250,000 IN 2003 AND THEN ANNUALLY BY WHATEVER ADDITIONAL AMOUNTS ARE RAISED THEREAFTER BY THE IMPOSITION OF AN EXCISE TAX ON THE LEASING OR RENTING OF ANY LODGING LOCATED IN THE CITY AT THE RATE OF THREE PERCENT (3.0%) BEGINNING JANUARY 1, 2003 AND CONTINUING THEREAFTER, WITH THE NET PROCEED OF SUCH TAX TO BE COLLECTED, RETAINED, AND SPENT FOR OPERATING AND MAINTAINING RECREATIONAL AND CULTURAL FACILITIES OF THE CITY AND FOR ANY LAWFUL MUNICIPAL PURPOSE; AND SHALL THE CITY BE PERMITTED TO COLLECT, RETAIN AND EXPEND ALL REVENUES DERIVED FROM SUCH TAX AS A VOTER-APPROVED REVENUE CHANGE AND AN EXCEPTION TO LIMITS WHICH WOULD OTHERWISE APPLY UNDER ARTICLE X, SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES 4,156
NO 3,241

BALLOT ISSUE 2D

SHALL CITY OF LOUISVILLE TAXES BE INCREASED \$1,500,000 IN 2004 AND THEN ANNUALLY BY WHATEVER ADDITIONAL AMOUNTS ARE RAISED THEREAFTER FROM THE CONTINUATION OF THE SALES AND USE TAX OF 0.375 PERCENT BEGINNING JANUARY 1, 2004 AND EXPIRING TEN YEARS AFTER SUCH DATE; WITH THE NET PROCEEDS OF SUCH SALES AND USE TAX TO BE COLLECTED, RETAINED AND SPENT EXCLUSIVELY FOR THE ACQUISITION OF LAND IN AND AROUND THE CITY OF LOUISVILLE FOR OPEN SPACE BUFFER ZONES, TRAILS, WILDLIFE HABITATS, WETLANDS PRESERVATION AND FUTURE PARKS; AND FOR THE DEVELOPMENT, CONSTRUCTION, OPERATION AND MAINTENANCE OF SUCH OPEN SPACE ZONES, TRAILS, WILDLIFE HABITATS, WETLANDS AND PARKS; AND SHALL THE CITY BE PERMITTED TO COLLECT, RETAIN AND EXPEND ALL REVENUES DERIVED FROM SUCH SALES AND USE TAX AS A VOTER-APPROVED REVENUE CHANGE AND AN EXCEPTION TO LIMITS WHICH WOULD OTHERWISE APPLY UNDER ARTICLE X, SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES 4,861
NO 2,789

I, THE UNDERSIGNED CITY CLERK FOR THE CITY OF LOUISVILLE, COLORADO, DO HEREBY CERTIFY THAT I CONDUCTED, IN COORDINATION WITH BOULDER COUNTY, COLORADO, A REGULAR ELECTION ON TUESDAY, THE 5TH DAY OF NOVEMBER, 2002, FOR BALLOT ISSUES 2A; 2B; 2C AND 2D AND THAT THE RESULTS OF THE ELECTION ARE TRUE AND CORRECT, AS SHOWN BY THE BALLOTS CAST IN THE CITY OF LOUISVILLE, COLORADO.

WITNESS MY HAND AND SEAL THIS 6TH DAY OF NOVEMBER, 2002.

NANCY VARRA
CITY CLERK, CITY OF LOUISVILLE
STATE OF COLORADO
COUNTY OF BOULDER

COORDINATED ELECTION STATEMENT AND CERTIFICATE OF
DETERMINATION OF A REGULAR ELECTION HELD IN LOUISVILLE,
COLORADO ON TUESDAY, NOVEMBER 6, 2012

CANDIDATE FOR OFFICE

OF VOTES

CITY COUNCIL - WARD I

Emily Jasiak

3,097

BALLOT ISSUE 2A

SHALL THE CITY OF LOUISVILLE TAXES BE INCREASED \$1,5000,000 IN 2014 AND THEN ANNUALLY BY WHATEVER ADDITIONAL AMOUNTS ARE RAISED THEREAFTER FROM THE CONTINUATION OF THE SALES TAX OF 0.375 PERCENT BEGINNING JANUARY 1, 2014 AND EXPIRING TEN YEARS AFTER SUCH DATE; WITH THE NET PROCEEDS OF SUCH SALES TAX TO BE COLLECTED, RETAINED AND SPENT EXCLUSIVELY FOR THE ACQUISITION OF LAND IN AND AROUND THE CITY OF LOUISVILLE FOR OPEN SPACE BUFFER ZONES; TRAILS; WILDLIFE HABITATS; WETLANDS PRESERVATION AND FUTURE PARKS; AND FOR THE DEVELOPMENT, CONSTRUCTION, OPERATION AND MAINTENANCE OF SUCH OPEN SPACE ZONES, TRAILS, WILDLIFE HABITATS, WETLANDS AND PARKS; AND SHALL THE CITY BE PERMITTED TO COLLECT, RETAIN AND EXPEND ALL REVENUES DERIVED FROM SUCH SALES TAX AS A VOTER-APPROVED REVENUE CHANGE UNDER ARTICLE X, SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES	8,082
NO	3,943

I, THE UNDERSIGNED CITY CLERK FOR THE CITY OF LOUISVILLE, COLORADO, CONDUCTED, IN COORDINATION WITH BOULDER COUNTY, AS A REGULAR ELECTION ON TUESDAY, THE 6TH DAY OF NOVEMBER, 2012 FOR A MUNICIPAL CANDIDATE AND , BALLOT ISSUE 2A, I HEREBY CERTIFY THE RESULTS FOR THE REGULAR ELECTION FOR A CANDIDATE, BALLOT ISSUE 2A ARE TRUE AND CORRECT BALLOTS, AS SHOWN BY THE MAIL BALLOTS, IN THE CITY OF LOUISVILLE, COLORADO.

WITNESS MY HAND AND SEAL THIS 13TH DAY OF NOVEMBER, 2012

NANCY VARRA
CITY CLERK, CITY OF LOUISVILLE
STATE OF COLORADO
COUNTY OF BOULDER

**ORDINANCE NO. 1617
SERIES 2012**

AN ORDINANCE IMPOSING FOR AN ADDITIONAL TEN-YEAR PERIOD THE CITY'S THREE-EIGHTHS OF ONE PERCENT ($\frac{3}{8}$ %) SALES TAX FOR OPEN SPACE ACQUISITION, DEVELOPMENT, MAINTENANCE AND RELATED PURPOSES; AND PROVIDING FOR THE SUBMISSION OF THE ORDINANCE TO A VOTE OF THE REGISTERED ELECTORS AT A SPECIAL ELECTION TO BE HELD NOVEMBER 6, 2012.

Section 1. The following ordinance of the City of Louisville, Colorado, is hereby adopted to read:

WHEREAS, the City of Louisville (the "City"), is a Colorado home rule municipal corporation duly organized and existing under laws of the State of Colorado and the City Charter (the "City Charter"); and

WHEREAS, the members of the City Council of the City (the "City Council") have been duly elected and qualified; and

WHEREAS, Article X, Section 20 of the Colorado Constitution, also referred to as the Taxpayer's Bill of Rights ("TABOR") requires voter approval for any new tax, any increase in any tax rate, the creation of any debt, extension of an expiring tax, and the spending of certain funds above limits established by TABOR; and

WHEREAS, pursuant to Article 12 and Section 4-8 of the City Charter, the City may authorize the issuance of bonds, the imposition of new taxes and the increase of a tax rate by ordinance and upon approval of the registered electors of the City; and

WHEREAS, pursuant to resolution adopted by the City Council, the City will hold a special election on November 6, 2012, as a coordinated election pursuant to the Uniform Election Code of 1992, as amended; and

WHEREAS, TABOR requires that the City submit ballot issues, as defined in TABOR, to the City's registered electors on specified election days before action can be taken on such ballot issues; and

WHEREAS, November 6, 2012, is one of the election dates at which TABOR ballot issues may be submitted to the registered electors of the City pursuant to TABOR; and

WHEREAS, pursuant to Ordinance No. 1119, Series 1993, the City Council referred to the voters a TABOR ballot issue concerning imposition for a ten-year period of a temporary $\frac{3}{8}$ % sales and use tax increase for the acquisition of land in and around the City of Louisville for open

space buffer zones, trails, wildlife habitats, wetlands preservation and future parks, and such ballot issue was approved by a majority of the City's voters; and

WHEREAS, pursuant to Ordinance No. 1395, Series 2002, the City Council referred to the voters a TABOR ballot issue for the continuation of such sales and use tax for an additional ten-year period for the acquisition of land in and around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks; and for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks, and such ballot issue was approved by a majority of the City's voters; and

WHEREAS, pursuant to Ordinance No. 1575, Series 2010, the City Council referred to the voters a TABOR ballot issue for the imposition of a permanent City use tax at a rate of 3.50% to supersede the City's then-current use tax, with revenues from a $\frac{3}{8}$ % percent rate of use tax to be used exclusively for the acquisition of land in and around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks; and for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks, and such ballot issue was approved by a majority of the City's voters; and

WHEREAS, the temporary $\frac{3}{8}$ % sales tax will expire on December 31, 2013, unless it is continued by approval of the City's voters; and

WHEREAS, the City Council is of the opinion that it should refer to the voters at the November 6, 2012 election a TABOR ballot issue concerning continuation of the City's temporary sales tax, as further stated in this ordinance.

NOW, THEREFORE, BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF LOUISVILLE, COLORADO:

A. Subsection A of Section 3.20.200 of the Louisville Municipal Code, regarding the sales tax levy, is hereby amended to read as follows (words added are underlined; words deleted are ~~stricken through~~):

Sec. 3.20.200. Levy of tax; rate.

A. There is hereby levied, and there shall be collected and paid, a sales tax equal to three percent of the purchase price of tangible personal property at retail or the furnishing of services, except that (1) for the ten-year period beginning on January 1, 2014 ~~2004~~, there is hereby levied, and there shall be collected and paid, an additional sales tax of three-eighths of one percent of the purchase price of tangible personal property at retail or the furnishing of services, as authorized at the November 6, 2012 ~~November 5, 2002~~ election, and (2) for the ten-year period beginning on January 1, 2009, there is hereby levied, and there

shall be collected and paid, an additional sales tax of one-eighth of one percent of the purchase price of tangible personal property at retail or the furnishing of services, as authorized at the November 4, 2008 election.

B. Subsection D of Section 3.20.600 of the Louisville Municipal Code is hereby amended to read as follows (words added are underlined; words deleted are ~~stricken through~~):

Sec. 3.20.600. Sales tax—Capital improvement fund.

D. Revenues from the temporary $\frac{3}{8}$ percent sales tax imposed for the ten-year period beginning on January 1, 2014 ~~2004~~ shall be used exclusively for the acquisition of land in and around the city for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks; and for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks.

Section 2. Total City tax revenues are estimated to increase by up to \$1,500,000 in the first full year in which the sales tax provided for in this ordinance is in effect. However, the revenues from said sales tax may be collected and spent, regardless of whether said revenues, in any year after the first full year in which said sales tax is in effect, exceed the estimated dollar amount stated above, and without any other limitation or condition, and without limiting the collection or spending of any other revenues or funds by the City of Louisville, under Article X, Section 20 of the Colorado Constitution or any other law.

Section 3. This ordinance shall not take effect unless and until a majority of the registered voters voting at the special municipal election on November 6, 2012 vote “yes” in response to the following ballot title:

SHALL CITY OF LOUISVILLE TAXES BE INCREASED \$1,500,000 IN 2014 AND THEN ANNUALLY BY WHATEVER ADDITIONAL AMOUNTS ARE RAISED THEREAFTER FROM THE CONTINUATION OF THE SALES TAX OF 0.375 PERCENT BEGINNING JANUARY 1, 2014 AND EXPIRING TEN YEARS AFTER SUCH DATE; WITH THE NET PROCEEDS OF SUCH SALES TAX TO BE COLLECTED, RETAINED AND SPENT EXCLUSIVELY FOR THE ACQUISITION OF LAND IN AND AROUND THE CITY OF LOUISVILLE FOR OPEN SPACE BUFFER ZONES, TRAILS, WILDLIFE HABITATS, WETLANDS PRESERVATION AND FUTURE PARKS; AND FOR THE DEVELOPMENT, CONSTRUCTION, OPERATION AND MAINTENANCE OF SUCH OPEN SPACE ZONES, TRAILS, WILDLIFE HABITATS, WETLANDS AND PARKS; AND SHALL THE CITY BE PERMITTED TO COLLECT, RETAIN AND EXPEND ALL REVENUES DERIVED FROM SUCH SALES TAX AS A VOTER-APPROVED REVENUE CHANGE AND AN EXCEPTION TO LIMITS WHICH WOULD OTHERWISE APPLY UNDER ARTICLE X,

SECTION 20 OF THE COLORADO CONSTITUTION OR ANY OTHER LAW?

YES _____
NO _____

Section 4. The provisions of this ordinance shall take effect, following passage and approval thereof as provided in Section 3, on January 1, 2014.

Section 5. If any portion of this ordinance is held to be invalid for any reason, such decision shall not affect the validity of the remaining portions of this ordinance. The City Council and the registered voters of the City hereby declare that they would have passed and approved this ordinance and each part hereof irrespective of the fact that any one part be declared invalid.

Section 6. The repeal or modification of any provision of the Municipal Code of the City of Louisville by this ordinance shall not release, extinguish, alter, modify, or change in whole or in part any penalty, forfeiture, or liability, either civil or criminal, which shall have been incurred under such provision, and each provision shall be treated and held as still remaining in force for the purpose of sustaining any and all proper actions, suits, proceedings, and prosecutions for the enforcement of the penalty, forfeiture, or liability, as well as for the purpose of sustaining any judgment, decree, or order which can or may be rendered, entered, or made in such actions, suits, proceedings, or prosecutions.

Section 7. All other ordinances or portions thereof inconsistent or conflicting with this ordinance or any portion hereof are hereby repealed to the extent of such inconsistency or conflict.

INTRODUCED, READ, PASSED ON FIRST READING, AND ORDERED PUBLISHED this 19 day of June, 2012.



Robert P. Muckle
Robert P. Muckle, Mayor

Carol Hanson
Carol Hanson, Deputy City Clerk

APPROVED AS TO FORM:
[Signature]
Light, Kelly & Dawes, P.C.
City Attorney

PASSED AND ADOPTED ON SECOND AND FINAL READING, this 3 day of July, 2012.



Carol Hanson
Carol Hanson, Deputy City Clerk

Robert P. Muckle
Robert P. Muckle, Mayor

Marla Olson

From: Malcolm Fleming
Sent: Monday, October 29, 2012 5:24 PM
To: City Council
Cc: Joe Stevens; Kevin Watson; Heather Balsler; tom.davinroy@gmail.com; Ember Brignull
Subject: Open Space and Parks Expenditures 2020-2011

Mayor Muckle and Council Members:

John Aguilar from the Daily Camera intends to publish an article concerning the Open Space and Parks Sales Tax measure that is on this year's ballot. To illustrate the importance of that ballot measure I prepared and sent to John the table below. This table shows for the past 10 years (2002-2011) the total revenue accruing to the Open Space and Parks Fund from all sources (including grants, interest earnings, sales of assets (the Damyanovich property) and other miscellaneous revenues) as well as just that portion of revenue from sales and use taxes.

To provide some context, because the Open Space and Parks Fund (OSPF) is not the only source of revenue for the City's Open Space, Parks and Trails operations, land acquisition and capital projects, I also summarized the Open Space and Parks (but not Recreation) expenditures from all sources. As the table shows, OSPF expenditures represent about 44% of total expenditures during 2002-2011.

Regarding the question of how much of the OSPF funds are spent on land acquisition compared with operations, the table reflects that during 2002-2011, 51% of OSPF expenditures were for land acquisition and debt service (33%) and capital outlay (18%), compared with 49% spent on operations.

Regarding the question of how important is the Open Space and Parks sales and use tax to the City...it is critically important. The tax generates about \$1.3 million annually and funds close to half of the City's Open Space and Parks activities. Without that revenue, we would have to make major changes to the City's budget and it would affect all operations (with the possible exception of the City's activities funded from enterprise funds).

Please let me know if you have any questions regarding this information (but as always, do not respond to all, so we don't violate Open Meetings requirements).

Malcolm Fleming

Louisville City Manager
(303) 335-4532
malcolmf@louisvilleco.gov

City of Louisville
Open Space & Parks Revenues and Expenditures
2002-2011

	2002-2011	Percent of Total
Open Space & Parks Fund Revenues		
Open Space & Parks Fund (All Revenue Sources)	16,991,326	100%
Open Space & Parks Fund (Revenue from Sales & Use Tax Only)	11,830,060	70%
 Open Space and Parks Expenditures		
Open Space & Parks Fund	9,731,558	44%
General Fund	6,664,104	30%
Capital Projects Fund	3,375,591	15%
Lottery Fund	2,309,972	10%
	22,081,224	100%
 Open Space and Parks Fund Expenditures		
Open Space & Parks Operations	4,793,708	49%
Land Acquisition & Debt Service	3,213,229	33%
Capital Outlay	1,724,621	18%
	9,731,558	100%

Open Space Advisory Board

Agenda

**Wednesday, November 12th 2014
Louisville Public Library
1st Floor Meeting Room
951 Spruce Street
7:00 pm**

- I. Call to Order
- II. Roll Call
- III. Approval of Agenda
- IV. Approval of Minutes
- V. Public Comments on Items Not on the Agenda
- VI. Discussion Item: **Open Space and Parks Fund- Ballot Measures Establishing and Continuing Funding for Open Space and Parks; Accounting for Open Space and Parks Fund Revenues and Expenditures; and Draft Policy on Open Space and Parks Fund Expenditures and Reserve.**
Presented by: Malcolm Fleming, City Manager
- VII. Discussion Item: Lafayette-Louisville Boundary Area Drainage Improvements
Presented by: Cameron Fowlkes, Public Works Department
- VIII. Discussion Item: Wayfinding- Trail Naming Concepts & Trail Modifications
Presented by: Kristin Cypher and Team, C+B Design
 - a. Wayfinding Tiger Team Update
- IX. Staff Updates
- X. Board Updates
 - a. Education Tiger Team Update
- XI. Discussion Item for Next Meeting on December 10th 2014
 - a. Wayfinding- Review Three Sign Concepts
 - b. Louisville Baseline Energy Survey, Sustainability Advisory Board
 - c. Preparation for Brainstorming Session with City Council
 - d. Open Space 2015 Operational & CIP Budget
- XII. Discussion Item: Upcoming Discussion Items
 - a. January- Preparation for Brainstorming Session with City Council, Officer Elections, 2015 House Keeping, 2015 Goal Setting, Wayfinding Costs & Phasing, Lake Park Open Space (Harney Pond)

Open Space and Parks Funding

Ballot Measures Establishing and Continuing Funding for Open Space and Parks

Ballot Question A initiated through voter petition and approved by Louisville voters in 1993 authorized a ten-year, 3/8% sales and use tax with the revenue from the tax to be used, “exclusively for the acquisition of land in and around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks”.

Following that question, in 1994, the City Council placed a measure on the ballot and Louisville voters approved Ballot Issue 2B. This Ballot Issue increased the City's debt by \$4.2 million, with a repayment cost of \$5.8 million, for the purpose of, “acquiring land for open space buffer zones, trails, wild life habitats, wetlands preservation and future parks *and all necessary and appurtenant facilities*”, with the debt repaid out of revenues from the City's Open Space Sales and Use Tax (approved through the 1993 Ballot Question A).

Then in 2002, with the 10-year tax approved in 1993 set to expire in 2004, the City Council placed another measure on the ballot. That Ballot Measure 2D, approved by Louisville voters in 2002 authorized a 10-year 3/8% sales and use tax with revenue from the tax to be used, “exclusively for the acquisition of land in an around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks; *and for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks*”.

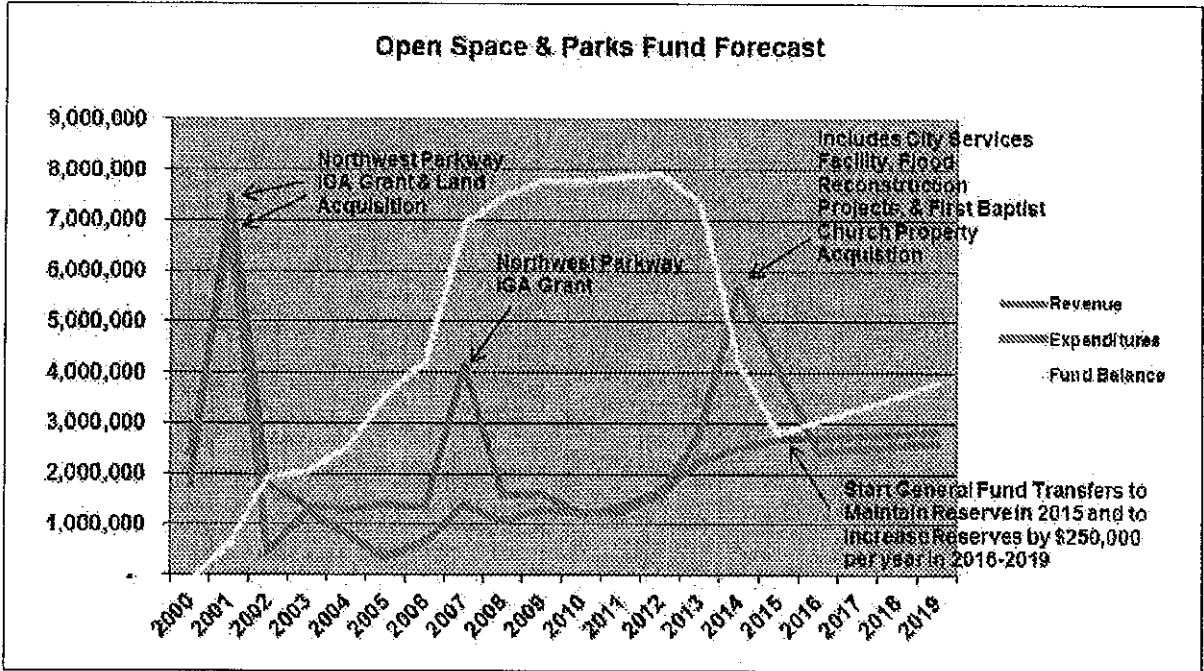
Finally, in 2012, with the 10-year tax approved in 2002 set to expire in 2014, the City Council placed another measure on the ballot. That Ballot Measure 2A, approved by Louisville voters in 2012, also authorized a 10-year 3/8% sales and use tax with revenue from the tax, as also stated in the 2002 Ballot Measure 2D, to be used, “exclusively for the acquisition of land in an around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks; *and for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks*”.

While Louisville voters have twice approved ballot measures providing clear authority to spend revenue from the sales and use tax on the development, construction, operation and maintenance of open space, trails, wildlife habitat, wetlands and parks, the origin of the City's funding for open space and parks—and the limitation in the 1993 ballot question restricting use of the funds to land acquisition only—still influences the way many people view how the 3/8% tax revenue should be used today. This perspective could also affect the continued community support for the tax. Consequently, it is very important to clearly show the sources and uses of all funding for all aspects of the City's open space and parks programs, to ensure the City maintains sufficient resources to acquire properties on the City's Open Space Candidate Properties list, and to have clear policies to guide management of the Open Space and Parks Fund.

Accounting for Open Space and Parks Fund Revenues and Expenditures

With the above history in mind, staff has divided the 2015 Open Space and Parks Fund budget into expenditures for Open Space Administration and Operations; Parks

Administration and Operations; and Capital Outlay. The graph below summarizes the Open Space and Parks Fund total revenues, expenditures and fund balance for 2000-2013 (actual), 2014 (estimated) and 2015-2019 (projected). Although there are records going back further, the year 2000 is as far back as the City's current Long-Term Financial Model goes.



As this graph indicates, total revenue to the Fund varies significantly depending on intergovernmental grants and on transfers from other funds. From 2000 to 2013 Tax revenue to the Fund averaged about \$1.25 million and totaled \$17.5 million over that 14-year period. During this same period, the Fund received over \$12.1 million, or about 40% of the total revenue, from intergovernmental grants and transfers from the General Fund, Impact Fee Fund and the Capital Projects Fund. The 2015 recommended budget and forecast also propose transfers from the General Fund of \$250,000 each year in 2015-2019 to provide a larger reserve and ensure there are sufficient funds to purchase Open Space Candidate properties as they become available.

The following table summarizes the total Open Space and Parks Fund revenues and expenditures for 2000-2015, including the three years prior to the adoption of Ballot Measure 2D in 2002 (which authorized the use of tax revenue for development, construction, operation and maintenance of parks in addition to land acquisition), and for the 16-year period of 2000 to 2015 (including estimated amounts for 2014 and projected amounts for 2015).

As the table indicates, for the years prior to the adoption of Ballot Measure 2D in 2002, and implementation of the tax in 2004, the only expenditures from the Fund were for property acquisition, debt service and \$3,730 for legal expenses (presumably associated with the Bond issue). During that period more was spent on property

acquisition (\$8.7 million) than tax revenue accruing to the Fund (\$3.9 million). For 2000 through 2013, amounts equal to roughly 64% of tax revenue were spent on property acquisition, 40% on operations and administration, and 22% for capital outlay (the percentages don't add up to 100% because the expenditures reflect revenue from intergovernmental grants and transfers from other Funds). Including the estimated amounts for 2014 and the proposed amounts for 2015, amounts equal to roughly 61% of tax revenue would be spent on property acquisition, 52% on operations and administration, and 42% for capital outlay (and again the percentages don't add up to 100% because the expenditures reflect revenue from intergovernmental grants and transfers from other Funds).

Open Space and Parks Fund Revenues and Expenditures						
Revenue	2000-2015 (Actual/Projected)		2000-2013 (Actual)		2000-2003 (Actual)	
	Dollars	% of Total	Dollars	% of Total	Dollars	% of Total
Total Taxes	\$20,695,760	58.4%	\$17,491,550	58.1%	\$ 5,146,545	41.5%
Total Intergovernmental Revenue	\$ 8,717,795	24.6%	\$ 7,996,865	26.6%	\$ 5,325,000	42.9%
Total Miscellaneous Revenue	\$ 2,196,485	6.2%	\$ 2,024,395	6.7%	\$ 513,891	4.1%
Transfers from General Fund	\$ 1,673,166	4.7%	\$ 1,089,096	3.6%	\$ 1,089,096	8.8%
Transfers from Impact Fee Fund	\$ 1,309,450	3.7%	\$ 573,460	2.2%	\$ -	0.0%
Transfers from Capital Projects Fund	\$ 327,114	0.9%	\$ 327,114	1.1%	\$ 327,114	2.6%
Total Transfers	\$ 3,307,741	9.3%	\$ 2,089,671	6.9%	\$ 1,416,211	11.4%
Total Open Space & Parks Fund Revenues	\$35,432,169	100.0%	\$30,116,319	100.0%	\$12,401,647	100.0%
Expenditures						
Property Acquisition	\$12,573,087	37.9%	\$11,164,087	48.0%	\$ 9,674,238	89.0%
Total Operations & Administration	\$10,751,758	32.4%	\$ 6,970,778	29.9%	\$ 3,730	0.0%
Other Capital Outlay	\$ 8,659,159	26.1%	\$ 3,943,369	16.9%	\$ -	0.0%
Total Debt Service	\$ 1,192,405	3.6%	\$ 1,192,405	5.1%	\$ 1,192,405	11.0%
Total Open Space & Parks Fund Expenditures	\$33,186,409	100.0%	\$23,290,639	100.0%	\$10,870,373	100.0%
Percent of Tax Revenue Spent On Property Acquisition	60.8%		63.9%		188.0%	
Percent of Tax Revenue Spent On Operations & Administration	52.0%		39.9%		0.0%	
Percent of Tax Revenue Spent On Capital Outlay	41.9%		22.5%		0.0%	

As noted above, staff has divided the 2015 Open Space and Parks Fund budget into expenditures for Open Space Operations and Administration; Parks Operations and Administration; and Capital Outlay. The following tables reflect the annual line item allocation of all Open Space and Parks Fund sources and uses of revenue for 2000-2015. The tables reflect all revenues accruing to the Fund and show that through 2003 there were only expenditures for property acquisition, debt service and \$3,730 for legal expenses. In 2004 the allocation reflects expenditures associated with Open Space and Parks Operations and Administration (reflecting the authority in the 2002 Ballot Measure 2D to spend Open Space and Parks tax revenue on such items). The allocations for 2015 reflect the separation of expenditures into distinct Open Space Operations and Administration and Parks Operations and Administration categories.

The 2015 recommended budget reflects \$1.6 million in Tax revenue; \$1.0 million in revenue from other sources, including a General Fund transfer of \$582,070; \$434,030 in expenditures for Open Space Operations and Administration; \$1.6 million in

City of Louisville
Five-Year Capital Improvement Program
For the Years 2015 Through 2019
Open Space & Parks Fund

Project Description	2015 Budget	2015 Balance	2015 Proposed	2016 Proposed	2017 Proposed	2018 Proposed	2019 Proposed	2 Year Total
Property Acquisition	1,268,000	1,389,000	-	-	-	-	-	-
City Services Facility (25%)	1,337,500	1,337,500	1,612,000	(2015 Cost = \$5,450,000, Less Grant = \$3,000,000)				1,612,500
McCaslin/Washington Underpass (50%)	432,630	432,630	-	(Removed \$25,000 in 2015 and \$55,000 in 2016)				-
Trail Improvements	27,500	27,500	-	-	55,000	55,000	55,000	165,000
Annual Tree Planting Program	7,500	7,500	15,000	15,000	15,000	15,000	15,000	75,000
Trail Flood Damage Repair	9,950	9,950	-	-	-	-	-	-
Trails Reconstruction Projects - Flood	600,000	462,890	-	-	-	-	-	-
Lastoka Property Conservation	19,500	19,500	7,000	5,000	10,500	-	-	22,500
Open Space Zoning	-	-	-	14,000	14,000	-	-	28,000
US36 Underpass at Davidson Mesa	162,500	162,500	162,500	25,000	15,000	15,000	-	162,500
Wayfinding & Signs	-	-	-	15,000	15,000	15,000	-	70,000
Davidson Highline Lateral Ditch	-	32,555	-	-	-	-	-	-
New Equipment - Truck	72,000	72,000	-	-	-	-	-	-
Machinery & Equipment	120,000	120,000	125,000	75,000	75,000	75,000	75,000	425,000
Hecia Lake Reservoir Improvements	34,450	34,450	20,000	-	-	-	-	20,000
Irrigation Controller Replacement	-	-	15,000	50,000	50,000	50,000	50,000	215,000
Boundary Treatments	-	-	-	15,000	13,000	25,000	5,000	60,000
Open Space Management Plan Updates	-	-	-	40,000	-	-	-	40,000
Trail Counters	-	-	-	15,000	-	-	-	15,000
Park Signs	-	-	-	15,000	15,000	15,000	15,000	60,000
Renovation of Demonstration Garden	-	-	-	34,200	-	-	-	34,200
Prescribed Burns	-	(Moved Forward One Year)	-	7,000	8,000	8,000	-	23,000
Parking Lot Improvements	-	-	-	-	17,500	-	-	17,500
Demonstration Gardens	-	-	-	(Moved Beyond Five Years)				-
New Trail from Tennis Center	-	-	-	(Moved Beyond Five Years)				-
Total Open Space & Parks Fund	4,091,570	4,107,790	1,982,000	300,200	288,000	259,000	216,000	3,045,200

Annual tax revenue to the Open Space and Parks Fund is about \$1.6 million, not including transfers from the General Fund or other sources. However, annual operations and maintenance costs for all of the City's Open Space and Parks related activities (excluding land acquisition and capital outlay) is just over \$2.0 million annually. Consequently, it is necessary to either transfer funds from the General Fund to the Open Space and Parks Fund to cover these expenses and to maintain or increase Open Space and Parks Fund reserves, or it is necessary to reduce expenditures.

Draft Policy on Open Space and Parks Fund Expenditures and Reserve

To ensure there are sufficient funds to acquire Candidate Open Space properties when they become available, and to ensure there is sufficient funding to appropriately maintain the Open Space and Parks properties the City already owns, staff recommends Council adopt a fiscal policy concerning Open Space and Parks Fund (OSPF) expenditure priorities, the target reserve to maintain in the OSPF, and the actions to take in the event City purchase of a Candidate Open Space property would cause the reserve balance to be lower than the target reserve. For discussion purposes, which staff recommends take place first with the Open Space Advisory Board and then with the City Council Finance Committee, before final consideration by the City Council, staff suggests the following draft policy:

DISCUSSION DRAFT POLICY

The Open Space and Parks Fund exists to provide funding for the City's Open Space and Parks system. Louisville voters in 1993 approved the taxes that provided revenue for this Fund and specified the revenue from those taxes could be used only for the acquisition of land in and around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks. In 2002 Louisville voters approved continuing the taxes for these same purposes as well as for the development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks. In 2012 Louisville voters approved continuing the taxes again for these same (comprehensive) purposes. In recognition of this history, the City Council's policy regarding these funds is as follows:

1. The City shall prioritize expenditures from the Open Space and Parks Fund in the following priority order:
 - a. Acquisition of land in and around the City of Louisville for open space buffer zones, trails, wildlife habitats, wetlands preservation and future parks
 - b. Development, construction, operation and maintenance of such open space zones, trails, wildlife habitats, wetlands and parks
2. To ensure there are adequate funds to acquire properties on the City's Candidate Open Space ranking, the City shall:
 - a. Maintain a year-end reserve balance in the Open Space and Parks Fund at least equal to an amount sufficient to cover the City's share (considering other likely joint partners) of the total projected cost of acquiring the three highest priority Candidate Open Space properties.
 - b. Project the cost indicated in section 2.a above by multiplying the total acreage of the three highest priority Candidate Open Space properties by a per acre value recommended by the Open Space Advisory Board based on a review of, among other things, the average per acre assessed value of agriculturally zoned land in and around the City of Louisville
3. In the event City purchase of a Candidate Open Space property would cause the year-end reserve balance in the Open Space and Parks Fund to be lower than the amount specified in section 2 above, the City Council shall evaluate options for restoring the reserve balance to the specified level, and a time frame for that action. Those options may include:
 - a. Increasing General Fund transfers to the Open Space and Parks Fund and reducing General Fund resources available for other programs
 - b. Securing a loan from Boulder County to jointly purchase a Candidate Open Space property or properties and repaying that loan over time with available Open Space and Parks Fund revenue
 - c. Seeking approval of bonds to finance acquisition of Candidate Open Space property and paying the debt service with revenue from the Open Space and Parks Fund

- d. Delaying and/or reducing expenditures for development, construction, operation and maintenance of open space zones, trails, wildlife habitats, wetlands and parks
- e. Other options that Council may wish to consider

Open Space & Parks Fund
City Manager's Recommended Biennial Budget - 2023 & 2024

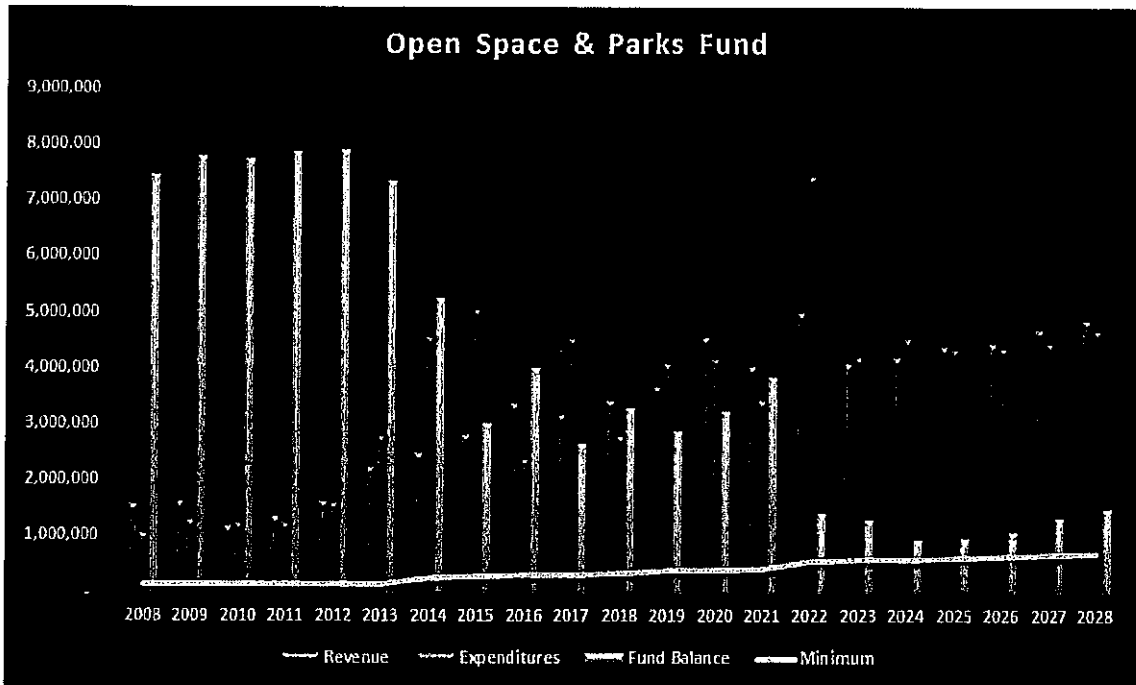
	2019 Actual	2020 Actual	2021 Actual	2022		2023 Recom'd Budget	2024 Recom'd Budget
				Amended Budget	Current Estimate		
Revenue:							
Taxes:							
Sales Taxes	1,766,284	1,618,529	1,881,624	2,069,790	2,107,420	2,265,480	2,378,750
Use Taxes	599,737	507,044	666,860	601,940	631,260	587,400	639,070
Intergovernmental Revenue	3,500	1,001,135	21,594	1,132,000	1,132,000	-	-
Miscellaneous Revenue:							
Land Dedication Fees	166,955	205,359	426,124	-	-	-	-
Other Miscellaneous Revenue	133,939	88,923	55,345	73,360	167,810	61,170	61,940
Other Financing Sources	10,390	10,544	34,327	-	-	-	-
Interfund Transfers	981,840	1,117,466	951,680	920,300	973,260	1,165,370	1,115,230
Total Revenue	3,662,644	4,548,999	4,037,554	4,797,390	5,011,750	4,079,420	4,194,990
Expenditures:							
Central Fund-Wide Charges	317,982	344,538	354,887	427,970	498,390	458,450	491,660
Snow & Ice Removal	91,685	93,143	111,553	114,800	117,710	127,400	133,470
Open Space Administration & Operations	342,815	369,021	423,517	556,360	564,410	620,380	596,250
Open Space Acquisition	8,919	4,076	5,096	4,390	4,390	14,680	14,990
Open Space Education & Outreach	186,742	185,226	250,954	253,920	256,860	256,250	270,210
Open Space Trail Maintenance	88,514	94,217	127,867	126,390	127,400	149,500	152,920
Open Space New Trails	19,091	20,488	25,000	24,760	24,880	27,700	29,270
Parks Administration & Operations	1,631,816	1,521,250	1,611,838	2,157,220	2,208,710	2,380,270	2,226,120
Capital - Snow & Ice Removal	4,035	33,228	-	-	-	-	-
Capital - Parks	127,114	33,685	94,344	1,440,090	1,440,090	-	-
Capital - Open Space Maintenance	34,973	-	207,431	20,000	22,960	-	-
Capital - Open Space Education & Outreach	44,652	3,563	-	-	-	-	-
Capital - Open Space Trail Maintenance	308,211	(60,179)	2,923	637,820	637,820	-	-
Capital - Open Space New Trails	868,446	1,539,890	223,220	1,753,450	1,753,450	-	-
Capital - Parks & Recreation	-	-	-	-	-	410,400	861,900
Total Expenditures	4,074,997	4,182,144	3,438,629	7,517,170	7,657,070	4,445,030	4,776,790
Revenue Over/(Under) Expenditures	(412,353)	366,856	598,925	(2,719,780)	(2,645,320)	(365,610)	(581,800)
Projected Operating Turnback	N/A	N/A	N/A	219,950	228,170	242,080	234,890
Beginning Fund Balance	3,275,092	2,862,739	3,229,595	3,828,519	3,828,519	1,411,369	1,287,839
Ending Fund Balance	2,862,739	3,229,595	3,828,519	1,328,689	1,411,369	1,287,839	940,929

While the minimum unrestricted fund balance is set at 15% of current operating expenditures, the targeted unrestricted fund balance will be at or above 25% of current operating expenditures.

The projected General Fund balance at the end of 2028 is \$7.5 million. This equates to 24% of operating expenditures and is very close to the targeted fund balance as defined in the Reserve Policy.

Open Space & Parks Fund

Incorporating the revenue projections, the operating expenditure targets and the interfund transfer projections outlined in the preceding discussion, along with the impacts of the recommended Capital Improvements Plan, the following graph summarizes a history and projection of revenue, expenditures and fund balances for the Open Space & Parks Fund.



The City's Reserve Policy for the Open Space & Parks Fund states,

The minimum fund balance of the Open Space and Parks Fund shall be maintained at or above 15% of current operating expenditures. For purpose of this policy, operating expenditures include only open space and parks operations and exclude all interfund transfers and capital outlay.

The Open Space & Parks Fund requires a recurring annual transfer from the General Fund to fund its operating deficit. This annual transfer will be calculated by taking the amount of funding provided by the General Fund for Parks in 2007 (\$626,900) and inflating that amount on an annual basis by the regional Consumer Price Index for All Urban Consumers. The 2007 funding level for Parks is the

Inter-Fund Transfers

The following two tables summarize the recommended transfers between funds for 2023 and 2024.

Inter-Fund Transfers Matrix 2023 Recommended Budget							
Transfers Out	Transfers In						Total
	General Fund	OS&P Fund	Cemetery Fund	Recreation Fund	Capital Projects Fund	Rec Center Debt Service	
General Fund	-	983,480 ^a	169,850 ^b	1,225,750 ^c	3,000,000 ^d	-	5,379,080
Cemetery Perpetual Care Fund	-	-	12,480 ^e	-	-	-	12,480
Historic Preservation Fund	190,190 ^f	-	-	-	-	-	190,190
Capital Project Fund	-	-	-	148,360 ^g	-	-	148,360
Impact Fee Fund	-	181,890 ^h	-	-	166,300 ^h	-	348,190
Recreation Center Construction	-	-	-	-	-	120,000 ⁱ	120,000
Total	<u>190,190</u>	<u>1,165,370</u>	<u>182,330</u>	<u>1,374,110</u>	<u>3,166,300</u>	<u>120,000</u>	<u>6,198,300</u>

^a Annual recurring support for operations and capital. Reduced by net revenue from Marshall Fire rebuild.
^b Annual recurring support for operations and capital.
^c Annual recurring support for operations and capital. Reduced by net revenue from Marshall Fire rebuild.
^d One-time transfer for funding Capital Improvement Program.
^e Annual recurring transfer of interest earned used to fund operations and capital.
^f Annual recurring transfer for reimbursement of costs associated with Museum Services.
^g Annual recurring support for capital.
^h Annual transfer of impact fee revenue for projects eligible for this type of funding.
ⁱ One-time transfer of remaining funds in Recreation Center Construction Fund.

Inter-Fund Transfers Matrix 2024 Recommended Budget							
Transfers Out	Transfers In					Total	
	General Fund	OS&P Fund	Cemetery Fund	Recreation Fund	Capital Projects Fund		
General Fund	-	1,017,900 ^a	131,840 ^b	1,268,650 ^c	-	2,418,390	
Cemetery Perpetual Care Fund	-	-	16,780 ^d	-	-	16,780	
Historic Preservation Fund	201,190 ^e	-	-	-	-	201,190	
Capital Project Fund	-	-	-	153,550 ^f	-	153,550	
Impact Fee Fund	-	97,330 ^g	-	-	215,410 ^g	312,740	
Total	<u>201,190</u>	<u>1,115,230</u>	<u>148,620</u>	<u>1,422,200</u>	<u>215,410</u>	<u>3,102,650</u>	

^a Annual recurring support for operations and capital.
^b Annual recurring support for operations and capital.
^c Annual recurring support for operations and capital.
^d Annual recurring transfer of interest earned used to fund operations and capital.
^e Annual recurring transfer for reimbursement of costs associated with Museum Services.
^f Annual recurring support for capital.
^g Annual transfer of impact fee revenue for projects eligible for this type of funding.

Adam Blackmore

From: J Fitzpatrick [REDACTED]
Sent: Thursday, January 12, 2023 8:41 AM
To: Adam Blackmore; Ember Brignull
Cc: Helen Moshak
Subject: Prep for Sales Tax Study Session
Attachments: TPL Conservation Finance 2022 (1).pdf; City of Louisville_TA DRAFT (1).docx

Adam and Ember,

Great to see you both last night. I am looking forward to attending the study session regarding the sales tax on January 24th. I know Ember already has several of the historical documents and context, but if you need any additional research from me and Helen, please let us know.

In advance of the meeting I also wanted to provide some additional information on the support the City could likely get from the Trust for Public Land to support decision-making for a sales tax measure. Here are some key points:

- The Trust for Public Land (TPL) and The Nature Conservancy (TNC), two of the leading land conservation and parks groups in the US, both have conservation finance teams. These teams support states, counties, and local communities in their efforts to raise public funding for open space and parks work through sales tax measures, bond measures, etc. I started my career and spent 5 years working for TNC's conservation finance team - first nationally and later in California. In California I helped renew a sales tax measure for Sonoma County's agricultural preservation and open space district. I also managed the ballot measure campaign to create a special parks and open space district in Napa County, which to that point did not have any public group working on open space and parks.
- Today, TNC's team focuses more on large-scale measures (e.g., statewide and count-level), but TPL's team continues to support more local measures like ours. In November 2022 alone, TPL endorsed 34 state and local ballot measures, 31 of which passed, generating \$8 billion in new funding for parks, climate, and conservation. You can see a list of the measures TPL supported in 2022 (including three in Colorado) [here](#) and [here](#). All three Colorado measures were approved, and are summarized at the end of this email.
- I spoke with the Colorado TPL team in October and they are interested in helping the City of Louisville. The first step would be a feasibility analysis and a recommendation about how to proceed (e.g., conduct polling, focus groups, etc.). **The TPL team are experts in ballot measure design.** They can help the City determine whether to keep the same tax level, for what period of time (e.g., 10 years again, maybe longer, possibly in perpetuity), and they can help draft ballot language that will be the most compelling to voters. Later phases of TPL involvement could also include supporting the actual campaign effort, including the possibility of raising funds for the campaign (e.g., for signs, voter outreach, etc.). I have attached TPL's services overview brochure [here](#).
- The initial phase of TPL support would be at no cost to the City, but because the TPL team cannot be seen as lobbying the City on this topic, the City needs to provide a technical assistance letter requesting TPL's help. I have attached a template letter [here](#) (also previously shared with staff).

As you can probably tell, I am a huge advocate of bringing TPL on to help the City evaluate its options. This is an opportunity for the City to get expert input on the renewal, which is essential since we only have one shot at this before the tax expires at the end of 2023. I am happy to answer questions about this during the study

session. I would also like to invite the TPL reps to attend the meeting (since it is a public meeting) in case questions arise that they could answer more directly.

Let me know if you have any questions or if I can share anything else about this resource!

Thanks,
Jessamine

TPL Measures Approved By Voters in November 2022

Douglas County, CO – Measure 1A would fund parks, trails, open space, historic preservation, and conservation for the next fifteen years. This renewal of the 0.17 percent sales and use tax is expected to raise \$217 million.

Routt County, CO – The Routt County Commissioners unanimously referred Prop 1A, the reauthorization of the County’s Purchase of Development Rights (PDR) program, to the ballot. If approved by voters, the measure will provide continued funding for the PDR program for the next ten years, conserving water, wildlife, and working ranches. The property tax is expected to raise \$29 million.

Windsor, CO – Issue 3F, if passed by voters, would increase the Town’s sales and use tax by \$1.62 million annually at a rate of 0.25 percent. The measure would put in place dedicated funding for land acquisition, stewardship, operations, and maintenance. The sales and use tax increase is expected to raise \$32 million over twenty years.

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C: (415) 531-2520

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Conservation Finance

The national leader in state and local funding for parks and conservation, Trust for Public Land's Conservation Finance program serves as a trusted advisor to state and local governments and community leaders on how to design, pass, and implement ballot and legislative measures to fund parks and conservation. Since 1996, we've helped pass over 600 measures—83 percent of those we've worked on—that generated more than \$84 billion for parks and conservation.

Technical assistance

Trust for Public Land helps elected officials and community groups research and evaluate park and conservation finance options and design ballot and legislative measures that reflect public priorities.

FEASIBILITY RESEARCH: Analyzing public finance options and exploring their legal, fiscal, and political constraints.

PUBLIC OPINION SURVEYS: Managing surveys by expert polling firms to gauge voter support for funding mechanisms, uses for funds, and messages.

MEASURE DESIGN: Recommending optimal funding method, amount, use for funds, ballot language, and election timing.

PROGRAM DESIGN AND EVALUATION: Providing models and recommendations for state and local government conservation programs.



Campaign services

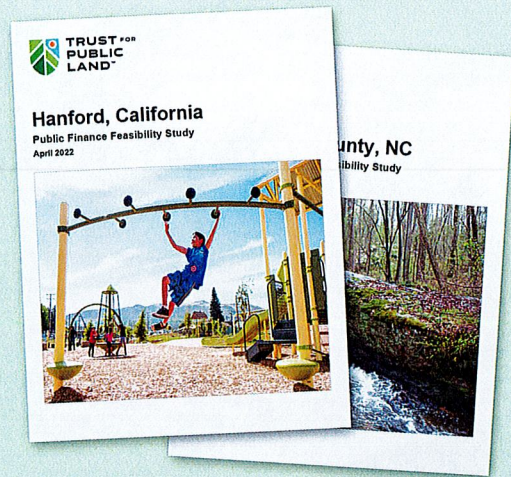
Trust for Public Land and Trust for Public Land Action Fund, our 501(c)(4) lobbying affiliate, offer a comprehensive suite of campaign services on a case-by-case basis. These include campaign planning, management, and fundraising; selecting and directing pollsters and other consultants; writing and producing digital, direct-mail, television, and radio advertisements; overseeing public education and get-out-the-vote programs; and managing compliance with campaign finance and lobbying registration and reporting.

To learn more about Trust for Public Land's Conservation Finance service, go to tpl.org/how-we-work/fund.



Connecting everyone to the outdoors™

tpl.org



Research and thought leadership

Trust for Public Land conducts research and publishes information in support of public funding for parks and conservation and to offer insight into emerging conservation trends. Tools and publications include:

CONSERVATION ALMANAC: A website for discovering, analyzing, and mapping the results of federal, state, and local land conservation funding. conservationalmnanc.org.

LANDVOTE®: A searchable online database of all state and local conservation ballot measures since 1988. landvote.org.

HANDBOOKS: For government and community leaders, including [The Conservation Finance Handbook](#) (2004), [The Conservation Program Handbook](#) (2009), and [Making the Most of Our Money](#) (2013).

FOR MORE INFORMATION:

In the East

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PHOTOS: FRONT, CHRISTI COOPER-KUHN; BACK, DARCY KIEFEL.
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City of Louisville Letterhead

Date

James Petterson
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Colorado & Southwest Director
The Trust for Public Land
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Denver, CO 80203

Jason Swann
Conservation Finance Program Director
The Trust for Public Land
1410 Grant St. Suite #D-210
Denver, Colorado 80203

Dear Mr. Petterson and Mr. Swann:

On behalf of the City of Louisville, (I/we) would like to request technical assistance from The Trust for Public Land in connection with our efforts to finance our parks, trails, open spaces, and other conservation priorities (feel free to edit benefits). As part of your advice and assistance, (I/we) understand you may undertake feasibility research, conduct a public opinion survey, and develop strategies for our consideration.

(I am/we are) interested not only in the factual information that you can provide, but also your organization's opinions and recommendation on public financing measures available to the City of Louisville. This could include the public's priorities and attitudes concerning outdoor recreation, parks, trails, natural areas and other aspects of land and water conservation.

Information provided to the City of Louisville will be public record as a matter of law. This request does not in any way commit public funds to the efforts of The Trust for Public Land related to this request, nor does it require public disclosure of any confidential information of the organization.

This request will continue in effect for any advice you offer or presentations you submit for the use of this body related to such matters. In addition, (I/we) would like to take this opportunity to request that you continue to be available to provide technical advice and assistance in this area and on related matters in the future.

Sincerely,

(Mayor, Chair of City Council, or full City Council)