**MEMORANDUM**

DATE: May 12, 2005

TO: Montgomery County Planning Board

FROM: Michael F. Riley, Chief, Park Development Division

SUBJECT: Briefing on the Park Planning, Design, Construction, and Operations Committee

Recommendation

This is an informational briefing. No action is requested. Feedback on the described initiative would be appreciated.

Executive Summary

In May 2003, the Director of Park & Planning and the Superintendent of Parks launched a new initiative to review and improve the process of planning, designing, constructing, and operating parks. The memorandum kicking off this initiative appears on © 1. Nearly 100 staff from the Department of Park & Planning met on June 2, 2003 to refine goals and objectives for the project. Vision statements from this meeting appear on © 2 - 5. At the conclusion of this meeting, Divisions were asked to identify participants for a working group to pursue these goals. The "Planning, Design, Construction, and Operations" (PDCO) team was formed consisting of:

- Central Maintenance Division – Gerry Barrick, Paul Scott
- Countywide Planning Division – Cathy Conlon, John Hench*, Rachel Newhouse
- Natural Resources Division – Rob Gibbs, David Vismara
- Northern Region – Jamie Christianson, Art Nelligan
- Park Development Division – Doug Alexander, Trevor Bourne, Marian Elsasser, Mike Riley*
- Southern Region – Lynn Witt

* Team Leads

Facilitation and support were provided by:

- Arden Consulting – Nedra Weinstein
- Management Services Division – Judy Cohall

The PDCO committee's work during many meetings from July 2003 through June 2004 resulted in the following outcomes and products:

- 1) The attached PDCO Handbook was produced. It outlines the park development process, which details the process for inclusion of internal stakeholders in the design and construction stages of park development projects. The PDCO team recognized that a wealth of diverse expertise exists within the staff of the Department that can be tapped to plan, design, construct, and operate exceptional parks. The processes recommended in the handbook are geared to identify and involve internal project stakeholders and incorporate their expertise into the development of parks at the ideal time. The handbook also established definitions for common terms used in the park development process to foster improved communication across the Department.
- 2) A proposal was made to the senior management team to create of a work program to develop park functional plans for key park facilities, resources, and park types. A park functional plan is Planning Board approved county-wide analysis of the current and future needs of facilities, resources, or park types that result in the formation of goals and a set of prioritized recommendations for planning, acquiring, developing, and/or maintaining the County Park System. The benefits of the Countywide Park Trails Plan were frequently referenced as a model. A list of priorities and a process for park functional plans was produced.
- 3) A process for planning and review of developer dedicated parks and park facilities was produced.
- 4) A revised park classification system was proposed for consideration in the next update of the Park, Recreation, and Open Space (PROS) Master Plan
- 5) Future initiatives to improve the park development process were identified and described. Those issues were presented to the Senior Management Team in April 2004. Some of these recommendations have been completed, while others are underway. All will be pursued as the work program permits.

These five products are described in greater detail as follows:

The Park Development Process

As park development projects progress from planning to operations, they benefit from quality review by various internal stakeholders at the appropriate time. There is a wide variety of expertise within the Department that can lend their knowledge to the betterment of each park project. Examples include an arborist's review to minimize tree impacts, a park police officer's review for Crime Prevention Through Environmental Design (CPTED), or a plumber's review for ease of maintenance and availability of parts for water and sewer systems. Various formal and informal processes to obtain these reviews had evolved over time, but consensus existed that an improved, commonly understood, formal process was needed.

The PDCO Handbook outlines this process. It outlines distinct processes for the three major phases of a project: facility planning, design, and construction. The process calls for each Division in the Department to designate an individual to serve as a Project Team Assigner. When a Project Manager or Construction Manager initiates a major phase of a project, a notification outlining a description of the project is sent to the Project Team Assigners. The informed Project Team Assigner then determines if their Division needs to assign Project Team Members, and responds accordingly. The Project Manager or Construction Manager, as appropriate, then conducts an initial meeting and reviews the process for quality review of the project

with the Project Team Members according to the detailed process outlined in Chapters 4 and 5 of the PDCO Handbook . There is formal sign-off by the Project Team at the conclusion of the process.

The PDCO process has been in use since August 2004 and has received favorable feedback and produced positive results thus far.

Park Functional Plans

The PDCO committee spent a significant amount of time discussing the initial planning work that results in a decision to create or modify a park. The committee concluded that despite the value of the general plan, countywide functional plans, area master plans, park master plans, and the PROS plan towards guiding park development; that there was a gap in certain areas of planning that, if filled, would benefit the future of the park system. While the Department has a program for preparation of master plans for our larger parks which frame management and development goals within particular geographic areas, we do not presently have a program for system wide analysis of particular facilities and resources.

Park functional plans would look across the park system at particular facilities or resources to form a plan for the future management of those assets. Park functional plans would guide priorities in future operating and capital budgets. A list of potential park functional plans appears as Appendix B of the PDCO Handbook.

A prime example for the need for a park functional plan would be to look at the future of our 34 small to medium size recreation buildings within the park system. Many of these buildings were built in the early years of the development of the park system and are quite old. Most were built prior to the Department of Recreation's proliferation of large, regional recreation centers across the county. Costs for utilities, maintenance, repairs, modernization, or replacement of these buildings are significant and grow as the facilities get older. A functional plan for park recreation buildings might ask the following questions:

- What needs do these buildings presently serve?
- What is the present usage and demand for each building?
- What is the 20-year cost for upkeep, modernization, or replacement of each building?
- Should some buildings be eliminated if the services they provide can be accommodated in other nearby public buildings (libraries, schools, county recreation centers)?
- What are the priorities for modernization and replacement?

Other needs for park functional plans include:

- Inventory and Assessment of Park Infrastructure for the purpose of Planned Lifecycle Asset Replacement
- Natural and Cultural Resources (Historic, Archaeological)
- Emerging Recreational Trends (Skate Parks, Dog Parks, Roller Hockey, Cricket)
- Local Parks (What is the nature of the local park of the future?)
- Regional Parks (What is the nature of the regional park of the future)

The best example of an existing park functional plan is the Countywide Park Trails Plan. It looked at trail possibilities across the county and recommended construction of trails in some areas while removing the construction of other previously planned trails in sensitive environmental areas. This plan facilitates prioritization of funding for trail projects in the CIP and also displays our commitment to balance park development with protection of natural and cultural resources.

Chapter 3 of the PDCO Handbook describes park functional plans in detail.

Developer Dedicated Parks

It has become increasingly common to obtain development and dedication of parks or park facilities by private developers through the Planning Board's review of preliminary plans of subdivision and site plans, and also through development districts. The PDCO committee recognized that the internal review and quality control of park projects obtained in this manner needed to differ from projects built through our CIP. There is commonly a very short time frame to negotiate the details of park improvements during the subdivision process. Therefore it is critical to have defined and established needs data, design guidelines, construction specifications, and quality control procedures in place in advance of plan submission in order to incorporate those details into the Board's approval of the plans. The next PROS plan is incorporating more detailed needs data. The Park Development Division has completed improved construction specifications and is working on improved design guidelines. The Park Planning and Resource Analysis Unit in the Countywide Planning Division will work closely with the Construction Section in the Park Development Division and the Development Review Division when negotiating developer dedicated parks. The Construction Section will issue a permit for construction on park property prior to commencement of construction and a construction manager will be assigned to assure that all work meets park specifications.

Revised Park Classification System

While researching existing documents relevant to the planning of parks, the committee formed the view that the current park classification system in the PROS plans required updating for both consistency with existing practices and future thinking for parks. The committee did not change the park types (Regional, Conservation, Local, etc.), but it did revise and augment the park description and the typical facilities associated with the particular park types. We also added an attribute called purpose for each park type and eliminated the attribute titled approximate size. The revised park classification system appears in Appendix A of the PDCO Handbook and is now being considered for incorporation into the next PROS plan.

Future Initiatives

During its deliberations, the committee often identified useful initiatives that would benefit the park development process that were beyond the purview of the PDCO committee to pursue to completion. The issues were presented to the Senior Management Team in April 2004. Some of these recommendations have been completed, while others are underway. All will be pursued as the work program permits. These initiatives are described in Appendix G of the PDCO Handbook.

Conclusion

The PDCO committee is appreciative of the support and leadership of Charlie Loehr and Les Straw in initiating and supporting our work. We were very aptly facilitated and supported by Nedra Weinstien of Arden Consulting and Judy Cohall of the Management Services Division.

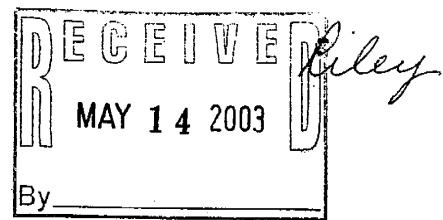
The park development process has been in use since August 2004 and has already produced quality improvements in park designs and constructed park facilities. Funding for the initiative for park functional plans was included in our proposed FY 2006 operating budget and \$100,000 to fund this work program was recently supported by the County Council at a time when other priorities were being cut. One Councilmember's comment during discussion of park functional plans was; "this is exactly the kind of thing we should be doing."

In addition to the tangible benefits of the PDCO committee's work, there was tremendous benefit in the sharing of information and perspectives on park development between staff of differing functions. Maintenance / operations staff gained greater understanding and appreciation for the complexities of the planning and design process, while planners and designers gained greater understanding and appreciation for the challenges in maintaining and operating our park system at a time when parks are being added without commensurate additions in resources. This committee achieved a sense of unity in working towards a common goal, despite the very different job functions of the individual members. There is clearly a sense of pride and ownership among the staff for our award winning park system. I believe this committee's work was extremely valuable and could serve as a model for future initiatives.

Attachment: PDCO Handbook



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION



May 14, 2003

MEMORANDUM

TO: Departmental Managers

FROM: Charles R. Loehr, Director *Charles*

SUBJECT: New Initiative--Establish and Agree to a Process for Conducting Park Planning, Design, Construction, and Operations

Over the years, there have been many discussions on the need to more fully integrate the process we use to plan, design, construct, and maintain our parks. It is probably safe to say that all of us believe we could improve this process. It is to this end that I have established an initiative to focus in on this issue. You are being invited to the kick-off meeting to begin our discussions in this area.

Our first meeting will be held on June 2, 2003, from 8:30 a.m. to 3:30 p.m. in the Saddlebrook Training Room. Nedra Weinstein will be facilitating the discussion. Our goals for this meeting are to:

- clarify and establish an understanding of the issues, concerns, and perspectives of the various stakeholders involved in this process;
- gather the perspectives and views of participants on our vision for this initiative; and
- review and discuss the formation of the Project Team that will be working on this project.

I am excited that we are undertaking this effort at this time and look forward to seeing you on June 2.

CRL:NW:dlf

Vision Statements

For Park Planning, Development, Construction and Operations from meeting held June 2, 2003

The following statements represent the thoughts of a group of 90 Montgomery County Department of Park and Planning staff members who participate, in many different ways, in the planning, development, construction and/or operations of our parks. They attended a 1-day session to articulate their vision and identify issues affecting their efforts to deliver and operate high-quality parks.

Divisions represented were Park Design and Development, Countywide Planning, Northern and Southern Park Divisions, Natural Resources and Central Maintenance. Since their meeting in June, a smaller group (the PDCO Committee) has been meeting regularly to further clarify, define and develop process standards, product (park) requirements and other important factors that are important to improving the way parks are brought into and maintained through our system. Mike Riley, PDD Chief and John Hench, Countywide PPRA Supervisor are the team leaders of the PDCO Committee.

Vision - End Result

- We have established procedures that enable the park planning, development, construction and operation processes to flow smoothly and result in: well built, easily maintainable, aesthetically pleasing, functional and environmentally sound parks and park facilities.
- These processes include participation from all stakeholders: Northern and Southern park regions, Natural Resources, Countywide Planning, Park Design and Development, Central Maintenance, Park Police, and the public, with clearly defined roles and includes a follow-up, feedback and debriefing stage.
- Park development projects are developed on time and on budget and we plan and develop only what we can afford to maintain.
- Our quality and quantity goals are met.
- Balance is sought and maintained between:
 - New development and maintenance of existing resources;
 - Active and passive recreation;
 - Efficiency/ cost-effectiveness and quality/customer satisfaction, and
 - Recreation and stewardship of natural and cultural resources.
- We deliver the right park, in the right place, at the right time, at the right price.

Vision- What Would Be Happening?

Defining and Managing the Process

- All-inclusive planning groups where the process is well known and understood; stake-holders' roles and time-frames are identified.
- Clarity on the goal, program, plan, and end product of the project- we have established a well-defined PDR and purpose for each project.
- We have a "How to" manual of the entire process including a checklist with time standards, appropriate stakeholder check-offs and established goals.
- We establish a set of standards and procedures, and process- project schedules/ timelines/ targets.
- Projects would be done in-house or there would be an educated liaison with staff and outside contractor.
- Information is widely shared throughout the project, especially proposed changes
- Less frustration, fewer reactive changes and surprises.
- We evaluate what went right and wrong after each project- there is an established evaluation process to ensure the user's needs are met, safety, and ease of maintenance, etc.

Everyone Understands the Process

- "Political" requests would go through a process with the team and politicians would gain a better understanding of constraints – there is minimal political interference with daily operations.
- We identify the appropriate role and time for politics in the PDCO process.
- "Higher ups" are adequately educated about the results of their requests.
- Better communication and cooperation would give historical perspective to projects to save time and prevent duplication.

Project Momentum

- Procurement is results oriented, not process oriented.
- Less frustration, more buy-in, less possessiveness.
- Process would be systematic and predictable.
- Streamline involvement and communication at key points.
- We manage our time well.
- Our process remains responsive to changing priorities, circumstances and conditions.

Project Integrity

- Practices and principles wouldn't be compromised because of time constraints, budget shortfalls, outside pressure, etc.
- Project managers solicit feedback as an integral part of the process.
- The final product is aligned with the original goal (even with involvement from outside groups and politics).
- There is predictable and reliable funding.
- We have established a well-defined program of requirements with accurate cost estimates and operating budget impacts on which team members agree.

Vision - How would people/staff be interacting with each other?

Project Team Members

- Coordinate with one point of project contact -- Project Manager coordinates stakeholders.
- Are established as the appropriate stakeholders/team-members.
- Know everyone involved and who the decision makers are.
- Interact with one another with a sense of balance to achieve results.
- Communicate on an on-going basis and gets to know each other.
- Act with a sense of purpose and direction.
- Interact in the field/on site rather than in meeting rooms.
- Document points of agreement and disagreements.
- Demonstrate an increased level of staff enthusiasm at the start of the project.
- Respect deadlines.
- Have respect for each others' ability and responsibilities.
- Make the time to contribute their expertise.
- Take responsibility versus complaining about the process.
- Are excited about starting the next project.
- Stay informed of decisions that had been made, and who makes such decisions at each step.
- Enjoy coming to work with each other.

Internal and External Stakeholders

- View the process as 95% seamless, with out unforeseen significant problems, delays or cost overruns.
- Talk about projects and we work collegially and collaboratively.
- Work together to achieve the desired product.
- Are involved all from the beginning.
- Figure out how to make things work or offer positive alternatives instead of setting up roadblocks or being apathetic- everyone is open to new ideas regardless of their position.
- Know who is accountable for the project/park.
- Operate from an informed viewpoint with the facts about projects and who is responsible.
- Are briefed by appropriate levels of managers about whole program for department.
- Understand what each other is up against.

The Process

- We have an identified leader or leaders with recognized and accepted authority to implement the process.
- Projects would be done in-house or there would be an educated liaison with staff and outside contractor.

Vision - What would our customers be experiencing?

- Well maintained, safe, enjoyable, accessible parks and facilities.
- Better understanding of how parks are delivered and what the operational and maintenance challenges are.
- No special group or area of the county would receive better facilities/parks, faster service, etc.
- They appreciate the efforts that have been made.
- As taxpayers, they feel that got their money's worth.
- They have confidence in the system.
- Feel pride.
- They have a wider range of experiences.
- They get through the process effectively, efficiently and faster (spending e.g. CIP and guaranteeing future CIP).
- They have enjoyable experiences yet still respect the rights of adjacent neighbors.

