

FINAL

**MUNICIPAL SERVICE REVIEW AND SPHERE OF INFLUENCE UPDATE
FOR MISSION OAKS RECREATION AND PARK DISTRICT**

JUNE 2009

**Sacramento Local Agency Formation Commission
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INTRODUCTION

Background

Mission Oaks Recreation and Park District is a dependent special district in central Sacramento County.

- **Mission:** Mission Oaks Recreation and Park District provides unique neighborhood destinations for recreation and personal enrichment.
- **Boundary:** The American River to the South, Ethan Way and Watt Avenue to the East, Auburn Boulevard and Cypress Avenue to the North, and Manzanita and Walnut Avenues to the East.
- **Population:** 62,500 in an area of 8.5 square miles

History

The district began as County Service Area No. 7 in 1963, serving the small Mission-Cottage area of the Arden-Arcade community, and administered by Sacramento County's Park and Recreation Department staff. It increased in size during the 1974-75 fiscal years as a result of the county study that attempted to place all un-served areas in the county in an active recreation and park agency. On November 5, 1974, residents approved a ballot measure that changed the service area to a dependent special district and annexed some formerly un-served areas in the Arden-Arcade and Carmichael communities. Thus, the Mission Oaks Recreation and Park District was officially formed in January 1975 pursuant to Public Resources Code Section 5780. Windemere Recreation and Park District was established on November 26, 1958 and merged with Mission Oaks Recreation and Park District on September 7, 1997. The Mission Oaks name itself gives honor to the history of California and the heritage of the California missions established by the early Spanish settlers and the majestic oak trees that flourish throughout the Sacramento Valley. In 1975, the population of the district was 56,000, and the budget was \$844,670. Today, the population is approximately 62,500, and the combined budget total for the Fiscal Year 2008-09 is \$4,400,285.

Through the dedication and commitment of the board, staff, and a multitude of community volunteers, the District is able to continue operation without any major disruptions or severe problems. The District's staff has witnessed a steady growth in the services that park district residents consider essential.

Service Area

Mission Oaks Recreation and Park District is located just east of the City of Sacramento and encompasses portions of the unincorporated communities of Arden-Arcade and Carmichael with a service capacity estimated at over 62,500 residents. The District owns 11 parks (86.22 acres) and maintains and operates four school parks (14.2 acres) and the county-owned Hazelwood Avenue Stormwater Detention Facility (1.84 acres). Three of these facilities are community parks, Gibbons, Mission North, and Swanston, while the others serve as neighborhood parks. Located within the 17.5 acre, Gibbons Park is the district's 12,000 square foot senior citizen/community center with an adjacent newer .37 acre parking lot on Gibbons Park Drive which was developed on a portion of the former American River Hospital site. The district's Swanston Community Center was dedicated on May 17, 2007. It is available for rental for large social gatherings. This facility had been in the district's master plan since 1974.

The district is currently pursuing the acquisition of surplus property of the Sacramento Metro Fire District. In addition, the district hopes to develop pocket parks in underserved areas of the district with new revenue from future “Park Impact Fees”. The district has completed a Nexus Study and is awaiting a hearing by the Board of Supervisors for consideration of approval both the Nexus Study and the implementation of developer Park Impact Fees. To date, Mission Oaks has not been included in any ordinance for the collection of these fees which would assist the district tremendously for future development.

Management and Employment Structure

Management Structure

The County Board of Supervisors acts as *ex-officio*¹ district directors and appoints a five member Advisory Board of Directors to oversee its affairs and operations. The district’s directors must be current residents of or own property in the Mission Oaks district. Candidates are nominated by Supervisor Susan Peters and appointed by the county Board of Supervisors. The appointments are made at large and are not population based. The board delegates authority to the District Administrator to administer the District. The Board of Directors and personnel of the District strive to maintain the highest level of service possible for its citizens while sustaining a cost-effective and fiscally responsible Recreation and Park District. Directors appointed to the Advisory Board can serve a maximum of two full four-year terms.

The Mission Oaks Recreation and Park District Advisory Board of Directors usually meet once monthly on the first Tuesday at 6:30p.m. at the district office, on Mission Ave. Meeting notices There is adequate, accessible seating (capacity of 38) for most regular meetings, with ADA accessible restrooms, however, when it is anticipated that a large number of people may be attending, meetings are scheduled at a community center. No fringe benefits are provided for board members; however, they are paid \$100 per meeting for a maximum of two meetings per month.

Outreach

The board encourages the public’s involvement in all meetings. Monthly meeting agendas are submitted to *The Sacramento Bee*, the *Carmichael Times*, and copies are posted at the district office and in the lobby of the community centers. A notice of the regularly scheduled meetings is included in the periodic newsletters, published in *The Bee* and on the district’s website (<http://www.morpd.com/>). Special meetings may be called as needed. The district’s activities and resources are distributed to district residents in a newsletter, published periodically and distributed with an appropriate edition of *The Bee*. Program and trip flyers are distributed through area schools and Community Center specific newsletters are made available monthly at the respective centers and on the district website.

¹ The County Board of Supervisors heads the District in name, but in daily practice they are not involved in its management.

Employment Structure

The Mission Oaks Recreation and Park District employs 14 regular full-time, 15 regular part-time, and 100-150 Seasonal part-time employees. In addition, Volunteers augment the district's programs and services by serving approximately 50,000 hours annually. The District performs a classification and salary survey regularly in order to determine and compare District salaries to the local recreation & park district market trends.

For more detailed information on the employment structure, please see Attachment C.

Employees from all three divisions meet quarterly as a Safety Committee (in accordance with California Association for Park Insurance (CAPRI) guidelines). The district uses an employee safety incentive program to encourage safe work practices and procedures in compliance with the guidelines of SB 198, the "Occupational Injury and Illness Prevention Program", and to reward divisions for safe work practices, meeting training obligations, and no lost time due to unsafe practices. Safety training is conducted weekly, biweekly, and monthly at the division level, as part of staff meetings. A Policies and Procedures Manual has been developed and approved by the Board, which is accessible to each employee electronically. One hard copy is shared as a cost cutting strategy and a step toward the district's sustainability effort.

The Mission Oaks Recreation and Park District has received multiple recognitions for participating in several organizations. In 1999 and 2001, the District Administrator Debby Walker received a Presidential Award and Pat O'Brien Professional Legislative Award by the California and Pacific Southwest Recreation and Park District in recognition of outstanding leadership and dedicated services to the park and recreation profession in California and also for legislative advocacy and work on the statewide Playground Safety Committee and Regulation promulgation. In addition, the District was a recipient of the Sacramento Workplace Excellence Leader (SWEL) Award offered by the Sacramento Area Human Resources Association (SAHRA), in partnership with *The Sacramento Bee*, based on the district's commitment to its employees and customers in 2007. Annually, Mission Oaks Recreation and Park District receives a Safety and Loss Control award from CAPRI.

Determination

The District has an adequate management structure, staffing, and facility sharing arrangements to ensure efficient management and provide parks and recreational service to the community at a reasonable cost. The District is efficiently structured and organized. The District provides the public with adequate information and opportunity for input and involvement in District Activities.

DISTRICT SERVICES

Services Provided

Mission Oaks provides open space and organized activities to serve the recreational needs of residents. Parks developed by Mission Oaks fall into three categories (1) Neighborhood parks (2) Community parks, and (3) School Parks

Existing neighborhood parks:

- 0.75 to 10.1 acres each
- Designed to serve residents within 0.5 mile radius
- Provide recreational amenities like open fields, playgrounds and picnic areas.
- Total 8 in the district, accounting for 62.99 acres

Existing community parks:

- 10 to 17.5 acres each
- Provide larger open spaces, more extensive onsite parking, and community centers
- Total 3 in the district, accounting for 40.2 acres
- Three community parks: Gibbons, Mission North, and Swanston.

Existing school parks:

- 0.5 to 6.1 acres each
- Developed by authority through a JPA with San Juan Unified District
- Provides needed developments to each of the neighborhoods served by a school park including playgrounds, soccer fields, softball fields, etc.
- Total 4 in the district, accounting for 13.7 acres.

	* Community Parks	** School Parks	Cooperative effort with San Juan Unified School District	(1) Jim Winthers Memorial Sports Complex	Acreage Devel. by MORPD	Maintained by MORPD	Maintained by SJUSD	Wheelchair Accessible	Ballfield with Backstop	Basketball Court - ⚡	Children's Play Equip. - ⚡	Exercise Course	Horseshoe Pits	Shuffleboard Courts Indoor	Soccer Field Seasonal	Tennis Courts - ⚡	Volleyball Courts	Open Play Area	Nature Area	Off Street Parking - ⚡	Bar-B-Ques	Benches - ⚡	Community Center - ⚡	Picnic Table Area - ⚡	Restrooms In Park - ⚡	Shade Shelter - ⚡	Reserve Picnic Areas - ⚡	
PARKS																												
1. ASHTON 4251 Ashton Drive, Sacramento	9.8								1.5						1	3	1											
2. VALLEY OAK 1100 Eastern Avenue, Sacramento	10.2					3		5							1													
3. EASTERN OAK 3127 Eastern Avenue, Sacramento	4.2														1													
4. * GIBBONS 4701 Gibbons Drive, Carmichael	17.5							1					4		4	2												
5. MADDOX 4821 Thor Way, Carmichael	6																1											
6. * MISSION NORTH 3344 Mission Avenue, Carmichael	12.7															2												
7. OAK MEADOW 2734 American River Dr., Sacto.	5.5																											
8. ORVILLE WRIGHT 2331 St. Marks Way, Sacramento	4.2																1											
9. SHELFIELD 1849 Suffolk Way, Carmichael	5														2													
10. * SWANSTON 2350 Northrop Ave., Sacramento	10							1.5							2	1												
11. WINDERMERE Windermere Lane, Sacramento	.75							1	5																			
12. HAZELWOOD STORM RETENTION BASIN	1.8																											
SCHOOL PARKS																												
13. COWAN 3350 Becerra Way, Sacramento	.5	**																										
14. DEL PASO MANOR 2700 Meryal Drive, Sacramento	3	**														1	2	1										
15. GREER/WINTHERS(1) 2301 Hurley Way, Sacramento	6.1	**					2										4											
16. SIERRA OAKS 2762 Huntington Road, Sacramento	4.6	**													2	2												

At the above sites, *Mission Oaks* offers a full range of recreational activities, including leisure enrichment classes, neighborhood recreation programs, camp programs, adult sports, teen programs, senior adult programs, and special events. District residents are notified of activities through periodically recreation guides available in the Sacramento Bee, and at the community centers through the year and also through the district website. In addition, these recreation and park sites have various sports fields, picnic area, playgrounds, and Community Centers that residents have access to.

The District leases event spaces at community and neighborhood parks around the District. *Mission Oaks* also rents out a variety of facilities to suit recreation, community or business needs. Demand for these spaces is steady – rooms and picnic areas are routinely rented, especially for weddings and large meetings. Swanston Community Center is the nucleus for a growing number of special interest classes, teen and senior programs and is home to Project HYPE, (Healthy Youth for Physical Excellence) a free summer program for low income families designed to create both fit youth and family members while helping to fight childhood obesity. The Swanston Center includes a music room that is popular with people of all ages, especially young people with a keen interest in music.

The following is a break-down of Mission Oaks's large event rental facilities:

Event Space Both offer Free Public WiFi	Location	Room Capacity Assembly/Dinning	Additional Amenities
Mission Oaks Community Center ➤ Auditorium ➤ Club and Craft Room	4701 Gibbons Drive	525/250 77/46	Round tables, Full catering kitchen, free parking Tables and Chairs
Swanston Community Center ➤ Activity room ➤ Conference room	2350 Northrop Avenue	250/125 25	Round tables, free Parking and use of Pantry/Kitchen Large white board for presentations, floor access for computers/internet

In addition, *Mission Oaks Recreation and Park District* rents out the following outdoor spaces and picnic rentals around the district:

Event Space	Location	Picnic Capacity	Additional Amenities
<u>Ashton Park</u> ➤ Alder ➤ Redwood ➤ Hackberry	4201 Ashton Drive	75-100	Barbequing areas, Playground, soccer and football fields, basket ball courts, and tennis court
<u>Mission North Park</u> ➤ Poplar ➤ Oak ➤ Camphor	3344 Mission Avenue	75-100	Tables, children playgrounds, restroom
<u>Gibbons Park</u> ➤ Liquidambar ➤ Sycamore	4701 Gibbons Drive	100	Large barbecue, buffet tables and chairs.
<u>Swanston Park</u> ➤ Pine ➤ Walnut ➤ Holly Oak ➤ Aristocrat	2350 Northrop Drive	75-100	Shade shelter, tables, chairs, playground, sport fields and courts.

Service Demand

Mission Oaks measures service demand and infrastructure needs variously. The existing service capacity approximates the Quimby Act standards consistent with the circumstances of each park district based on a minimum of 3 acres, and a maximum of 5 acres per 1,000 population. Using telephone poll and stratified random sample surveys, including that of homeowner association input, youth athletic groups and park neighbors, the District has been able clearly understand the level of service demands. Staff has witnessed a steady growth in the services that park district residents consider essential.

The district is landlocked and population growth is slowing and changing. Age and ethnicity changes occur more rapidly than population growth. District staff works closely with San Juan Unified School District to provide programming to fit the changing student demographics by custom programming for various schools.

Determination

The District is able to appropriately gauge the demand and provide parkland, recreational facilities, and recreational programming to meet the needs of the community. The District provides adequate levels of service for parks and recreational facilities. The District effectively meets the needs of existing and future populations of the service area.

INFRASTRUCTURE

Capital Improvement Projects

As a result of the 2000 District Master Plan update, the Mission Oaks Recreation and Park District formed an assessment district, effective January 1, 2000 that included a long range Financial Plan to facilitate the Master Plan's projected CIP program. The capital projects list contains improvement projects that the community identified and supported as its highest priority during the assessment election. Park and facility improvements are generally funded by the Assessment District budget. A list, which is part of the annual budget, identifies the plans and development projects that will be met that year.

Infrastructure needs are determined by members of the Advisory Board of Directors, district staff, youth athletic groups, community groups, school children, park neighbors, homeowner association input, stratified random sample surveys, telephone poll surveys and using the district's Master Plan. The district periodically replaces, improves, or renovates amenities in its parks in an effort to preserve the infrastructure and to provide safe and enjoyable facilities for its residents.

The District's bidding process for Capital Improvement Projects places an emphasis on the lowest responsive bidder. Acceptance of the lowest bid is contingent on staff's research of past records on other projects and the company's past work history with the district. The District's staff will analyze the cost of work projects that do not meet the bid process requirements to determine whether they can be completed less expensively in-house as opposed to contracting out the work. The district has a five-year landscape maintenance contract, renewable annually at the request of either party. This arrangement has provided a dependable business model, whom contractors have been able to work compatibly to the joint benefit of both the district and the contractor.

Infrastructure Duplication

Mission Oaks Recreation and Park District relies heavily on the use of facilities with the San Juan Unified School District for its youth and teen programs. None of the District's facilities are underutilized or redundant with other agencies. Many facilities are shared with partner groups including Sacramento County, local school districts, neighboring communities, and other public and private agencies to improve services and maximize efficiency

Emergency Facilities

The district participates in the regional Sacramento Operational Area Plan for disaster mitigation and planning strategies with various county organizations and special districts from around the Sacramento area. The community centers have been identified as sites for emergency operations and will be used in whatever capacity is deemed necessary or appropriate. Both of the district's community centers have been designated as "cooling centers" during extreme heat waves and addresses have been posted on television public service announcements.

Determination

The District provides adequate levels of service and park maintenance. Through the use of Financial Planning and Capital Improvement projects, the District is able to replace, improve, and renovate amenities in the park and to provide safe and enjoyable facilities for its residents.

FINANCE

Mission Oaks has provided for acquisition and development in accordance with its master plans, without having to borrow funds or to use general obligation bonds as methods of financing, which was a recommended consideration in the first master plan adopted in 1973. The acquisition and development program has been carried out without incurring any type of long term indebtedness and the district has no outstanding obligations.

Combined Budgets for both the District and Lighting and Landscape Assessment District

			Preliminary
Fiscal Year	FY 07-08	FY 08-09	FY 09-10
Property Taxes	\$2,131,392	\$2,203,844	\$1,917,344
Interest Income	\$38,560	\$22,487	\$16,865
Aid to County Funds	0	0	0
Assessment Fees	\$782,418	\$893,418	\$893,418
Misc Other	\$124,342	\$76,960	\$65,000
Fund Balance Previous Year (07-08)		\$1,203,576	Unknown
TOTAL REVENUE	\$3,076,712	\$4,400,285	\$2,892,627
Reserve Funds			
District Budget		\$1,089,617	
Assessment Budget		\$1,809,046	
Total Reserve Funds		\$2,898,663	

The Total Reserve Fund is a combination of what is currently in the Reserve and what accrues to it at the end of the year (unspent monies.) Although an expenditure may be approved in the budget, the purchase is sometimes deferred, in the interest of fiscal prudence. The reserve funds may be used for property acquisition, emergency funding, (i.e., rainy day fund) and during dry period financing as necessary.

Revenue Sources

Mission Oaks Recreation and Park District receives revenue from secured and unsecured property taxes for which the County of Sacramento has been assigned the responsibility for assessment, collection, and apportionment. Local tax-related funds and some of the assessment district funds are used for basic maintenance and operation costs, while supplemental funding is sought from other governmental entities (i.e., federal, state, and county) to help provide for land acquisition, development, and renovations. Sources, other than general revenue used by the district recently for the capital outlay programs, include fees related to

1. The county's Land Dedication Ordinance;
2. SB 174 funds;
3. 1974, 1976, 1988, 2000 and 2002 state bond funds;
4. A competitive grant from the Urban Parks Act of 2001 (Part of the

- 2000 Park Bond Act)
5. The Mission Oaks Parks and Recreation Maintenance and Improvement District funds,
 6. Gifts and donations.
 7. Land and Water Conservation Fund Grants
 8. Community Development Block Grants

The District leases property at Valley Oak Park to two commercial telephone companies for cell towers. The lease terms are for five successive five year periods after the first five year term, for a total of 30 years unless the company cancels the leases prior to the end of the initial lease term. A CPI rate is built into one of the lease agreements.

The *Mission Oaks Parks & Recreation Maintenance and Improvement District*, organized under the Landscaping and Lighting Act of 1972, was approved by district homeowners in 1999 and provides revenue primarily for capital outlay projects and maintenance of facilities. This measure was due to expire in January 2009. The district pursued another ballot measure in 2006 to renew the assessment, drop the automatic sunset and add a COLA of up to 3% annually. The measure passed with a 68.78% vote of property owners.

The district charges fees for reserved use of the community centers, picnic areas, and some athletic fields. All other district facilities are available on a first come, first serve basis. Mission Oaks Recreation and Park District plans to finance future upgrades, using property taxes, levies assessed in the assessment district, park dedication funds, donations and contributions, communication tower revenue, and various state and private grants and hopefully, Park Impact Fees if adopted by the Board of Supervisors.

Revenue Constraints

With the current economic market, Missions Oaks Recreation and Park District has not increased Program Fee and Charges but made a special "REConomics" 5% discount coupon available to the public for a reduction of fees and charges for specifically targeted youth programs for the Spring and Summer 2009. The District must receive approval from the Board of Supervisors for the creation of Park Impact Fees for the district. The district has worked diligently with the County Infrastructure Finance Section for the last two years on this project including a Nexus Study completed and approved by the district's advisory board.

Joint Facilities

The District holds joint use agreements with

1. San Juan Unified School District for use of school facilities, particularly adult athletic facilities, and maintenance of school parks;
2. Sacramento County for the maintenance of the Hazelwood Greens Stormwater Retention Basin;
3. Lutheran Church of Our Redeemer for use of classrooms for the district's preschool program;
4. River Oak Center for Children for joint use and maintenance of parking lot at Valley Oak Park;
5. Contract with Alliance for Excellence for afterschool grant fund programming for the Building Bridges Program;

6. A JPA with the Arden Little League for the construction of the snack/bar and restroom building at Valley Oak Park;
7. A Memorandum of Understanding between the Sunrise and Mission Oaks Recreation and Park Districts for shared construction and use of A radio tower to facilitate computerized irrigation system.

Mission Oaks is always proactively seeking opportunities to partner with community groups and other agencies.

Costs Avoidance

The district has worked closely with park neighbors to coordinate “Community Builds” of many playground projects saving over \$250,000 in just a few short years. These projects have also served as excellent Eagle Scout Learning Opportunities.

Volunteers have always played a large part in the delivery of recreation and park services to the Mission Oaks Recreation and Park District. When the district kept service hours records, the annual total of volunteer hours routinely exceeded 50,000 hours per year, double that of our full-time workforce. With changes to worker’s comp insurance, the district restructured its volunteer programs and now recognizes groups that make volunteer contributions rather than individuals. People continue to serve in a voluntary capacity making contributions to both recreation programs at all levels as well as park improvements. Each employee works with volunteers in some capacity however we no longer have part-time volunteer coordinators.

Revenue Opportunities

Mission Oaks Landscaping & Lighting Assessment District

The Mission Oaks Parks and Recreation Maintenance and Improvement District is an assessment that provides funding for park maintenance services as well as for expanding and improving park facilities to meet the growing demand placed on the parks. The assessment proceeds will be used for park improvements such as new playground equipment, security patrols and playfield and building renovations. The supplemental funding was necessitated by a revenue shortfall created by escalating costs and declining revenues. The District was established following a successful assessment ballot proceeding in 1999. The assessment was renewed with 68.78 percent weighted support by property owner respondents. In 2006-07 the rate of assessment is \$39.00 for a single family home. In future years, the assessment rate can increase by up to 3 percent per year.

Determination

The District is currently financially well-positioned and has adequate financial planning practices. Though there are revenue constraints, the District is able to enhance the district’s programs and facilities by involving volunteers. This enables the district to maintain quality programming without raising fees more than needed to cover baseline expenses. The District has also initiated an Assessment District in order to continue providing improved parks and services to the community. The District also takes advantage of various grants and private donations to improve infrastructure and services provided.

SUMMARY OF DETERMINATIONS

Management

The District has an adequate management structure, staffing, and facility sharing arrangements to ensure efficient management and provide parks and recreational service to the community at a reasonable cost. The District is efficiently structured and organized. The District provides the public with adequate information and opportunity for input and involvement in District Activities.

District Services

The District is able to appropriately gauge the demand and provide parkland, recreational facilities, and recreational programming to meet the needs of the community. The District provides adequate levels of service for parks and recreational facilities. The District effectively meets the needs of existing and future populations of the service area.

Infrastructure

The District provides adequate levels of service and park maintenance. Through the use of Financial Planning and Capital Improvement projects, the District is able to replace, improve, and renovate amenities in the park and to provide safe and enjoyable facilities for its residents.

Finance

The District is currently financially well-positioned and has adequate financial planning practices. Though there are revenue constraints, the District is able to enhance the district's programs and facilities by involving volunteers. This enables the district to maintain quality programming without raising fees more than needed to cover baseline expenses. The District has also initiated an Assessment District in order to continue providing improved parks and services to the community. The District also takes advantage of various grants and private donations to improve infrastructure and services provided.

CONCLUSION

Mission Oaks Recreation and Park District effectively meets demand in its 8.25 square-mile area. It strives to satisfy the recreational needs of the community by providing a wide range of facilities and opportunities to enrich the quality of life. In relation to these efforts, the residents of Mission Oaks have roughly equal availability to the District's community programs. The acquisition and development program has been carried out without incurring any type of long term indebtedness and the district has no outstanding obligations. The District's Master Plan, along with the annual budget, continues to serve as the basis upon which the District will expand to meet the growing service level needs of the citizens in the community.

MISSION OAKS RECREATION AND PARK DISTRICT

Parks and Recreation – Urban

Address: 3344 Mission Ave.
Carmichael, CA 95608-3111

Phone: (916) 488-7276 x 3000
Fax: (916) 488-4349
Web site: www.morpd.com

Administrative Officer: Debby Walker, District Administrator

Fiscal Data:

Budget:	\$4,400,285 (2008)
Gann Limit:	\$11,841,565 (2007)

No. of Acres Developed:

District Owned:	86.22
District Managed:	1.84
On School Property:	<u>14.20</u>
TOTAL	102.26

No. of Acres Undeveloped: 0

No. of Parks:

District Owned – Locations:

1. Ashton Park (9.8 ac.) – 4251 Ashton Drive, Sacramento
2. Eastern Oak Park (4.2 ac.) – 3127 Eastern Avenue, Sacramento
3. Gibbons Park (17.5 ac.) – 4701 Gibbons Drive, Carmichael
Gibbons Parking Lot Annex (.37ac.)
4. Maddox Park (6.0 ac.) – 4821 Thor Way, Carmichael
5. Mission North Park (12.7 ac.) – 3344 Mission Avenue
6. Oak Meadow Park (5.5 ac.) – 2734 American River Drive, Sacramento
7. Orville Wright Park (4.2 ac.) – 2331 St. Marks Way, Sacramento
8. Shelfield Park (5.0 ac.) – 1849 Suffolk Way, Carmichael
9. Swanston Park (10.0 ac.) – 2350 Northrop Avenue, Sacramento
10. Valley Oak Park (10.1 ac.) – 1150 Eastern Avenue, Sacramento
11. Windemere Park (0.75 ac.) – Windemere Lane/Rolling Hills Road, Sacramento

School Parks – Locations:

Total No. of Acres: 13.7 acres

Cowan School Park – 3350 Becerra Way, Sacramento

Del Paso Manoir School Park – 2700 Maryal Drive, Sacramento

Greer School Park – 2301 Hurley Way, Sacramento

Sierra Oaks School Park – 2762 Huntington Drive, Sacramento

District-maintained site -- Location

1. Hazelwood Greens 4600 Hazelwood Ave, Sacramento
(1.84 acres, owned by Sacramento County)

No. of Facilities: 3

1. District Office and Shop – 3344 Mission Avenue, Carmichael
2. Mission Oaks Senior Citizen/Community Center – 4701 Gibbons Drive, Carmichael
3. Swanston Community Center – 2350 Northrop Avenue, Sacramento
4. Snack bar & Restroom Facility – 1150 Eastern Avenue, Sacramento

Square Miles: 8.5±

Population: 62,500

Service and Operation Data:

1. Authorized and actually performed: Park and recreation services; use private contractors to provide some services.
2. Latent powers: Fire protection, garbage collection and disposal, and street lighting, if not otherwise provided and if authorized by Board of Supervisors.

Location: Arden-Arcade and Carmichael area

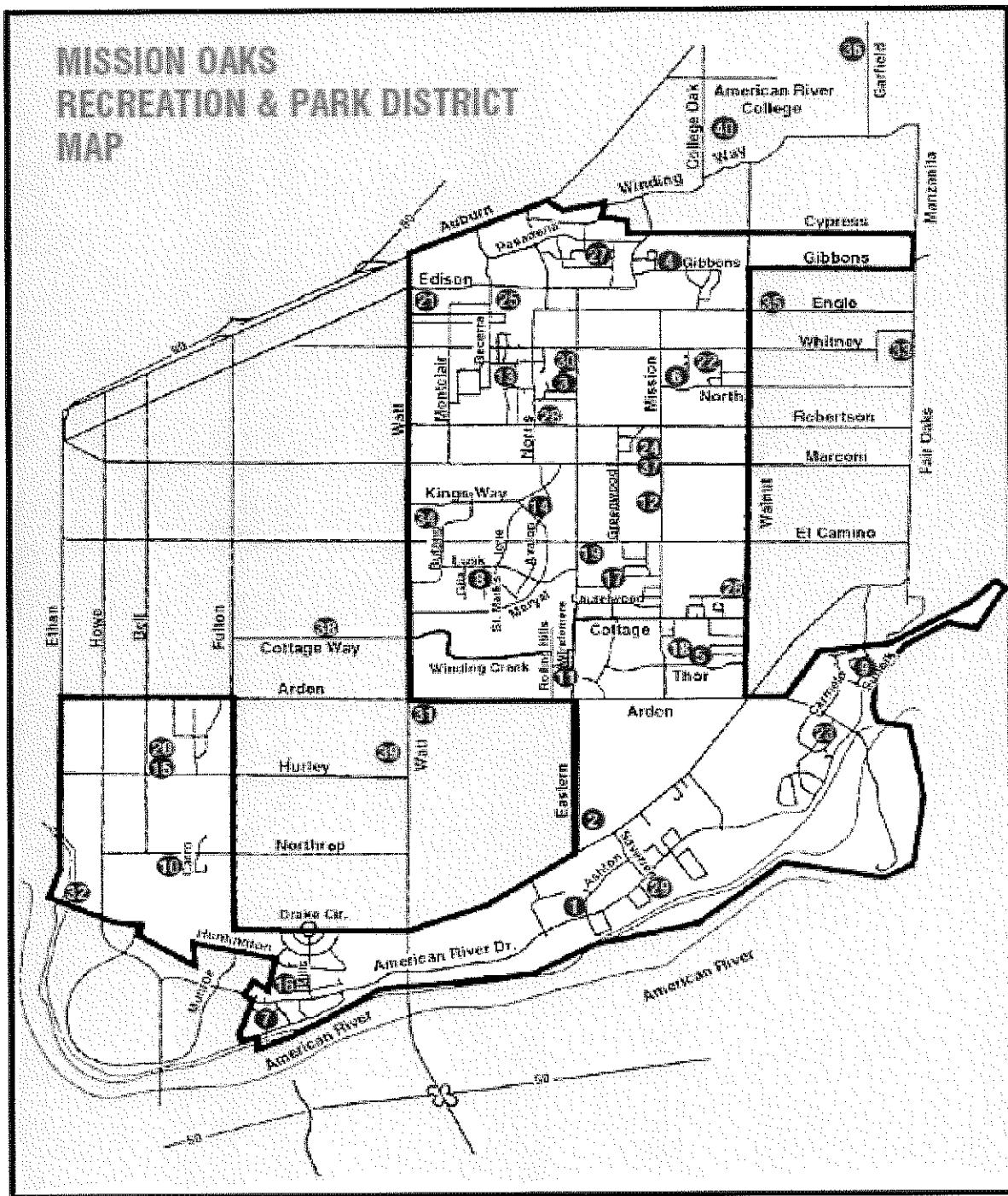
Remarks: Formerly County Service Area No. 7

Historical and Political Data:

1. Established January 1975. Windemere Recreation and Park District established November 26, 1958; merged with Mission Oaks Recreation and Park District September 7, 1997.
2. Enabling Act: Public Resources Code, Section 5780. (Board of Supervisors Resolution 74-787.)
3. Governing Body: Board of Supervisors, ex officio directors; five member Advisory Board of Directors, appointed by the Board of Supervisors.
4. No. on Governing Body: 5.
5. Board meets 1st Tuesday of the month at 6:30 p.m. in the District Office.
6. Registered voters: Not known at this time.

ATTACHMENTS

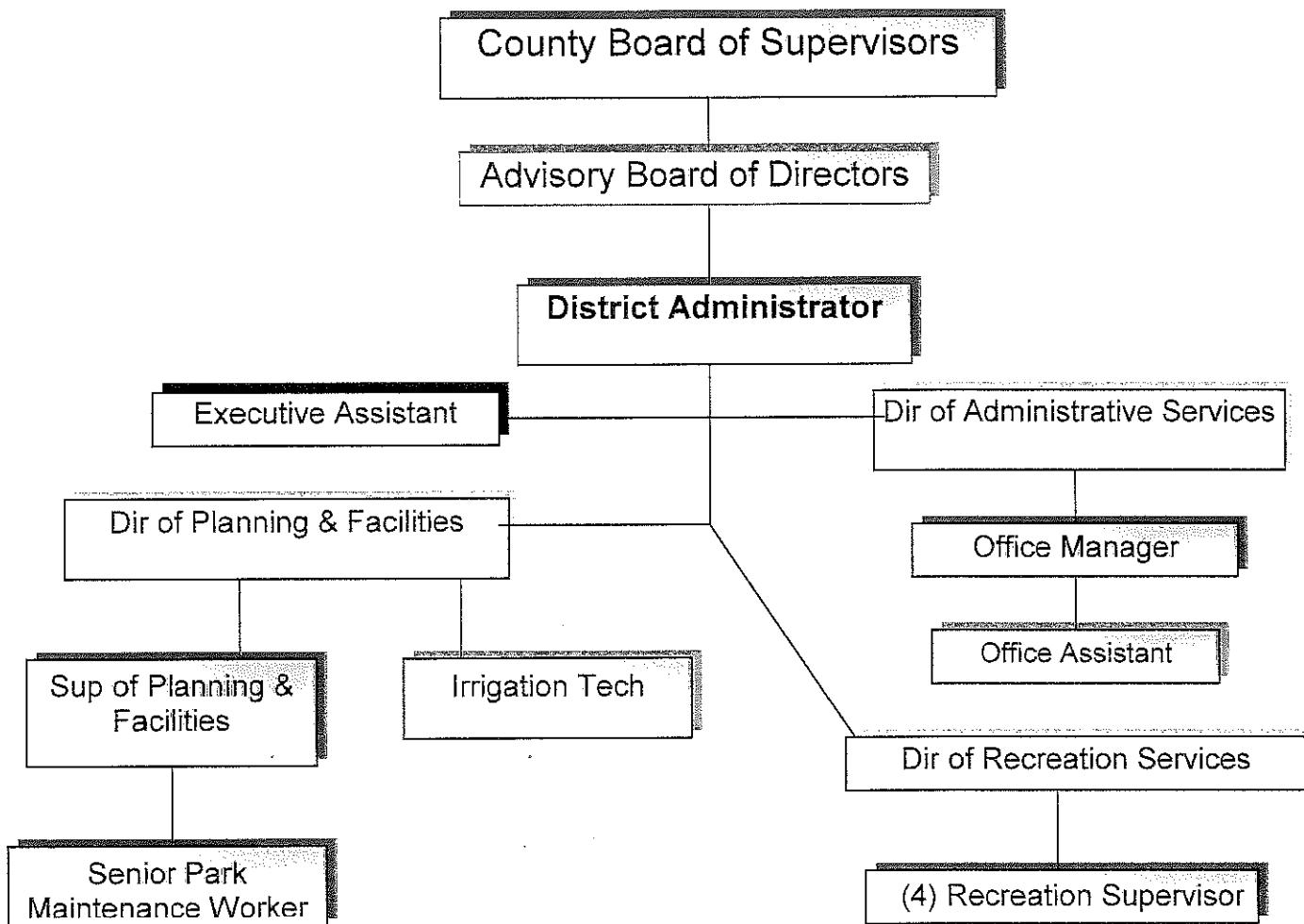
ATTACHMENT A

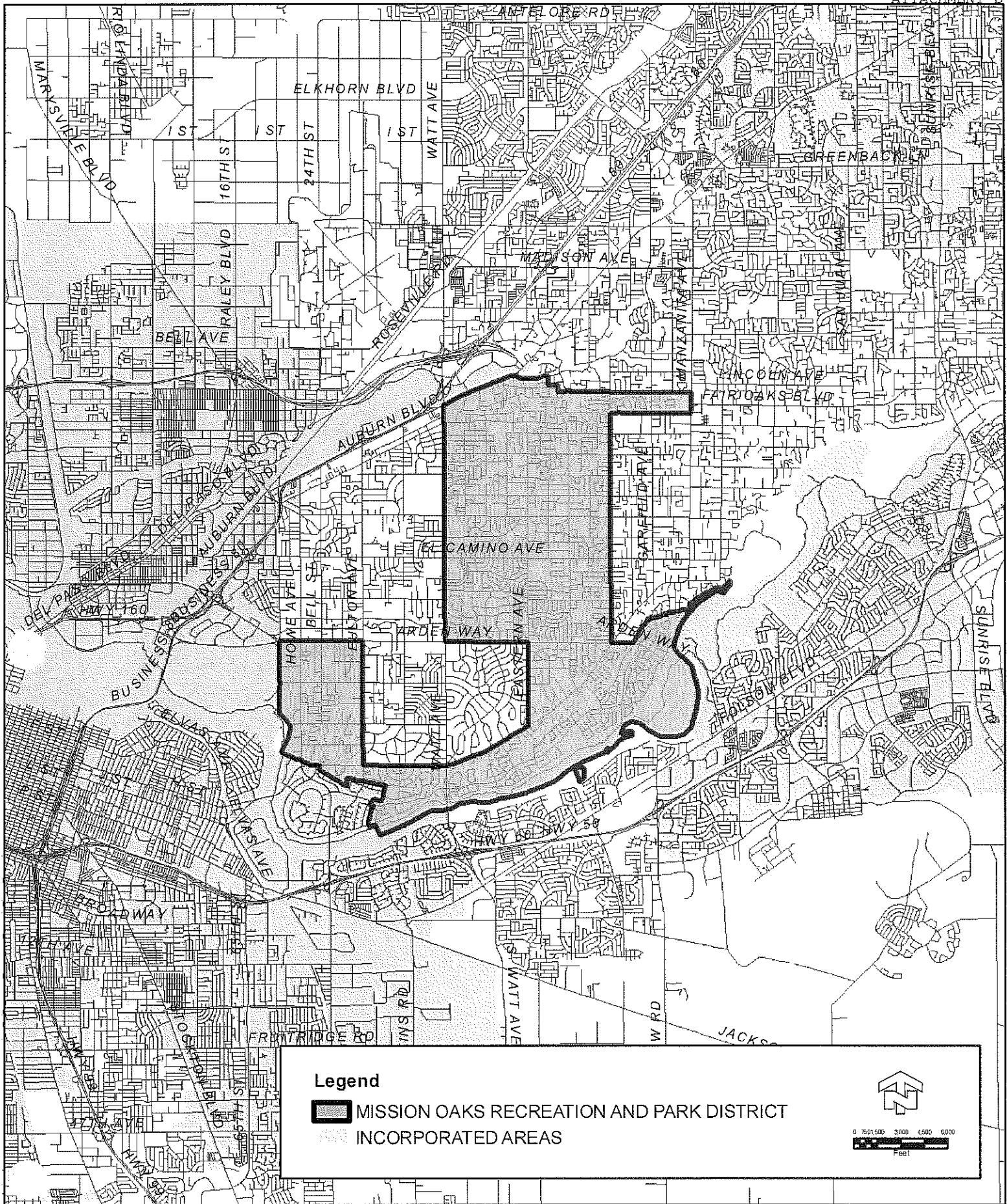


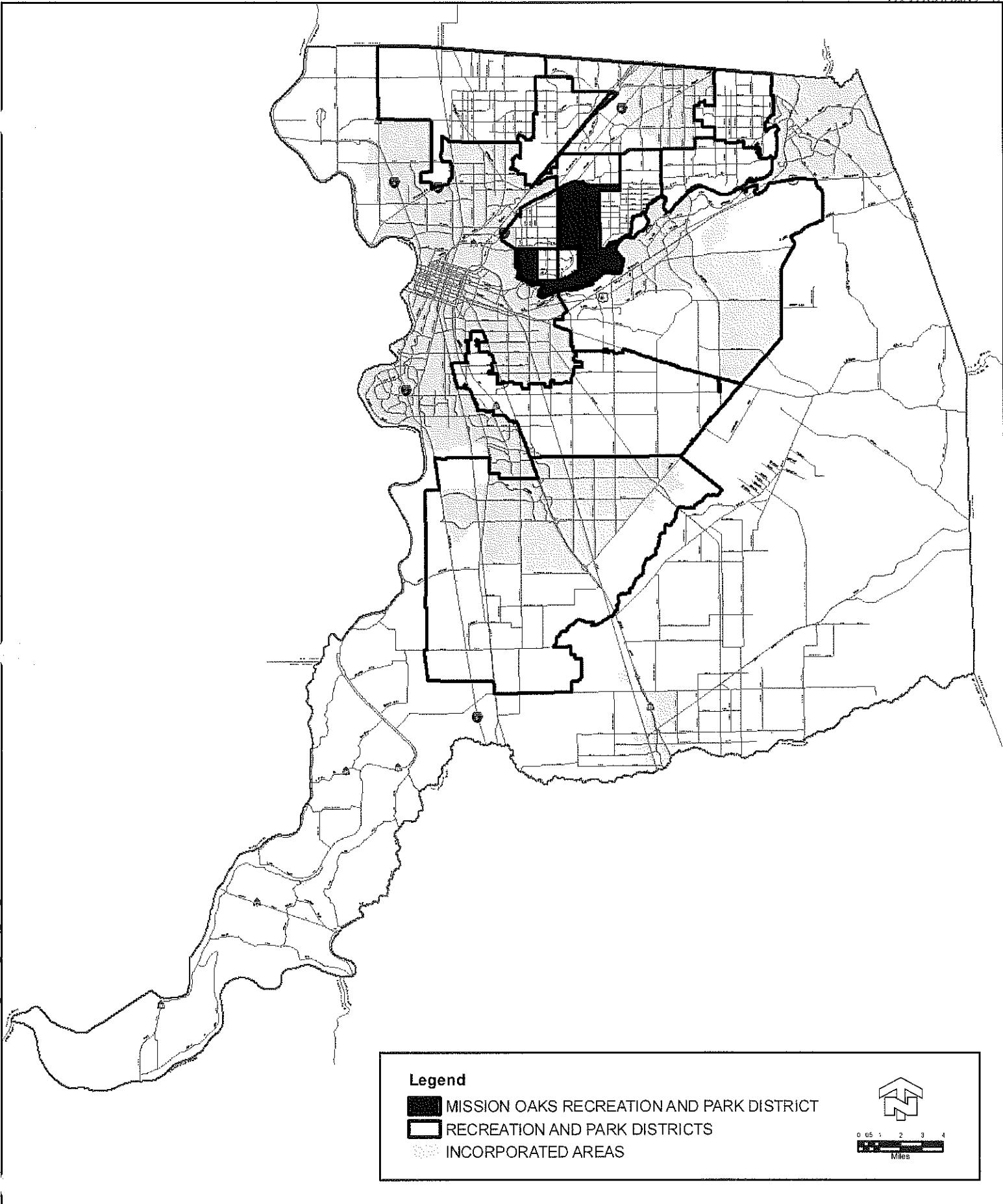
ATTACHMENT B

PARKS	SCHOOL DISTRICT FACILITIES	COMMUNITY FACILITIES
1. ASHTON 4251 Ashton Dr. Sacramento	17. BILLY MITCHELL 4425 Laurelwood, Sacramento	8. DEVELOPMENTAL DISABILITIES SERVICE ORGANIZATION (DDSO) 2331 St. Marks Way, Sac.
2. VALLEY OAK 1150 Eastern Ave., Sacramento	18. STARR KING 4848 Cottage Way, Carmichael	
1. EASTERN OAK 3127 Eastern Ave., Sacramento	19. EL CAMINO 4300 El Camino Ave., Sacramento	32. CAMPUS COMMONS GOLF COURSE 2 Cadillac Drive, Sac.
2. GIBBONS 4701 Gibbons Ave., Sacramento	20. ENCINA 1400 Bell Street, Sacramento	33. CARMICHAEL PARK VETERANS BLDG. & COMMUNITY CLUBHOUSE
3. MADDOX 4821 Thor Way, Carmichael	21. ARCADE FUNDAMNETAL 3500 Edison Ave., Sacramento	5750 Grant Ave. Carmichael
4. MISSION NORTH 3344 Mission Ave., Carmichael	22. WINSTON CHURCHILL 4900 Whitney Ave., Sacramento	34. COUNTRY CLUB LANES 2600 Watt Avenue, Sac.
7. OAK MEADOW 2734 American River Dr., Sacto.	23. DEL DAYO 1301 McClaren Dr., Carmichael	35. LA SIERRA SKATE ARK 5325 Engle Rd., Carmichael
8. ORVILLE WRIGHT 2331 St. Marks Way, Sacramento	24. MISSION AVENUE 2935 Mission Ave., Sacramento	
9. SHELFIELD 1849 Suffolk Way, Carmichael	25. MIRA LOMA 4000 Edison Ave., Sacramento	36. LAUREL RUFF 5325 Garfield Ave., Sac.
10. SWANSTON 2350 Northrop Ave. Sacramento	26. OUR LADY OF ASSUMPTION 5055 Cottage Way, Carmichael	37. LUTHERAN CHURCH OF OUR REDEEMER 4641 Marconi Ave., Sac.
11. WINDERMERE Windemere Lane, Sacramento	27. PASADENA 4300 Pasadena, Sacramento	38. COTTAGE CENTER 3097 Cottage Way, Sac.
12. HAZELWOOD STORM RETENTION BASIN	28. PRESENTATION 3100 Norris Ave., Sacramento	39. DETERDING COMMUNITY CENTER 1415 Rushden Dr., Sac.
SCHOOL PARKS	29. RIO AMERICANO HIGH SCHOOL 4540 American River Dr., Sac.	40. AMERICAN RIVER COLLEGE 4700 College Oak, Sac.
13. COWAN 3350 Becerra Way, Sacramento	30. WHITNEY AVENUE 4248 Whitney Ave., Sacramento	
14. DEL PASO MANOR 2700 Maryal Dr., Sacramento	31. ARDEN INTERMEDIATE SCHOOL 1640 Watt Ave., Sacramento	
15. GREEN/WINTHERS (1) 2301 Hurley Way, Sacramento	OTHER DISTRICT FACILITIES	
16. SIERRA OAKS 2762 Huntington R, Sacramento	4. MISSION OAKS COMMUNITY CENTER (MO/CC) 4701 Gibbons Dr., Carmichael	
	6. DISTRICT OFFICE 3344 Mission Ave., Carmichael	
	10. SWANSTON COMMUNITY CENTER (SCC) AND SPLASH PARK 2350 Northrop Ave., Sacramento	

Organizational Chart







Origins of Names of Parks and Areas within Parks

Names of several parks and certain designated areas within parks have been named in honor of persons who have had a significant impact on the early history of the area or have contributed in some significant way to the district or to parks and recreation in general. In some instances, donations have been made by family and friends as memorials to loved ones- a park bench in Mission North Park for Nick Guzzi, a long time resident of the area; a playground equipment area in Oak Meadow Park for Stevie Walters, an eight year old boy who lived near the park; and two tennis courts at Swanston Park donated by Robert C. Powell in memory of his friend and former administrative assistant for former-Supervisor Sandra Smoley, Robert B. Wood. Mr. Wood was a strong supporter of parks and recreation and an avid sports enthusiast who greatly enjoyed tennis. Many other memorials include stands of trees or park benches throughout the district.

Parks and Community Centers

Mission Oaks developed and maintains 11 parks (88.75 acres). Six school parks were originally developed and maintained by the park district however, two of those, Billy Mitchell and Starr King were given back to the San Juan Unified School District. The remaining four school parks comprised of 13.7 acres; Greer, Del Paso Manor, Cowan and Sierra Oaks School parks continue to be maintained by Mission Oaks. In addition, the district maintains the county-owned Hazelwood Greens (a Storm Water Detention Facility (1.8 acres), providing collectively 105.18 acres for the community's enjoyment. Three of these facilities are community parks, Gibbons, Mission North, and Swanston, while the others serve as neighborhood parks. Located in the northeast corner of the district and within the 17.5 acre Gibbons Park is the district's (1982) 12,000+ square foot community center. The district office is located on Mission Avenue within the 12.7-acre Mission North Park. The newest district development (2008) is the Swanston Community Center located within the 10 acre Swanston Park in the southwest corner of the district

Orville Wright Park

Development of the northwest corner of the Orville Wright School property for a tot lot and small park area had been recommended in the original master plan. Although the allotted space was minimal in terms of neighborhood needs; however, no other vacant parcels were available in the immediate area for consideration of park development. In 1984, the district reached an agreement with the school district to purchase the 4.2 acres of open space at this site for \$84,000 through the Naylor Act.

Shelfield Park

This ten-acre site, located at 1849 Suffolk Way, was not within the district boundaries when the original master plan was approved. It was annexed as part of a consolidation that occurred when Mission Oaks became a dependent recreation and park district. The property was purchased from the school district in 1975 for \$161,966.

Valley Oak Park

The 1974 Master Plan recommended that a neighborhood park be considered on the playground area of the school district's Eastern Avenue adult education facility. The district fully supported retaining the three baseball diamonds, developed by little league supporters, and an existing nature area on the property. This site was originally referred to as Eastern Avenue Park.

In February 1984, after the school district declared the school surplus to its needs, Mission Oaks purchased this site from the school district through the Naylor Act, for \$335,520. The park is approximately 10.2 acres of the entire school site, which included all the open space and half the paved parking area. The school building and the other portion of the parking lot were purchased from the school district by River Oak Center for Children, Inc. (formerly known as Re-Ed West), a private, non-profit school.

Mission North

In Mission North Park, there is a wonderful grove of trees that the district's Board designated as the Edwin Z'berg Memorial Grove. Mr. Z'berg was a state assemblyman who represented the area for 16 years, from 1959-1975. He was responsible for major legislation and development of park land throughout the state. Assemblyman Z'berg was one of the strongest supporters of parks and recreation programs that ever served in the California legislature. The Edwin Z'berg Memorial Grove was dedicated in ceremonies conducted in conjunction with the official dedication of the park on June 14, 1980.

Maddox Park

Maddox Park, dedicated on January 13, 1979, was named in honor of the memory of Kate Herrick Maddox whose family formerly owned the land when it was part of a large walnut and olive ranch. Mrs. Maddox was born in 1875 in Maine and in 1883 moved to Sacramento where she attended local schools and graduated, along with U. S. President Herbert Hoover, from the first class at Stanford University in 1895. She was co-editor of the Stanford Quad while attending the university, active in the American Red Cross and the Belgium Relief during World War I, a co-founder of Pro-America and a member of the American Association of University Women. Mrs. Maddox, who had a great love for nature and animals, taught at Sacramento High School for 26 years until her marriage in 1921 to Elmer Lee Maddox, a retired furniture manufacturer from Michigan, who purchased the land in 1917. Mr. Maddox passed away in 1948 and Mrs. Maddox continued living on the ranch until her death in January 1972 at the age of 97.

Gibbons Park

Gibbons Park, named in honor of Robert Linus Gibbons, was dedicated during ceremonies conducted on May 19, 1979. Mr. Gibbons, whose grandparents came to the area from Massachusetts in a covered wagon, was a member of the second graduating class of the University of California at Davis in 1913, at which time it was known as the University Farm School. In 1914, he married. The marriage lasted 53 years, until his death in 1966 at the age of 73. Maude Gibbons attended the dedication ceremonies, accompanied by several members of her family.

The Gibbons family came to the Carmichael area in 1921, where they became involved in the ranching and dairy business. The family sold milk directly from the farm until the retail store, Gibbons Dairy located on Walnut Avenue, opened in 1964. They owned 130 acres in the community where Mr. Gibbons was very active in civic affairs, giving of his time and energy to help make the community a better place to live. He was a charter member of the Carmichael Presbyterian Church and a member of the Carmichael Rotary Club, the Masonic Order, the Board of Trustees of the Carmichael School District, and the Carmichael Farm Bureau. He was also founder and president of the former Northridge Water District.

Within Gibbons Park is a remnant of the grove of almond and olive trees that the board has designated as the Leif Owre Grove. On June 28, 1980, the district and the Ronald Amundsen Lodge #48 of the Sons of Norway conducted ceremonies dedicating the grove in honor of the memory of Leif Owre, who was president of the lodge in 1929, 30, 31, and 35. Mr. Owen was a former owner of the land where he and his brothers, Anders and Alfred, planted and harvested crops of hay and wheat and tended horses and cattle. The family planted olive and almond trees that greatly enhanced the beauty of the park, until the 1990's when they succumbed to age and disease. Mr. Owre was involved in community and church activities and was an innovator and avid supporter of youth programs in the area.

The open space site at 4701 Gibbons Drive was purchased for \$100,000 in 1973 from the school district as a ten-acre parcel and originally designated a neighborhood park. In 1978, the district acquired an additional seven and one half acres of abandoned freeway property (known as Route 143) from the California Department of Transportation for \$281,468, which expanded the park acreage from Gibbons Drive to Cypress Avenue. The 17.5 acre site became the largest park in the district.

In the 1979-80 fiscal year, a master plan for the additional 7.5 acres was prepared for the board's approval by the county Department of Parks and Recreation's Planning Division. The plan included the re-designation from a neighborhood to a community park, and provided for a 12,000 square foot senior citizen/community center on the original ten acres. The center was completed in 1982, at a cost of \$826,987.

The center includes a club room, a crafts room, a large auditorium, a kitchen, offices and counseling rooms, a four-lane shuffleboard court, restrooms, patio, and a 72-space parking lot. An exercise course designed for senior citizen use was provided next to the center.

Harry Morse Shuffleboard Courts

The four-lane shuffleboard courts are named in honor of Harry Morse who began the efforts for such a facility with a letter to the board in 1976 requesting consideration for "funds for the installation of enclosed shuffleboard courts". Mr. Morse had allowed the district free use of his one-lane enclosed court at his home from Sept. 1976 until October 1982, at which time; the courts at the center were ready for use. Mr. Morse chaired a community group that launched a grass roots fund raising drive to help secure funds for

the construction of the community center at Gibbons Park. In March 1983, at the district's request, the board of supervisors recognized Mr. Morse for his donation of over 2,286 volunteer hours.

Swanston Park

On June 23, 1979, Swanston Park was dedicated in memory of Charles Swanston, a man whose name was synonymous with cattle raising and ranching in the Sacramento area dating back to 1870. Mr. Swanston settled in Ohio upon his arrival to the United States from Ireland in the late 1850's and traveled to Sacramento in 1870 where he started a cattle ranch and packing plant. In 1910, he owned land encompassing approximately 3,500 acres, including most of the area between El Camino Avenue on the north to the American River on the south, to Howe Avenue on the east and the railroad tracks to the west just beyond what later became Interstate 80. Under Mr. Swanston's son, George, and George's son, Robert, C. Swanston & Sons, whose trademark of the single "S" was the fourth oldest trademark in California, purchased an additional 1,000 acres in Sacramento and from Yolo Counties where they continued raising livestock for many years.



Municipal Service Review



3344 Mission Avenue, Carmichael, California 95608

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e-mail: dwalker@morpdpd.com

SACRAMENTO LOCAL AGENCY FORMATION COMMISSION
1112 I Street, Suite #100, Sacramento, California 95814
(916) 874-6458

MUNICIPAL SERVICE REVIEW WORKSHEET AND QUESTIONNAIRE

Date: **April 9, 2009**

Agency Name: **Mission Oaks Recreation and Park District**

Address: **3344 Mission Avenue, Carmichael, California 95608**

Website: **<http://www.morpd.com>**

Telephone: **(916) 488-2810** **Fax:** **(916) 488-4349**

Administrator's Name: **Debora S. Walker**

Title: **District Administrator**

Name of Contact: **Debora S. Walker**

Contact's Email Address: **dwalker@morpd.com**

Agency's Principle Act: **Recreation and Park District**

Date of Formation/Incorporation: **November 1975,**

Services Provided: **Recreation and park services**

Latent Powers: **Fire protection, garbage collection and disposal, and street lighting, if not otherwise provided and if authorized by Board of Supervisors.**

1. **Governing Body:** **The Board of Supervisors serves as the ex officio directors. A five (5) member Advisory Board of Directors, nominated by the District 3 supervisor and approved by the Sacramento County Board of Supervisors meets monthly on the first Tuesday at 6:30 p.m. at the district office. Advisory board members serve a maximum of two full four-year terms.** Public Resources Code, Section 5780. (Board of Supervisors Resolution 74-787.)

Total Number of Employees: **14** **Regular full-time employees**
15 **Regular part-time employees**
100-150 **Seasonal Part-time employees**
Many **Volunteers**

Acreage/Sq. Miles within Agency: **8.5+**

Total Population within Agency: **62,500**

DISTRICT PROPERTY AND FACILITIES

No. of Acres Developed:

District Owned:	86.22
District-managed	1.84
On School Property:	<u>14.2</u>
TOTAL	102.26

No. of Acres Undeveloped: 0

No. of Parks:

District Owned – Locations:

1. Ashton Park (9.8 ac.) – 4251 Ashton Drive, Sacramento
2. Eastern Oak Park (4.2 ac.) – 3127 Eastern Avenue, Sacramento
3. Gibbons Park (17.5 ac.) – 4701 Gibbons Drive, Carmichael
Gibbons Parking Lot Annex (.37ac.)
4. Maddox Park (6.0 ac.) – 4821 Thor Way, Carmichael
5. Mission North Park (12.7 ac.) – 3344 Mission Avenue
6. Oak Meadow Park (5.5 ac.) – 2734 American River Drive, Sacramento
7. Orville Wright Park (4.2 ac.) – 2331 St. Marks Way, Sacramento
8. Shelfield Park (5.0 ac.) – 1849 Suffolk Way, Carmichael
9. Swanston Park (10.0 ac.) – 2350 Northrop Avenue, Sacramento
10. Valley Oak Park (10.1 ac.) – 1150 Eastern Avenue, Sacramento
11. Windemere Park (0.75 ac.) – Windemere Lane/Rolling Hills Road, Sacramento

School Parks – Locations:

Total No. of Acres: 13.7 acres

1. Cowan School Park – 3350 Becerra Way, Sacramento
2. Del Paso Manor School Park – 2700 Maryal Drive, Sacramento
3. Greer School Park – 2301 Hurley Way, Sacramento
4. Sierra Oaks School Park – 2762 Huntington Drive, Sacramento

District-maintained site -- Location

1. Hazelwood Greens 4600 Hazelwood Ave, Sacramento
(1.84 acres, owned by Sacramento County)

No. of Buildings: 3

1. District Office and Shop – 3344 Mission Avenue, Carmichael
2. Mission Oaks Senior Citizen/Community Center – 4701 Gibbons Drive, Carmichael
3. Swanston Community Center – 2350 Northrop Avenue, Sacramento

INTRODUCTION, HISTORICAL AND POLITICAL DATA

Mission Oaks Recreation and Park District is a dependent, special, recreation and park district in central Sacramento County.

- **Mission:** Creating the atmosphere for recreational possibilities and personal enrichment, with a tradition of quality and care.
- **Boundary:** The American River to the South, Ethan Way and Watt Avenue to the East, Auburn Boulevard and Cypress Avenue to the North, and Manzanita and Walnut Avenues to the East.
- **Population:** 61,500 in an area of 8.5 square miles

Mission Oaks Recreation and Park District was formed in January 1975 in pursuant to Public Resources Code Section 5780. In September 1973, Windemere Recreation and Park District, established on November 26, 1958, merged with Mission Oaks on September 7, 1997. The Mission Oaks name itself gives honor to the history of California and the heritage of the California missions established by the early Spanish settlers and the majestic oak trees that flourish throughout the Sacramento Valley.

Vision Statement

Creating the atmosphere for recreational possibilities and personal enrichment, with a tradition of quality and care.

Mission Statement

Mission Oaks is dedicated to the courteous and efficient delivery of services **for all**, providing opportunities for memorable, wholesome, and enjoyable programs and activities in safe and attractive settings. We foster strong partnerships with the community and schools by involving them in park improvement projects and the development of classes and enrichment programs. Mission Oaks also creates an environment that nurtures and guides future leaders by providing employment and volunteer opportunities in the field of recreation and parks.

The following material is available on a separate CD as attachments to this report:

- Current Organizational Chart (FY 08-09 attachment)
- Most Recently Adopted Budget – (Fiscal Year 08-09 and Preliminary 09-10 attached)
- Most Recently Completed Financial Audit Report (FY 06-07 attached)
- Annual Report (Monthly Board Reports available only, available upon request)
- Strategic Plan/Master Plan (2009 Draft Strategic Plan and 2000 Master Plan available)
- Copies of Current and Past Year's Newsletters (pdf. Versions available)
- Any other Relevant Supporting Documents
 - I. Cost Recovery Matrix
 - II. Appendix 1/4000), which is part of the district's Policies and Procedures Manual.

III. Summary of completed assessment district capital outlay projects by PowerPoint.

I. INFRASTRUCTURE, FACILITIES AND SERVICES/GROWTH AND POPULATION PROJECTION FOR THE AFFECTED AREA

A. What is the current (baseline) demand for services?

Residents are remarkably supportive of the parks and recreation services Mission Oaks offers.

The district began as County Service Area No. 7 in 1963, serving the small Mission-Cottage area of the Arden-Arcade community, and administered by county's park and recreation department staff. It increased in size during the 1974-75 fiscal year as a result of the county study that attempted to place all un-served areas in the county in an active recreation and park agency.

On November 5, 1974, residents approved a ballot measure that changed the service area to a dependent special district and annexed some formerly un-served areas in the Arden-Arcade and Carmichael communities. In 1975, the population of the district was 56,000, and the budget was \$844,670. Today, the population is approximately 62,500, and the combined budget total for the Fiscal Year 2008-09 is \$5,026,537. It is composed of the district budget in the amount of \$3,687,037 and the Mission Oaks Parks and Recreation Maintenance and Improvement District budget of \$1,339,500.

Gann Limit was \$11,069,147 for FY 06-07. The revised limit for the 08 and 09 fiscal years has not yet been provided to the district by the county. The district's budget is well within the Gann Limitations.

In 1991 and 1992, the State, to help relieve a major shortfall in revenues, shifted substantial amounts of local property taxes. As a result, from 1992 to 1994, district revenues were decreased by \$438,585 (22%), and its reserve was reduced by \$240,061 (27 percent). The total amount of funds lost through the ERAF shift to the state from 1992-2003 was \$1,998,315.

Through the dedication and commitment of the board, staff, and a multitude of community volunteers, the district was able to continue operation without any major disruptions or severe problems.

The district owns 11 parks (86.22 acres) and maintains and operates four school parks (14.2 acres) and the county-owned Hazelwood Avenue Stormwater Detention Facility (1.84 acres). Three of these facilities are community parks, Gibbons, Mission North, and Swanston, while the others serve as neighborhood parks. Located within the 17.5 acre Gibbons Park is the district's 12,000 square foot senior citizen/community center with an adjacent newer .37 acre parking lot on Gibbons Park Drive which was developed on a portion of the former American River Hospital site. The district office is located on Mission Avenue within the 12.7-acre Mission North Park.

Municipal Service Review Worksheet and Questionnaire

Page 6 of 33

There is a high degree of demand for the district's services:

- The district cosponsors its adult sports programs (softball, volleyball, and basketball) with the Carmichael Recreation and Park District, using La Sierra Community Center for volleyball and basketball, and Carmichael Park for softball.
- Arden Little League uses fields jointly developed and maintained with the park district at Valley Oak Park on Eastern Avenue for its programs. Through a unique Joint Powers Agreement drafted by the County Counsel's office, the district and Arden Little League constructed a much-needed snack bar/restroom facility at the park. The actual development was coordinated through and primarily funded by the Little League then gifted to the district and received by resolution of the Sacramento County Board of Supervisors.
- Del Dayo Soccer Club, in 1995 collaborated with the district on renovating the open space area at Ashton Park for soccer, which is over-used by other community groups, including Rio Americano High School athletic teams and other soccer teams and clubs.
- The district's Mission Oaks Community Center, open since October 1982, is available for rental for weddings, parties, and workshops.
- The center is a hub for seniors from all over and beyond Sacramento County.
- The center is open weekdays days providing social and educational resources for seniors who enjoy the hot lunch program, the four-lane shuffleboard court, exercise classes, dances, leisure enrichment classes, clubs and special interest groups, special events, and trips and excursions. Many dances and other physically stimulating classes offer opportunities for health and fitness.
- The district's Swanston Community Center was dedicated on May 17, 2007 is available for rental for weddings, large parties and social gatherings, and small business meetings. This facility had been in the district's master plan since 1974.



The Swanston Community Center
Dedicated May 2008

- Swanston Community Center is the nucleus for a growing number of special interest classes, teen programs, sports programs, and a hot lunch program, as well

as special weekly and monthly events for seniors. Its music room is popular with people of all ages, especially young people with a keen interest in music.

- Swanston Community Center is home to Project HYPE, (Healthy Youth for Physical Excellence) a free summer program for low income families designed to create both fit youth and family members while helping to fight childhood obesity.
- The district has a successful group picnic area program with 12 sites at four parks which are in high demand year-round.
- The district offers afterschool programming, funded by the San Juan Unified School District's Building Bridges grant at middle and elementary schools in the park district area.
- After school 3rd-6th grade youth flag football, volleyball, basketball, track and field sports is offered at many of the district's public schools.
- Seasonal sports (flag football, volleyball, basketball, track and field and wrestling) for young teens are provided at area middle schools.
- Preschool programming has been offered for more than 35 years and continues at rented facilities at The Lutheran Church of Our Redeemer on Marconi Avenue. The school year program is always filled to capacity.
- A wide range of leisure enrichment programs are offered for youth, young adults, and adults, and senior adults

B. What is projected demand for services?

The district is located just east of the City of Sacramento and encompasses portions of the unincorporated communities of Arden-Arcade and Carmichael. The district is generally bounded by the American River on the south, Ethan Way and Watt Avenue on the west, Auburn Boulevard and Cypress Avenue on the north, and Manzanita and Walnut Avenues on the east. Staff has witnessed a steady growth in the services that park district residents consider essential.

A 1998 public opinion poll resulted in the following statistics:

71% gave the district a job rating of excellent/good

89% have heard of the district

66% of family members use park facilities near their residence

60% believe the parks increase their property value

78% believe it is important to improve park facilities and add programs

The board has attempted to provide facilities throughout the district, while encouraging multiple use strategies and taking steps to avoid allowing development to exceed maintenance and operation capabilities. Primary among those concerns is the observance of a "Good Neighbor" policy, which embodies the obligation to be mindful of the problems that may be encountered by those residing closest to district facilities and to take reasonable precautions and actions to safeguard their interests. The board has been conscientious in this regard, as it has avoided, wherever and whenever possible and reasonable, unduly imposing upon a minority of residents

when designing a facility, amenity, or activity for the enjoyment of the majority of residents.

- An increased interest in participation in youth sports, especially basketball can be attributed to the successful Sacramento Kings franchise.
- The district is contemplating the need for alternatives to the school district's afterschool programming. Recreation Services Division personnel are researching the need, available facilities, transportation issues, and funding sources to meet this target group.
- At a request by participants, the advisory board, in 2002, changed the name of the Mission Oaks Community Center from the Mission Oaks Senior Citizen/Community Center. The new designation was more acceptable to current and prospective participants who are opposed to the term "senior citizen".
- With the shifting emphasis to younger adults, who are healthier and more active, the center population is just as interested in active programming, such as sports and exercise programs and trips, as sedentary and passive activities, such as cards and bingo.
- District personnel are cognizant that a great many, if not a majority of the visitors to district parks, are from outside the service area, attracted by the high maintenance standards and renovation of its play equipment areas.
- The athletic fields in district parks are scheduled for use by a variety of soccer and youth baseball groups and it would be difficult to ascertain the number of members who live outside the park district boundaries.
- Use of established athletic fields and informal open space areas for sports is expected to continue as a strong demand in the district. Open space for soccer, rugby and Lacrosse is in short supply within the entire county, not just within the Mission Oaks District as evidenced by the many phone calls received annually.
- District staff has seen the demand for tennis facilities and classes rise and fall over the past 35 years; it seems to be on the rise once again. It is imperative that the courts be maintained for the future and overall appearance and safety of the park patrons. Even non-tennis playing residents have voiced concern over regular preventive maintenance of tennis court surfaces.
- As a result of the filing in of swimming pools at Encina High School as well as the Carro Drive neighborhood pool, a void exists in the southwest end of the Mission Oaks District for aquatic activities other than the American River. While the river is a tremendous asset, many neighborhood children lack the opportunity for swim lessons. The new Spray Ground facility at Swanston Park provides the much needed relief from the summer heat for all ages, abilities, income levels and ethnicities. Summer 2009 will be the second season of operation:



C. What is the existing and projected service capacity?

It is the advisory board and staff's objective:

- To provide a system that encompasses parks, natural areas, facilities, and recreation programs for all ages, regardless of race, sex, religion, developmental ability, or economic status.
- To provide a full range of opportunities for the pursuit of recreational activities and programs in an effort to meet the needs of district residents.
- To insure that all facilities shall be preserved, protected, and held for public recreational use.
- To develop cooperative working partnerships with other agencies, both public and private.

The existing service capacity approximates the Quimby Act standards consistent with the circumstances of each park district based on a minimum of 3 acres, and a maximum of 5 acres per 1,000 population.

The Mission Oaks district's service capacity is estimated at over 62,500 residents.

DISTRICT SERVICES
Services Provided

Mission Oaks provides open space and organized activities to serve the recreational needs of residents. Parks developed by Mission Oaks fall into two categories – (1) Neighborhood parks and (2) Community parks. (Three of these facilities are community parks: Gibbons, Mission North, and Swanston; all others serve as neighborhood parks).

Existing neighborhood parks:

- 0.75 to 10.1 acres each
- Designed to serve residents within 0.5 mile radius
- Provide recreational amenities like open fields, playgrounds and picnic areas
- Total 8 in the district, accounting for 62.99 acres

Existing community parks:

- 10 to 17.5 acres each
 - Provide larger open spaces, more extensive onsite parking, and community centers
- Total 3 in the district, accounting for 40.2 acres

* Community Parks ** School Parks Cooperative effort with San Juan Unified School District (1) Jim Winters Memorial Sports Complex	Acreage Devel. by MORPD	Maintained by MORPD	Maintained by SJUSD	Wheelchair Accessible	Ballfield with Backstop	Basketball Court -	Children's Play Equip. -	Exercise Course	Horseshoe Pits	Shuffleboard Courts Indoor	Soccer Field Seasonal	Tennis Courts -	Volleyball Courts	Open Play Area	Nature Area	Off Street Parking -	Bar-B-Que	Benches -	Community Center -	Picnic Table Area -	Restrooms In Park -	Shade Shelter -	Reserve Picnic Areas -	
PARKS																								
1. ASHTON 4251 Ashton Drive, Sacramento	9.8																							
2. VALLEY OAK 1100 Eastern Avenue, Sacramento	10.2																							
3. EASTERN OAK 3127 Eastern Avenue, Sacramento	4.2																							
4. *GIBBONS 4701 Gibbons Drive, Carmichael	17.5																							
5. MADDOX 4821 Thor Way, Carmichael	6																							
6. *MISSION NORTH 3344 Mission Avenue, Carmichael	12.7																							
7. OAK MEADOW 2734 American River Dr., Sacto.	5.5																							
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9. SHELFIELD 1849 Suffolk Way, Carmichael	5																							
10. *SWANSTON 2350 Northrop Ave., Sacramento	10																							
11. WINDEMERE Windemere Lane, Sacramento	.75																							
12. HAZELWOOD STORM RETENTION BASIN	1.8																							
SCHOOL PARKS																								
13. COWAN 3350 Becerra Way, Sacramento	.5		**																					
14. DEL PASO MANOR 2700 Maryal Drive, Sacramento	3		**																					
15. GREER/WINTHERS(1) 2301 Hurley Way, Sacramento	6.1		**																					
16. SIERRA OAKS 2762 Huntington Road, Sacramento	4.6		**																					

At the above sites, Mission Oaks offers a full range of recreational activities, including leisure enrichment classes, neighborhood recreation programs, camp programs, adult sports, teen programs, senior adult programs, and special events. District residents are notified of activities through published recreation guides that are mailed out periodically through out the year and also through the district website. In addition, these recreation and park sites have various sports fields, dog parks, picnic area, playgrounds, and Community Clubhouse that residents have access to.

The District leases event spaces at community parks around the District. *Mission Oaks* also rents out a variety of facilities to suit recreation, or business needs. Demand for these spaces is steady – rooms

Municipal Service Review Worksheet and Questionnaire

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and picnic areas are routinely rented, especially for weddings and large meetings. The following is a break-down of Mission Oaks's large event rental facilities:

Event Space Free Public WiFi at both centers	Location	Room Capacity Assembly/Dinning	Additional Amenities
Mission Oaks Community Center ➤ Auditorium ➤ Club and Craft Room	4701 Gibbons Drive	525/250 77/46	Round tables, Full catering kitchen, free Parking Tables and Chairs
Swanston Community Center ➤ Activity room ➤ Conference room	2350 Northrop Avenue	250/125 25	Round tables, free Parking and use of Pantry/Kitchen Large white board for presentations, floor access for computers/internet

Picnic Rental Opportunities

Event Space	Location	Room Capacity Assembly/Dinning	Additional Amenities
<u>Ashton Park</u> ➤ Alder ➤ Redwood ➤ Hackberry	4201 Ashton Drive	75-100	Barbequing areas, Playground, soccer and football fields, basket ball courts, and tennis court
<u>Mission North Park</u> ➤ Poplar ➤ Oak ➤ Camphor	3344 Mission Avenue	75-100	Tables, children playgrounds, restroom
<u>Gibbons Park</u> ➤ Liquidambar ➤ Sycamore	4701 Gibbons Drive	100	Large barbecue, buffet tables and chairs.

<u>Swanston Park</u>			
➤ Pine ➤ Walnut ➤ Holly Oak ➤ Aristocrat	2350 Northrop Drive	75-100	Shade shelter, tables, chairs, playground, sport fields and courts.

D. How are infrastructure needs determined? Provide copies of capital improvement and master plans that address infrastructure.

Infrastructure needs are determined by: members of the Advisory Board of Directors, district staff, youth athletic groups, community groups, school children, park neighbors, homeowner association input, stratified random sample surveys, telephone poll surveys and using the district's Master Plan.

(See attached Master Plan which highlights many of the Capital Improvement plans that address infrastructure.)

E. Provide schedules for infrastructure replacements and upgrades; explain how schedules are being met. Describe operation and maintenance program(s), including any identified areas of deferred maintenance.

a. Infrastructure replacements and upgrades

In 1998, when it became obvious that the district could no longer maintain and operate its parks and recreation programs at desirable levels, to replace or restore worn out or vandalized park amenities, or to comply with new state and federal safety and accessibility standards, the district hired a consultant to help the district develop a Master Plan Update and Financial Plan. This led to the formation of an assessment district, approved by Mission Oaks homeowners in 1999. The levy assessments fund capital outlay projects (*See attached PowerPoint*), which are reviewed and approved as to highest priority by the advisory board during the annual budget process. The capital projects list contains improvement projects that the community identified and supported as its highest priority during the assessment election.

A list, which is part of the annual budget, identifies the plans and development projects that will be met that year. Park and facility improvements are generally funded by the Assessment District budget.

b. Operation and maintenance program

The district contracts its maintenance of district's park with a private company. It also enlists private companies for tree service and routine building maintenance. A crew of four regular part-time facilities division staff performs minor site work, including repairing benches, playground equipment inspections, repair of fountains, signs, graffiti removal, tennis court maintenance and all other work not included in contracts.

Currently, there are no areas of deferred maintenance.

Park operations and maintenance is divided into two categories. The contractual category is one in which the District will contract for repair or maintenance that can be performed, either cheaper than performing the task in-house, or the task must be completed by contract due to licensing requirements for work such as electrical or work that requires a higher skill set.

b) **How will new or upgraded infrastructure be financed?**

The district plans to finance future upgrades, using property taxes, levies assessed in the assessment district, park dedication funds, donations and contributions, communication tower revenue, and various state and private grants.

c) List infrastructure deficiencies; indicate if deficiencies have resulted in permit or other regulatory violations; explain how deficiencies will be addressed.

The district has no facilities that have resulted in citations for non-compliance with regulatory statutes. There are several walkways in district facilities that have been identified as requiring renovation; however, they are scheduled for improvement within the next two fiscal years. Park restrooms must be further improved for newer ADA compliance requirements.

d) Describe capital facilities that are underutilized; explain how underutilized facilities could be shared with other agencies.

There are no underutilized park sites or facilities. All are very popular, and some (including the community center in Gibbons Park is programmed daytime and evening hours 6-7 days a week, and we conduct special events or programs the majority of weekends; Ashton and Eastern Oak Parks with their athletic fields) could be considered over-utilized. Swanston Community Center and the newly developed Spray Ground will be among those facilities also considered over-utilized.

e) **How are service needs forecast?**

Staff is qualified to seek and pursue changing societal needs and trends from the District's users. Staff also consults with experts in the field conducting research on state and national levels. Our residents have always been very vocal in expressing their recreational needs. Staff has traditionally been responsive and takes pride in maximizing the available human and physical resources available to meet those needs, often through partnerships and collaborative projects.

- f) How are growth/population projections integrated with plans for future services?

The district is land locked and population growth is slowing and changing. Age and ethnicity changes occur more rapidly than population growth. District staff works closely with San Juan Unified School District to provide programming to fit the changing student demographics by custom programming for various schools.

Studies were completed in the district's Master Plans (see attached)

- g) Provide maps of service areas for services that are provided less than agency wide.

All services are provided agency wide.

- h) Describe any variance or inequity in levels of service provided to customers. Explain why unequal service levels are present.

If there is an unequal service level it can be attributed to the lack of transportation to afterschool program sites.

With the development of the new Swanston Community Center programming is now available to those in greatest need in the southwest sector of the district.

- i) Provide the assessor parcel number or addresses of properties, which are located outside agency boundary and receive agency services; list type of service and date service commenced.

There are none outside of the district's service area.

- j) Explain policies or procedures that establish priorities for directing services to infill areas.

The entire district is generally considered an infill area.

- k) Describe provisions for providing services in emergency situations, (i.e., storage capacity, number of days that services can be provided, etc.).

The district participates in the regional Sacramento Operational Area Plan for disaster mitigation and planning strategies with various county organizations and special districts from around the Sacramento area. The executive director of directors of recreation services, parks and administrative services will liaise at the operational area level with district staff who will gather status information from key district sites. The community centers have been identified as a site for emergencies and will be used in whatever capacity is deemed necessary or appropriate.

Both of the district's community centers have been designated as "cooling centers" during extreme heat waves and addresses have been posted on television public service announcements.

II. EVALUATION OF MANAGEMENT EFFICIENCIES

- a. What awards or recognition has the agency received?

CAPRI – Safety and Loss Control annually

1999 Presidential Award to District Administrator Debby Walker by the California and Pacific Southwest Recreation and Park District in recognition of outstanding leadership and dedicated services to the park and recreation profession in California.

2001 Pat O'Brien Professional Legislative Award to District Administrator Debby Walker by the California and Pacific Southwest Recreation and Park District in recognition for legislative advocacy and work on the statewide Playground Safety Committee and Regulation promulgation.

2007 Recipient of the Sacramento Workplace Excellence Leader (SWEL) Award offered by the Sacramento Area Human Resources Association (SAHRA), in partnership with *The Sacramento Bee*, based on the district's commitment to its employees and customers.

- b. List number of employees by category; executive, management, professional, operational, etc.

(See Organizational Chart for information)

- c. Describe internal reorganizations within the past three years; list job titles or positions that have been eliminated; provide pre-and post- reorganization charts.

No staff positions have been eliminated; however, hiring three positions were deferred between 2004 and 2007-08 due to fiscal constraints from the last ERAF shift and to conserve funds.

- d. List number of annual terminations, resignations, and retirements, which have occurred in each category, for the preceding three years.

Retired: Executive Director (1975-2003)

Resignation: Supervisor of Recreation Services (2)

Terminations: From time to time, at will employees have are terminated for various reasons. No full-time staff has been terminated. Seasonal part-time staff terminates their employment from time to time due to school (college) obligations, the conclusion of a program season or to pursue other part-time or full-time employment.

- e. Describe positions that have remained vacant during the past three years.

Funding for the following positions had been deferred due to fiscal constraints:

- Director of Planning and Facilities (duties assumed by District Administrator (2003-2007))
- Supervisor of Recreation Services (2004-2008)
- Irrigation Technician (work previously contracted. In-house position held vacant from 2006-2008)
- Park Maintenance Supervisor (2008-2009)

- f. Describe training and personnel policies.

Safety training plays an important role in district activities.

Employees from all three divisions meet quarterly as a Safety Committee (in accordance with California Association for Park Insurance (CAPRI) guidelines). CAPRI is the district's self-insurance administrator. The committee reviews operations, which includes consideration of problems and/or errors that could occur as it relates to the environment, equipment, job procedures, and personnel, and how to minimize unsafe acts, contain environmental hazards, and control unsafe conditions.

The district maintains that the public and its employees are important assets, and division heads and supervisory personnel at all levels of the district work force are directed to make safety a matter of continuing concern, equal in importance to all other operational considerations.

The district uses an employee safety incentive program to encourage safe work practices and procedures in compliance with the guidelines of SB 198, the “Occupational Injury and Illness Prevention Program”, and to reward divisions for safe work practices (no accidents or injuries that would require reporting to the California Office of Safety and Health Administration), meeting training obligations, and no lost time due to unsafe practices.

Safety training is conducted on a more frequent basis (weekly, biweekly, or monthly) at the division level, as part of staff meetings.

A Policies and Procedures Manual has been developed and approved by the Board, which is distributed to each employee. Policy sections are reviewed by full-time staff members. Suggested revisions, developed and drafted by leadership staff are reviewed and discussed before they are submitted to the advisory board for consideration of approval. A copy of the policy manual is available to all staff electronically. One hard copy is shared as a cost cutting strategy to save resources.

- g. Are salaries and pay scales comparable/competitive with regional and industry standards?

District salaries and benefits for full-time employees are in the average range of that paid by other similar local special recreation and park districts. Salaries are typically lower than other larger special districts, cities and counties. Part-time wages are comparable with that paid by other local recreation and park agencies and the local school district.

- h. Is the organization structure similar with like service providers?
Describe any differences.

Yes, our organizational structure is similar to other recreation and park agencies, locally and statewide.

III. FINANCING CONSTRAINTS AND OPPORTUNITIES/OPPORTUNITIES FOR RATE RESTRUCTURING

- a. Describe rate setting methodology.

Fees for recreation programs and classes are proposed by the appropriate division (e.g., programs fees by the Recreation Services Division staff;

group picnic reservations by the Planning and Facilities Division), and ratified by the advisory board as part of the annual budget process. Staff uses other recreation and park district fees and charges as a benchmark for its recommendations, in addition to an analysis of the program content and popularity that might support a fee increase. Fees for the community center are comparable for similar rental facilities in the Sacramento area. The district makes an every effort to keep fees reasonable and affordable as evidenced by the recent REConomics program which offers residents and opportunity to register for summer 2009 programs at a discount.

(See attached Cost Recovery Matrix)

- b. Describe all revenue sources (i.e., property taxes, special taxes, service charges, fees, assessments, grants, etc.).

The underlying principle of the district's fiscal program is to efficiently offer facilities and diversified recreational programs and services, ensuring that all citizens have equal opportunity and choice of participation. The demand upon the district is greater than its ability to generate adequate funds from tax-related revenues; therefore, it is an economic necessity to charge fees. A formal, comprehensive policy for the establishment, implementation, and evaluation of fees and charges is outlined in the attachment.

(Appendix I/4000), which is part of the district's Policies and Procedures Manual.) Adjustments to the fee-supported programs and services are to be considered annually during the budget preparation process.

The District receives revenue from secured and unsecured property taxes for which the County of Sacramento has been assigned the responsibility for assessment, collection, and apportionment. Secured property taxes are levied on January 1, for the following fiscal year and on the date that it becomes a lien on real property. Secured property taxes are due in two installments on November 1, and February 1, and are delinquent after December 10, and April 10. Property taxes on the unsecured roll are due on the January 1 lien date and become delinquent if unpaid by August 31. Property tax revenues are recognized in the fiscal year they are received.

The District leases property at Valley Oak Park to two commercial telephone companies for cell towers. The lease terms are for five successive five year periods after the first five year term, for a total of 30 years unless the company cancels the leases prior to the end of the initial lease term. A CPI rates is built into one of the lease agreements.

The Mission Oaks Recreation and Park District Parks & Recreation Maintenance and Improvement District, organized under the Landscaping and Lighting Act of 1972, was approved by district homeowners in 1999 and provides revenue primarily for capital outlay projects and maintenance of facilities. This measure was due to expire in January 2009. The district pursued another ballot measure in 2006 to renew the assessment, drop the

automatic sunset and add a cola of up to 3% annually. The measure passed with a 68.78% vote of property owners.

The district charges fees for reserved use of the community centers, picnic areas, and some athletic fields. All other district facilities are available on a first come, first serve basis.

- c. Explain constraints associated with agency's ability to generate revenue. What options are available – special assessments/special taxes/increases in sales tax, etc.

In 1978, as a result of the passage of Proposition 13, Mission Oaks experienced the largest reduction in tax-related revenues of all Sacramento County districts - 66 percent in the 1978-79 fiscal year. In 1991 and 1992, the State faced a financial crisis due to a major shortfall in revenues. To help relieve the deficit, the state shifted substantial amounts of local property taxes. As a result, from 1992 to 1994, district revenues were decreased by \$438,585 (22%), and its reserve was reduced by \$240,061 (27 percent). Through the dedication and commitment of the board, staff, and a multitude of volunteers, the district was able to continue operation without any major disruptions or severe problems.

The passage of Proposition 1A in the November 2004 election helped ease the burden of the additional local funds shifted help balance the state budget. During this time the board approved staff's recommendations for program and rental fees increases in an effort to recapture lost revenue. It is always a concern that higher fees and charges will affect those who can least afford it and who are in greatest need (low income families, single parent households, senior adults, etc.).

The district avails itself of every opportunity to apply for grants or to collaborate on successful grant programs with the school district, CDBG through Sacramento Housing and Redevelopment Agency for qualifying areas in the district; Building Bridges Afterschool Program; California Endowment Association grant, partnered with the Light in Life Community Outreach nonprofit organization for a Sunday parental empowerment and youth leadership program; Murray-Hayden Urban Parks and Youth Service Program; the 2002 Resources Bond Act; supported a successful Safe Route to Schools grant for walkways at Del Paso Manor Elementary School; and Proposition 12 block grant. Staff reviews all grant opportunities available to them; however, the district is limited by the project scope that many times require proposed projects be located in areas of low income, high crime, including deficiencies of similar park facilities, high demand, and inability to otherwise provide facilities and location in a low-income urban area with high youth crime and a high unemployment rate. The district has applied unsuccessfully for several other private grants including the Stewardship Foundation and Sierra Health Foundation.

In 1999, the district's homeowners supported an assessment district, under the Landscaping and Lighting Act of 1972, has provided revenue primarily for capital outlay projects and maintenance of facilities.

The district's subsequent successful assessment district ballot measure in 2006 has allowed the district to continue to complete preventive maintenance projects protecting the district's aging infrastructure as well as to continue to implement the district's master plan. As mentioned previously, the 2006 measure dropped the sunset, increased the assessment fee to a rate of \$39.00 per single family residence and allows the addition of up to a 3% cola annually to the rate. SCI conducted the community survey, engineered the demographic and parcel study and fashioned the ballot measure as required by Proposition 218.

d. Describe policies and procedures for limiting expenditures, which staff may make, without board/council approval.

All expenditures support or endorse the objectives and goals of projects and programs identified in the district budget.

The Mission Oaks administrator worked in cooperation with Carmichael and Sunrise, the other two dependent special districts, to update the purchasing policy. This document was reviewed by all appropriate departments of the county and received approval from the county counsel's office. The revised policy was approved by Resolution # CP-0417 of the board of Supervisors on February 27, 2007.

The district is a member of the IMPAC Visa Card Program, and individual cards have been issued to key full-time employees that have been given purchasing authority. Purchases can be made without division head approval for needed programs and services expenditures that are identified in the budget. Division heads and the Administrator scrutinize the monthly statements for accuracy and appropriateness of purchases.

Credit cards, authorized by the District, are held and maintained at the District office, with a list of employees who have use privileges. Certain employees also have purchasing power at retail stores, which have been provided with a list of authorized employees.

Authorized operational ongoing expenditures made are listed on the monthly "Expenditure Detail Report". In addition, a Billing Report noting all expenditures made is prepared each month and presented monthly to the advisory at each regular board meeting for consideration of approval. The report includes the expense account charged; the name of the vendor; date of

the invoice; the item(s) purchased; the division incurring the obligation; the specific park or program utilizing the expenditure; and the amount obligated; a subtotal by expense code; and the grand total for the report period.

The District maintains a petty cash fund (Imprest Cash Fund) for the purchase of items that need to be obtained in an expeditious manner and that generally cost less than \$20.

- e. Provide a summary of annual legal expenditures for the past three years; segregate expenditures associated with settling claims by employees or other parties and describe the justification for each settlement.

The district has had no legal expenditures for claims over the past three years.

Prior to March 2009, the district had access to the Sacramento County Counsel's Office for legal issues.

The law firm (Gregory B. Bragg & Associates, Inc.) is retained by CAPRI (the pool that provides liability and property insurance for the district) and PARDEC (Park and Recreation District Employee Compensation), which provides workers compensation insurance and fees are covered by premiums paid to the groups.

- f. Explain the agency's bond rating; discuss reason for rating. Discuss amount and use of existing debt. Describe proposed financing and debt requirements.

N/A – The district has never used bonds for capital improvements and does not have a rating.

- g. Describe policies and procedures for investment practices.

The District is a participant in the County of Sacramento Investment Pool under the oversight of the County Treasurer. The fair value of the District's investment in this pool is reported in the financial statements at amounts based upon the District's pro-rata share of the fair value provided by the Pool for the entire Pool portfolio.

- h. Describe policies and procedures for establishing and maintaining reserves/retained earnings. What is the dollar limit of reserves/retained earnings?

The advisory board has established an informal policy of maintaining a minimum of \$250,000 in the district's Reserve Fund, and an unspecified amount for Contingency Appropriations.

What is the ratio of undesignated, contingency, and emergency reserves to annual gross revenue?

The contingency and reserve account for the Final 08-09 District budget is 46.6% of the budget.

The contingency and reserve account for the Assessment District budget is 160% of the assessment budget

- i. Explain any variances in rates, fees, taxes, etc., which are charged to agency customers. Describe rate/fee policies.

The district received a percentage of 1% of the property taxes as defined by a post-Prop 13 agreement among agencies.

Program and facility fees and charges are approved by the advisory board in conjunction with the annual budget process.

The district does not have a non-resident fee; however, it does offer priority program registration to residents.

- j. Explain policies and procedures for fee rebates, tax credits, or other relief given to agency customers. Provide details of any rebates, etc., issued during the past three years.

N/A

- k. Discuss increases or decreases in rates, fees, taxes, or other charges that have been implemented during the past three years.

The current annual budget balances anticipated revenue from fees with the cost of supporting programs and services.

The board and staff are fully aware that it would not be sensible to increase fees or institute new fees merely in order to generate revenue. They bear in

mind several factors, including the ability of the participants to pay for services rendered; similar programs offered by other agencies and organizations, or private enterprises; and increased costs of equipment and supplies and employee wages and benefits.

The cost of group picnic reservations was increased this past year, and now reflects the higher cost of janitorial supplies (plastic waste container bags) and increases in workers compensation costs for weekend picnic area monitors.

Program fees are increased slightly from time to time due to increased recreation supplies costs and increases in the cost of employee benefits mandated by the state. This summer however, as an economic stimulus to families, the district is offering a \$5.00 per person REconomic discount when registering for a summer day camp, class, program, activity or rental. A coupon was published on the cover of our activity guide which is distributed as a special edition of the Sacramento Bee for subscribers in the Arden Arcade and Carmichael Areas. The coupon is also available online at www.morpd.com

l. Discuss opportunities for rate restructuring.

The district faces a competitive market for similar programs and services, and we are aware that we must maintain a rate structure that is comparable with other local recreation and park agencies, and private businesses, such as gyms and fitness centers.

This year the advisory board approved increased rates for reserved use of soccer and baseball fields by athletic organizations. This is the first time the rate has been increased since it was implemented in 1986. The market base is expanding, as we become aware that more organizations are using district open space areas without prior permission or reservation permit.

The rate structure for membership at the community center has been unchanged for more than 15 years. With increased demands on the facility, it may become necessary to review the fees and charges for senior adult and other programming.

m. Describe policies and practices for depreciation and replacement of infrastructure.

Depreciation: The district follows the appropriate state mandated accounting practice as directed by the county to depreciate its fixed assets. These figures are reviewed annually during the audit process.

Replacement of infrastructure: The district follows state and federal legislation for the design, installation, and maintenance of playgrounds,

including the Consumer Products Safety Commission guidelines, the American Standards for Testing and Materials regulations, and the Americans with Disabilities Act access standards.

- n. Describe impact on growth on current ratepayers, and need to accrue debt for capital improvements for projected growth.

The district has made it a practice to date not to accrue debt for capital improvement projects.

IV. GOVERNMENT STRUCTURE OPTIONS/LOCAL ACCOUNTABILITY AND GOVERNANCE

- a. Explain the composition of the agency's governing body and indicate if elections or appointments are at large or by district. Number of Directors, Nature/Length of Terms - indicate if governing body is landowner or population based.

The five-member advisory board, appointed by the county Board of Supervisors, must be current residents of or own property in the Mission Oaks district. They can be appointed to a maximum of two full four-year terms.

The appointments are made at large and are not population based. An attempt is made to have representation throughout the district whenever possible.

The board delegates authority to the District Administrator to administer the District. The Board of Directors and personnel of the District strive to maintain the highest level of service possible for its citizens while sustaining a cost-effective and fiscally responsible Recreation and Park District.

- b. Provide a three-year history of agency election and appointment results; identify candidates and winner/appointee for each position.

Candidates are nominated by Supervisor Susan Peters and appointed by the county Board of Supervisors.

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Kevin Taylor Appointed August 8, 2001	<i>Expires</i> June 30, 2009 Reappointed July 20, 2005
Michael Alcalay Appointed June 13, 2007	<i>Expires</i> June 30, 2011 (Eligible for a second four-year term)
John Skoien Re-appointed May 2008	<i>Expires</i> June 30, 2012 (Eligible for a second four-year term)
Eric Milstein Appointed June 13, 2007	<i>Expires</i> June 30, 2011 (Eligible for a second four-year term)
David Bolland Appointed July 2005	<i>Expires</i> June 30, 2009 (Eligible for a second four-year term)

- c. Explain compensation and benefits provided to the governing board, including any benefits that continue after term of service.

No fringe benefits are provided for board members; however, they are paid \$100 per meeting for a maximum of two meetings per month. They are not paid for committee meeting service. The district will pay for attendance at conference or workshops.

- d. How frequently does the governing body meet?

The board meets on the first Tuesday of each month. Special meetings may be called as needed.

- e. Describe rules, procedures, and programs for public notification of agency operations, meetings, programs, etc. How is public participation encouraged? Are meetings accessible to the public, i.e., evening meetings, adequate meeting space, etc.?

The board encourages the public's involvement in all meetings. Monthly meeting agendas are submitted to *The Sacramento Bee*, the *Carmichael Times*, and copies are posted at the district office and in the lobby of the community centers. A notice of the regularly scheduled meetings is included in the periodic newsletters, published in *The Bee* and on the district's website (<http://www.morpd.com/>).

The district's activities and resources are distributed to district residents in a newsletter, published periodically and distributed with an appropriate edition of *The Bee*. Program and trip flyers are distributed through area schools and Community Center specific newsletters are made available monthly at the respective centers and on the district website.

Regular meetings are held in the conference room at the district office. There is adequate, accessible seating (capacity of 38) for most regular meetings, with ADA accessible restrooms. When it is anticipated that a large number of people may be attending, meetings are scheduled at a community center. Meetings are held at 6:30 p.m. for the convenience of residents who wish to attend without incurring a late night commitment.

The staff and board have an informal policy of extending personal invitations if an agenda item is of interest to a person and/or community group.

The board will relocate a meeting to accommodate a neighborhood if there is an item of interest to a large group in a certain neighborhood within the district.

f. Describe public outreach efforts, (i.e., newsletters, bill inserts, website, etc.)

A notice of our regular meetings, with an invitation to request an agenda is posted on our website and included in our periodic newsletter. Public notices of agendas are distributed to local newspapers and posted at the district office and community center.

g. Describe means of compliance with the Ralph M. Brown Act and the Political Reform Act. Describe grand jury or law enforcement agency investigations, if any.

The District complies with State conflict of interest disclosure laws and The Brown Act. Leadership staff and board members have participated in CSDA's Special District Governance Academy, with an emphasis on Brown Act compliance and issues that are integral to all special districts, including ethical training and practices.

The district has not been a party to grand jury investigations. Its dealings with law enforcement agency investigations primarily are related to incidents of vandalism in district parks.

h. Describe agency's prior involvement in a re-organization (i.e., consolidation, merger, etc.) if applicable. Explain opportunities and obstacles for future reorganizations. Provide copies of any relevant studies on reorganization that agency has conducted and summarize outcomes.

There have been several attempts over the years to unite or join the Mission Oaks district with two or more districts into a single new successor district.

The board and staff are able to justify consolidation only if there are financial savings and enhancement of services.

Since the 1970's, there have been several attempts to consolidate with one or more local park districts, including one effort by the county to have most of the Sacramento area districts incorporated into one agency.

Upon request, the Mission Oaks board always has been willing to consider the benefits of consolidation, determine what the affected agencies would bring to the negotiating table, and discuss the advantages and disadvantages from all perspectives. Recent efforts have been unsuccessful primarily due to inability to come to any accord or to the board and staff's perception that it would not be in the best interest of the Mission Oaks district residents.

Consolidation was discussed as an issue in 1994-95 which involved a series of meetings that resulted in a broad network of functional consolidation of equipment and services.

In 2002, the board's ad hoc Consolidation Study Committee met with a like committee of the Fulton-El Camino Recreation and Park District regarding the potential for consolidation of the two agencies. The board committee and staff met several times; however, in July 2003, it was determined that an aggressive study of consolidation be suspended, due to the pending retirement of Mission Oaks' executive director, and the hiring of a new director beginning in December or January. In addition, the Mission Oaks board and staff believed they needed to expend their time and energy on crucial fiscal issues, especially in regards to the possibility of seeking a modified assessment district, which would have required their primary attention in the coming years.

At the same time, the district continued its participation in functional consolidation for adult sports leagues and shared use of equipment with the Fulton-El Camino and Carmichael Recreation and Park Districts, as well as cooperative recreation programming with other local park districts.

In October 2003, the Carmichael Recreation and Park District (a dependent special district, similar to Mission Oaks district) approached our board with an invitation for "an open discussion on the concept of a possible consolidation between our districts". The Mission Oaks directors responded that they chose to defer discussion of the Carmichael proposal, as the district was in the process of considering feasibility measures to enhance our revenue, which requires a strong commitment to sustaining existing assets and resources.

Our board strongly believes that our residents would consider it our primary responsibility to maintain the high level of maintenance and improvement of our own facilities, and that any consolidation effort should be a partnership of equal agencies in such matters as philosophies regarding provision of recreation and services, financial status, and maintenance and development

standards. The board requested that, before any decision to discuss consolidation be made, that they receive information on the Carmichael district's finances and the state of its parks and facilities and master plan.

It was thought that, although there might be some merit to consolidation; it was an inopportune time for Mission Oaks, as the district had begun the process of renewing the assessment prior to its sunset in January 2009.

The results of a survey distributed by the county on behalf of the Carmichael Community Action Plan, which asked residents to respond to a question regarding the consolidation of recreation and park districts, and a similar survey and request for a response for the Arden-Arcade Community Action Plan offered no persuasive or compelling demand for consolidation from respondents.

i. Describe level of public participation, and ways that staff and directors are accessible to the public.

Residents are able to contact district staff who are available and accessible to the public during the published business hours. In addition, key employees have shared their cellular phone numbers and e-mail addresses with key members of the community, such as school administrators, representative of athletic organizations, legislators, members of the board of supervisors, homeowner association officials, park neighbors and relevant county and state departments. District residents also have access to staff during regular and off hours by email as each staff member's email address is available online.

All board meetings and special meetings are posted in advance of any meeting in freely accessible locations, as well as the district's website. Board members attend public meetings that might have an effect on the district and its operations, and appear at neighborhood association meetings upon request.

Residents who request to contact board members outside of a public meeting are requested to provide their phone numbers to a staff person who will contact the board members and request he/she return the call at his/her earliest convenience.

j. Describe ability of public to access information and agency reports.

Residents may learn about the district and its operations through newsletters and brochures, which are published and distributed periodically throughout the year. In addition, program and services information can be found on our website or by contacting the District Office. Monthly board reports are made available upon request and at the board meetings.

- k. Describe existing and new government options to provide for logical service boundaries in the local and regional context. **N/A**
- l. Describe opportunities to eliminate service islands, peninsulas and other illogical service areas. **N/A**

V. OPPORTUNITIES FOR SHARED FACILITIES COST/AVOIDANCE OPPORTUNITIES

- a. Describe existing and potential shared facilities, infrastructure, and staff. Describe any joint power agreements or other agreements for sharing resources with other agencies.

The District holds joint use agreements with the San Juan Unified School District for use of school facilities, maintenance of school parks, an agreement with Sacramento County for the maintenance of the Hazelwood Greens Stormwater Retention Basin, agreement with the Lutheran Church of Our Redeemer for use of classrooms for the district's preschool program; agreement with River Oak Center for Children for joint use and maintenance of parking lot at Valley Oak Park; contract with Alliance for Excellence for afterschool grant fund programming for the Building Bridges Program; a JPA with the Arden Little League for the construction of the snack/bar and restroom building at Valley Oak Park; and a Memorandum of Understanding between the Sunrise and Mission Oaks Recreation and Park Districts for shared construction and use of radio tower to facilitate computerized irrigation system.

Mission Oaks is always proactively seeking opportunities to partner with community groups and other agencies.

- b. Describe existing and *potential* joint use planning.

Mission Oaks participated in a joint planning project with the Del Paso Manor School and Homeowners Association for a Safe Routes to Schools Grant. By further partnering with Sacramento County the grant was realized and the community now benefits from sidewalks and ADA improvements around the entire school property, new street lighting, shade trees and other improvements. The district has an ongoing commitment to provide better programs for the public by planning with a variety of agencies including County Health and Human Services and the California Department for Public Health. We are working currently with the Sacramento County on Childhood Obesity Prevention Coalition and many other organizations.

- c. Describe existing and/or potential duplication with existing or planned facilities or services with other agencies.

There is no perceived duplication. We work aggressively with our neighboring agencies to avoid duplication and to publicize each other's programs and activities when possible if we are not offering a similar program. We also routinely refer the public to other programs and facilities as a courtesy when they call us for information.

Many agencies are listed on our website with links to further service the public.

- d. Describe availability of any excess capacity to serve customers or other agencies. Describe any economies of scale in shared purchasing power, and any other cost sharing opportunities that can be implemented by joint use or sharing resources.

The district shares joint use of facilities with the San Juan Unified School District, and shares adult athletic programming with local recreation and park districts.

- e. Describe any duplication (overlap), or gaps in services or boundaries. N/A
- f. Describe ongoing cost avoidance practices. (Contract vs. in house, is bidding process cost effective and efficient)?

The district's bidding process for capital improvement projects places an emphasis on the lowest responsive bidder. Acceptance of the lowest bid is contingent on staff's research of past record on other projects and the company's past work history with the district.

Staff will analyze the cost of work projects that do not meet the bid process requirements to determine whether they can be completed less expensively in-house as opposed to contracting out the work.

The district has a five-year landscape maintenance contract, renewable annually at the request of either party. We have been fortunate to have had dependable businesses, with whom we have been able to work compatibly to the joint benefit of both the district and the contractor.

g. Describe opportunities to reduce overhead and operational costs.

The District pursues every opportunity to reduce expenses, where applicable.

In October 2004, we took advantage of an offer from a play equipment vendor to purchase equipment (valued at \$43,000) for a discounted sale price of \$28,000. The equipment was displayed at the 2004 NRPA Congress and Exposition in Reno, and the company found it more cost effective to sell equipment displayed at large venues, such as this, rather than shipping it back to the factory. We have taken advantage of such opportunities in the past. Since that time we have been able to take advantage of show specials realizing up to a 50% discount for park amenities.

The district has a sustained relationship with several local construction companies for maintenance and development projects that do not meet the procurement guidelines set for public construction projects. This affords a reciprocal association that benefits the district and the company both: the company can anticipate a steady flow of lesser park and facility projects to keep their crews busy, and the district can expect a high level of commitment from a company that is familiar and supportive of the district's needs and expectations for quality of work.

We have worked closely with park neighbors and coordinate "Community Builds" of many playground projects saving over \$250,000 in just a few short years. These projects have also served as excellent Eagle Scout Learning Opportunities.

h. Describe opportunities to reduce duplication of infrastructure.

The district relies heavily on the use of facilities with the San Juan Unified School District for its youth and teen programs. There is no duplication of infrastructure but a shortage of such.

i. Identify areas outside agency boundary, which could be efficiently served by existing or proposed agency facilities.

Our programs and facilities effectively and efficiently serve residents in areas outside the district's boundaries. We have expanded the youth sports to include

the Jonas Salk Middle School, which is in the Arden Manor Recreation and Park District. These program expansions were at the request of other recreation and park districts that had insufficient staff to handle their own programs. In addition, our agreement with the school district for the Building Bridges grant funded program includes Cameron Ranch School, which is in the Arcade Creek Recreation and Park District.

Past informal surveys indicated that participation in the programs and services at the Mission Oaks Community Center included a majority from outside our boundaries and include residents of the Carmichael, Orangevale, Sunrise, Fulton-El Camino, Fair Oaks, Arden Park, Arden Manor, Arcade Creek park districts. The afternoon dances attract residents from these districts and surrounding cities, including Sacramento, Citrus Heights, North Highlands, Roseville, and Rocklin.

- j. Identify areas within agency boundary, which could be more efficiently served by another agency.

None can be identified.

- k. Are your service plans compatible with other local agencies? Explain.

We believe our service plans are compatible. (Please refer to the district's Master Plans). District staff often seeks information from other agencies regarding their methods of service plans.

VI. ADDITIONAL INFORMATION

Please provide any additional information that you would like LAFCo to evaluate as part of your agency's Municipal Service Review.

- a. Indicate any information relevant to your agency, which LAFCo should obtain from other agencies. **N/A**
- b. Please forward any publications your agency has produced that will assist LAFCo staff in a review of your agency's service provision.

The following provided on CD or hard copy

- Current Organizational Chart (FY 08-09 attachment) Most Recently Adopted Budget – (Fiscal Year 08-09 and Preliminary 09-10 attached)
- Most Recently Completed Financial Audit Report (FY 06-07 attached)
- Annual Report (Monthly Board Reports available only, available upon request)

Municipal Service Review Worksheet and Questionnaire

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- Strategic Plan/Master Plan (2009 Draft Strategic Plan and 2000 Master Plan available)
- Copies of Current and Past Year's Newsletters (pdf. Versions available)
- Any other Relevant Supporting Documents
 - Cost Recovery Matrix
 - Appendix 1/4000), which is part of the district's Policies and Procedures Manual.
 - Summary of completed assessment district capital outlay projects by PowerPoint.

