

Oregon Parks and Recreation Commission

September 18, 2008

Agenda Item: 17

Information

Topic: Introduction to Comprehensive Planning Policy

Presented by: Kyleen Stone

Background: The commission adopted OPRD's Park Acquisition Policy on March 13, 2008. As follow-up to the acquisition process, Director Wood signed OPRD's Comprehensive Park Planning Policy on April 1, 2008. This policy guides staff once an acquisition has been completed.

Because of Oregon's land-use laws, OPRD has a long tradition of planning and public involvement for park property use. State rules dictate that OPRD seek local jurisdictional approvals for all park master plans. This allows OPRD to place parks in areas that would otherwise have land-use constraints. We utilize the planning model pioneered by Ian McHarg, University of Pennsylvania, where we identify areas of sensitivity and work to avoid those areas for park development. We recently codified this planning approach into policy through OPRD Policy OP 00-31. This policy details the staff roles from planning through to construction, operational resource management and broad-based recreation programming including trails, camping/day use facilities, and interpretation.

The planning process described in our policy includes the following steps:

1. Identify intent and purpose for the park property.
2. Identify property assets and liabilities including existing facilities and infrastructure, inventories of vegetative cover, wetlands, sensitive species, fish/wildlife occurrence/use, water features, invasives, soils, topography, historic/prehistoric landscapes, above ground historic features, archaeological features, historic significance, and viewpoints.
3. Identify existing and potential recreational uses and trends in the region.
4. Identify interpretive themes and messages, audiences, and delivery modes.
5. Identify land-use issues such as zones and overlays, jurisdictions and special permitting.
6. Scope issues with stakeholders and the public.
7. Complete site and facility design concepts. These are generally broad-based and include information about areas within the property where certain uses would occur and supporting facilities required such as roads, buildings, restrooms, and trails.
8. Document historic and natural resource management concepts and guidelines for park development and operation.
9. Seek additional public involvement, commission approval and local jurisdiction approvals.
10. Adopt the master plan through Oregon Administrative Rule.

After a master plan is approved, project development begins:

1. Complete detailed work scope for each development project including preliminary site and building designs.
2. Estimate costs and develop a financing strategy.
3. Develop resource management project prescriptions.
4. Develop detailed designs for interpretive media.
5. Complete plans and specifications for construction and build the project.
6. Seek staffing and funding to operate the park and maintain the property.

The process is comprehensive and includes an interdisciplinary team of OPRD staff and consultants including the Region Manager, the Planning Manager, the Project Manager, the Natural Resource Manager, the Cultural Resource Manager, the Recreation Programs Manager, and the Engineering Manager.

Action Requested: None.

Prior Action by Commission: March 13, 2008 adoption of Acquisition policy.

Prepared by: Kyleen Stone



OREGON PARKS & RECREATION
DEPARTMENT
Management Procedure

NUMBER OP 00-31

PAGE 1 OF 4

EFFECTIVE DATE: April 1, 2008

APPROVED

[Signature]

AUTHORITY

SUBJECT

Comprehensive Park Planning

ORS 390.180(b)

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PURPOSE: To establish a comprehensive planning approach for park properties that includes the statutory requirements for park master plans, plus integrated support for interpretation, management of natural, scenic and cultural resources, project development, preliminary design, staffing and operations.

Background The Oregon Parks and Recreation Department has been engaged in master planning for state park properties for many years. The master planning process, established in statute and rule, provides the department guidance and direction for the future development of park lands and includes a well documented public process designed to incorporate input from stakeholders and the general public on future development and use of a particular park. While the master planning process does include an inventory and documentation of important natural, scenic and cultural/historic resources, recreational and interpretive needs for the park and guidelines for resource management, it does not include specific management prescriptions for protecting, restoring, and interpreting those resources. Nor does it include preliminary design and programming, constraint and cost analysis or plans for future staffing or other operational aspects required for developing, managing and operating a property once the master plan is implemented.

The goal of this directive is to develop a comprehensive planning process to assist the department in forecasting future budget needs, establishing expectations and management objectives and providing direction to park managers and other department staff with regard to scheduling, sequencing, and workload projection.

Process: The executive team comprised of the Director, Assistant Directors, and Region Managers will determine priorities for the development of comprehensive park plans for the agency based on recommendations from the Planning Manager. Once that schedule is determined, the Region Manager will be responsible for insuring completion of the comprehensive park plans in his/her region, working with the Planning Division to develop and integrate the traditional master plan with supportive plans for interpretation, management of natural and cultural resources, development, staffing and operations. The Planning Manager will assemble interdisciplinary, cross divisional staff teams to complete the work for Region and Director approval. The process will be reviewed and refined periodically or as needed.

Comprehensive Park Planning Process/Chapters

I. Master Plan Completion

A. Set up Team and Schedule

Planning Manager to work with Region Manager to determine team roles, leads, tasks and schedule.

B. Complete Plan Background

1. Brief description of the park location and context about the area.
2. Describe the department's intent/purpose for park and plan.
3. Describe the kind of experiences we want visitors to have at this park. (Recreational, orientational, interpretive/educational.)
4. Reference any relevant direction from other OPRD and regional plans.
5. Provide a description of plan completion and approval process, mandates, etc..

C. Complete Plan Research Inventories

1. Natural Resources (Inventory current vegetative cover, wetlands, sensitive species, fish/wildlife occurrence/use, water features, weeds, soils, slopes.)
2. Cultural Resources (Inventory historic/prehistoric landscapes, sites & structures, above ground and archeological, contributing elements, and significance.)
3. Scenic Resources (Inventory character settings, viewpoints and view corridors)
4. Existing park facilities and infrastructure summary.
5. Recreational Resources (Identify current regional and park activities, opportunities for new activities, regional trends, and park needs.)
6. Interpretation (Identify themes and messages, audiences, and delivery modes)
7. Operational Needs (Identify infrastructure, orientation, administrative needs.)
8. Land Use (Identify jurisdictions, zones and overlays, special permitting.)

D. Complete a Suitability Analysis

Based on resource constraints research, identify those areas of the park that can support use/development without harming sensitive resources, or that can support mitigation.

E. Conduct a Series of Issues Discussions

Conduct a discussion of desired future park use and management issues, with an advisory committee of stakeholders, Integrated Professionals Team, Park Crew, Exec Team/Program Managers, focus groups and general public. Base issues discussion on the areas that master plans affect, the intended use for the park and intended experiences for visitors to the park. Record issues/comments in a narrative.

F. Complete Plan Goals/Objectives Statements

Based on the research, discussions and background above, complete plan goals and objectives including, but not limited to: natural, cultural and scenic resource management; intended interpretive and recreational experiences; access, orientation and circulation; providing administrative support; working with partners and neighbors; and expanding the park.

G. Identify Opportunity Areas

Identify orientation, interpretive, recreational and administrative opportunity areas that can fit with resource protection intent for the park and also take advantage of appropriate visitor capture, sequencing, staging and support intentions. This will include identifying desired interpretive messages and delivery strategies, orientation strategies, and appropriate locations for providing for intended recreational activities and needed administrative support.

H. Complete Site and Facility Design Concepts

This will include a park-wide roads and trails plan and a concept plan for each park use area. Each park use area concept will describe and map roads, trails, open spaces, vegetated areas, buildings, camping pads, parking lots and major site furnishings, sign structures, walls, water features and other major design elements. Concept plans will at a minimum indicate the location, general layout and maximum size of all design elements and will define the kind of use of each area. (Administrative, day use for example.)

1. State over-all design guidelines/criteria.
2. Identify area functional needs (programming).
3. Write design intent for roads/trails network and each use area concept.
4. Map road/trails network and each use concept area.
5. List development projects for each concept area with reviews requirements.

I. Complete Integrated Resource Management Concepts and Guidelines

1. Complete a narrative and map describing the desired outcome for management of these resources, based on the department's intent for the park and it's resources, and intended visitor experiences.
2. Describe key management guidelines to be used as a basis for later completion of detailed prescriptions/actions.

J. Public Involvement and Local Jurisdictional Approval Process

Complete the involvement and approval process as per state rule.

II. Project Development Completion

A. Complete a Detailed Workslope for each Development Project

Based on master plan concepts, and biennial and six year project priorities, select projects for next level of evaluation and design. This work will be preparatory for later completion of construction documents.

1. Review and refine programming.
2. Review and update site constraints analysis. Complete detailed surveys, if needed.
3. Complete a permit requirements review. Determine timeline and parameters for compliance.

4. Complete preliminary site and building design, including interpretive facilities, trails and landscape elements according to priorities for development. Look at alternatives including cost estimates. Choose a preferred.
5. Set cost estimate, phasing and scheduling.
6. Consider funding options. Potentially seek grant leverage.
7. Design work can be done through consultants, and/or with landscape architectural and architectural staff.
8. Resolve disagreements at the Region and Program level.

III. Construction Document Completion

A. Complete plans and specifications for construction purposes.

Based on biennial and six year priorities, complete construction documents for projects that have approved funding. Work will be based on the approved master plan and preliminary design.

1. Draft contract language and review with IP Team.
2. Let design contract.
3. Review contract progress with IP Team at 30, 60 and 90%. Incorporate comments.
4. Resolve disagreements at Region, Deputy Director and Director level.
5. Ensure that permits are in place, before pursuing construction contract.

IV. Construction Contract

A. Complete a construction contract and build the project.

Any changes must be consistent with the approved master plan.

V. Review and Refine Process

IP Team would review success of the project after construction is complete and the site has been used for a while. Make recommendations for future project design, process and costing changes.

Other Project Work (to proceed after the Master Plan is completed.)

A. Resource Management Project Prescriptions: Complete detailed project scoping and then detailed project prescriptions for priority natural, cultural and/or scenic management projects. Base projects on concepts and guidelines in the master plan. Complete more detailed inventories and analysis, as needed. This work may be contracted and/or done by resource staff with IP Team involvement.

B. Interpretive Media Detailed Design: Complete detailed interpretive media design in conjunction with facility design (III and IV). Design will be consistent with the master plan and the interpretive facility concepts and guidelines found in the master plan. This work may be contracted and/or done by interpretive staff with IP Team involvement.

C. Staffing and Funding: Complete proposals for needed staff and funding support based on the desired experience for visitors, maintenance standards and proposed level of development. Set up budgets in time for each project and park to be implemented. This work is generally completed by the Region Manager and his/her designees.

Responsibilities:

1. Region Manager:
 - a. Initiate comprehensive park plans scheduled for the region on a biennial and six year basis. Schedule completion through agreement with other Region Managers and the Planning Manager.
 - b. Oversee the Planning Manager, and designated staff, on the completion on the park master plans and related land use approval.
 - c. Oversee the Project Development Manager, and designated staff, on the completion of preliminary plans and cost estimates that follow the master plan.
 - d. Oversee the Natural Resource Manager, and designated staff, and/or field management and staff on the completion of natural resource management plans.
 - e. Oversee the Interpretive Program on completion of interpretive projects.
 - f. Oversee the field management and staff on implementation of facility and interpretive projects, cultural/historic/scenic management and maintenance plans.
2. Master Planning Manager
 - a. Based on Exec Team approved master plan prioritization, facilitate and oversee the completion of each master plan for Region Manager, and Deputy Director and Director approval. Facilitate Commission review and approval to support the Region Manager.

- b. Oversee the master plan team and planning leader for each plan, based on the master planning rule and approved planning outline and product, and with the objective of striving for an integrated approach that is based on the desired experience for visitors and intended purpose of the park.
 - c. Oversee land use approval of the master plan and coordinate with the Region Manager, and with the Deputy Director and Director on progress and results. Address challenges by providing recommended alternatives for the land use process to the Region Manager, Deputy and Director.
 - d. Oversee preparation of an initial phasing and cost estimate assessment for each plan in cooperation with the Project Development Manager.
 - e. Oversee maintenance of web-based information about each master plan and related involvement process and scheduling.
 - f. Maintain background files for master plans including process, consultant reports and maps, stakeholder input, Commission, land use and state rule approvals.
 - g. Oversee Planning Division staff involvement in natural, cultural and scenic resource management plans or prescriptions, landscape design, facility project development, and review and approval of design and development projects for consistency with each master plan. Facilitate any disagreements with other Divisions with the Region Manager, Deputy and Director.
3. Project Development Manager
- a. Oversee completion of initial costs and phasing for each draft master plan, in cooperation with Planning Division team and manager, and Region Manager.
 - b. Oversee completion of preliminary implementation priorities and cost estimates for each biennial and six year planning, design and construction work list, for Exec approval.
 - c. Oversee completion of detailed project development work scopes, based on master plan proposals and parameters. This includes a schematic site plan, elevations and sections, character sketches for sites and buildings associated with each project. Also includes a review of site, program and permitting constraints and requirements, and an assessment of alternatives to meet requirements. Includes cost estimates and scheduling to be used for design/engineering construction document contracting.
 - d. Facilitate any disagreements with other Divisions, Region Manager, Deputy and Director.
4. Natural Resource Manager
- a. Provide natural resource management-related information to Planning Team, by writing draft and final natural resource management concept and guidelines for each master plan.
 - b. Review and comment on master plan proposals and resource guidelines for fit with natural resource management needs and guidelines.
 - c. Oversee completion of natural resource management prescriptions, assist with finding funding and coordinate with Region Manager for completion of projects.
5. Cultural Resource Manager
- a. Review and comment on inventories, analysis and proposals for master plan. Provides staff review of archeological and aboveground survey contract language and products.
 - b. Oversee completion of and use of state parks master plan protocol agreement.
6. Recreation Programs Manager
- a. Oversee interpretive, trails and water trails staff involvement in IP team. Advise on agency direction for Interpretive Program to be incorporated into the master plan intent and purpose.
 - b. Approve interpretive facility-related contract language, master plan chapters and any funding from interpretive program with Region Manager concurrence.
 - c. Approve trail standards resulting from master plan with Region Manager concurrence.
7. Design and Engineering Manager
- a. Ensure that construction documents are consistent with concepts and parameters of master plan and project development workscope.
 - b. Provide construction documents to Planning Manager, Project Development Manager, Recreation Programs Manager and Field Management at 30,60 and 90%. Facilitate any disagreements through Region Manager, Deputy and Director.

The Region Manager is the responsible party for ensuring that all components of the comprehensive master plan are developed and included in the final product.