2018 NRPA AGENCY PERFORMANCE REVIEW

PARK AND RECREATION AGENCY PERFORMANCE BENCHMARKS

NRPA National Recreation and Park Association

Because everyone deserves a great park

BECAUSE EVERYONE DESERVES A GREAT PARK

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EXECUTIVE SUMMARY

The National Recreation and Park Association (NRPA) is pleased to present the *2018 NRPA Agency Performance Review.* This annual report summarizes the key findings from *NRPA Park Metrics*—our benchmarking tool that assists park and recreation professionals in the effective management and planning of their operating resources and capital facilities.

NRPA Park Metrics is a suite of tools that help evaluate your agency's performance so you can more effectively manage and plan operating resources and capital facilities. You can use these tools to easily build customized reports and compare your agency to others to gain more funding support, improve operations and better serve your community.

The *2018 NRPA Agency Performance Review* and *NRPA Park Metrics* together represent the most comprehensive collection of park and recreation benchmarks and insights which inform professionals, key stakeholders and the public on the state of the park and recreation industry. These resources provide all professionals with a variety of tools.

- ***Guidance on the resources dedicated to and performance of parks and recreation.*** How does your local park and recreation agency measure up in terms of providing open space, recreation opportunities and programming relative to your peer agencies? Is your agency properly staffed or sufficiently funded compared to others?
- ***Data that allow informed decisions on the optimal set of service and facility offerings.*** Due to their unique characteristics, park and recreation agencies do not make decisions based on a "one-size-fits-all"standard. These metrics allow park and recreation professionals to compare their agencies with others they view as peers.
- ***Comprehensive data that demonstrate the broad offerings and programming that meet the full definition of parks and recreation.*** The information in this report helps demonstrate to policymakers, key stakeholders, the media and the general public the full breadth of service offerings and responsibilities of park and recreation agencies.

Data is a powerful tool, but not the final answer for what is best for your agency. As park and recreation leaders, you are encouraged to use the *2018 NRPA Agency Performance Review* and *NRPA Park Metrics* to start a conversation with internal colleagues, external consultants and partners, policymakers, and the public regarding the role of parks and recreation in your community. The combination of insights from this report with information about your community's specific needs and experiences will help you identify the optimal mix of facilities and programming your agency should deliver.

You will note that this report does not include "national standards." The reason is simple: no two park and recreation agencies are the same. Different agencies serve different residents with unique needs, desires and challenges. Agencies also have dissimilar funding mechanisms. For example, just because your agency may have more workers per 1,000 residents relative to the "typical" agency does not necessarily mean that your agency should shed staff. It is possible that an agency with more staff offers more hands-on programming because of the unique needs of the population it serves. As communities vary in population and their ability/willingness to fund park and recreation amenities, so too should their park and recreation agencies.

A successful agency is one that tailors its services to meet the needs and demands of its community. Knowing who uses your agency's resources and the characteristics of the residents who may use those resources in the future (including age, race and income trends) are also factors in shaping the optimal mix of facilities and services offered.

Consequently, park and recreation professionals should use the *2018 NRPA Agency Performance Review* in conjunction with other resources, including those that are proprietary to an agency, from NRPA and outside sources. Some additional NRPA resources to consider include:

- ***NRPA Facility Market Reports:*** These customized reports offer key census and marketing data and insights about the market served by your agency. Your agency will gain a

greater understanding of the residents served by a park, aquatic center, recreation center or any other facility. There are two types of *NRPA Facility Market Reports:*
(1) Community Profiles, which contain detailed demographic data on the population living near the facility studied; and (2) Health and Wellness, which focuses on the health characteristics of people living near the facility studied.

- ***NRPA Connect:*** Your peers are the best knowledge base to answer your questions. NRPA Connect is an online professional networking tool that connects you with like-minded park and recreation professionals from across the country and is a valuable source of information about industry-related issues and insights into trends.
- ***Economic Impact of Local Parks:*** Park and recreation agencies not only improve communities through their activities dedicated to conservation, health and wellness and social equity; they are also engines of economic activity. This recently updated study finds that operations and capital spending at America's local park and recreation agencies generated more than $154 billion in annual economic activity and 1.1 million jobs in 2015. The report also includes estimates of the economic impact of operations and capital spending by local and regional park agencies for all 50 states and the District of Columbia.
- ***Americans' Engagement with Parks Survey:*** This annual NRPA research survey looks at Americans' use of parks, the key reasons that drive their use and the greatest challenges preventing greater usage. Each year, the study examines the importance of public parks in Americans' lives, including how parks compare to other services and offerings of local governments. Recent findings show Americans typically visit local park and recreation facilities twice a month, nine in ten Americans agree that parks and recreation is an important local government service, and 85 percent of people consider high-quality park and recreation amenities as a principal factor when choosing a place to live.
- ***Local Government Officials' Perceptions of Parks and Recreation:*** The study captures the views and priorities of elected and appointed local government officials regarding park and recreation services. While public officials see parks and recreation as a critical solution to many of their top concerns, they do not perceive park and recreation agencies as important contributors to their biggest day-to-day concern: economic development. Agencies that contribute more readily to the attraction and retention of businesses to a community are likely to benefit from greater and steadier funding from their local governments.
- ***NRPA Park and Recreation Salary Survey:*** Comprehensive compensation data can assist park and recreation agency leaders in attracting the best staff. This survey report features detailed base salary and bonus data for five senior-level park and recreation agency positions. Also included are sample job descriptions for each of these positions and organization charts from 20 park and recreation agencies.
- ***Parks & Recreation magazine:*** Each issue of NRPA's monthly flagship magazine features content on a number of topics, including conservation, health and wellness, social equity, advocacy, research, law review and operations.

How to Use the *2018 NRPA Agency Performance Review* and *NRPA Park Metrics*

Most of the data in The *2018 NRPA Agency Performance Review* are presented with the medians, along with results at the lower-quartile (lowest 25 percent) and upper-quartile (highest 25 percent). The data allow for insights into where your agency stands compared not only to typical agencies (i.e., those at the median values) but also to the full spectrum of agencies at both the high and low quartiles. Many metrics include the top-line figures as well as certain cross-tabulations of jurisdiction population or population density. A more comprehensive set of cross-tabulations is available as interactive tables at www.NRPA.org/metrics.

While the *NRPA Agency Performance Review* provides data on "typical" agencies, you can customize key metrics using *NRPA Park Metrics* to compare characteristics of your agency to those of its peers. This may include filtering by agency type, size and geographic region. You can enhance this experience even further by entering your agency's data into *NRPA Park Metrics*, and then generate reports that compare your agency's data with the key metrics of agencies throughout the United States.

The *2018 NRPA Agency Performance Review* contains data from 1,069 park and recreation agencies across the United States as reported between 2015 and 2017.

Note: *Not all agencies answered every survey question.*

2018 NRPA AGENCY PERFORMANCE REVIEW KEY FINDINGS

OPERATING EXPENDITURE PER CAPITA: $78.26/YEAR

REVENUE-TO-OPERATING EXPENDITURE: 28 PERCENT

FULL-TIME EQUIVALENT EMPLOYEES (FTES) PER 10,000 RESIDENTS: 7.9

ACRES OF PARK LAND PER 1,000 RESIDENTS: 10.1

RESIDENTS PER PARK: 2114

AGENCIES OFFERING SUMMER CAMPS: 84%

AGENCIES OFFERING AFTER-SCHOOL CARE: 55%

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PARK FACILITIES

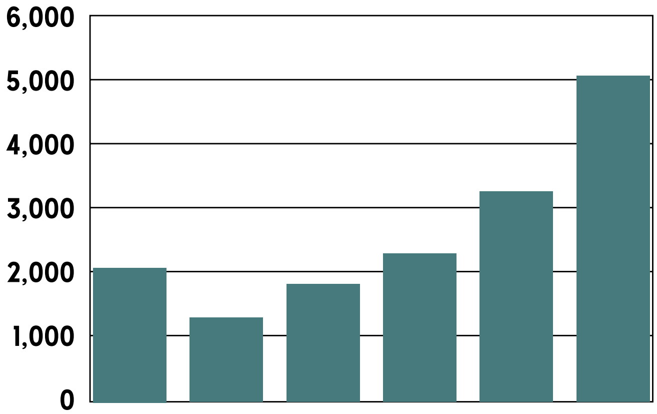
America's local and regional park agencies differ greatly in size and facility offerings. The typical agency participating in *NRPA Park Metrics* serves a jurisdiction (e.g., a town, city, county and/or region) of 36,000 people. Other agencies serve a population of just a few thousand people; still others are the primary recreation resources for millions of people.

Naturally, the offerings of these agencies vary as much as the markets they serve. The typical agency has 18 parks comprising a total of 413 acres under its watch. When one includes non-park facilities, the median number of parks and non-park facilities increases to 25 encompassing 500 acres.

At the typical agency, there is one park for every 2,114 residents. The number of people served per park rises as the population of the town, city, county or region served by the agency increases. For agencies in jurisdictions with fewer than 20,000 residents, there is one park for every 1,318 residents. The ratio increases to one park for every 2,326 residents in jurisdictions with a population of 50,000 to 99,999 and rises further to one park for every 5,107 people at agencies serving areas with a population greater than 250,000.

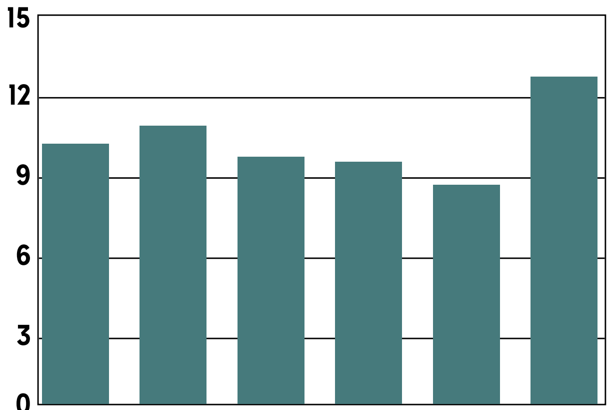
The typical park and recreation agency oversees 10.1 acres of park land for every 1,000 residents in its jurisdiction. The smallest agencies—those serving fewer than 20,000 residents—typically have 10.8 acres per 1,000 residents. That ratio increases to 12.7 acres per 1,000 residents in jurisdictions where agencies serve a population greater than 250,000 people. Agencies serving jurisdictions with populations between 100,000 and 250,000 have 8.5 acres of park land per 1,000 residents.

FIGURE 1: RESIDENTS PER PARK (BY JURISDICTION POPULATION)



	ALL AGENCIES	LESS THAN 20,000	20,000 TO 49,999	50,000 TO 99,999	100,000 to 250,000	MORE THAN 250,000
MEDIAN	2,114	1,318	1,849	2,326	3,300	5,107
LOWER QUARTILE	1,233	811	1,213	1,501	1,886	2,744
UPPER QUARTILE	4,451	2,057	3,539	4,458	6,353	13,878

FIGURE 2: ACRES OF PARK LAND PER 1,000 RESIDENTS (BY JURISDICTION POPULATION)



	ALL AGENCIES	LESS THAN 20,000	20,000 TO 49,999	50,000 TO 99,999	100,000 to 250,000	MORE THAN 250,000
MEDIAN	10.1	10.8	9.6	9.4	8.5	12.7
LOWER QUARTILE	5.1	4.9	5.4	5.1	4.1	6.2
UPPER QUARTILE	17.4	18.0	17.5	15.0	15.6	18.1

Park and recreation agencies offer a wide variety of facilities and features. **An overwhelming majority of park and recreation agencies includes playgrounds (92 percent) and basketball courts (83 percent) in their portfolio of outdoor assets.** At least 50 percent of agencies have diamond fields for baseball and/or softball, tennis courts, outdoor swimming pools, multipurpose rectangular fields and dog parks.

Also, the typical park and recreation agency that manages or maintains trails for walking, hiking, running and/or biking has 10.0 miles of trails in its network. Agencies serving more than 250,000 residents have a median of 70.5 miles of trails under their purview.

FIGURE 3: OUTDOOR PARK AND RECREATION FACILITIES—POPULATION PER FACILITY (BY PREVALENCE AND POPULATION PER FACILITY)

		Median Number of Residents per Facility				
			Residents per Square Mile			
	% of Agencies	All Agencies	Less than 500	500 to 1,500	1,501 to 2,500	More than 2,500
Playgrounds	92%	3,600	6,132	3,558	3,000	3,572
Basketball courts	83	7,122	7,869	7,040	6,037	7,350
Tennis courts (outdoor only)	77	4,545	5,462	4,833	4,250	4,578
Diamond fields: baseball - youth	75	6,519	6,628	5,358	6,613	7,770
Diamond fields: softball fields - adult	66	12,000	10,957	9,491	12,083	14,725
Rectangular fields: multi-purpose	63	8,055	9,043	6,158	7,691	9,547
Diamond fields: softball fields – youth	59	9,900	10,495	8,181	9,255	12,121
Diamond fields: baseball - adult	55	18,880	15,000	13,367	18,140	25,179
Dog park	55	41,500	51,804	37,000	40,000	49,665
Swimming pools (outdoor only)	52	31,709	42,344	23,350	31,600	40,218
Totlots	47	12,104	19,766	10,625	14,850	11,301
Rectangular fields: soccer field – youth	47	6,039	5,584	5,082	5,900	8,773
Community gardens	46	27,587	37,571	30,346	28,605	27,042
Rectangular fields: soccer field - adult	42	11,383	10,250	9,833	11,692	15,746
Multiuse courts - basketball, volleyball	38	14,650	12,757	12,105	15,214	18,557
Diamond fields: tee-ball	38	14,511	11,270	12,763	13,045	18,557
Rectangular fields: football field	38	24,742	21,750	19,023	22,615	35,453
Ice rink (outdoor only)	16	17,310	11,168	13,669	17,072	25,500
Multipurpose synthetic field	15	41,719	35,238	20,888	28,728	54,161
Skate park	14	46,850	27,375	40,620	37,607	61,306
Rectangular fields: lacrosse field	11	24,060	12,522	17,500	22,119	29,924
Rectangular fields: cricket field	9	160,000	199,889	288,617	160,000	108,575
Overlay field	6	12,844	10,820	7,200	55,245	15,831
Rectangular fields: field hockey field	4	20,893	20,893	23,034	15,757	22,500

Park and recreation agencies also offer a number of indoor facilities for their residents. **A majority of agencies offers recreation centers, gyms and community centers, while approximately two in five agencies offer senior centers and fitness centers.** The typical agency with a recreation center has one such facility for every 27,375 residents while those agencies with at least one gym have one of those facilities for every 27,334 residents.

FIGURE 4: INDOOR PARK AND RECREATION FACILITIES—POPULATION PER FACILITY (BY PREVALENCE AND POPULATION PER FACILITY)

		Median Number of Residents per Facility				
			Residents per Square Mile			
	% of Agencies	All Agencies	Less than 500	500 to 1,500	1,501 to 2,500	More than 2,500
Recreation centers	57%	27,375	25,000	27,004	24,825	30,853
Gym	55	27,334	21,000	24,250	26,668	30,378
Community centers	54	27,486	24,746	25,625	28,645	29,683
Senior centers	41	45,436	26,750	35,426	44,025	62,700
Fitness center	38	40,602	33,000	37,707	32,339	49,858
Performance amphitheater	30	47,442	43,735	41,254	39,000	70,496
Nature centers	26	99,783	160,380	73,826	63,125	111,296
Ice rink	18	31,709	9,250	24,084	50,175	54,259
Stadiums	17	64,500	27,375	38,941	71,538	120,310
Indoor track	13	49,000	25,000	44,348	49,500	70,757
Teen centers	12	53,490	16,440	48,900	32,550	57,432
Arena	9	56,119	43,879	42,000	72,417	48,000

Note: *Some of these facilities may be included as part of another one. For example, a fitness center may be part of a recreation center*

PROGRAMMING

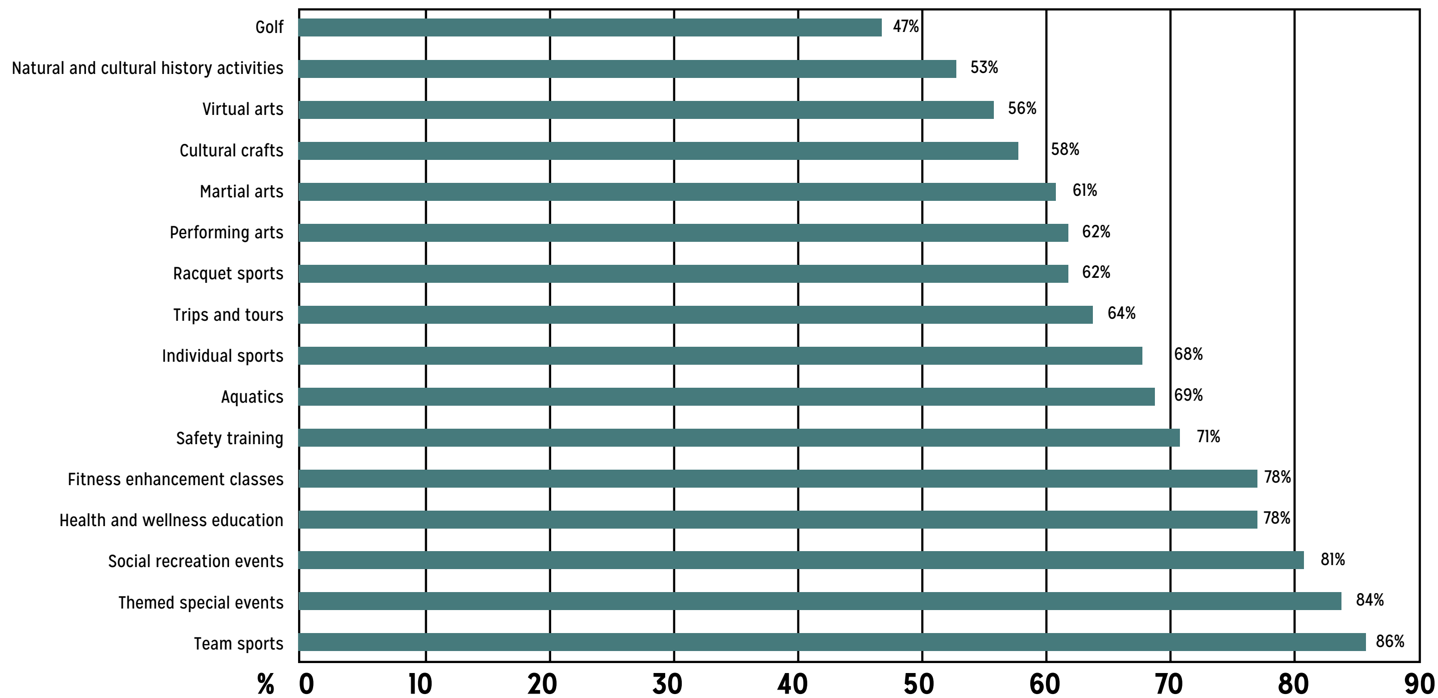
Park and recreation agencies may have thousands, if not millions, of interactions with their residents and visitors each year. The **typical park and recreation agency has nearly 200,000 contacts every year.** But the number of interactions varies dramatically agency to agency. For example, the agency at the 75th percentile has nearly 900,000 annual contacts. Interaction between larger park and recreation agencies and visitors is even greater—the typical agency serving a population of more than 250,000 has 2.3 million contacts per year, with the 75th percentile of larger agencies serving nearly 4.8 million people annually.

"Contacts" is defined in a variety of ways. They can be visits to a local park, running or biking on a local trail, visits to the local recreation center or other interaction with any of the agency's park and recreation facilities. Moreover, a person can have more than one contact; for example, those who annually visit their local aquatic center 10 times and run on the local trail five times would have had 15 contacts with their agency.

Programming is a key method of engagement that drives the use of park and recreation facilities. When associated with registration fees, it is also the largest source of non-tax revenue for most agencies. The typical agency offers 161 programs each year; 95 of those programs are fee-based events. Agencies serving a population of fewer than 20,000 residents typically hold 40 fee-based programs per year, while large jurisdictions of 250,000 or more residents provide nearly 300 fee-based programs annually.

Programming spans many different types of park and recreation activities, with many touching one or more of **NRPA's Three Pillars: Conservation, Health and Wellness, and Social Equity.**

FIGURE 5: PROGRAMMING OFFERED BY PARK AND RECREATION AGENCIES (PERCENT OF AGENCIES)



Park and recreation agencies are leaders in providing services and programming for children, seniors and people with disabilities. Six in seven park and recreation agencies offer summer camp programs for their communities' children, with a majority of agencies also delivering programs for teens and after-school care as a part of their out-of-school-time (OST) offerings. Fewer agencies include before-school care and full daycare as a part of their program offerings. Out-of-school-time programs are commonplace offerings by agencies of nearly all sizes, but most especially by those that serve populations of at least 20,000.

Also, most park and recreation agencies offer specific programming for other segments of their community, including older adults (79 percent) and people with disabilities (62 percent). Again, these services are more commonly offered by agencies serving jurisdictions with at least 20,000 residents. For example, 81 percent of park and recreation agencies in jurisdictions serving 100,000 to 250,000 residents offer programming designed for people with disabilities versus one in three agencies serving communities of fewer than 20,000 residents.

FIGURE 6: TARGETED PROGRAMS FOR CHILDREN, SENIORS AND PEOPLE WITH DISABILITIES (PERCENT OF AGENCIES BY JURISDICTION POPULATION)

	% of Agencies	Less than 20,000	20,000 to 49,999	50,000 to 99,999	100,000 to 250,000	More than 250,000
Summer camp	84%	68%	90%	90%	89%	87%
Specific senior programs	79	70	82	85	85	75
Specific teen programs	63	47	62	73	77	73
Programs for people with disabilities	62	34	63	72	81	75
After-school programs	55	44	46	66	65	72
Preschool	36	27	41	45	35	35
Before-school programs	21	15	20	28	20	31
Full daycare	8	2	9	11	7	16

RESPONSIBILITIES OF PARK AND RECREATION AGENCIES

Park and recreation agencies take on many responsibilities for their communities beyond their "traditional" roles of operating parks and related facilities (95 percent) and providing recreation programming and services (92 percent). In addition to those two functions, the top responsibilities for park and recreation agencies are:

- Have budgetary responsibility for their administrative staff (89 percent of agencies)
- Operate and maintain indoor facilities (88 percent)
- Operate, maintain or manage trails, greenways and/or blueways (75 percent)
- Conduct major jurisdiction-wide special events (73 percent)
- Operate, maintain or manage special purpose parks and open spaces (66 percent)
- Operate and maintain non-park sites (63 percent)
- Administer or manage tournament/event-quality outdoor sports complexes (55 percent)
- Operate, maintain or contract outdoor swim facilities/water parks (48 percent)
- Operate, maintain or contract tennis center facilities (46 percent)
- Administer community gardens (41 percent)

FIGURE 7: KEY RESPONSIBILITIES OF PARK AND RECREATION AGENCIES (PERCENT OF AGENCIES)

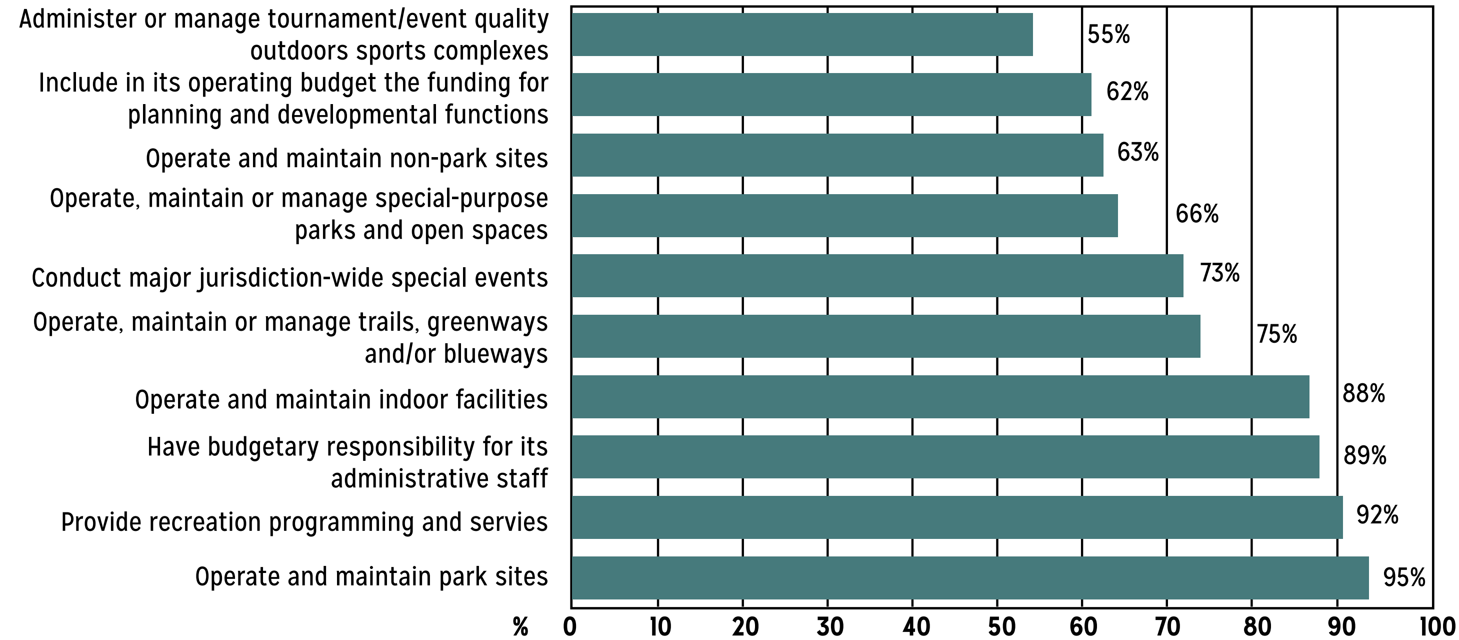


FIGURE 8: OTHER RESPONSIBILITIES OF PARK AND RECREATION AGENCIES (PERCENT OF AGENCIES)

Operate, maintain or contract outdoor swim facilities/water parks	48%
Operate, maintain or contract tennis center facilities	46%
Administer community gardens	41%
Operate, maintain or contract golf courses	32%
Operate, maintain or contract tourism attractions	28%
Operate, maintain or contract indoor swim facilities	25%
Manage large performance outdoor amphitheaters	24%
Administer or manage tournament/event quality indoor sports complexes	19%
Maintain, manage or lease indoor performing arts centers	18%
Administer or manage farmer's markets	18%
Operate, maintain or contract campgrounds	16%
Administer or manage professional or college-type stadiums/arenas/racetracks	9%
Manage or maintain fairgrounds	5%

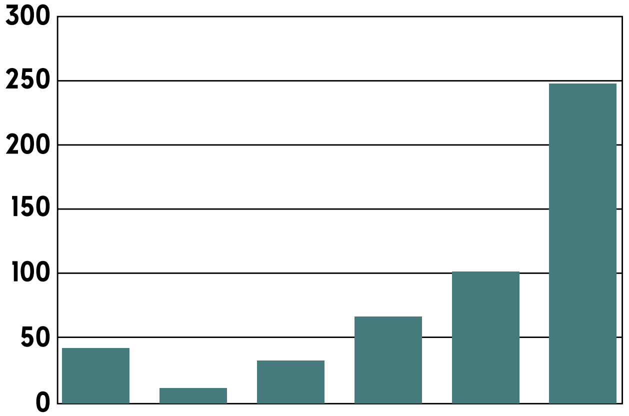
STAFFING

Staffing at the typical park and recreation agency includes 36 full-time equivalent employees (FTEs) that include a mix of both full-time and part-time staff. The size of the staff, however, expands exponentially as the size of the jurisdiction served by the agency expands. Park and recreation agencies serving jurisdictions having a population of fewer than 20,000 have a median of 9.8 FTEs on staff. Agencies serving areas with 50,000 to 99,999 people have a median of 56.5 FTEs, while those serving areas with more than 250,000 residents have a staff with a median of 250 workers.

Median counts of FTEs on staff also positively correlate with the number of parks and acres maintained, the amount of operating expenditures and how many residents an agency serves:

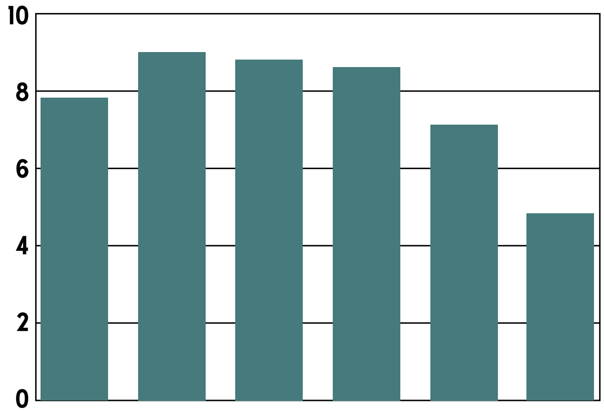
- Number of acres maintained
  - 250 or fewer acres: 15.1 FTEs
  - More than 3,500 acres: 253.6 FTEs
- Number of parks maintained
  - Less than 10 parks: 12.7 FTEs
  - 50 or more parks: 210.0 FTEs
- Operating expenditures
  - Less than $500,000: 3.5 FTEs
  - More than $10 million: 189.0 FTEs
- Population served by the agency
  - Less than 500 people per square mile: 15.9 FTEs
  - More than 2,500 people per square mile: 56.7 FTEs

FIGURE 9: PARK AND RECREATION AGENCY STAFFING: FULL-TIME EQUIVALENTS (BY JURISDICTION POPULATION)



	ALL AGENCIES	LESS THAN 20,000	20,000 TO 49,999	50,000 TO 99,999	100,000 to 250,000	MORE THAN 250,000
MEDIAN	36.0	9.8	27.9	56.5	109.5	250.0
LOWER QUARTILE	12.8	4.8	15.1	28.4	45.7	132.4
UPPER QUARTILE	102.9	18.1	52.2	111.3	205.9	462.5

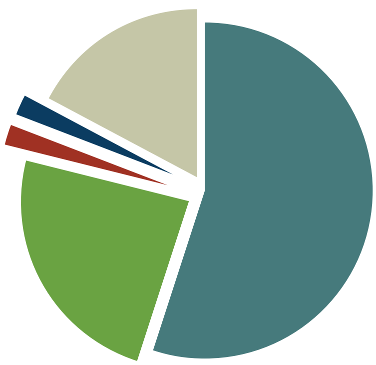
FIGURE 10: PARK AND RECREATION FTEs PER 10,000 RESIDENTS (BY JURISDICTION POPULATION)



	ALL AGENCIES	LESS THAN 20,000	20,000 TO 49,999	50,000 TO 99,999	100,000 to 250,000	MORE THAN 250,000
■ MEDIAN	7.9	9.1	8.9	8.7	7.2	4.8
LOWER QUARTILE	4.0	4.7	5.3	4.0	3.4	2.3
UPPER QUARTILE	15.0	19.8	16.4	15.5	12.8	8.4

FIGURE 11: RESPONSIBILITIES OF PARK AND RECREATION STAFF (AVERAGE PERCENTAGE DISTRIBUTION OF AGENCY FTEs)

55%	OPERATIONS/MAINTENANCE
24%	PROGRAMMING
17%	ADMINISTRATION
2%	CAPITAL DEVELOPMENT
2%	OTHER



One way of gauging agency staffing is to measure it relative to the population of the area that the agency serves. **The typical park and recreation agency has 7.9 FTEs on staff for every 10,000 residents in the jurisdiction served by the agency.** Agencies located in more populated areas tend to have fewer FTEs on staff. Agencies serving jurisdictions with less than 20,000 people have 9.1 FTEs for every 10,000 residents, with this ratio falling to 4.8 FTEs for every 10,000 residents in areas with more than 250,000 people.

The agencies that tend to have more FTEs per residents are those that serve areas of greater population density. Agencies operating in areas with fewer than 500 people per square mile have 3.9 FTEs per 10,000 people served compared to the 10.4 FTEs per 10,000 residents in areas with more than 2,500 people per square mile.

Operations and maintenance is the primary work responsibility for park and recreation professionals. But there are other areas where staff devote their energies. On average, an agency's full-time staff dedicates their time to the following general activities:

- Operations/Maintenance (55 percent)
- Programming (24 percent)
- Administration (17 percent)
- Capital development (two percent)
- Other (two percent)

Just over a third of park and recreation agencies (36 percent) have staff who are covered by a collective bargaining agreement. Union members are more likely to be part of an agency's park and recreation staff at agencies that:

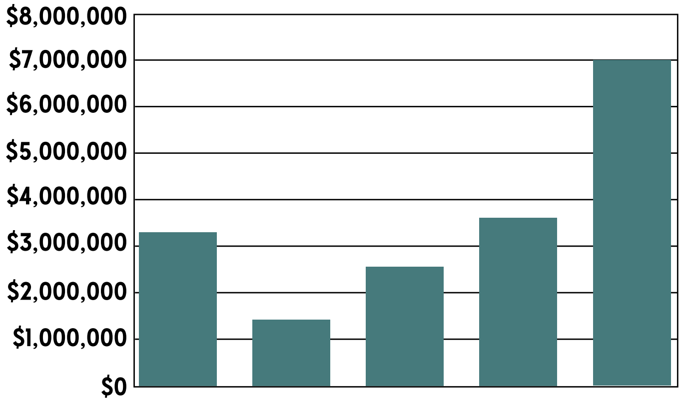
- Have a larger staff: 21 percent of agencies with a staff of fewer than 10 FTEs compared to 51 percent of agencies with 100 or more FTEs
- Serve larger populations: 19 percent of agencies in jurisdictions with fewer than 20,000 people compared to 56 percent of agencies serving more than 250,000 people
- Have more parks: 17 percent of agencies with less than 10 parks compared to 63 percent of agencies with at least 50 parks
- Maintain more park land: 26 percent of agencies that maintain 250 acres or less of park land compared to 59 percent of agencies that maintain more than 3,500 acres of park land

BUDGET AND EXPENDITURES

How does the funding at your park and recreation agency compare with funding levels at other agencies? Does your agency have access to the same level of funding as its peers? Per *NRPA Park Metrics* data, **the typical park agency has annual operating expenditures of $3,313,040.**

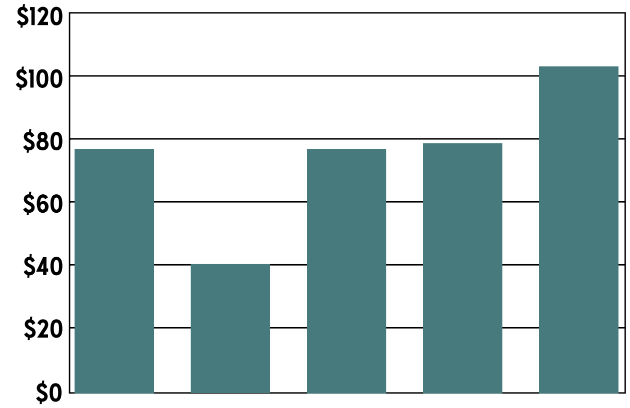
However, the amount of an agency's operating expenditures varies dramatically with the size of the agency—the number of park and non-park acres managed, the population served by the agency, the agency's mission and responsibilities, etc. For example, the median operating expenditure for agencies serving a jurisdiction with fewer than 20,000 residents is $1,009,243 while the median for agencies serving more than 250,000 residents expands to $25,000,000.

FIGURE 12: ANNUAL OPERATING EXPENDITURES (BY POPULATION PER SQUARE MILE)



	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$3,313,040	$1,426,272	$2,571,081	$3,629,020	$7,026,240
LOWER QUARTILE	$1,259,054	$545,254	$1,139,439	$1,410,138	$2,632,982
UPPER QUARTILE	$9,943,000	$3,538,280	$6,825,459	$10,452,622	$18,886,580

FIGURE 13: OPERATING EXPENDITURES PER CAPITA (BY POPULATION PER SQUARE MILE)



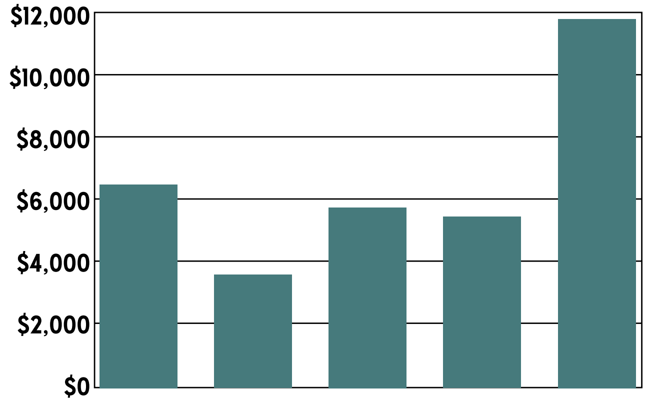
	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$78.26	$41.23	$78.26	$79.95	$104.58
LOWER QUARTILE	$42.09	$16.01	$42.35	$49.98	$60.88
UPPER QUARTILE	$151.00	$86.23	$132.71	$142.58	$203.66

One way to get a better handle on agency funding is to normalize operation expenditure data by the size of the population it serves. **The typical park and recreation agency has annual operating expenses of $78.26 on a per capita basis.** This is less than $7.00 per month for every resident in the jurisdiction served by the agency.

Per capita operations spending is inversely related to the population of the area served: agencies serving jurisdictions with fewer than 20,000 people have a median operating expenditure of $93.17 per capita. That figure declines to $44.01 per resident for agencies serving jurisdictions with more than 250,000 people.

The denser the population served by the agency, the higher the per capita operating expenses: the typical agency serving a jurisdiction with fewer than 500 people per square mile has per capita operating expenses of $41.23, while one serving an area with more than 2,500 people per square mile has a median of $104.58 per resident.

FIGURE 14: OPERATING EXPENDITURES PER ACRE OF PARK AND NON-PARK SITES (BY POPULATION PER SQUARE MILE)

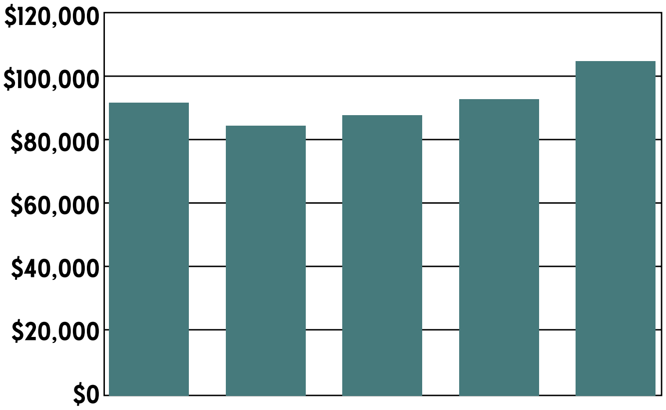


	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$6,589	$3,673	$5,846	$5,550	$11,953
LOWER QUARTILE	$2,907	$1,163	$2,580	$3,075	$5,246
UPPER QUARTILE	$15,999	$9,322	$12,329	$10,703	$28,319

The median level operating expenditures is $6,589 per acre of park and non-park sites managed by the agency. Non-park sites are public spaces—such as lawns at a city hall—not designated as parks but whose maintenance and/or operation costs are borne by the local park and recreation agency. The typical operating expenditure rises with population density. The typical agency serving a jurisdiction with fewer than 500 people per square mile spends $3,673 per acre of park and non-park sites. The median rises to $11,953 per acre at agencies serving a jurisdiction with a population density greater than 2,500 per square mile.

Park and recreation agencies serving larger populations tend to have lower operating expenditures than do agencies serving smaller and medium-sized jurisdictions. The typical park and recreation agency serving a jurisdiction with fewer than 20,000 people spends a median of $7,333 per acre of park and non-park sites. The median declines slightly to $7,386 per acre for agencies serving jurisdictions with populations between 50,000 and 99,999 and then falls precipitously to $3,515 per acre managed at agencies serving jurisdictions greater than 250,000 people.

FIGURE 15: OPERATING EXPENDITURES PER FTE (BY POPULATION PER SQUARE MILE)



	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$92,916	$85,694	$89,031	$94,148	$106,159
LOWER QUARTILE	$68,344	$61,492	$67,465	$71,644	$74,103
UPPER QUARTILE	$134,812	$121,312	$127,515	$140,451	$154,067

The typical park and recreation agency has $92,916 in annual operating expenditures for each employee (as measured by full-time equivalents or FTEs). The denser the jurisdiction served by the agency, the greater the operations expenditures per each FTE. Agencies serving jurisdictions with less than 500 residents per square mile have median operating expenditures of $85,694 for each FTE. The median rises to $106,159 per FTE for agencies serving areas with more than 2,500 residents per square mile. Similarly, the measure rises from $85,758 for agencies with less than 10 parks to $98,128 for agencies with 50 or more parks.

FIGURE 16: DISTRIBUTION OF OPERATING EXPENDITURES (AVERAGE PERCENTAGE DISTRIBUTION OF OPERATING EXPENDITURES)

55%	PERSONNEL SERVICES
38%	OPERATING EXPENSES
5%	CAPITAL EXPENSE NOT IN CIP
2%	OTHER

At the typical park and recreation agency, personnel services account for 55 percent of the operations budget. This includes expenditures for all salaries, wages and benefits for both full-time and non-full-time personnel, along with contracted individuals. Another 38 percent of operating expenditures fund the agency operations, including operational support where the capital fund repays the operating budget, all enterprise funds, interdepartmental transfers, and, in some cases, the capital debt service. Five percent of the operations spending include capital expenses that are not part of the agency's capital improvement plan (CIP). This includes expenditures for capital equipment (e.g., computers, vehicles, large-area mowers, tractors, boats), some periodic cyclical maintenance (carpets, conference chairs, push mowers) and, perhaps, debt services paid from the agency's operating funds.

FIGURE 17: OPERATING EXPENDITURES DEDICATED TO PARKS OR RECREATION (AVERAGE PERCENTAGE DISTRIBUTION OF OPERATING EXPENDITURES)

43%	PARKS
40%	RECREATION
16%	OTHER

The typical park and recreation agency dedicates 43 percent of its annual operating budget to the management and maintenance of parks and open space. Agencies spend a median of 40 percent of their annual operating expenditures to support recreation offerings, including programming (e.g., out-of-school time activities, sports leagues, health and wellness programs) and the facilities for such activities.

AGENCY FUNDING

On average, **park and recreation agencies derive three-fifths of their operating budgets from general fund tax support,** although the percentage of funding from general fund tax support tends to be lower at agencies with larger operating budgets. The second largest source of funding for most agencies is earned/generated revenues, accounting for an average of 25 percent of operating expenditures. Some agencies depend on special, dedicated taxes for part of their budgets. These park and recreation districts obtain the majority of their funding from tax levies dedicated to park and recreation purposes approved by citizen referenda.

The typical park and recreation agency generates $847,396 in non-tax revenues on an annual basis, although this amount can vary greatly based on agency size, services and facilities offered by the agency and the mandate from leadership and policymakers. Agencies with annual operating budgets under $500,000 typically derive $40,000 from non-tax revenues, while those with annual budgets greater than $10 million generate a median of $5.933 million from non-tax revenue sources.

The typical park and recreation agency generates $19.36 in revenue annually for each resident living in the jurisdiction it serves. Agencies operating in lower-density population areas generate less revenue than do those in areas with a higher population density. The typical agency—operating in a jurisdiction with fewer than 500 people per square mile—makes $7.27 in revenue on a per capita basis per year compared to a median of $28.71 for agencies serving a jurisdiction with more than 2,500 people per square mile.

Medium-sized agencies generate more revenue on a per capita basis than do small and large park and recreation agencies. Agencies serving jurisdictions with populations between 50,000 and 99,999 generate a median of $23.63 in revenue per resident each year. Agencies serving jurisdictions with fewer than 20,000 people generate $21.23 in per capita revenue per resident and agencies serving jurisdictions with more than 250,000 people generate $7.16 per capita.

FIGURE 18: SOURCES OF OPERATING EXPENDITURES (AVERAGE PERCENTAGE DISTRIBUTION OF OPERATING EXPENDITURES)

59%	GENERAL FUND TAX SUPPORT
25%	EARNED/GENERATED REVENUE
8%	DEDICATED LEVIES
3%	OTHER DEDICATED TAXES
2%	OTHER
2%	GRANTS
1%	SPONSORSHIPS

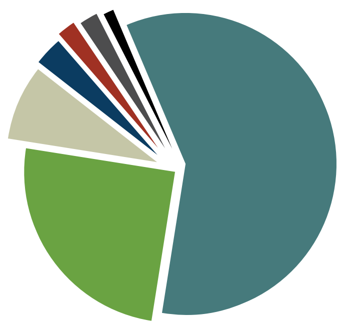
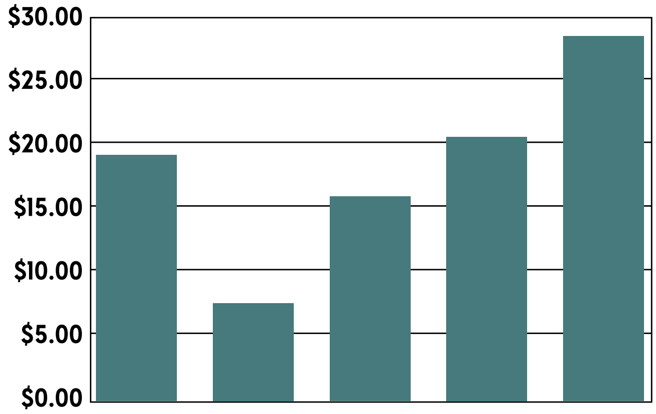
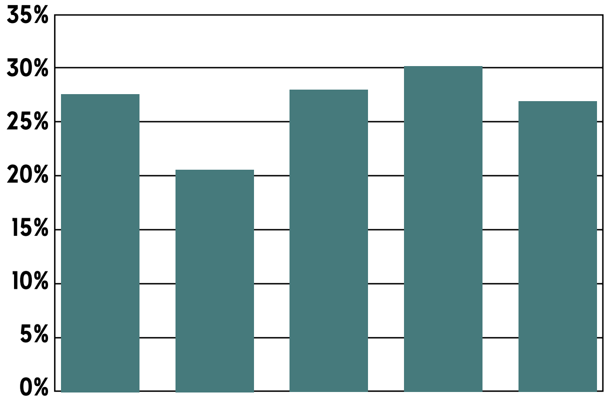


FIGURE 19: PARK AND RECREATION REVENUES PER CAPITA (BY POPULATION PER SQUARE MILE)



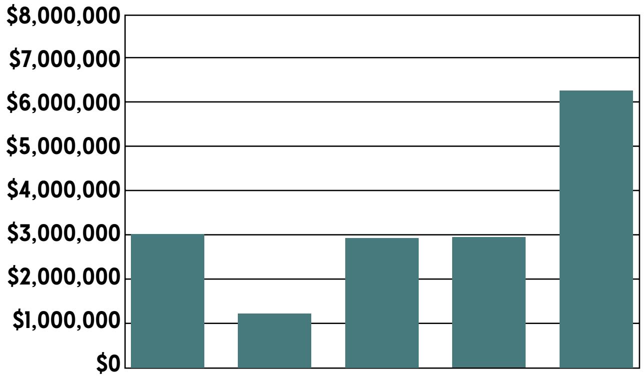
	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$19.36	$7.27	$16.10	$20.79	$28.71
LOWER QUARTILE	$6.17	$1.72	$7.28	$7.63	$8.87
UPPER QUARTILE	$50.62	$27.56	$46.15	$56.25	$69.89

FIGURE 20: REVENUE AS A PERCENTAGE OF OPERATING EXPENDITURES (COST RECOVERY) (PERCENTAGE OF OPERATING EXPENDITURES BY POPULATION PER SQUARE MILE)



	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	28.0%	20.9%	28.4%	30.6%	27.3%
LOWER QUARTILE	12.3%	8.5%	13.0%	13.9%	12.3%
UPPER QUARTILE	46.0%	48.0%	40.6%	47.1%	48.0%

FIGURE 21: FIVE-YEAR CAPITAL BUDGET SPENDING (BY POPULATION PER SQUARE MILE)



	ALL AGENCIES	LESS THAN 500	500 TO 1,500	1,501 TO 2,500	MORE THAN 2,500
MEDIAN	$3,075,880	$1,250,000	$2,982,300	$3,000,000	$6,370,000
LOWER QUARTILE	$624,125	$250,000	$725,000	$516,500	$1,500,000
UPPER QUARTILE	$10,613,790	$4,843,350	$8,917,578	$9,989,536	$21,389,800

Another way to gauge the impact of agency-generated revenue is to examine cost recovery as a percentage of operating expenditures. **The typical agency recovers 28.0 percent of its operating expenditures from non-tax revenues.** The amount of cost recovery differs greatly from agency to agency based on an agency's portfolio of facilities and programming, the demographics of the population served, agency mission and possible revenue mandates from an agency's governing jurisdictions.

At the same time, agencies serving higher-density jurisdictions tend to have higher percentages of cost recovery. Agencies serving an area with fewer than 500 people per square mile have a median percentage cost recovery of just under 21 percent. Cost recovery rises to over 30 percent of operating expenditures for agencies serving jurisdictions with between 1,501 and 2,499 people per square mile.

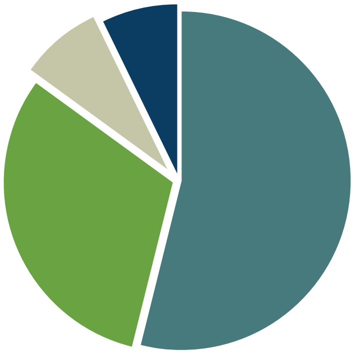
Beyond day-to-day operations, **park and recreation agencies spend a median of $3,075,880 in capital expenditures budgeted over the next five years.** Not surprisingly, the larger the agency, the larger the size of the five-year capital budget. The typical park and recreation agency serving a population of fewer than 20,000 has a median five-year capital budget of $649,750. This increases to $5.4 million at agencies serving jurisdictions with 50,000 to 99,999 people and $34.5 million at agencies serving areas with more than 250,000 residents.

The following are also positively related to the size of five-year capital budgets:

- Number of parks maintained
  - Less than 10 parks: $864,583
  - 50 or more parks: $19.913 million
- Acreage of parks maintained
  - 250 or fewer acres: $1 million
  - More than 3,500 acres: $35.813 million
- Operating budget
  - Annual operating budgets less than $500,000: $110,000
  - Annual operating budgets greater than $10 million: $20.000 million
- Population density
  - Less than 500 people per square mile: $1.250 million
  - More than 2,500 people per square mile: $6.370 million

FIGURE 22: TARGETS FOR CAPITAL EXPENDITURES (AVERAGE PERCENTAGE DISTRIBUTION OF CAPITAL EXPENDITURES)

54%	RENOVATION
31%	NEW DEVELOPMENT
7%	ACQUISITION
8%	OTHER



Park and recreation agencies designate their capital expenditures to a variety of areas. **On average, just over half of a capital budget is designated for renovation, while 31 percent is geared toward new development.** At larger park and recreation agencies, new development is the focus of a greater percentage of capital budgets. At agencies serving jurisdictions with more than 250,000 residents, 31 percent of capital budgets is for new development, while 52 percent is for renovating current properties.

NEW THREATS... BUT ALSO NEW OPPORTUNITIES

While the *2018 NRPA Agency Performance Review* focuses on current performance benchmarks, a look at present-day uncertainties and future trends and prospects also should be part of park and recreation professionals' decision-making.

Strong Public Support for Parks, More Modest Backing from Public Officials

Recent NRPA studies have shown consistently solid support for public parks and recreation. Nine in ten respondents to the *2017 NRPA Americans' Engagement with Public Parks Survey* agreed that parks and recreation is an important service provided by their local government. This level of support is comparable to that for public safety, education and transportation. Three-quarters of respondents to the *2016 NRPA Americans' Engagement with Public Parks Survey* indicated they would support their local governments increasing their financial contribution to their local park and recreation agencies.

However, the support for public parks and their funding is a bit more modest among government officials. While 99 percent of the elected and appointed government officials responding to a recent Penn State University survey commissioned by NRPA agree that their communities benefit from public parks, they also see parks and recreation as only a moderately important local government service. Consequently, they consider parks and recreation as the most discretionary line item in their budgets. During good fiscal times, these officials likely direct extra tax receipts to their local park and recreation agency. Conversely, when officials must cut their city, town or county budgets, the local park and recreation agency is often targeted for the largest budget cut.

The Result: Volatile General Funding Support and Increasing Demand for Self-Generated Revenue

Many local governments across the country appear to waver in providing general fund support for their park and recreation systems. This trend is likely to build as municipal governments struggle to keep up with inflationary pressures and long-term debt obligations, as well as deal with residents averse to higher taxes. Since the Great Recession of 2008, the percentage of tax-supported funding of parks and recreation has experienced a slow, steady decline and, in response, many agencies have turned to fees, charges and other generated revenue to make up for funding shortfalls.

As noted earlier, the typical agency recovers 28 percent of its operating budget through generated revenue. More startling is the fact that 22 percent of agencies are generating cost recovery levels of 50 percent or more. On the one hand, this trend bodes well for park and recreation agencies in weathering economic downturns and further reductions in general funds. On the other hand, inflated entry and registration fees can price-out less fortunate residents of the many benefits of parks and recreation.

A recent proposal of the County Executive of Milwaukee County (WI) to raise revenues by installing new parking meters in popular lake-front parks was rejected vociferously by county residents. Milwaukee County already recovers 50 percent of its operating costs, with the goal to increase cost recovery further to 62 percent in 2019 and to 75 percent in 2020. Increasing fiscal pressures and middling support for parks and recreation by public officials will continue to weigh heavily on agencies as they struggle to balance the need for generated revenue with their mission to serve all residents of their communities.

Parks as Economic Infrastructure

Eight-five percent of respondents to *NPRA's 2017 Americans' Engagement with Parks Survey* indicated that availability of high-quality park and recreation amenities is an important factor in their choice of living location. But the impact of local parks and recreation goes beyond real estate choice. Nearly 20 years ago, John Crompton of Texas A&M University demonstrated that private properties located near parks had significantly higher property values than did comparable ones located farther away from parks. His "Proximate Principle" has become a truism of sound real-estate investing.

The economic impact of close-by signature parks is evident in the High Line trail in New York City, the Atlanta BeltLine and The 606 railtrail conversion in Chicago. Well-planned urban park infrastructure can have a significant economic benefit for cities. Two examples are the formerly battered Oklahoma City riverfront and the equally depressed Anacostia Riverfront in Southwest Washington, DC. Plans for linear, waterfront and central downtown parks in urban metro areas are on the rise; indeed, many cities have committed to large-scale redevelopment in which urban parks and active transportation trails are central to their revitalization plans.

Critics of these projects express concern that such developments can lead to gentrification, rising home prices, higher property taxes and rising rents, resulting in displacement of long-time residents. Counteracting these effects are new strategies such as nonprofit urban land trusts that offer low- or no-cost loans to residents, helping ensure that long-term residents may benefit from these important investments.

High-quality urban park networks, especially those with extensive greenways and blueways, can provide substantial economic value to cities and metropolitan areas. Far-sighted planners and savvy elected officials are realizing that businesses will be more likely to relocate to such areas, and good jobs will be more likely to remain in areas where recreational amenities are good. A 2017 editorial in the *Roanoke Times* noted that Humm Kombucha's decision to relocate to the Roanoke Valley was based, in part, on the excellent trails and greenways in the area—amenities which, in the eyes of the company, were not frills but economic infrastructure of a different kind. In the widely anticipated (and heavily hyped) Amazon HQ2 selection process, the online retailer is taking into account the importance of quality of life issues (and particularly the availability of recreation opportunities) in its site-selection deliberations.

The Impact of Unfunded Pension Liabilities on Agency Performance and Employee Security

Unfunded pension costs continue to plague many cities and states, and accumulating pension debts may have disproportionate impacts on park and recreation systems and their retirees. A decades-long pattern of granting greater pension benefits than there were funds to pay liabilities—as well as the borrowing from municipal and state pension funds without paying them back—have left some cities and states in deep financial trouble with few viable solutions for how to continue to pay retiree benefits without bankrupting themselves in the process. Chicago, Dallas and Houston are notable examples of cities that are carrying deep pension debts; a number of states including Illinois, Connecticut and Rhode Island have massive pension debt relative to their ability to pay.

What do these enormous debts mean for park and recreation agencies and their retirees? It may mean that cities and states will no longer offer defined benefit plans—long a hallmark benefit of local and state government employment—and such debts could affect current hiring. Pension funds may also have to significantly cut benefits to existing and future retirees and consequently agencies may have to change their retirement plans from defined-benefit ones to individual retirement accounts.

Those debts will have other impacts as well. Cities' bond ratings may be at risk and their ability to take on new debt to support capital projects could be highly restricted. In the worst-case scenarios, cities may need to slash the health benefits and annuities for existing employees and retirees, as has occurred in Detroit.

Public-Private Partnerships and the Rise of a New Type of Public Park

As cities and counties look to build innovative new parks in urban areas, the funding for these parks is coming not solely from public funds, but from a combination of public and private sources. Large-scale urban park development in Oklahoma City, Columbus, Houston, Chicago, Washington, DC and New York City has shown how conservancies, foundations, business improvement districts and philanthropic organizations can be successful catalysts in developing high-quality urban parks.

Such new approaches to urban public park development have empowered and encouraged nonprofit community partners to develop, manage and fund parks, including the Central Park Conservancy, People and Parks Foundation in Baltimore, 21st Century Parks in Louisville and the Detroit Riverfront Conservancy. While nonprofit corporations—such as the Brooklyn Bridge Park Corporation in New York and the Rose Kennedy Greenway in Boston—may receive some limited state funds, they essentially operate without direct funding from a city, and instead, self-generate revenues for operations and maintenance from fees, rents and leases.

The impacts of these new hybrid "public/private funded" parks on traditional public parks are still unfolding. On one hand, cities can reduce the capital and operating costs for these new parks.

On the other hand, these parks use pay-to-play funding models to make the parks self-sufficient including their operating and maintenance funding. This raises questions about how public parks can maintain equity with these hybrid models, and if these new approaches will potentially deprive underserved and poor communities access to these park and recreation amenities.

The Increasing Importance of Parks in Making Communities More Resilient

2017 saw some of the most extreme weather and climate-change-enabled storms that our nation has experienced in more than a decade. Hurricanes Harvey, Irma and Maria that impacted Houston, Miami, Puerto Rico and the U.S. Virgin Islands were the most widespread weather events. Other storms, droughts, wildfires, extreme heat waves and other natural disasters caused tens of billions of dollars of damage and untold human suffering in many parts of the country.

The accelerating impacts of climate change are forcing local communities to take more action to prevent the crushing impacts that destroy infrastructure and affect human health and well-being. Parks have long mitigated the impact of extreme weather, including providing a tree canopy that offers a respite from urban heat island effects or serving as a natural floodplain to manage storm water. But more frequent floods and rises in sea levels have made green infrastructure storm water management and other adaptation strategies even higher priorities since they have proven to be cost-effective and well-supported by the public.

For example, the impacts of Hurricane Harvey so galvanized the City of Houston that in the post-storm recovery, Mayor Sylvester Turner made the acquisition of more open space lands and expansion of Houston's park system top priorities. A consortium of developers that have just completed three sky-rise buildings downtown created "The Acre," a mega-plaza whose primary function is green infrastructure storm water management. Other cities and counties are recognizing the critical role parks play in making communities more resilient. The net result will be more funding from a variety of traditional and non-traditional sources for land acquisition and park improvements in floodable parks, as well as the creation of more resilient park infrastructure.

Parks Becoming Partners in Health Care Delivery

Even in the wake of declining tax dollars, health-related programs have shown to be a promising avenue for public parks and recreation funding. Health-care delivery via park and recreation activities such as arthritis, asthma and obesity prevention programs have shown results in ameliorating chronic health conditions. Park and recreation agencies are expanding their health and wellness offerings that emphasize greater social and health equity in underserved and disadvantaged communities. New funding streams and new partnerships will be developed in partnership with park and recreation agencies that participate in developing evidence-based health programs and activities.

Emerging Technologies

Emerging technologies have had an impact on most U.S. industries; parks and recreation is no exception. An early example was the proliferation of cell phones. Visitors to public parks complained when they could not get cell service and park agencies often declined to allow cellular companies to install antennas in park locations. Today, continuous coverage in parks is a given and considered a safety essential for both park managers and visitors. Pokemon Go and other video-based geo-location games had a short-lived impact that drove new visitors to public parks. The increasing use of drones, however, by both the public and governmental agencies, has the potential for far greater disruption with its impact still unfolding.

There are other technologies—or the practical *uses* of technologies—that could have unknown consequences on parks and recreation. Certainly, the migration of user data and personal information to cloud-based platforms for class/event registration, permits, program fees and bikeshare data are making data security a critical issue for park and recreation professionals. Understanding best practices for data security is critical in minimizing financial and reputational risk to park and recreation agencies and their localities.

Cryptocurrencies and blockchain ledger record keeping present an opportunity for parks and recreation. With both parties able to monitor all aspects of transactions in blockchain ledgers, the need for contract processing and review, for example, may be dramatically reduced, saving time and money currently spent on contract preparation and monitoring. While these technologies for data and financial record keeping may seem far-fetched for parks and recreation today, the public may soon want to use cryptocurrencies not just for fees, classes and other financial transactions, but also for donations to park-related causes.

CONCLUSION

The *2018 NRPA Agency Performance Review* reveals that park and recreation agencies are as diverse as the towns, cities and counties they serve. Agencies differ not only in size and service offerings, but also in the definition of their core mission and the means by which they fund their offerings. Thus, there is no single "right" way for a park and recreation agency to fund or staff itself, or to offer programs to their community. Data from this report and *NRPA Park Metrics* can certainly help inform park and recreation professionals.

This report also highlights the many different ways that park and recreation agencies benefit their local communities. Some residents may think of their local agency when they hike on a trail, take their children to the playground or enjoy a picnic at the neighborhood park. For others, their touchpoint with their local agency may be the out-of-school-time offerings that provide care for children of working parents, a health and wellness class targeted to older adults, a sports league that teaches teamwork and sportsmanship or a class that teaches a valuable skill.

Remarkably, parks and recreation is delivering vast offerings for less than $7 per month, typically, for each member of their local communities. As the fight to secure funding continues to intensify, **the value of parks and recreation's effectiveness and efficiency cannot be overstated.** NRPA research reveals the strong passion that Americans have for their local park and recreation amenities, their view that parks and recreation is an important service delivered by their local government, and their support for increased funding of their local agency.

The park and recreation field benefits from the wealth of data now collected by NRPA and other organizations. Of course, that data does not answer every question, and we can do even better. We encourage all park and recreation professionals to enter their agency's data in *NRPA Park Metrics* so they can gain a more detailed analysis of their agency's performance when compared with its peers throughout the United States. Linking the insights contained in both this *2018 NRPA Agency Performance Review* and *NRPA Park Metrics* with other NRPA reports and resources can provide park and recreation professionals with the tools they need to tell their agency's story—and to make a case for further investments in the future.

ABOUT NRPA

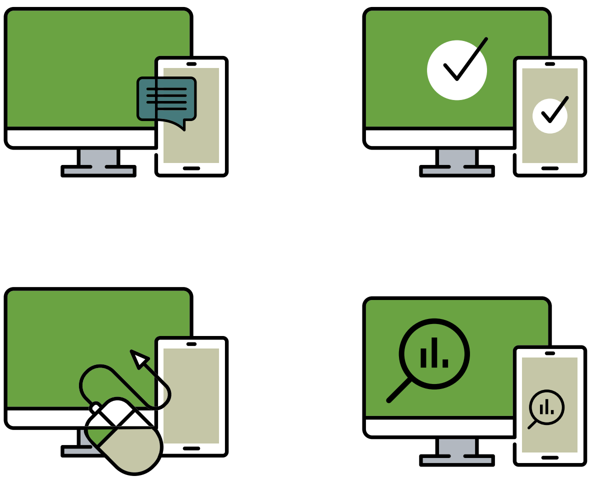
The National Recreation and Park Association (NRPA) is a national not-for-profit organization dedicated to advancing parks, recreation and conservation efforts that enhance quality of life for all people. Through its network of 60,000 recreation and park professionals and advocates, NRPA encourages the promotion of healthy and active lifestyles, conservation initiatives and equitable access to parks and public space.

NRPA brings strength to our message by partnering with like-minded organizations including those in the federal government, nonprofits and commercial enterprises. Funded through dues, grants, registrations and charitable contributions, NRPA produces research, education and policy initiatives for our members that ultimately enrich the communities they serve.

NRPA places immense importance on research and data to raise the status of parks and recreation and conducts research with two goals. First, NRPA creates data to help park and recreation agencies make optimal decisions on operations, programming and spending. Second, NRPA generates data and insights that support park and recreation professionals making the case for greater and more stable funding to policymakers, key stakeholders, the media and the general public. The NRPA research team works closely with internal subject matter experts, respected industry consultants and the academic community to develop its reports and data resources. Learn more at www.nrpa.org/Research

NRPA PARK METRICS

NRPA Park Metrics is a suite of tools that help evaluate your agency's performance so you can more effectively manage and plan operating resources and capital facilities. You can use these tools to easily build customized reports and compare your agency to others to gain more funding support, improve operations and better serve your community.



www.nrpa.org/metrics

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Enter your agency's data into NRPA's newly streamlined Agency Performance Survey to gain access to dashboards and custom reports that compare your agency to that of its peers. By entering your data, you ensure that your agency will be a part of NRPA's annual Agency Performance Review.

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