

PRC 03/05/20

Presentations

Item #4

Receipt of the Marketing Report Prepared by Learning  
Resources Network (LERN)



**CUPERTINO**

City of Cupertino  
Parks & Recreation Department  
LERN Marketing Report




**LEARNING RESOURCES NETWORK**  
Greg Marsello  
March 2020

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## Learning Resources Network

- The leading association in lifelong learning
- Founded in 1974 as a nonprofit
- Over 25% of LERN member organizations are parks and recreation departments
- *“Information That Works!”*®




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## Agenda

- Positive Accomplishments
- Recommendations
- Most Critical Action Items
- Market Plan



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## Positive Accomplishments

-  **Covering Direct Costs (Cost Recovery):** *Marketing + Production/Delivery, but also some Administration*
-  **Marketing Materials:** *Industry Best Practices*
-  **Repeat Rate:** 45%
-  **Members:** *Senior Center and Sports Center Selling & Retaining*
-  **ACTIVE Net:** *Up and Running & Data Generation*

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Unique Selling Proposition

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Data-Driven: *Carrier Routes & Next Activity*

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80/20, Best Customers & Primary Market Segments

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AIDA Principle: *Print, Website and Descriptions*

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Integrated Marketing: *Print, Website, Emails, Social Media & Video Campaigns*

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Listening to Best Customers

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## Most Critical Action Items

- Increase percentage of budget spent on promotion to 3% and ultimately 5%. Reduce production costs.
- Have one centralized marketing budget broken down by general marketing and programming areas.
- Hold session marketing meetings to determine session marketing strategies and build session promotion campaign.
- Ramp up digital marketing. Contract for or repurpose staff time to content generation.
- Use ACTIVE Net to track registrations to determine promotion method to registration ratio. Recreation Schedule should be <20:1. Target carrier routes.
- Consider a Summer Camp-Only Schedule as well as testing second session Recreation Schedule mailing.

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- Determine Department’s unique selling proposition and zealously promote.
- Have one person write activity descriptions. 40-120 words and follow the AIDA Principle.
- Implement annual needs assessment to gather information for improvements from Department’s best customers.
- Implement annual experience survey checking on activity quality and customer service.
- Use polls and focus groups specific to programming areas to ensure 20% new offerings and updated and relevant content.
- Classes should be evaluated at least once a year.
- Cross-promote Adult programming and 50+ programming.
- Consider changing the name of the Senior Center. Could be Lifelong Learning Center or named after a person.

## Annual Market Plan

### Foundation

- Explanation
- Vision, Mission, Values & USP
- Primary Market Segments
- Marketing Model: *Process*
- Marketing Budget: *Historical*

### Plan

- 3 to 7 Annual Goals
- Marketing Budget:  
*Distribution Method & Program Area*
- Marketing Benchmarks:  
*Promotion: Registration Ratio*
- Promotion Methods: *Print, Website, Email, Social Media & Video*
- Repeat Rate Actions
- Campaigns
- Staff Responsibilities

## One-Year Market Plan *SAMPLE*

Learning Unlimited is a lifelong learning program providing Anytown community members and businesses continuing professional education, community education and workforce solutions opportunities. The Learning Unlimited marketing staff is responsible for the program's brand, think marketing and planning efforts, and integrated marketing promotion tasks. The Learning Unlimited One-Year Market plan outlines the marketing staff's accountabilities.

**Unique Selling Proposition**  
Learning Unlimited's unique selling proposition is our defining characteristic or what our best participants and clients value the most about Learning Unlimited.

**Achieve Your Goals**

**Primary Market Segments**

Market Segment	Interest Area	Revenue Percentage
Baby Boomer Females	Personal Enrichment	20%
Baby Boomer & Generation X Males	Transportation	15%
Generation Y Females	Allied Health	14%
Female & Male Generation X	Real Estate	10%
Generation Y & Generation X Females	Dental	9%
Generation X Males	Computer Certificates	7%
Baby Boomer & Generation X Females	Culinary	5%

**Finances**

- 10% of Learning Unlimited Budget spent on promotion with 13.5% being spent on course programming marketing and 3% on contract training
- 70% of promotion budget spent on direct mail, 10% on advertising, 5% on customer service and 15% on digital marketing

## FYXX Market Plan

**Goals**

- Redesign website.
- Purchase and implement Inbound Marketing Tool.
- Work with Operations Team to start collecting Student Birth Year.
- Produce Sales Kit for Workforce Solutions Team.
- Develop and implement an Internal Marketing Plan.

**Budget & Benchmarks**

**Budget**

Category	Amount	Percentage
Continuing Professional Education	\$45,000	30%
Community Education	\$37,500	25%
Health	\$30,000	20%
Transportation	\$22,500	15%
Workforce Solutions	\$15,000	10%
<b>TOTAL</b>	<b>\$150,000</b>	<b>100%</b>

**Benchmarks**

Promotion Campaign On-Time	90%
General Catalog/Registration Ratio	<45:1
Targeted Promotion/Registration Ratio	<75:1
ROI on Advertising	10X
General SEO Ranking	Page 1
Email Performance	Open Rate 15%
	Click/Open Rate 12%
	Unsubscribe Rate 5%
Website Traffic	Measure & Set Next FY Benchmarks
Promotion Costs	10%
Market Segment Analysis	Identify Primary Market Segments
Carrier Route Analysis	Identify Carrier Routes Generating 80%

**Promotions**  
*The following promotions will be used.*

-General Catalog	-Targeted Promotions	-Email
-Social Media	-Inbound Marketing	-Website
-Newspaper/Etc. Articles	-Case Studies	-Events
-Advertising	-Email Newsletters	-SEO
-Lead Generation	-Retention Contacts	-Advising

**Retention Actions**

- Track and follow-up with certificate students.
- Each Quarter develop a Next Course list for \$100+ courses and follow-up.
- Provide Summer Camp discounts to past participants registering by December 31.

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### Quarter 1 (July-September) Campaigns

**Promotion Plan**  
*The following are Promotion Campaigns per Quarter. The details of each Promotion Campaign can be found in the Promotion Tracking Tool.*

**QUARTER 1 (July-September)**

- General Fall II Catalog Campaign
- Health Fall II Targeted Campaign
- Transportation Fall II Targeted Campaign
- Workforce Solutions First Quarter Campaign
- November Innovation Conference Campaign

**QUARTER 2 (October-December)**

- General Winter Catalog Campaign
- Health Winter Targeted Campaign
- Transportation Winter Targeted Campaign
- Workforce Solutions Second Quarter Campaign
- February Internal Marketing Event Campaign

**QUARTER 3 (January-March)**

- General Spring Catalog Campaign
- Health Spring Targeted Campaign
- Transportation Spring Targeted Campaign
- Workforce Solutions Third Quarter Campaign
- Summer Camp Campaign

**QUARTER 4 (April-June)**

- General Fall I Catalog Campaign
- Health Fall I Targeted Campaign
- Transportation Fall I Targeted Campaign
- Workforce Solutions Fourth Quarter Campaign
- September Community Outreach Event Campaign

**Staff Responsibilities**

- Marketing: Campaign Management, Branding, Data Analysis, Website
- Course Programming: Coordinating with Marketing on Open Enrollment Campaigns
- Workforce Solutions: Coordinating with Marketing on Workforce Solutions Campaigns
- Operations: Data Inputting, Data Collection, Tracking, Retention, Advising, Logistics

**General Fall II Catalog Campaign: October 16 – December 15**

Task	Due Date
Catalog Printed	9/1
Mass Email	9/6
First Catalog Arrives	9/11
Targeted Email News	9/20
Second Catalog Arrives	10/2
Mass Email	10/11
Weekly Social Media	FB: Once per day T: 3 times per day I: Once per day Pinterest: Once per day

**Health Fall II Targeted Campaign: October 16 – December 15**

Task	Due Date
Included in Fall II Catalog	Follow Fall II Catalog Campaign
Brochure Printed	9/8
Targeted Email	9/13
Brochure Arrives	9/18
Retention Communication	10/4
Targeted Email	10/9
Weekly Social Media	FB: 3 times a week T: 3 times a week

**Transportation Fall II Campaign: October 15 – December 15**

Task	Due Date
Included in Fall II Catalog	Follow Fall II Catalog Campaign
Brochure Printed	9/8
Targeted Email	9/13
Brochure Arrives	9/18
Retention Communication	10/4
Targeted Email	10/9
Weekly Social Media	FB: 3 times a week T: 3 times a week

**Workforce Solutions First Quarter Campaign: July - September**

Task	Due Date
Free Supervisory Training Webinar	Webinar Date: 8/16 Invitation eVites: 7/5, 7/26 & 8/9
Health Trends Content Paper	Live on Website: 9/6 Content Emails: 9/13, 9/27 &

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## Thanks!

- Greg Marsello: [marsello@lern.org](mailto:marsello@lern.org)
- [info@lern.org](mailto:info@lern.org)
- [www.lern.org](http://www.lern.org)



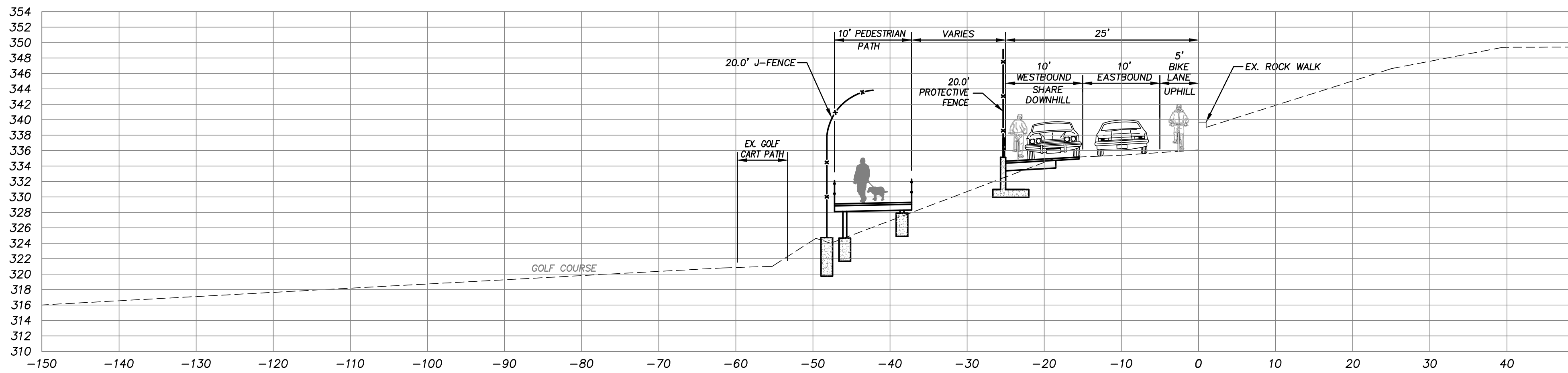
PRC 03/05/20

Presentations

Item #5

Blackberry Farm Entrance Road Improvement –  
Feasibility Study Alternatives

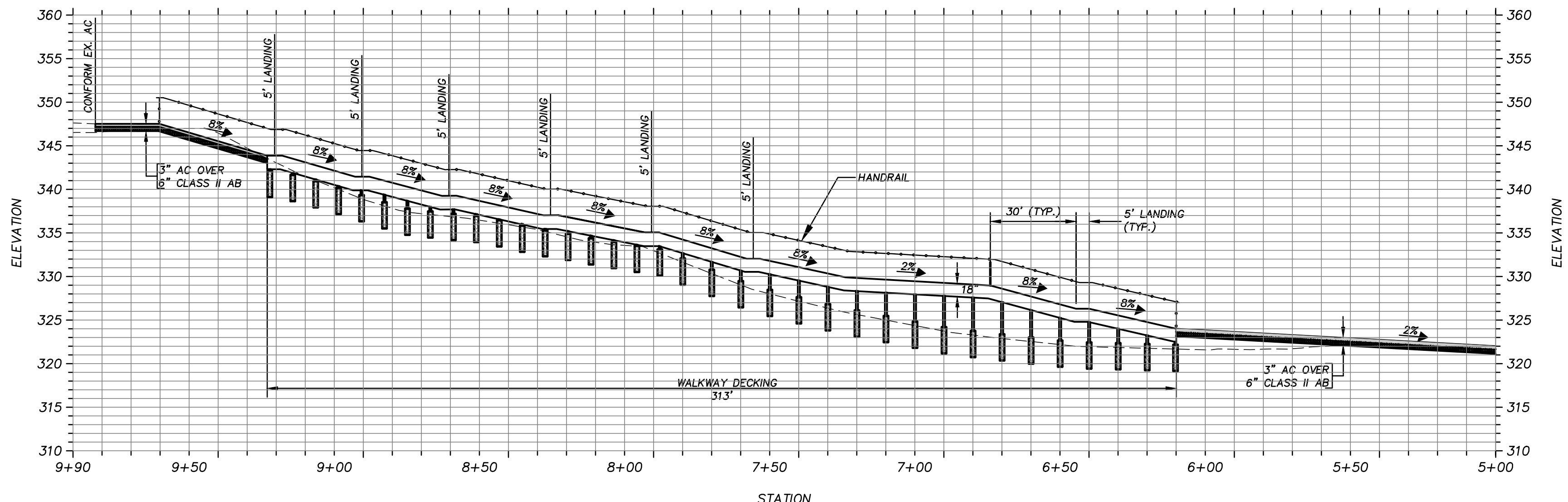




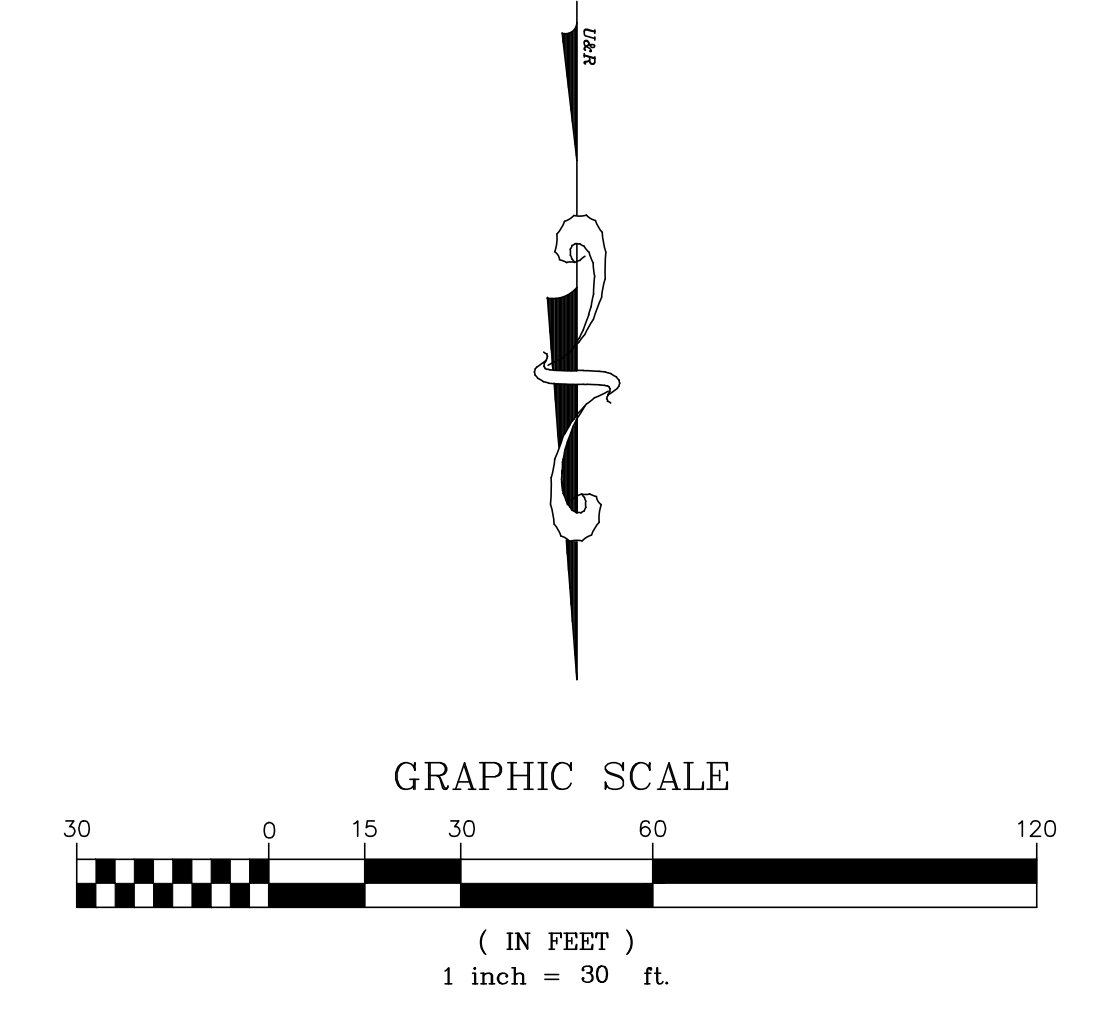
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VERT: 1"=10'

**PLAN LEGEND**

- PROPOSED ROAD WIDENING
- PROPOSED ADA PATH-PAVED
- PROPOSED ADA PATH-DECKING
- PROPOSED 6.0' ADA ACCESSIBLE PATH
- EXISTING PAVEMENT
- PROPOSED REMOVABLE BOLLARD
- NEW FENCE LINE
- NEW HANDRAIL
- REMOVE EXISTING TREE



**PROPOSED PEDESTRIAN PATHWAY PROFILE**  
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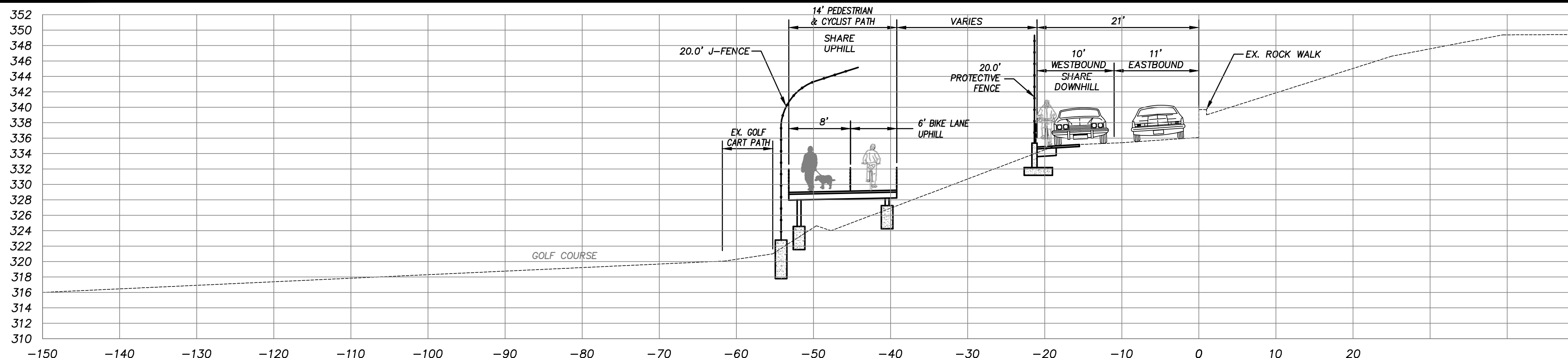


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civil engineers and surveyors  
1839 Oakland Road, Suite A114, San Jose, CA 95131  
(408) 453-1222  
www.usr.com

**BLACKBERRY FARM**  
ACCESS ROAD STUDY  
SAN FERNANDO AVE  
CUPERTINO CALIFORNIA

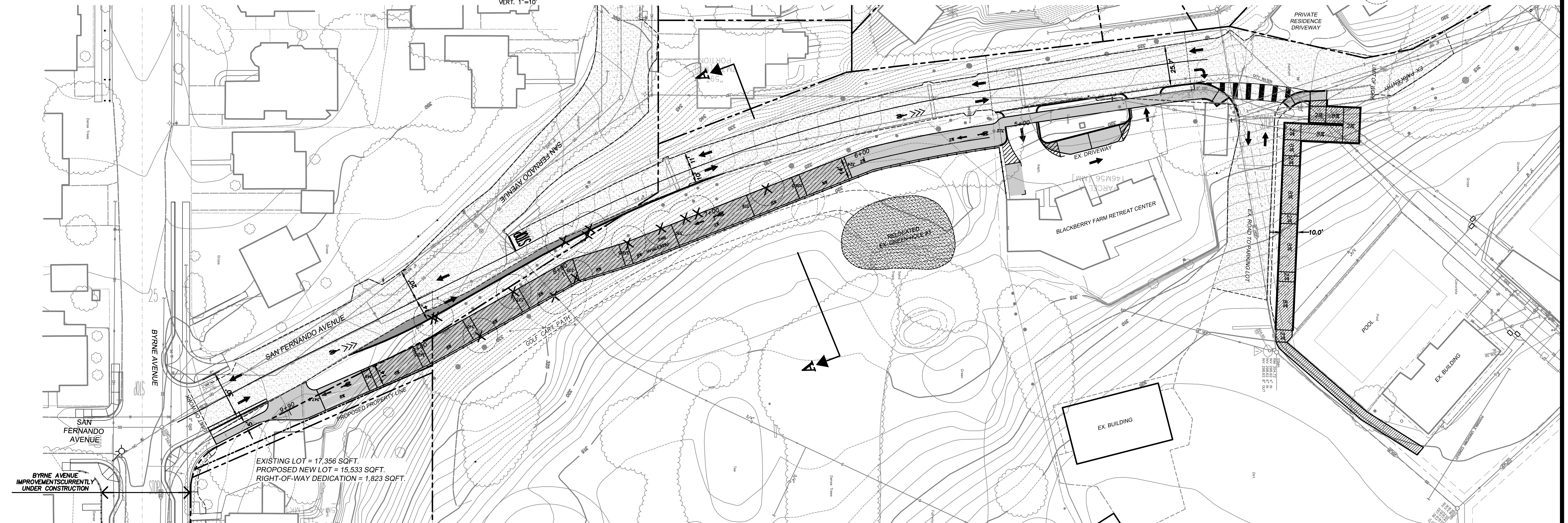
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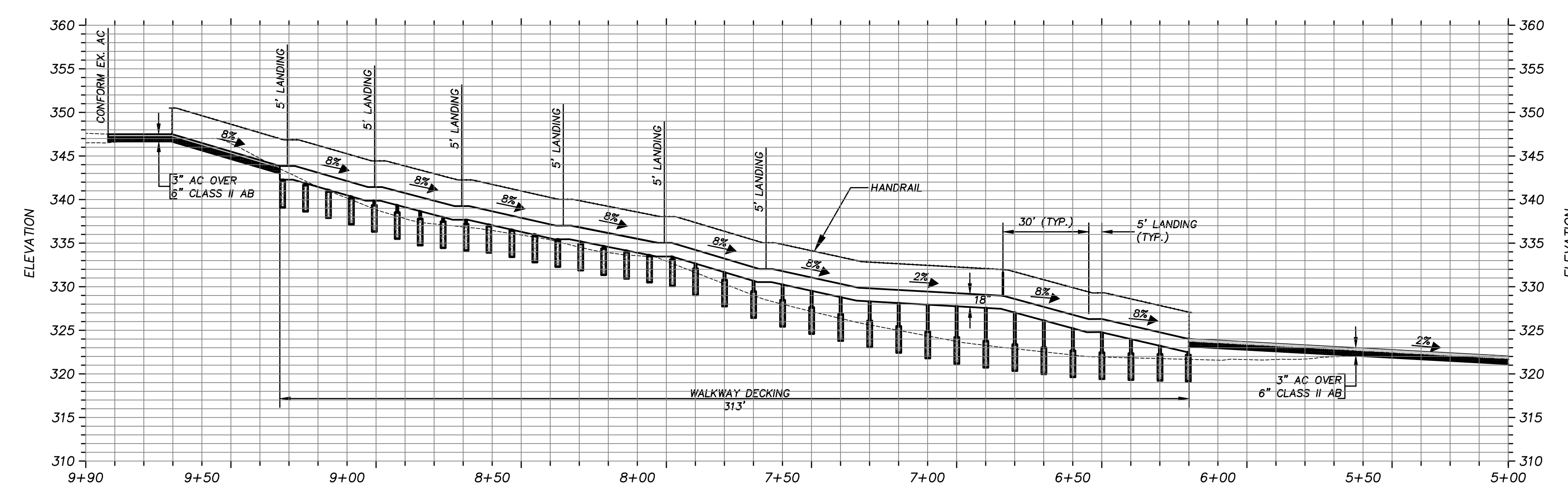
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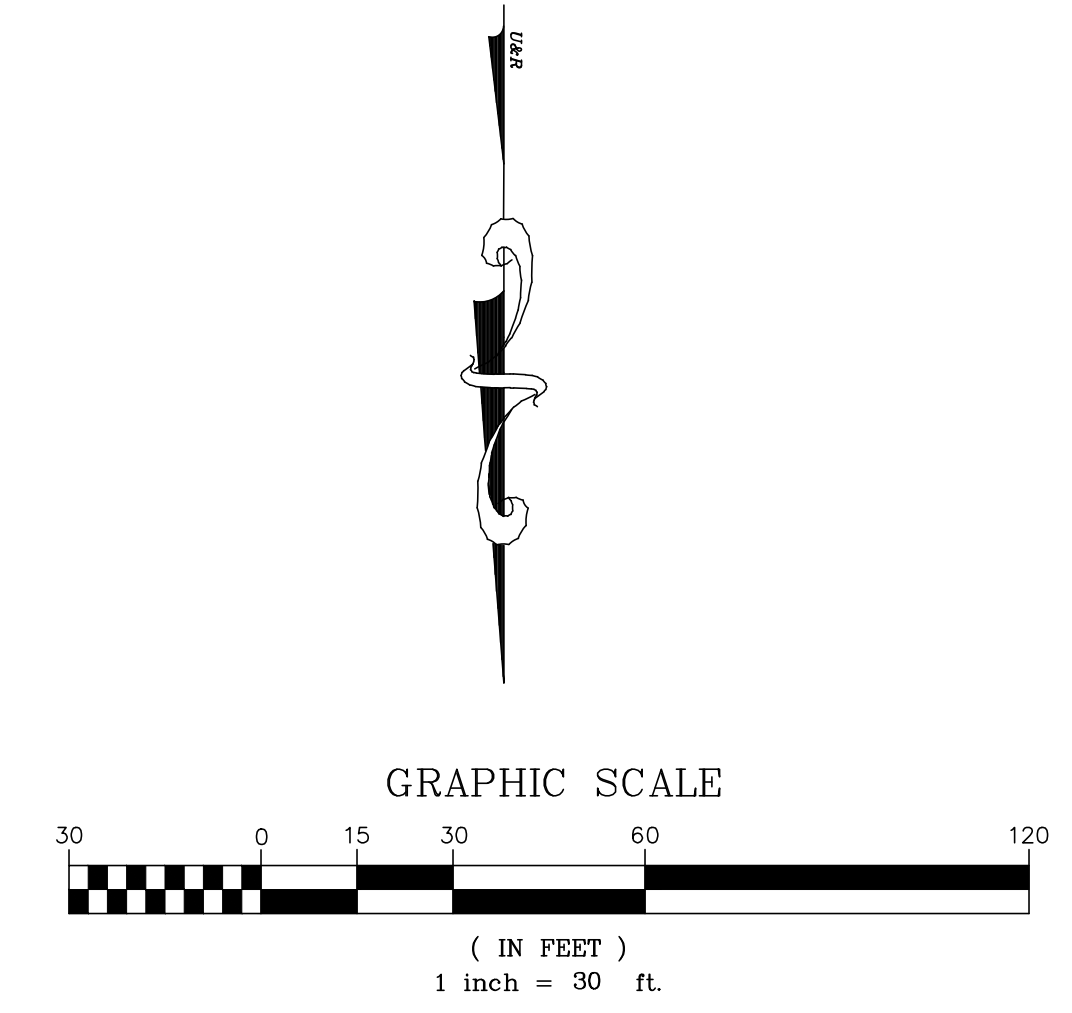
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- PROPOSED 6.0' ADA ACCESSIBLE PATH
- EXISTING PAVEMENT
- PROPOSED REMOVABLE BOLLARD
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- NEW HANDRAIL
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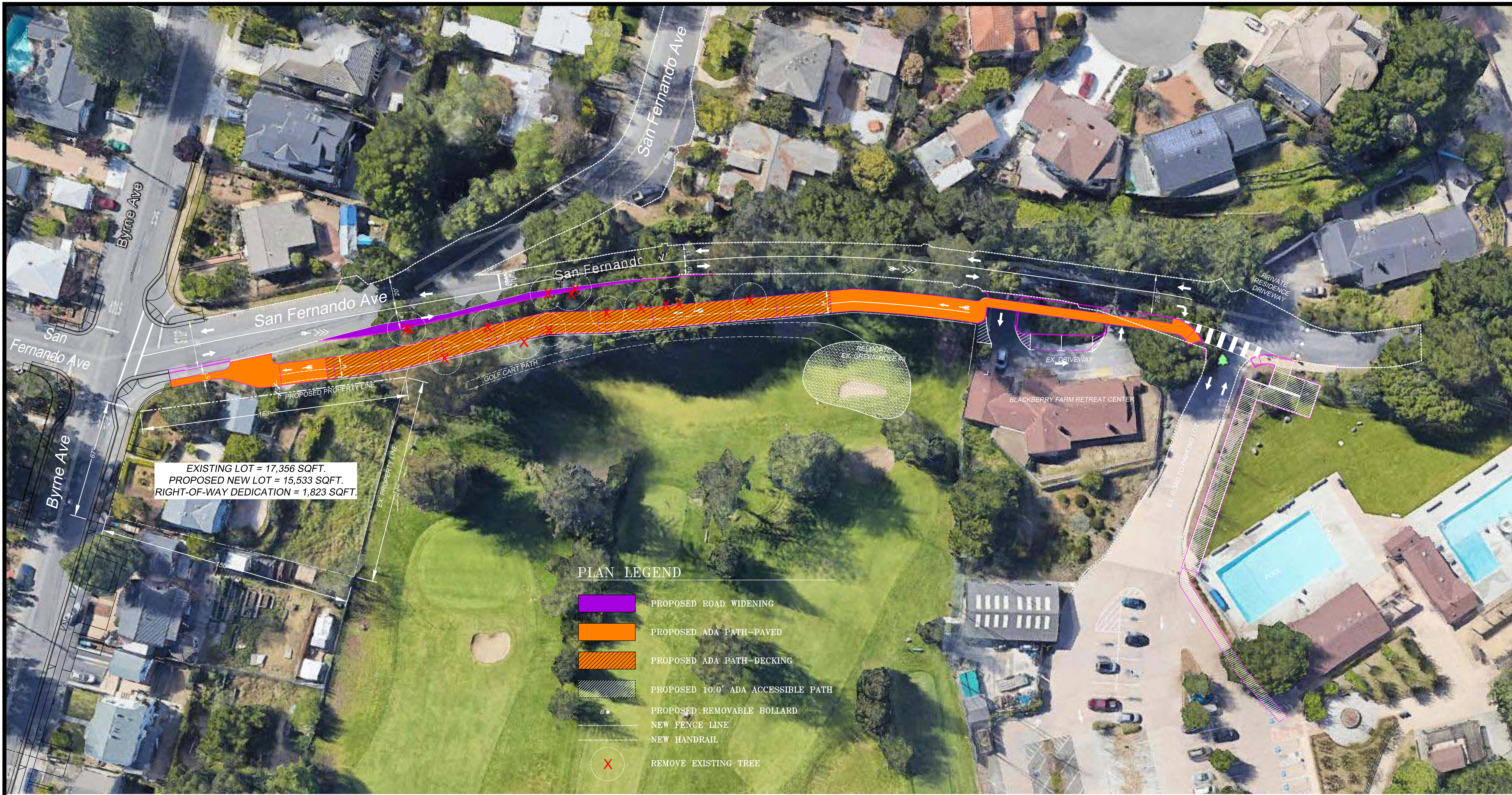
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PROPOSED NEW LOT = 15,533 SQFT.  
RIGHT-OF-WAY DEDICATION = 1,823 SQFT.



**PROPOSED PEDESTRIAN PATHWAY PROFILE**  
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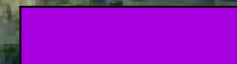









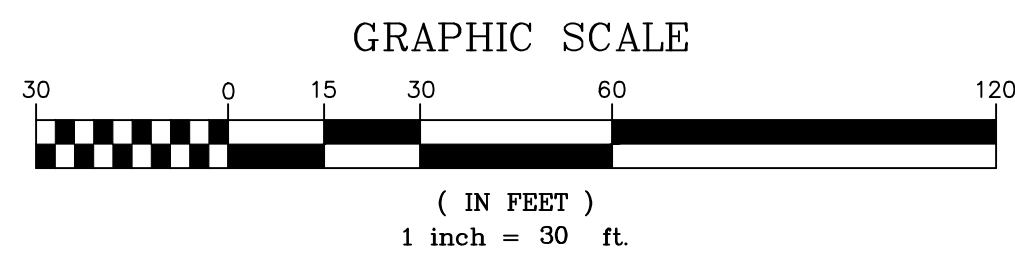
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<p><b>UNDERWOOD &amp; ROSENBLUM, INC.</b> civil engineers and surveyors 1839 Oakland Road, Suite A114, San Jose, CA 95131 (408) 453-1222 www.usr.com</p>		<p><b>BLACKBERRY FARM</b> ACCESS ROAD STUDY SAN FERNANDO AVE CUPERTINO CALIFORNIA</p>		
<p>ALTERNATIVE B</p>		<p>Date 2-11-2020 Scale 1"=30' Design By: FR Job J19092 Sheet 2</p>		



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-  PROPOSED ADA PATH-DECKING
-  PROPOSED 10.0' ADA ACCESSIBLE PATH
-  PROPOSED REMOVABLE BOLLARD
-  NEW FENCE LINE
-  NEW HANDRAIL
-  REMOVE EXISTING TREE



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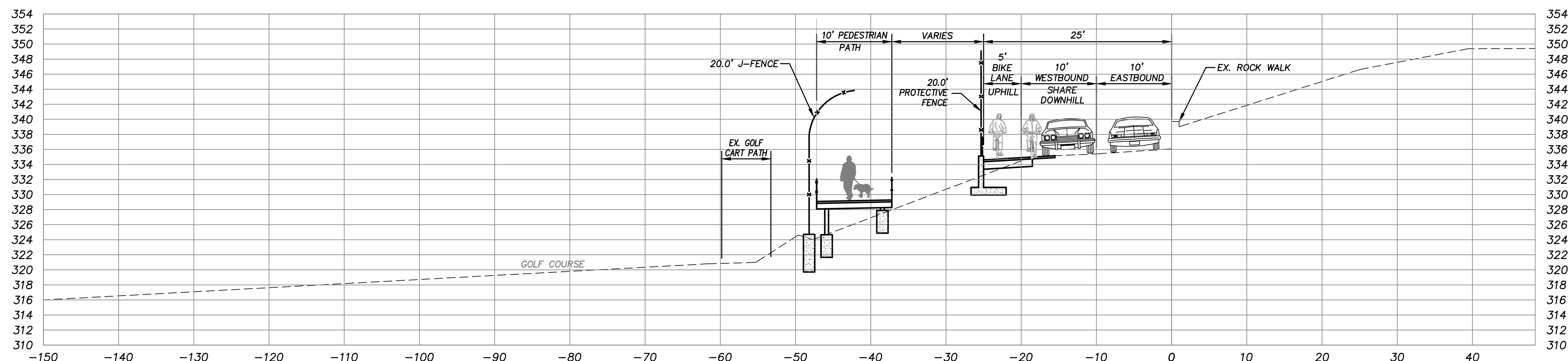
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 civil engineers and surveyors  
 1830 Oakland Road, Suite A114, San Jose, CA 95131  
 (408) 455-1222  
 www.uandr.com



**BLACKBERRY FARM**  
 ACCESS ROAD STUDY  
 SAN FERNANDO AVE  
 CUPERTINO CALIFORNIA

COMMUNITY MEETING  
 ALTERNATIVE B

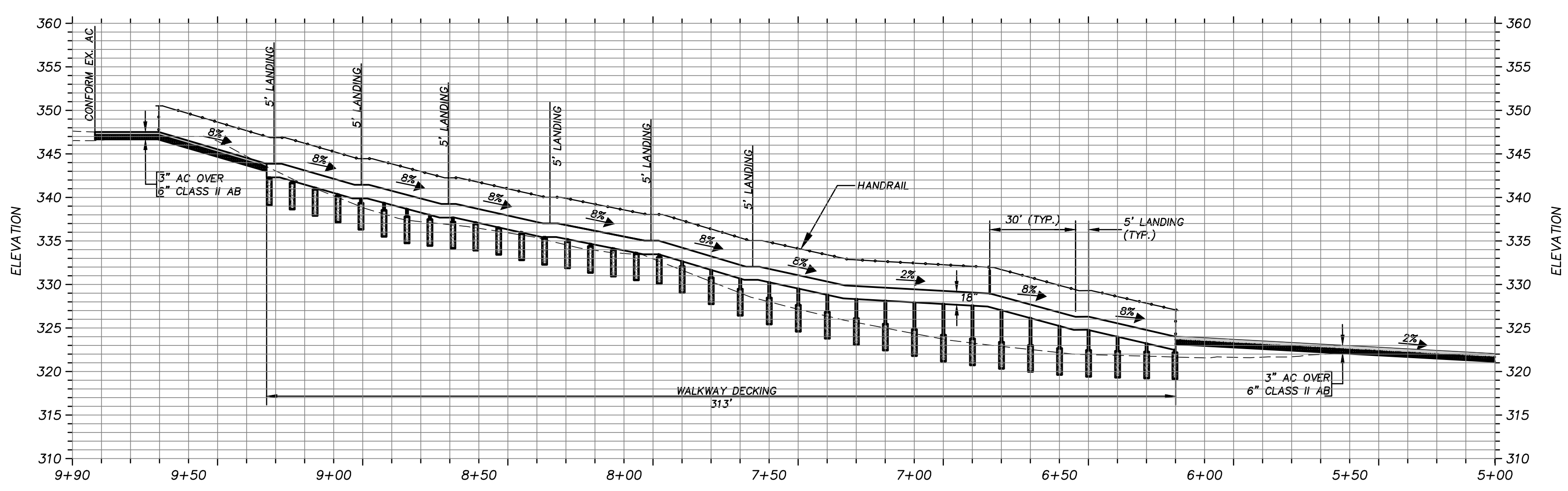
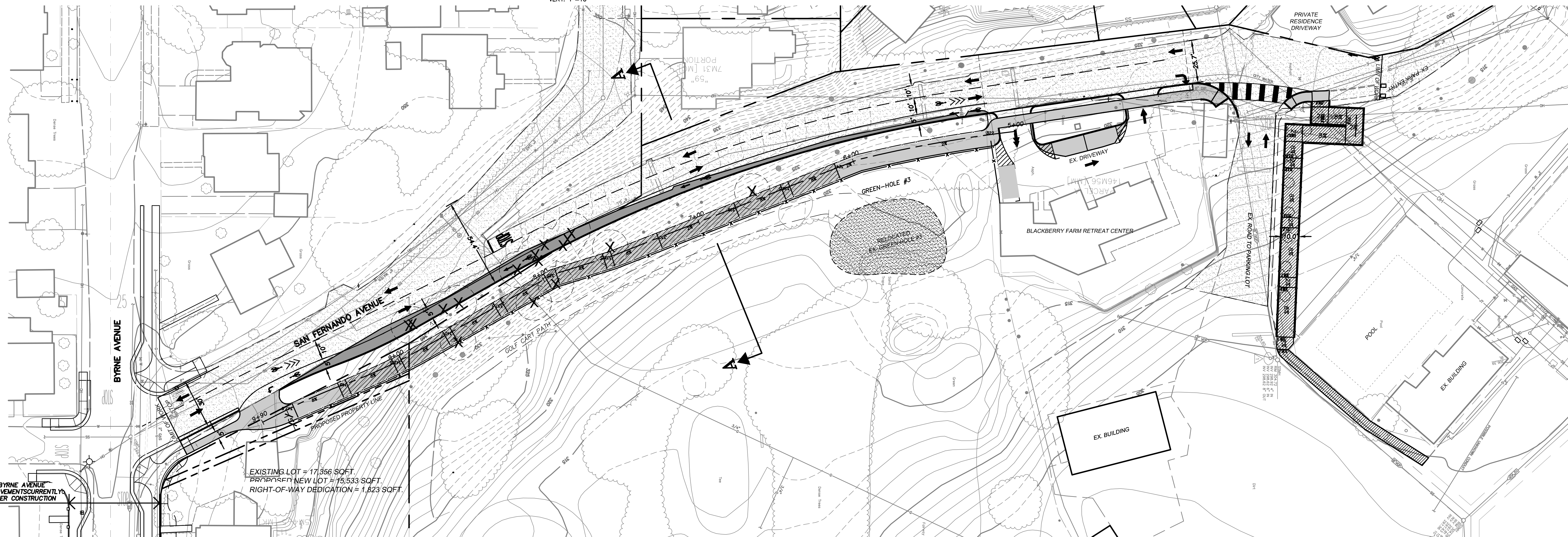
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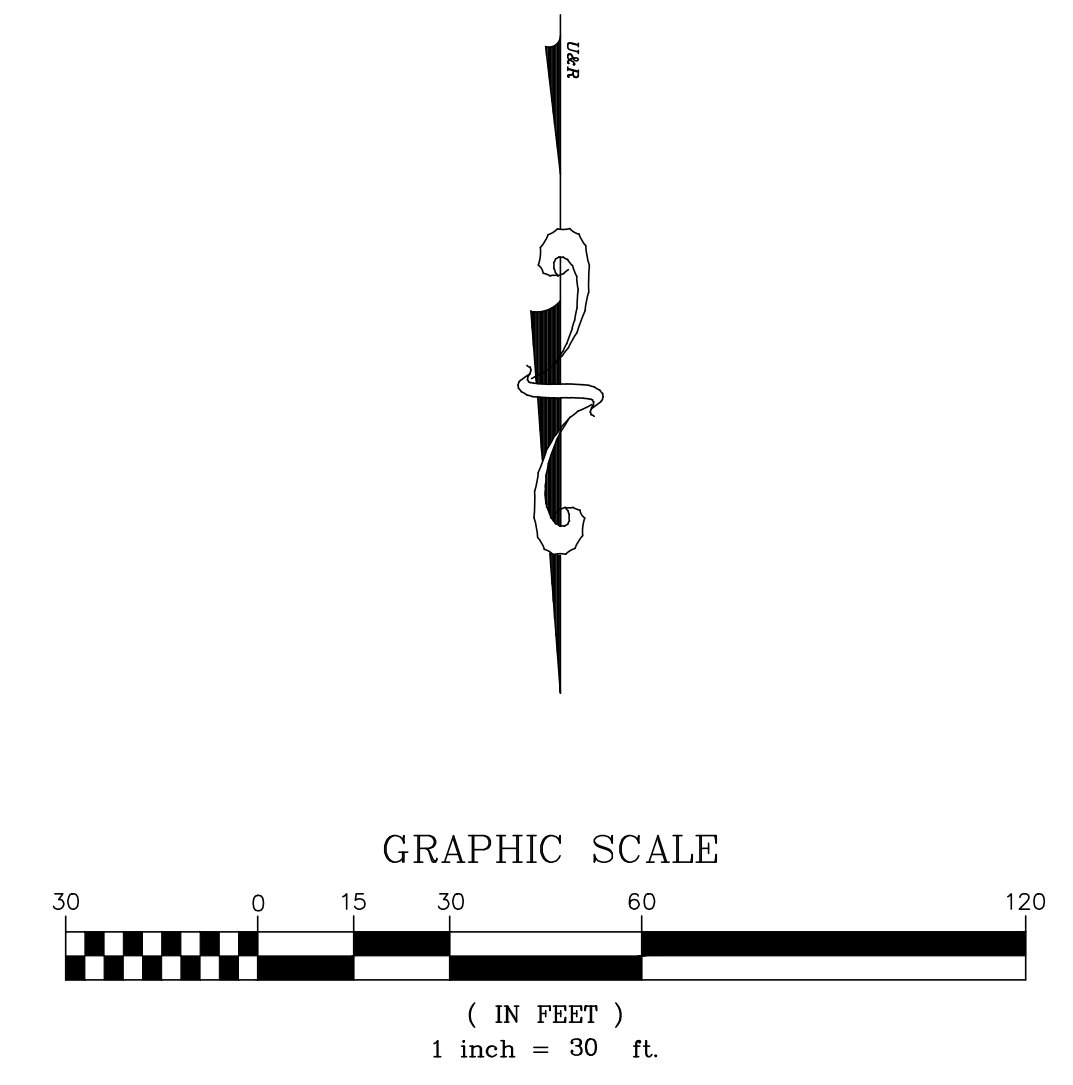
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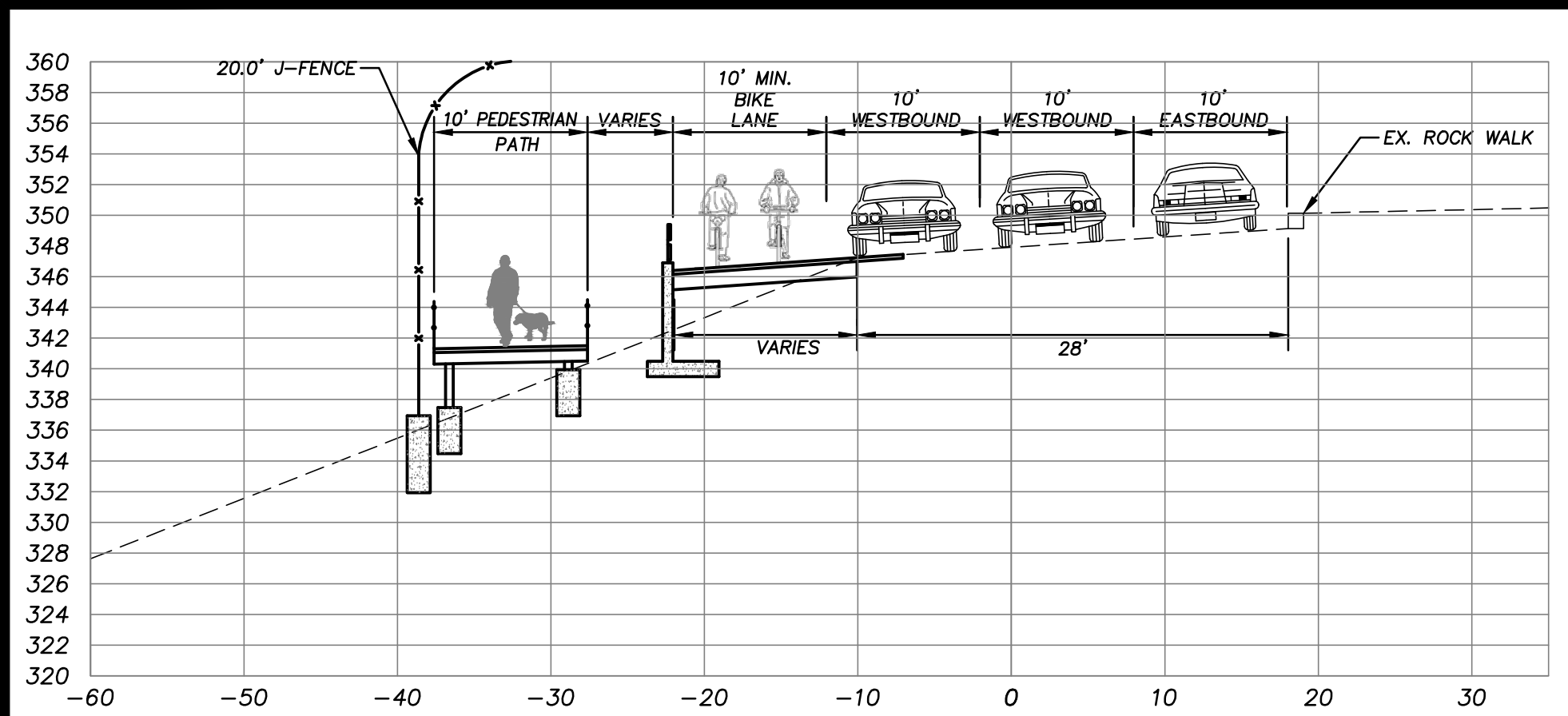
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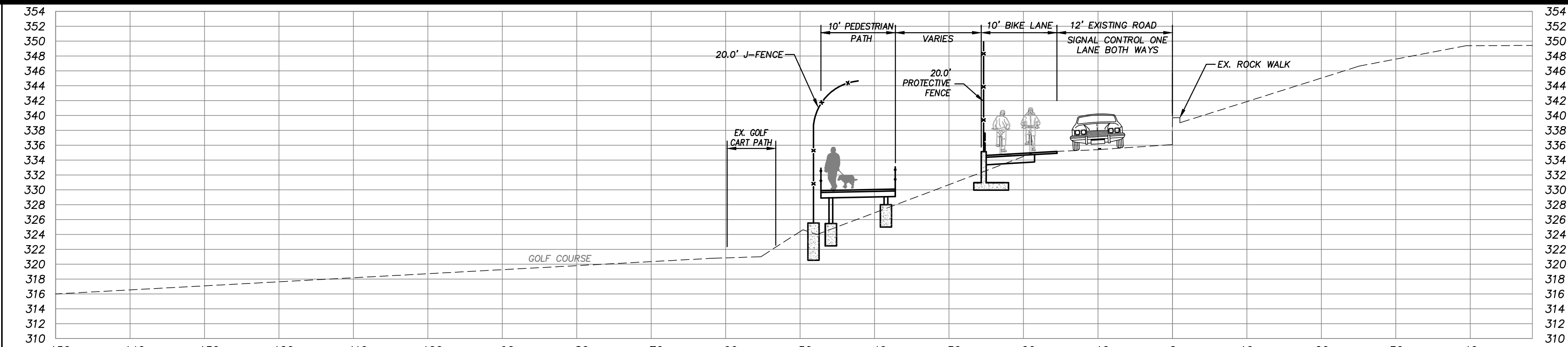
**BLACKBERRY FARM**  
ACCESS ROAD STUDY  
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CUPERTINO CALIFORNIA

**ALTERNATIVE C**

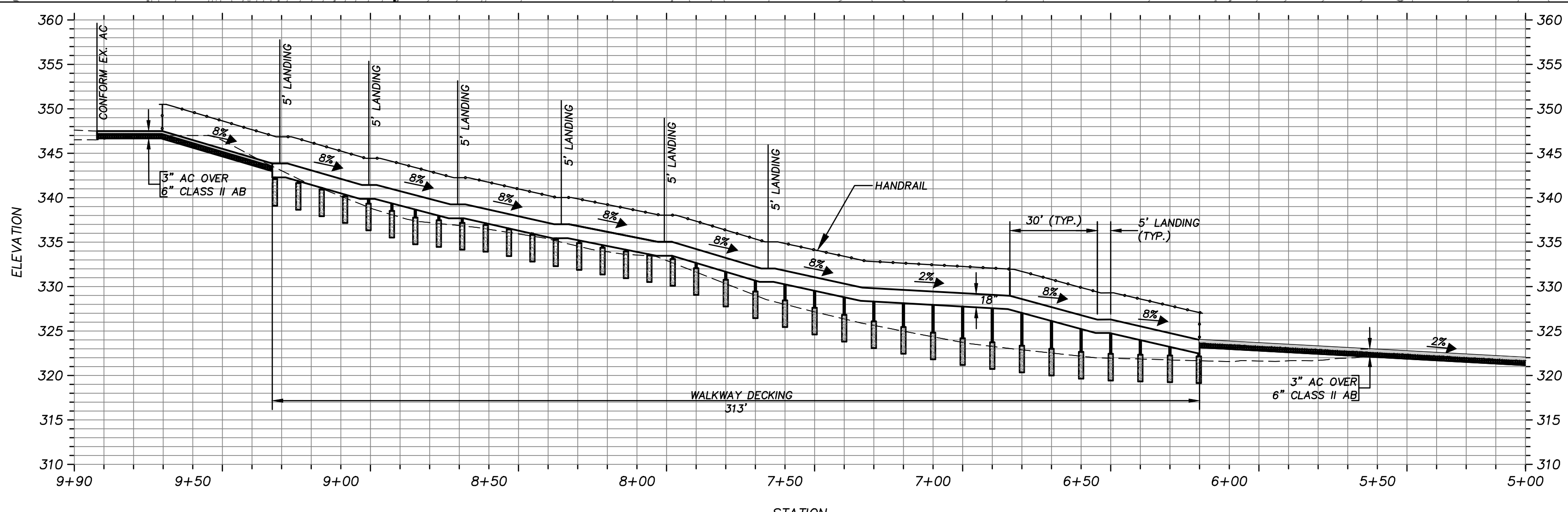
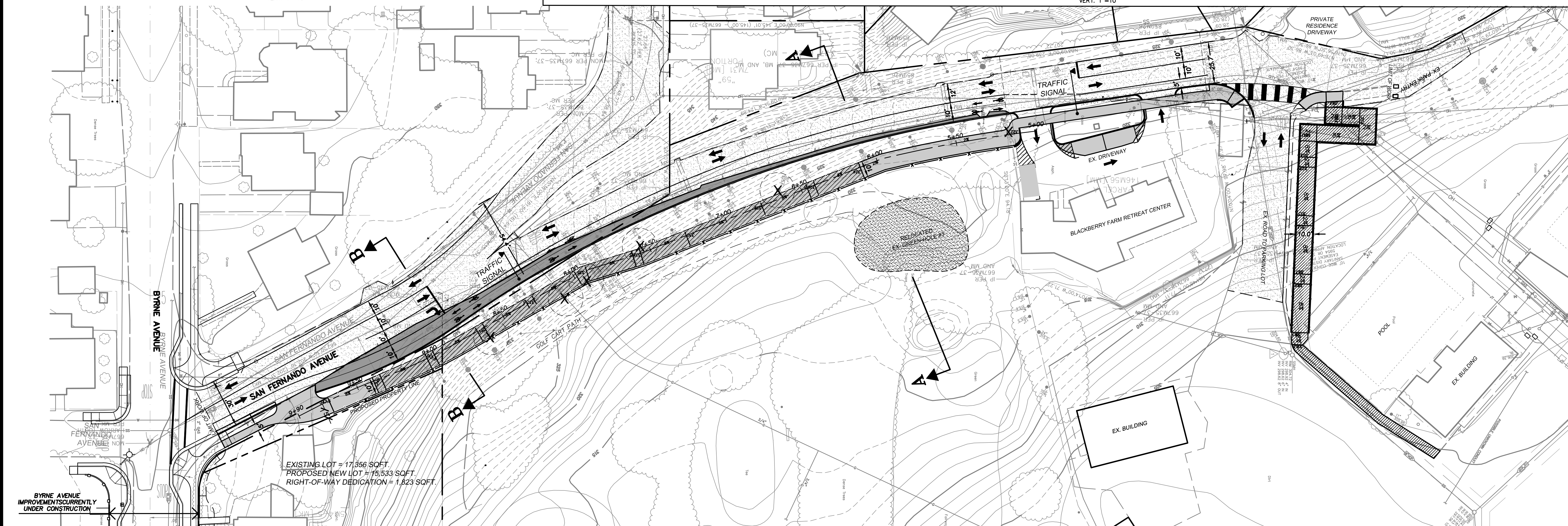
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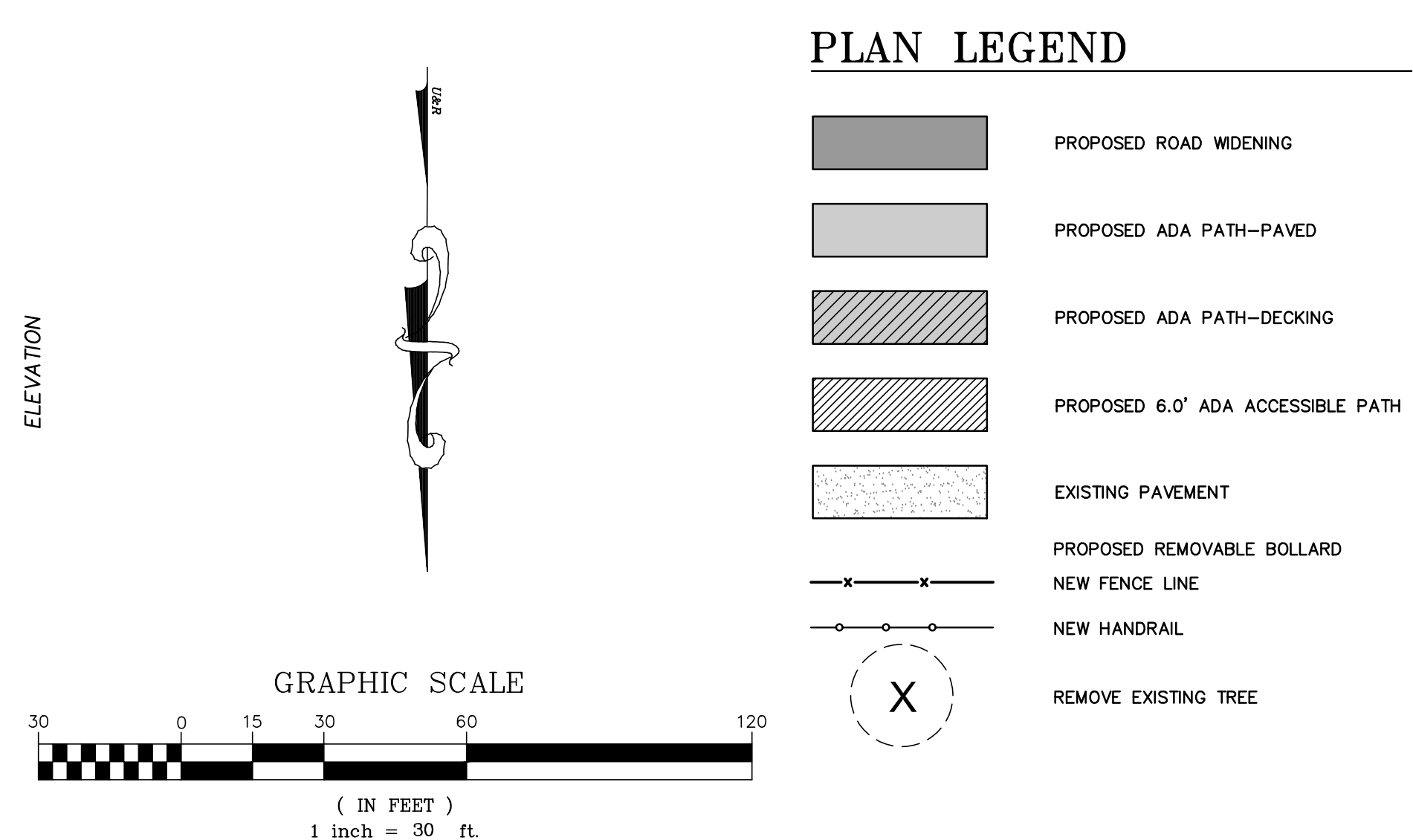
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**PROPOSED PEDESTRIAN PATHWAY PROFILE**  
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CUPERTINO CALIFORNIA

**ALTERNATIVE D**

Date 2-11-2020  
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Job J19092  
Sheet  
**4**

PRC 03/05/20

Presentations

Item #6

Receive a Presentation on the Senior Center's Classes  
and Programs

# Cupertino Senior Center

## Classes and Programs



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## Classes



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## Classes



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## Hidden Treasures



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## Lunch Programs



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## Lunch Programs



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# The 50+ Scene




PRC 03/05/20

Presentations

Item #7

Rancho Rinconada Recreation & Park District

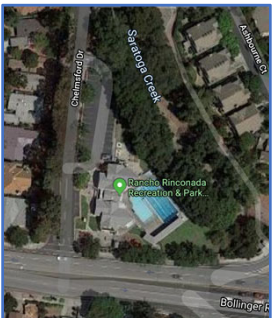
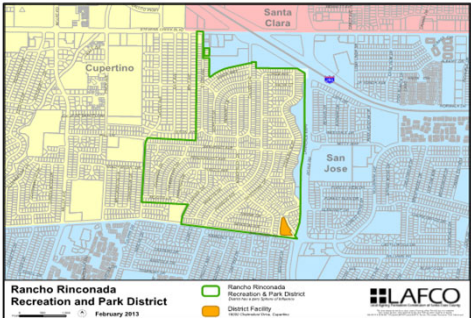



**BA** Berkson Associates  
Urban Economics  
Policy Forensics & Forecasting  
Planning & Policy Analysis

**SPECIAL STUDY: GOVERNANCE OPTIONS**  
Rancho Rinconada Recreation and Park District  
Presentation to LAFCO of Santa Clara County  
Feb. 5, 2020  
Presentation to City of Cupertino  
March 5, 2020

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## RRRPD Formed in 1955



**Rancho Rinconada Recreation and Park District**  
February 2019

**LAFCO**

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## Overview of the District



Item	Amount
Land Area (1)	0.4 sq. miles
Residential Parcels (2)	1,266
Population (3)	3,983
Registered RRRPD Voters (4)	2,086
Total City Voters	30,630
RRRPD Voters as % of City	6.8%
Assessed Value (5)	\$1,200,662,755
Tax Increment Factors FY19-20 (6)	
Rancho Rinconada RPD	4.61%
City of Cupertino	6.17%



See **Table 1** in the report.

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## RRRPD Programs




- Swim lessons (8,458 lessons in 2018)
- Public swim (May-Sept., approx. 8,781 entries)
- Training and teams (year-round)
- Swim camp
- BBQ, pool and hall rentals
- Other recreation partners (e.g., scuba lessons)

See **Appendix B** in the report.

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## RRRPD Revenues & Expenditures



- Surplus = \$51,000/year
- “Net Position” = \$2 mill.
  - \$1 million unrestricted, cash/investments
  - Capital assets \$1 million
- \$350,000 upgrades


Item	STATUS QUO RRRPD
<b>REVENUES</b>	
Program Revenues (1)	\$438,500
Property Tax (2)	<u>\$30,000</u>
<b>Total Revenues</b>	<b>\$968,500</b>
<b>EXPENDITURES</b>	
Administration and Office Expenses (3)	\$77,957
<b>Facilities (4)</b>	
Building/Yard, Pool, Utilities	113,000
Facility Depreciation (5)	<u>72,000</u>
<b>Subtotal, Facilities</b>	<b>186,000</b>
Program Expenses (exc. staff) (6)	26,200
Personnel (7)	626,982
<b>Total Expenditures</b>	<b>\$917,139</b>
<b>ANNUAL SURPLUS OR (SHORTFALL)</b>	<b>\$51,361</b>
Surplus or (shortfall) excluding depreciation	<u>\$124,361</u>

*See **Table 2** in the report.*

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## Governance Issues



- RRRPD has a “zero-sphere” LAFCO designation
- 2013 MSR reviewed governance options, found a significant service overlap which
  - “...creates inherent inefficiencies and fragmented service delivery and impedes long-term planning for the delivery of recreation services to the residents of Cupertino”
    - MSR recommended further study of options
- Allegations of mismanagement, board dysfunction and resignations, lack of a quorum in 2019
- Currently 3 board members, upcoming Fall 2020 election

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## Governance Options



- **Option 1** – Maintain RRRPD’s Current Governance (Status Quo)
- **Option 2** – Dissolution/Merger of RRRPD with the City of Cupertino
- **Option 3** – Reorganize RRRPD as a Subsidiary District to Cupertino

See **Table 3** in the report.

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## Option 1 Status Quo



### **Advantages**

- RRRPD property taxes continue to be spent within District
- The District continues to be governed by locally-elected board

### **Disadvantages**

- RRRPD potentially could revert to contentious/dysfunctional board
- Possible future election costs & difficulty filling vacant seats
- Property tax continues to be allocated to two duplicative aquatic recreation providers

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## Option 2 Dissolution/Merger



### **Advantages**

- Eliminates duplication of aquatic recreation services/admin
- No board member election costs
- Reduces potential for contentious/dysfunctional board
- Programs publicized and available to all City residents at same cost
- Expanded year-round City swim
- Integrated, City-wide planning, programming, budgeting
- More extensive management and supervisory structure

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## Option 2 Dissolution/Merger



### **Disadvantages**

- Representation of District residents same as Citywide representation
- Property tax to go to City General Fund
- Costs are slightly greater, but budget surplus is substantially similar to Status Quo after considering potential for slightly higher revenues

Financial comparison is **substantially similar** to Status Quo.

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## Option 2 Dissolution/Merger



- Revenue slightly exceeds Status Quo
- Costs are higher
- Net surplus is substantially similar

Item	STATUS QUO		OPTIONS 2 & 3	
	RRRPD	City	RRRPD	City
<b>REVENUES</b>				
Program Revenues (1)	\$438,500	\$460,400		
Property Tax (2)	<u>530,000</u>	<u>530,000</u>		
<b>Total Revenues</b>	<b>\$968,500</b>	<b>\$990,400</b>		
<b>EXPENDITURES</b>				
Administration and Office Expenses (3)	\$77,957	\$31,957		
<b>Facilities (4)</b>				
Building/Yard, Pool, Utilities	113,000	99,000		
Facility Depreciation (5)	<u>73,000</u>	<u>73,000</u>		
Subtotal, Facilities	186,000	172,000		
Program Expenses (exc. staff) (6)	26,200	26,200		
Personnel (7)	626,982	702,657		
<b>Total Expenditures</b>	<b>\$917,139</b>	<b>\$932,814</b>		
<b>ANNUAL SURPLUS OR (SHORTFALL)</b>				
Surplus or (shortfall) excluding depreciation	\$51,361	\$57,586		
Surplus or (shortfall) excluding depreciation	\$124,361	\$130,586		

See **Table 4** and **Appendix A**.

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## Option 3 Subsidiary District



### **Advantages**

- RRRPD property tax would continue to be allocated to subsidiary district for use by the district
- Other advantages of Option 2

### **Disadvantages**

- Restricting property tax to the district could reduce the City's flexibility managing other City recreation programs
- Other disadvantages of Option 2

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## Reorganization Process



- Could be initiated by voter petition, RRRPD (or City) resolution, or by LAFCO
- Findings required for LAFCO initiation can be met:
  - Costs are substantially similar (net surplus is similar)
  - The proposal promotes public access and accountability

See **Table 5** in the report.

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## Questions?



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