



SOAR

2007 – 2012 Strategic Plan

Prepared: Summer/Fall 2007
Adopted
SOAR Board of Directors
November 26, 2007

Acknowledgements

We would like to thank the many people and organizations that helped to complete the SOAR Strategic Plan.

SOAR Board of Directors

Bonnie Malone, President
Carole C.B. Davis, Vice President
Marie Clasen, Secretary
Peggy Tehan, Treasurer
Ben Ehrenstrom
Sue Boettner
Jim Long

SOAR Staff

Carrie Ward, Executive Director
Laurie Greco, Office Manager
Grace Porraz, Youth Program Manager
Greg Garretson, Outdoor & Marketing Manager
Darcy Ling Scott, Clubhouse Staff
Barbra Turner, Clubhouse Staff
Matt Macauley, Sports Program Manager
Shalee Hanks, Sports Program Manager

Citizen Participants

Thank you, also to the many citizens in the SOAR District who participated in this project by attending stakeholder interviews and the community meeting. Your ideas and thoughts are an integral part of the SOAR Strategic Plan.

Consultant

Jane Boubel, Park and Recreation Management Consultant

The Strategic Plan was made possible with a grant and technical assistance
from
The Ford Family Foundation

MISSION

Provide recreational opportunities designed to benefit the health and wellness of the Sisters community.

VISION

To be a full service Parks and Recreation District, providing leisure opportunities and facilities to encourage health and wellness throughout our community.

Critical Goals for SOAR 2007-2012

- Provide quality recreation programs designed to benefit the health and wellness of the SOAR District residents
- Plan and provide public recreation facilities to meet the needs of our growing community
- Communicate SOAR's mission, vision and critical direction to the district residents
- Assess funding needs and options for future operation of SOAR and delivery of its programs and services

- Deliver quality programs and facilities to the district residents by providing professional management and leadership
- Prepare and initiate the plan to become the Sisters Parks and Recreation District
- Prepare a board development plan

SOAR Goals for 2007-2010

#1 Critical Direction 2007	Action Steps We provide quality recreation programs designed to benefit the health and wellness of the SOAR District residents <ul style="list-style-type: none"> • Inventory current SOAR and Sisters area recreation programs and providers (programs, participant numbers, budgets, etc.)
Opportunities Identified	<ul style="list-style-type: none"> • Focus on existing programs and make them the best by incorporating best practices, then expand offerings • Conduct SWAT (strengths, weakness and opportunities) analysis of core District programs • Review, evaluate and make recommended changes in the preschool and Clubhouse programs • Prepare recommendations for improvements, changes to core programs
2008	<ul style="list-style-type: none"> • Look at opportunities to develop parks programs • Spend time on research and development of new or improved programs • Find resources to conduct a community needs assessment for recreation programs • Review and refine outdoor recreation and leadership programs
2009	<ul style="list-style-type: none"> • Look at program opportunities for special needs participants • Continue to develop and expand the middle school leadership program to identify community needs and gaps in services; prepare recommendations for development of new programs. • Develop a volunteer program
Selected Opportunity	<ul style="list-style-type: none"> • Develop new programs in order to focus resources on improvements of existing programs
Lead Staff:	Carrie
	Action Steps
2007	<ul style="list-style-type: none"> • Inventory current SOAR and Sisters area recreation programs and providers (programs, participant numbers, budgets, etc.) • Conduct SWAT (strengths, weakness and opportunities) analysis of core District programs • Prepare recommendations for improvements, changes to

SOAR Goals for 2007-2010

#2 Critical Direction: We plan and provide public recreation facilities to meet the needs of our growing community	
Opportunities Identified:	
<ul style="list-style-type: none"> ○ <i>Remodel and expand the playground area</i> ○ <i>New buses</i> ○ <i>Facility planning and development</i> <ul style="list-style-type: none"> <i>Phase II Community Center</i> <i>Pool</i> <i>Parks and facility master plan for the district</i> ○ <i>Landscaping plan at Community Center</i> ○ <i>Develop a maintenance plan and budget for facilities, grounds and vehicles to assure that District facilities are adequately maintained and safe</i> ○ <i>Inventory facilities for accessibility</i> ○ <i>Participate in the Senior Center Steering Committee Feasibility Study</i> ○ <i>Joint meeting with City Council: Park and facility planning, Park SDC program</i> 	
Selected Opportunity: Remodel and expand the playground area	
	Action Steps
2007	<ul style="list-style-type: none"> • Prepare grant application for playground renovation
2008	<ul style="list-style-type: none"> • Find other resources and hire an architect to develop conceptual plan • Locate resources necessary to renovate playground
2009	<ul style="list-style-type: none"> • Renovate playground
	Lead Staff: Carrie
Selected Opportunity: New/repaired buses	

	Action Steps
2007	<ul style="list-style-type: none"> • Assess the transportation needs for SOAR
2008	<ul style="list-style-type: none"> • Prepare a plan to finance, purchase and maintain new buses, vans for 08'-09' budget • Secure resources
	Lead Staff: Greg
Selected Opportunity:	
Develop Maintenance plan and budget for facilities, grounds & vehicles to assure that District facilities are adequately maintained and safe.	
	Action Steps
2009	<ul style="list-style-type: none"> • Develop maintenance plan and budget for building, grounds and vehicles. • Evaluate need for maintenance position
2010	<ul style="list-style-type: none"> • Budget for maintenance program and position

SOAR Goals for 2007-2010

#3 Critical Direction: Communicate SOAR's mission, vision and critical goals to the district residents	
Opportunities Identified:	
<ul style="list-style-type: none"> ○ <i>Develop and communicate a clear, compelling and inspiring organizational Vision, Mission and Brand</i> ○ <i>Organize and develop a professional look for SOAR</i> ○ <i>Energize the community about SOAR programs</i> ○ <i>Develop a feeling of community support</i> ○ <i>Focus on participant needs and requests</i> ○ <i>Work on a new brand for SOAR</i> ○ <i>Become the community leisure resource in Sisters</i> ○ <i>Work closer with and develop new partners</i> 	
Selected Opportunity:	
Develop new name for District and public information campaign	
	Action Steps
2007	<ul style="list-style-type: none"> • Board input and approval of the new SOAR mission, vision and goals
2008	<ul style="list-style-type: none"> • Discuss possible organizational name change with Board • Share new mission, vision and goals with community
2009	<ul style="list-style-type: none"> • Develop and finance organization "brand," graphics and communication plan • In conjunction with the process of becoming the Sisters Parks and Recreation District, initiate the new brand
Lead Staff: Greg	

--

**SOAR
Goals for 2007-2010**

#4 Critical Direction: Assess funding needs and options for the future operation of SOAR and delivery of its programs and services	
Opportunities Identified: <ul style="list-style-type: none">○ <i>Become financially stable and secure</i>○ <i>Research capacity building grants to expand the fundraising opportunities for programs and facilities</i>	
Selected Opportunity: Prepare a three year financial plan for SOAR	
2008	Action Steps <ul style="list-style-type: none">• Begin the analysis of the programs and cost centers of SOAR• Prepare and present a three year financial forecast and plan to the Board
2009	<ul style="list-style-type: none">• Prepare and submit, multi year, capacity building grant
Lead Staff: Carrie	

SOAR Goals for 2007-2010

<p>#5 Critical Direction: Professional management and leadership are critical to the delivery of quality programs and facilities to the district residents</p>	
<p>Opportunities Identified:</p> <ul style="list-style-type: none"> • <i>Provide staff training and development</i> • <i>Incorporate best practices in the development of programs, facilities and staff</i> • <i>Retain current Executive Director</i> • <i>Explore the opportunities for staff support for the fund development functions</i> • <i>Evaluate need for Recreation Director and/or Development Director positions</i> 	
<p>Selected Opportunity: Prepare and submit Capacity Building Grant to help fund staff training and development</p>	
2008	<p>Action Steps:</p> <ul style="list-style-type: none"> • Assess current staff training needs • Discuss the training needs with the Board • Annually budget and plan for staff training • Conduct salary and benefit survey • Capacity Building Grant for training and development • Identify funding for new position: Recreation Director and/or Development Director • Develop a program for staff recruitment and retention, including competitive compensation packages
<p>Lead Staff: Carrie</p>	



SOAR
Goals for 2007-2010

#6 Critical Direction: Prepare and launch the plan to become the Sisters Parks and Recreation District	
Selected Opportunity: Prepare a public information campaign to “announce” the Sisters Park and Recreation District	
2007	Action Steps: <ul style="list-style-type: none">• Discuss with Board the strategic planning process and results• Provide information and resources to educate Board about park and recreation districts
2008	<ul style="list-style-type: none">• Make decision about direction of SOAR and potential new name & brand for the District• Prepare a public information campaign describing park and recreation districts, benefits, community needs & partnerships
2009	<ul style="list-style-type: none">• District ballot measure/funding proposal
Lead Staff: Carrie	

SOAR Goals for 2007-2012

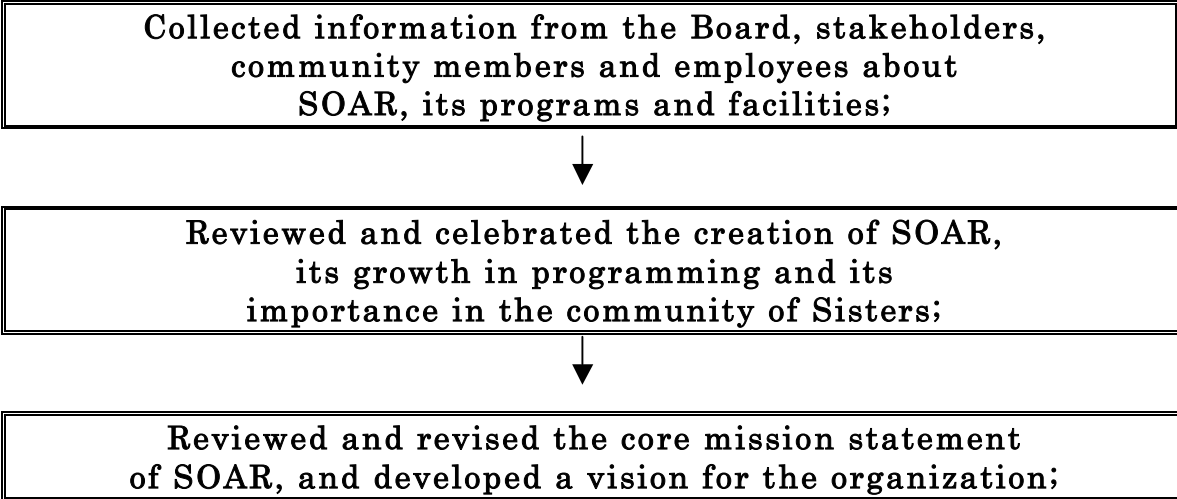
#7 Critical Direction: Prepare a Board development plan	
Opportunities Identified by Board:	
<ul style="list-style-type: none"> • <i>Make resources available for SOAR Board Members to attend the ORPA conference in September 2008</i> • <i>Make resources available for SOAR Board Members to attend the Oregon Special District Association conference in February 2008</i> • <i>Develop a plan and opportunities for newly elected SOAR Board Members to attend community and civic meetings</i> 	
Selected Opportunity:	
Develop a plan and opportunities for Board members to attend community and civic meetings to discuss the Strategic Plan and move to becoming a park and recreation district	
2008	Action Steps:
2009	<ul style="list-style-type: none"> • Budget for board members to attend ORPA and Special Districts conferences • Board members attend conferences • Board members attend community and civic meetings
2010	
2011	

Lead: Board of Directors	

SOAR's Strategic Planning Process

The strategic planning process provided an opportunity for employees, Board members, and other community stakeholders and the general public to express their interests in the current operation and future of SOAR.

The process used a very simple strategic planning model, and with our limited resources we have:





Selected opportunities and developed strategies that build upon the strengths of the organization and the desires of the community, that will move SOAR forward toward the vision.



Develop Annual Plans

Annual Planning Process

Annual Goal Setting January

The planning process begins in January of each year with a goal setting retreat with staff and board. Using the Strategic Plan, key goals and action steps are decided upon and prioritized.

- Key goals identified and prioritized
- Budget parameters and priorities identified
- Programs and services
- Staffing needs
- Major maintenance and equipment needs

Budget Planning February and March

Using the goals and priorities in the Annual Plan, staff works to create a budget proposal that will support the annual goals.

Annual Budget Review and Adoption May – June

The development of the District's annual budget is based on the Board's approved Strategic Plan. The budget committee reviews and approves the budget proposal. The Board adopts the budget

in June. The fiscal year is July 1 – June 30.

**Annual Action Plan
June**

The specific steps and actions required to implement the annual staff and board goals.

The Annual Plan serves as the basis for end of year performance reviews of the organization as a whole, staff members, the executive director and board.

SOAR's History

Sisters Organization for Activities and Recreation, (SOAR), was founded in 1995 as a non-profit organization to provide recreation, sports and enrichment programs for Sisters area youth and families. Many groups in the community came together to create SOAR including the Sisters School District, Sisters Kiwanis Club, Sisters Rotary Club, Sisters Rodeo Association, AARP and the Parent Teacher Association.

In 1998 voters approved the formation of the SOAR District, a special park and recreation district, which is partially funded by taxes. The District boundaries are similar to the Sisters School District boundary. SOAR serves Sisters and the outlying areas for a total of about 14,000 residents. The SOAR District is governed by a board of five elected officials.

The original SOAR non-profit organization evolved into the SOAR Foundation which is governed by an appointed Board of Directors. The SOAR Foundation helps to raise funds for the SOAR programs by holding fundraising events, and seeking grants and support from the community.

The mission of SOAR is to provide opportunities for residents to lead active and healthy lifestyles through recreation, enrichment and sports programs.

SOAR continues to focus on our original mission by maintaining an emphasis on prevention programs for youth.

In 2004 the SOAR Foundation raised over one million dollars to build the new community center. The 10,000 square foot community center includes a teen center, dance and fitness studio, business office and three classrooms. Outdoor facilities include a playground, two new baseball fields, a skate park and a Disc Golf Course. The Community Center is located within walking distance of the Sisters high school and middle school.

SOAR offers a year round schedule of over 100 different programs for kids and adults. A wide variety of activities are offered including a drop in teen center, all day child care and after school programs, preschool programs, summer camps, tutoring, youth and adult sports, outdoor recreation, fitness, cultural and martial arts programs. Over 150 people come to the SOAR Community Center each day to participate in programs. Each year over 3000 kids participate in the programs.

Organizational Profile

The SOAR Recreation District was formed in November 1998 when voters approved the formation of the District and approved the permanent tax rate of .22 cents per \$1,000 of assessed evaluation. The District boundaries include the City of Sisters and outlying areas surrounding Sisters. There are approximately 14,000 residents in the District.

The SOAR District is governed by a policy setting board of five elected members. District Board members represent the District residents and set policy and planning directives for the organization.

The District is managed by professional staff members who are responsible for day to day operations, program management and facilities. Currently, there are eight full time staff members and up to 12 part time staff members who work directly in the programs.

SOAR Programs and Facilities

Programs	Pre School	Elementary	Middle School	High School	Adult
Arts Programs	Art classes	Art classes Art camps Dance	Art classes Art camps Dance		Art classes Art camps Dance
Fitness Programs		Martial Arts	Martial Arts	Martial Arts Weight Lifting	Martial Arts Fitness Classes
Sports Programs		Basketball Football Track & Field Wrestling Volleyball Lacrosse Sports Camps	Basketball Football Track & Field Wrestling Volleyball Lacrosse Sports Camps	Lacrosse Sports Camps	Basketball League Softball League
Outdoor Adventure		Day Camps Rock Climbing Hiking Rafting Caving Fly Fishing	Day Camps Extended Trips Rock Climbing Hiking Rafting	Day Camps Extended Trips Rock Climbing Hiking Rafting	Hiking Groups Snowshoeing Groups Fly Fishing

			Caving Fly Fishing	Caving Fly Fishing	
Child Care Programs	4-5 years, full day	Kindergarten, half day program 1-5 th Grades, after school & summer full days	Drop in Teen Center, after school & summer full days Teen Leadership	Drop in Teen Center, after school & summer full days	
Enrichment Programs	Tumbling Creative Play	Language classes Special Interest Camps Recreation Classes Homework Club	Language classes Special Interest Camps Recreation Classes Homework Club	Language classes Special Interest Camps Recreation Classes	Language classes Recreation classes Special Interest classes
Facilities					
Community Center					
Baseball Fields					
Skateboard Park					
Frisbee Golf Course					
Sisters Trail System					
Community Garden					

**SOAR Strategic Planning Process
Stakeholder Interview Results**

(Comments not prioritized, duplicates were combined)

What do you consider the three most significant strengths of SOAR?

- Organization created from nothing, great passion of the believers
- Good reputation overall
- Community support, recognition and involvement
- Good nucleus of existing facilities and programs to build from

- Great potential to grow into something bigger, stronger and more vital with leadership, planning and goals
- Community relies upon SOAR for kids programs
- After school activities for kids
- Tournaments
- Leadership: Competent Executive Director
- Unlimited opportunity to build successful partnerships with existing Sisters businesses and organizations
- Staff have heart, they care
- Ability to be parks and recreation service provider, Boys and Girls Club, and Y all in one
- Many hats to provide services
- Youth programs and child care
- Vital organization for kids
- Broad perspective of programs for youth
- Staff are “well connected” and like what they offer the community
- SOAR builds self esteem in children
- Support for parents, especially working moms
- Adventure that SOAR brings to children
- Gets kids physically active at a young age
- Proactive programs for pre-K to 8th grade
- Brand Name, SOAR, big deal for little community of Sisters
- Good reputation needs to be cultivated
- Pretty good infrastructure: facility and bus
- Outdoor adventure programs
- Only thing like it in Sisters
- Great summer programs
- Wonderful selection of programs
- Tenacious and caring Board of Directors
- Willingness to “umbrella” other projects/organizations ie trails and community garden

What do you consider the two or three most important issues or concerns facing SOAR?

- Funding
- Lack of stable/predictable funding including maintenance of facilities/equipment
- Development of new facilities and programs
- Lack of dedicated staff position to fund development
- Growth in community, responding without complaining
- Get ahead of growth with planning

- Community growth and inability of facility to provide for needs
- Quality programs outside sports
- Image, perception that services are for low income, programs are rowdy/loud
- Lack of professionalism
- Staff retention, wages and benefits
- Finding alternative ways to show appreciation to employees
- Increasing programming quality/quantity requires funding, the challenge: to keep fees and taxes at a level community willing to pay
- Communication to increase awareness and relevancy of SOAR to broader public
- Will Carrie stay
- Five Pines facilities are exclusive and expensive, may be considered competition
- Community does not have understanding of the impact if programs or services were eliminated
- Lack of position/place in community therefore individuals form their own impressions that often places SOAR in a defensive position
- Community awareness of programs and services
- Lack of Vision that is known and accepted by community
- It is time to be a parks and recreation district
- Becoming a well managed business/service organization that thinks ahead particularly growth, demographics, and community issues
- In the past had a wider range of programs
- Get SOAR “out of the box” vision is way too narrow
- SOAR gets little publicity in local paper
- Public/private money: People with financial resources go to 5 Pines
- Have and have nots
- Achieving operational financial security w/o compromising support for low income
- Building support for SOAR requires connection with retirees and their resources
- Youth focused operation does not lend itself to community wide funding
- Current operation is day to day, crisis management is the norm, needs to move to planned strategic thinking with strong, community recognized leadership
- Board development, recruitment and training
- Programs are offered without focus/direction/goals, programs would benefit from supervisory oversight for breadth and depth of content
- SOAR message when requesting funding is: “We’re a sinking ship”
- Negative perceptions for past performances of certain programs and staff that have since been improved, eliminated or moved on
- Marketing visibility

What is your vision for SOAR five years from now?

- Parks and recreation service district with facilities and programs
- Sliding scale for fees and funding for a scholarship program for those unable to pay
- Funding from a variety of sources
- Facilities where kids are near schools and current SOAR building
- Continue doing what they do now, only more consistently (more programs throughout the year, not just summer concentration, more reliably, less cancellations, etc.)
- SOAR facility with gym
- More programs for all community members, not just kids
- SOAR is a gift to the community
- SOAR is community leader in early child hood development program
- Provide self esteem programs for youth
- SOAR is one of Sisters “strategic partners” in community planning/development
- School District and SOAR work together to provide athletic/sports programs in schools
- Broaden public perception of what is SOAR
- More than a babysitting service for kids
- More adult/community programs, adult sports and activities, involved community that supports organization
- Operating levy with real stable funding to build a future therefore not reliant on 100% cost recovery
- Great leadership with a strong staff able to operate programs and facilities
- Decision as to who does parks and recreation programs and facilities in Sisters community
- Single board for leadership and policy of SOAR, incorporate resource development into board responsibility
- Regular structure for education and training of staff and board
- SOAR has become the Greater Sisters Parks and Recreation District with responsibility for providing quality outdoor and indoor recreation opportunities, managing community parks in close partnership with the City of Sisters and managing community trails in partnership with the City and US Forest Service
- SOAR is a key cog in a community wide team of supporters, closely cooperating with the School District, CATS, City, Sports Clubs, Service Clubs, Library, etc to identify and deliver youth oriented sports, cultural and civic programs

- Associated with Boys and Girls Club of Central Oregon, SOAR is fully integrated into the Sisters community so that the majority of residents fully understand and value the organization
- Full time staff to create and implement quality programming for children and adults
- More complete use of all regional facilities-art, music, movement and recreational
- Full service Parks and Recreation Department with funding from the City of Sisters
- Entire community involved in and sharing the vision of where SOAR is headed
- Coordinated programs and use with the senior community
- Improved access by bike or foot for kids to the facility
- Better tax base to operate SOAR

Is there anything else you would like to add from your experience with Soar or from your perspective?

- Parental involvement is encouraged
- Family venue
- Funding will build opportunity base and create more impact upon community
- Create community vision for SOAR
- Create capacity to operate professionally
- As a parent, appreciate services at a reasonable cost
- Provides meaningful supervised work to community service workers
- SOAR needs to understand their role in the community
- People's perception of SOAR is critical to forward progress, development and community value
- "I'm removed because my kids are grown and gone."
- "SOAR does great things, but I don't exactly know what"
- Lack of marketing message
- After school programs have great potential, but babysitting is a parental responsibility
- Why not part of the Sister's municipal government?
- Schools are well funded, find out their formula for success and use it
- Culture of organization is conflicted: tax and donation supported with fees and charges for cost recovery
- Needs to be decided: tax supported or non-profit
- Organization losing community respect because of unclear mission
- Broaden participant base
- Be clear: What do you want from SOAR?

- Executive Director is a good leader, but the programs need a Pied Piper (Tom was that for SOAR)
- Relationship with Seniors, concerning the Senior Center, is destructive and needs to be resolved
- Not sure Senior Center and SOAR, co-location is the best “fit”
- Community values SOAR, but will they fund it?
- Pledge commitments from community members for annual support i.e. \$1000 a year for 5 years
- Perhaps vision for SOAR needs to be more than a Parks and Recreation District, it should be the hub for community, youth and senior services
- Classes are designed for 9am-5pm offerings, need to be expanded outside “work” hours for those working 9-5
- Don’t understand the loyalty to Tai Kwan Do
- Sports too competitive, rely upon parents, need good coaching and training
- Consider using HS referees
- Focus upon recreation not just sports
- Build relationships with community
- Need to align youth development with programs
- Need clear goals for each staff and program with managerial staff to help attain goals
- Wake board class: where’s the community benefit at the high cost? Sends conflicting message
- Image: “Babysitting center, when I go into program area and see anything goes, out of control feeling and staff behind desk “surfing” on computer I am upset.”
- Define Mission and Share the Benefits
- Very troubled that some kids report sensing that SOAR programs are baby-sitting, uncool, for low-income
- We need a public swimming pool
- Gaining the full support of the community will be the only way to gain the funding necessary to maintain SOAR
- SOAR needs to pay for the professional services it expects from it’s Executive Director
- Basic parks and recreation services and facilities should be supported through City/taxes, etc. Special services, classes, etc should be supported by fees

SOAR Strategic Planning Process
Community Comments

June 14, 2007

(Comments not prioritized, duplicates were combined)

Mission

- SOAR critical to drug/alcohol prevention
- More activity/program focus than social service
- What is the stated mission for SOAR?
- SOAR needs to align with Sisters Vision

Governance/Scope of Services

- Learn what is possible as a parks/recreation agency/organization and decide focus, rather than respond to individual requests and special interests
- Organizational culture shift to proactive vs. reactive
- SOAR needs rebirth, no longer community babysitters
- Tax supported organization (community value) or Non-Profit (passion)?
- Programs and/or facility focus, or both?
- Programs need to have community value, not individual or special interest focus
- Need for new Board and Foundation members
- SOAR Program Advisory Council (participant and parent program input)

Image/Perceptions

- SOAR is for kids
- Community supports SOAR
- Drop-in programs at SOAR have bad image
- Community not aware of SOAR youth programs other than drop-in center
- SOAR responsive to parents concerns
- “Place where kids come”
- Extensive summer program, but limited other seasons
- Community support for SOAR is inconsistent

Funding

- Community does not want more taxes
- Competition with upcoming school bond
- Community will support taxes/funding for programs/facilities they really want
- Program started with little money now fees must cover full program costs
- Scholarship opportunities important
- Program fee philosophy needs to be established and published
- Are there grants, gifts, donations, etc. that can support SOAR?
- Create SDCs for SOAR

Relationships

- SOAR needs to cooperate with School District
- SOAR more supportive of schools than visa versa
- Partner with social services for local service delivery or on a regular scheduled basis
- Create relationship with Bend Metro Parks for program delivery on cost share basis
- Improve relationship with the Nugget for publicity, ie “Kid of the Week”
- Recognize relationships with Sisters Community Garden, Sisters Trail Committee, TAPS and HELP
- Create a Teen Advisory Council

Service Constituency (Who are the primary users and/or customers of SOAR?)

- SOAR should not be involved with a Senior Center
- Senior Centers are costly, isolating, and often fail to meet needs
- Senior Centers serve the frail elderly
- Church currently meets need for senior meal site
- Seniors can share experiences with youth
- Integrate youth and seniors through programs
- Shared infrastructure for programs, services and age groups
- “Seniors” today are not “old”

Programs

- Integrate programs and ages
- Fencing classes
- Local programs for adults no travel to Bend
- Summer chess program
- SOAR may not need to be in the day care business, market is meeting need
- Physically active programs needed
- Athletic programs: overall desire for recreational sports, conflicted images in community with competitive, recreational, learning
- More sports, active recreation programs, educational opportunities, less daycare
- Special events for community i.e. Munch ‘n Movies, once/month
- More neighborhood programs
- Hiking, skiing, exercise classes (locally)
- SOAR building open after school activities/programs
- Expand offerings and programs to increase confidence in programs and scope of services
- Sports programs unorganized, inconsistent

- Need training for volunteers and coaches
- Program changes are not well communicated
- Special needs participants need consideration
- Art programs
- Adult health and fitness

Facilities

- Multipurpose expansion of SOAR building for all age groups, none specifically
- Seniors, youth and community together, no separation
- Safe routes to facilities and program sites
- Should SOAR get involved in trails and parks on non-federal land?
- SOAR could manage volunteers for trails and facilities with more resources
- “We need SOAR but may need change in focus, programs and message”
- Should SOAR be in the daycare business?
- Specific facilities: Senior Center, public pool, nine hole executive golf course, community center, public fitness facility, rental facility for community and family events, more athletic facilities, neighborhood parks, skateboard park phase II, more bike paths
- How to engage local participation vs. going to Bend
- Cost of gas/transportation will affect desire for more local facilities/opportunities

Concerns

- Some kids report bullying at Teen Center
- Activities repeatedly cancelled at last minute, therefore no confidence
- Billing process not specific, requires resolution by participants/parents
- SOAR needs to be a leader in child safety practices (improvement of lately noted)
- Competitive wages and benefits for employees
- SOAR needs publicity, marketing, branding
- Once kids turn 16 they are on the road to Bend for entertainment
- Trade off: More activities for kids, Sisters loses its “quaintness”
- More media coverage
- Parents need to know program goals
- Transportation shuttles to/from programs
- Public needs to feel confident about programs to develop SOAR organizational creditability
- How best to publicize program offerings

SOAR's
Strengths, Challenges, Opportunities
(All responses noted without prioritization)

General Community Responses

Strengths

- SOAR building, lively and fun
- Parent involvement
- Leadership
- Has some good programs in place
- Has good staff and Director that is willing to look at change and new opportunities
- Sports programs
- Families welcome
- Serves many age groups
- Community partnerships
- Encourages physical activities
- The fact that SOAR exists and provides recreation services
- The Executive Director and her community connections
- Breadth of activities SOAR provides

Challenges, issues or concerns

- Cost of activity participation
- More facilities
- How to pay the salaries of full time employees
- Community growth will create more demands on scheduling, space and programs
- Program attendance
- Not many adult programs
- Day care is bogged down with issues
- Billing discrepancies
- Safety issues: non enforcement of helmet, parking and bullying
- Lack of communication to parents
- Being more stably funded and organized
- Bringing more professionalism to the rest of the staff

Vision of SOAR in 2012

- Operating a pool
- Programs for all ages

- Programs for active adults, including those 50+
- Programs similar to those offered in Bend
- Front line staff that are trained in dealing with poor/low income in non-judgmental way
- Place where my child can safely participate without being bullied.
- Space/programs where staff/child ration is 1-5 or 1-10 depending upon program
- Bussing service during summer from rural areas
- A well funded, stable, professional recreation organization

Other comments

- Really good facility for a town this size, with a staff that is looking at new things to try
- Create more of a parks and recreation based program
- Love the support when I have a school related concern
- Would like to see detailed billings
- Glad this strategic planning effort is happening and can't wait to see results

**SOAR Retreat
August 7, 2007**

AGENDA

- 9:00 Review agenda for day
 Goals for today
- Warm up activity
 Personal Coat of Arms
- 9:45 SOAR Timeline
- 10:15 Break
- 10:30 What is strategic planning?
- 10:45 Staff generated strengths, challenges, 5 year vision
 Most significant strengths of SOAR
 Most important challenges, issues, concerns
 What is your VISION for SOAR in the next 5 years?
- 11:15 Community results
 Individually review results of community meetings and
 highlight top 10 comments
 Group discussion of observations
- Noon Lunch
- 1:00 Mission and Vision of SOAR
- 2:15 What does this mean for us?
- Specific goals
 - Action steps, timeline, results

3:00 Report outs and conclusions

3:30 Conclusion

**Sisters Organization for Activities and Recreation (SOAR)
Retreat Summary
August 7, 2007**

Location: Five Pine Conference Center, Sisters

Attending: Carrie, Matt, Greg, Grace, Barb, Darcy, Laurie

Facilitator: Jane Boubel

The day began by reviewing the agenda, discussing the concept of strategic planning and sharing individual goals for the day. The employee goals for the day were:

- Reconnect with team, sharing direction and plans for the Fall
- Understand job responsibilities, balancing performances and expectations
- Move toward changes with a positive attitude
- Be inspired to do even more great programs
- Reconnect and learn about the goals and directions for organization
- Discuss how to educate and get the word out, connecting with the community
- Educate ourselves about our programs

Each participant was asked to prepare a personal Coat of Arms depicting their most significant professional accomplishment, favorite personal recreation activity, focus or goal in their personal life and a significant personal achievement.

SOAR Timeline

Participants were asked to note significant events and activities in the history of SOAR. Those events and activities were shared and placed on a timeline. (See attachment R-1) The group discussed the growth and evolution of SOAR and realized the changes, growth and opportunities ahead for the organization.

Strategic Planning

Jane and Carrie discussed the concept of strategic planning:

- Looking at the past, **how** SOAR developed to where it is today, and **what** SOAR will be in the future
- Creating **alignment**, taking all the great programs, ideas and activities of SOAR its employees and Boards and creating alignment of those ideas to reach the stated goals (critical directions)
- Reaching the **vision**, the picture of where SOAR will be in five years.

SOAR as a Non-Profit and Special Taxing District

SOAR as a Non-Profit Organization (Created 1995)

- SOAR was initially created as a Non-Profit 501(c)(3) organization under the Federal Tax Code
- Tax exempt organization for charitable purposes
- Governed by an appointed Board of Directors
- When the Special Taxing District was formed (1998) the non-profit evolved into the SOAR Foundation

- SOAR Foundation Mission: To support the programs and services of the SOAR district by raising money
- Constituents are donors to SOAR and benefactors of SOAR (participants, facility users and tax payers)
- Must comply with non-profit (federal) laws

SOAR as a Special Taxing District (Created 1998)

- Formed under State Law
- Requires voter approval to create and change boundaries and taxing amount
- Taxing Districts are another form of local government like school districts, cities, etc.
- Governed by an elected Board of officials who represent district residents
- Board sets policy/direction for the District
- Organization managed by professional staff that carry out the policy and programs of SOAR
- Constituents are district tax payers, participants and facility users and partner agencies and donors
- Must comply with state, federal and local laws

Strengths, Concerns and Challenges

The staff was asked to share their perceptions of SOAR's strengths, concerns and challenges.

Strengths

- Quality personnel
- Affordable programs
- Convenient locations
- Facility
- Wide variety of programs
- Good reputation
- Longevity and experience of personnel
- Room for growth
- Goal oriented
- Community partners
- Participant and family support
- Employee family and spouse support
- Family friendly employer
- Employee flexibility for work day
- Creativity
- Versatility and tenacity

- Multi-tasking
- Model for other communities, especially small communities
- Ability to transport participants to programs
- Community resource
- Positive impact upon children's lives
- Referral source for community

Concerns and Challenges

- Financial-operating costs
- Safety
- More jobs than personnel and time-under staffed
- Staff training- time and money
- More facilities
- Impact of community growth
- Community perception; misunderstanding of SOAR programs and funding
- Vehicle maintenance and replacement
- Program equipment maintenance and replacement
- Facility maintenance, replacement and expansion
- SOAR growing pains
- Playground expansion and remodel
- Board leadership
- Foundation Board fund raising support
- Senior Center/senior services controversy
- Displacement of working poor and middle class
- More requests for scholarships
- Increased expectations
- Influx of wealth
- Many citizens take SOAR for granted
- Community lack of education about SOAR funding
- Finding balance between expectations and costs
- Staff compensation

The summaries of community and stakeholder comments were shared with staff. The employees were asked to read the comments and make note of those that really stood out, or got their attention in their review. See pages 16-23.

The Mission of SOAR (What do we do?)

The Vision Statement for SOAR (What do we want to be in the year 2012?)

We discussed the difference between the mission of an organization and its vision. In summary, the mission of an organization is what the organization does, and the vision is where the organization wants to be in the future. The current mission statement is: *SOAR's mission is to provide educational, cultural and recreational activities and programs for the Sisters community.*

After individual thought, the employees shared key words and thoughts they felt important to include in SOAR's mission and vision statements. Two groups were formed and worked on statements. The results were shared with the full group, refined and accepted for Board approval.

Mission of SOAR: Our mission is to provide recreational opportunities designed to benefit the health and wellness of the Sisters community.

Vision of SOAR: The best little Parks and Recreation district in the world. We are building a proactive path of health and wellness for our community.

Critical Directions for 2007-2012

The employees developed the following critical directions and activities for Board review, amendment as needed and approval.

Recreation program development

- *New adult softball program*
- *More adult classes and sports opportunities*
- *New youth recreation opportunities*
- *Clubhouse program planning*
- *Refined preschool program*
- *Spend time on research and development of new or improved programs*
- *Focus on existing programs and make them the best in the world, then expand offerings*

Recreation facility planning and development

- *Develop a bicycle/pedestrian obstacle course*
- *Develop grounds and playgrounds*
- *Create ambience with park-like setting*
- *New/repared buses*
- *Remodeled playground area*
- *Phase II new facility*

- *Phase II gym or pool*
- *Pool*
- *Facility Planning and Development*
 - Phase II Community Center*
 - Pool*
 - Parks and Facility Master Plan for District*
 - Playground expansion/remodel*

Staff training and development

- *Staff training and classes*
- *Best parks and recreation staff in the world*

Finance and Leadership

- *Carrie as Executive Director*
- *Become financially stable and secure*

Initiation of new Mission, Vision and Goals

- *Clear Compelling Inspiring: Vision, Mission and Brand*
- *Organize and develop an awesome image for SOAR*
- *Energize our community about our programs*
- *A feeling of community support*
- *Focus on participant needs and requests*
- *Work on a new brand for SOAR*
- *Become the community resource in Sisters*
- *Working closer and gaining new partners*

Prepare and launch plan to be the Sisters Parks and Recreation District

Prepare a Board Development Plan

Parking Lot

During the retreat several items were brought up that need follow-up:

1. What is the Sisters Vision?
2. What is the specific formation language that the voters approved for the special taxing district?

