

NEXT50 EXPLORATORY PHASE: Key Learning & Recommendations

October 30
2021

Members love and appreciate the BPHA organization; its board, volunteers, rec centre, and the Beechwood Park-based projects it fosters in the community, like the Produce Stand, newsletter, planting of 50 trees, sponsorship of a refugee family, Claire Lake Rehabilitation, etc. After 50+ years the members see the rec centre as dated and in need of improvement. They envision a future built on the strengths of the current organization – one that is environmentally and financially sustainable.

*The future
flows from the
present.*

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This exploratory research phase of the NEXT50 project was designed to capture, present, and draw implications for BPHA members, the Board and local residents. The views and desires of Associate and Local Members along with local Beechwood Park residents are impartially described and interpreted without bias or preconceived assumption, as far as humanly possible.

Cost estimates for suggestions and ideas submitted by survey participants have not been included at this point in the project. We believe it would be premature to do so. Cost estimates should be part of Phase 2 along with site concepts & renderings.

EXECUTIVE SUMMARY: A BPHA Renaissance

For over 50 years the Rec Centre has been our neighbourhood gathering place. It was founded by a visionary donor and supported by decades of volunteer effort. It is a family-centric local oasis that is safe and nurturing with a side order of tennis and adult social gatherings.

The NEXT50 project (*see Appendix A: 'Origins' for details*) represents an exciting point in the life of this association! **IT CAN BE AN OPPORTUNITY TO RESHAPE THE ORGANIZATION FOR FUTURE GENERATIONS.** Based on the data collected and analyzed during the past 22 months **3 KEY LEARNINGS** are evident:

- The Rec Centre, though much loved, is viewed as dated and in need of improvement (facility & landscaping). The, continuously evolving, onsite programming is strongly supported.
- There is strong interest in the role of the BPHA being formally expanded to include programming for the broader neighbourhood, outside the walls of the Rec Centre (appealing to those neighbours who have little or no interest in using the pool or the tennis courts).
- There is strong interest in reviewing & revising the current membership model. Associates are overwhelmingly supported as part of our future.

Yes, the challenge of change is great! Yes, yes, we are ALL busy! Yes, COVID has taken a toll; but it has also made some things crystal clear... The importance of family and strong social bonds.... Acting for the **'common-good'** is one of the most significant lessons of the pandemic.

The following pages contain a set of detailed recommendations to address the 3 key learnings listed above. **IN SUMMARY we recommend:**

1. Engaging a landscape architect¹ in early 2022 to create **alternative site concepts** (with cost estimates) for member consideration during the summer of 2022.
2. Examining the **role and structure** of the association and adapting it to suit a more expanded, community-oriented ethos; adding a focus on needs and interests of the entire neighbourhood, in addition to those who use the Rec Centre.
3. Creating **two new Director roles**: A **NEXT50 Project Director** and a **Director of Community Engagement**
4. Commissioning a subcommittee **to research potential member models** and recommend an alternate model by early 2023.
5. Setting a **target date** to complete the NEXT50 project by 2028 – the 60th Anniversary of the BPHA.

Those of you who love this neighbourhood and who feel the potential of this opportunity will accept this invitation to **'act for the common good'**. With a full complement of volunteers, we **CAN 'BUILD BACK BETTER'**. Whether you've lived here for 50 years or 50 days we invite you to decide to get involved and reach out to us **NOW** at bpha.NEXT50@gmail.com. **The benefits of getting involved are personal as well as social** and they will be **your legacy** for generations to come.

The 10 most important two letter words in the English language:

'If it is to be, it is up to me.'

¹ A professional capable of preparing site drawings and costing components so that the membership can see the trade-offs and establish priorities for improvements. Once this is accomplished, seeking capital funds becomes feasible.

Key Learning and Recommendations in Greater Detail

The two surveys conducted during the past 22 months, built on each other, and both included a measure of desires for change vs. maintaining the status quo, as did the 'IDEAS' website data collection in 2020. **See Appendix B: NEXT50 Surveys and Idea Collection, for details.** In all cases, survey content was pre-approved by the Board liaison for the NEXT50 Project.

When combining the 2020 and 2021 survey results ([SPRING 2020 SURVEY RESULTS - Full Report](#) and [NEXT50: Let's Talk Spring 2021 Survey Results](#)) three common aspirations become clear along with one common concern. These are presented as key learning for member and Board consideration.

The following sections offer more detailed remarks on each of these key 4 topics as well as recommendations.

1. Many suggestions for **rec centre improvements and upgrades.**

2. Strong support for broadening the role of the BPHA **beyond managing the rec centre.**

3. Members support exploring new **membership models** (Associates are overwhelmingly seen as part of the future.)

4. There are justifiable concerns about **financing and volunteer resources** for tackling these opportunities.

1. Many suggestions for rec centre improvements and upgrades.

In all data collected there was **very strong support**, for improvements and upgrades to the rec centre. Suggestions for improvement are many and varied. **Building consensus on the highest leverage changes will be part of the next phase of this project.**

- Generally, the suggestions referenced: upgrading the fixtures/contents of the main building (including consideration for enlarging its footprint & making it a 4-season building); improvements to landscaping; maximizing the space on the slope; creating a play area for young children; seating/conversation areas for adults; and creating a variety of shade canopies. Making some accommodation for the annual produce stand was also strongly supported.
- *'Let's make the best of what we have and maximize the adjacent public space'* is a summary of the clarion call from the surveys. One verbatim comment that eloquently summarizes the situation is: *"No need to start from scratch – just share our current space differently and selectively make improvements within and adjacent to the existing footprint."*

An important component of this topic is the condition of the pool and cost of upgrades to the existing concrete structure. The **2019 AGM Board Directors** [year-end reports](#) provides a thoughtful and comprehensive review of the key elements for upgrading the current structure. It needs to be part of a briefing document to a landscape architect. With this approach, when the current liner needs replacement, we will have proactively calculated the costs of upgrading the underground filtration piping and the supporting mechanical equipment. Potentially, this work would require ripping out large swaths of the current pool deck and enlarging the mechanical room; this represents an opportunity to also make other desired changes at the same time.

Currently, neither concrete engineers (UWaterloo Engineering Faculty volunteers) nor London Rec (our pool servicing company) have concerns about imminent pool/liner failure. Planning for liner replacement is a prudent strategy. Annual inspections with the Maintenance Director in concert with London Rec during pool opening and closing are strongly advised.

RECOMMENDATION #1:

- **Engage a landscape architect** early in 2022 to create 2-3 alternative site concepts (with cost estimates for components) for member consideration. The designs will be based on data/input collected since June 2019. The surveys contain ample information for creating a Request For Proposal (RFP). Using an RFP and, possibly a Steering Committee, will set some guard rails for the architect and help with the identification of the 'nuggets' i.e. the items with the most leverage, from the data.
- The renderings could be **on display under the gazebo for the summer of 2022**, with several neighbourhood meetings/discussions scheduled to facilitate consensus on the most supported improvements. **Final design selection announced at 2022 AGM.**

2. Strong support for broadening the role of the BPHA beyond managing the rec centre.

Both surveys revealed strong support and interest in formally expanding the role of the BPHA; broadening its scope to include 'neighbourhood wide' issues, concerns, and programming.

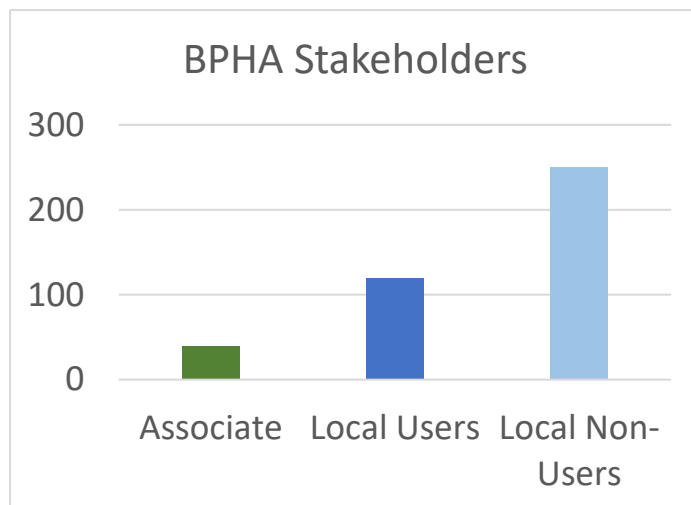
- Some of the ideas in this regard included: periodic 'suppers with seniors', community programming that is NOT rec centre based (book clubs, walking groups, cooking classes, tool-sharing, neighbour helping neighbour programs, etc.); information about civic affairs and government initiatives that affect residents.

The existing BPHA catchment contains 375 homes, typically only 120-130 become members annually. In fact, the average number of 'local' members between 2010 and 2021, for the years we have records, is 125 households.

Appendix C provides more detail on membership and our catchment.

Noting that 250 'local' households choose NOT to join the association indicates lack of relevance for the majority and holds huge opportunity for increasing membership by offering new benefits and programming.

Without adding to current rec centre usage, the BPHA could potentially expand its membership by discovering areas of interest to local non-users.



Formally expanding the role of the BPHA to include more 'neighbourhood wide' interests could potentially create new categories of Local membership. This opportunity is explored further in the next section of this report which focuses on membership models.

RECOMMENDATION #2:

- The Association consider **formally expanding its role**, taking this opportunity to make changes that support a neighbourhood wide ethos.
- Add a **Director of Community Engagement** focused on developing community programming; relationship building across all the Beechwoods; and information about civic affairs and government initiatives impacting our community.
- Take this opportunity to lower the microscope on current Board focus & organization looking for opportunities to align/realign the organization. Wherever possible, the current Board structure be streamlined with the use of sub-committees.

Current Board Structure

President
Vice President
Past President
Treasurer
Bookkeeper
Membership Director
Maintenance Director
Social Director
Secretary
Program Director
Pool Co-Director
Pool Co-Director
Tennis Director
Member-at-Large

3. Members support exploring new membership models (Associates are overwhelmingly seen as part of the future.)

During its first 50 years (1968- 2018) the organization evolved from an exclusive covenant-based Homes Association to a voluntary-based membership consisting of members who live **inside** the catchment (Locals) and others who live **outside** the catchment (Associates). **Appendix C** shows membership since 2003 and documents what we know about evolution of the membership model. There is a downward trend in memberships across the board, including Local and Associate members.

Both surveys demonstrated strong levels of support for examining different approaches to membership to attract more Local membership. In addition, both surveys demonstrated strong support for our 'Associate' members – the annual number of which are capped to avoid overtaxing the rec centre facility.

As discussed in the previous section, **establishing a new type(s) of neighborhood membership, not related to facility use, could potentially increase the relevance of the association and add a new revenue stream.** Interest in expanding the role of the BPHA, is aligned with member support for exploring membership models that move beyond the status quo.

Appendix D maps all the Beechwoods and highlights their current membership models. Two remain under covenants; 3 have successfully converted to the Special Services Levy (SSL) program offered through the City of Waterloo; and the remaining 5 have various versions of 'voluntary' membership models.

It should be noted that both Beechwood North & Beechwood Bridlegate have already moved away from our current member model (2 member tiers: one for 'Locals' and a 2nd for 'Associates'). They both now have one tier for 'families' (regardless of address) and a 2nd tier for 'adult-only households' (again regardless of address). This is an interesting evolution.

Detailed data related to the other Beechwoods was collected as part of the '[BETTER TOGETHER](#)' NEXT50 initiative in early 2021. It provides a large amount of secondary membership information online for benchmarking purposes.

RECOMMENDATION #3:

- The Board establish a **steering committee** to research other potential membership models and recommend a model for members to vote on at a Special General Meeting in Spring of 2023. Timing of its implementation to be determined. The scope of work should include exploring options with the City, potential Common Element Condominium (CEC) variations, other Beechwood models, other Neighbourhood Association models.

4. There are justifiable concerns about financing and volunteer resources for tackling these opportunities.

Members are rightly concerned about financing rec centre improvement and finding volunteers capable and motivated to tackle initiatives beyond managing the rec centre. To date the **ideas** for potential sources of capital funding include:

- potential mortgage on the Rec Centre, 295 Shakespeare Dr.
- New Membership Model built on condo fee model. (This idea involves setting up a fund to support future capital expenditures. For example, if we each put \$100 away as members for 10 years and there are 100 members a year, that adds up to \$100,000 in the capital expenditures fund, in 10 years)
- solicitation of donations (Individuals? Business? Real Estate Agents?)
- fundraising campaigns
- grant writing (Trillium Foundation, Federal infrastructure grants, others)
- City of Waterloo.

The community has been successful in finding donations for specific projects in the past ranging from helping to build a local area playground, purchasing new equipment for the pool and sponsoring refugees.

RECOMMENDATION #4

- **Add a NEXT50 Project Director to the Board**, with overall responsibility for overseeing the key components of the project and the related sub /steering committees:
 - site (re)development steering committee (2022/23)
 - membership model steering committee (2022/23)
 - fundraising team (2023/28)
- Set a target to complete most, or all, phases of the NEXT50 project by 2028 - our 60th Anniversary.

This is a multi-year project commenced in 2020 and now projected to run until 2028. The specifics in each phase are likely to evolve over time.

Explore 2020-21	Refine 2022-23	Plan 2023-24	Implementation 2024-28
<ul style="list-style-type: none"> •Member & Community Surveys, reports, presentation, and discussions •Recommendations •City funded •During the COVID pandemic 	<ul style="list-style-type: none"> •Site Designs & estimates - priority setting •Role expansion? •Board reorg? •Membership model review + new community memberships? 	<ul style="list-style-type: none"> •Specific project estimates •Capital fund raising •City building permit reviews •Project approvals •New member growth 	<ul style="list-style-type: none"> •On-going improvements as funds permit •2028 target date for completion

Final thoughts

For those interested in a deep dive into the NEXT50 project, all the details are accessible at <https://www.bpha.ca/next50/>. Being transparent with the information has been important to us.

If you want to discuss **involvement**, we invite you to reach out to us at bpha.NEXT50@gmail.com.

A huge **'thank you'** to:

- all those who volunteered on the NEXT50 Project: Exploratory Phase
- the Board and all those who completed our surveys and provided suggestions.
- those who attended the September '21 meetings and helped refine our thinking.
- those neighbours who took the time to edit our first draft(s) improving the effectiveness of this report.
- the City of Waterloo and its Neighbourhood Matching Fund (NMF) program for grants totally \$5,000 to support costs related to this neighbourhood initiative.
- **all the future volunteers for embracing a vision of promise and opportunity....**

APPENDIX A: NEXT50 Project Origin

The BPHA celebrated its 50th anniversary in 2018 and after half a century of ‘making memories’ the BPHA Board acknowledged that, given the age of the facility, major repairs and improvements were a matter of inevitability. They wanted to face the future with a well thought out, comprehensive **‘Master Plan’** for site (re)development. This proactive approach was fostered by the maintenance committee (the Planning & Doing (P&D) Committee) as it would provide clarity about annual priorities and sequence them, as part of a long-term plan. Without this kind of direction, improvements could become haphazard and risk being a waste of both time & money. In addition, two focus groups with members were held during August 2019 to solicit site improvement ideas. The numerous suggestions that surfaced are documented at [two town hall meetings](#) and [Maintenance / Planning & Doing \(P&D\) Team](#).

At the Dec 2019 AGM the Board commissioned a small group of volunteers with the task of initiating the first step in this multi-year project and the NEXT50 team was formed.² **Its objective was to help the Board understand the interests and aspirations of members and local residents as input for a future vision.** The first step in this process was a consultative, ‘exploratory’ phase involving collecting input from members and neighbours.

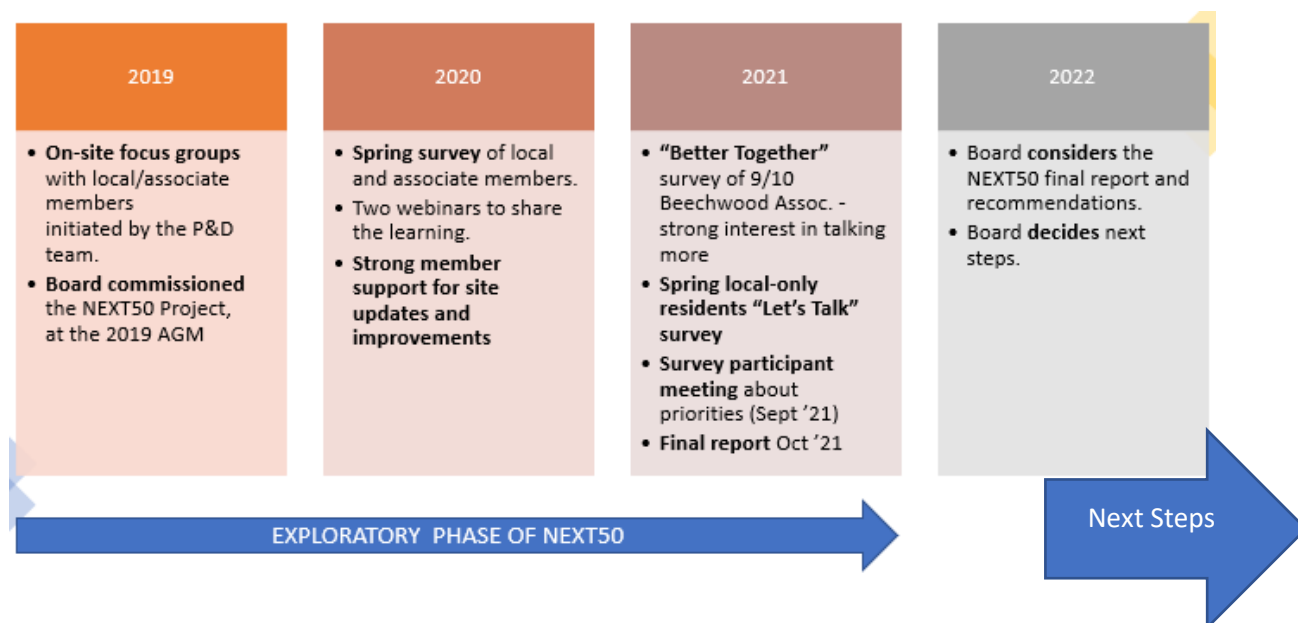
Inspiration

The NEXT50 Team drew inspiration from Abram Wiebe as summarized on page 9 of the **‘BPHA: The First 50 Years’**, published in 2019.

“Whatever tomorrow may bring it is unlikely to be simply more of today.” - Abram Wiebe

The team approached this exploratory research with an open mind and respect for desires to preserve the status quo.

Overview of the NEXT50 Exploratory Phase³



² Team members: Joel Blit, Serge LeVert Chiasson, Sanjay Govindaraj, Paul Harrington, Katie MacGuire, Dianne & Bill Ratcliffe, Carole & Jim Wilkinson worked on the NEXT50 team for all, or part of the past 22 months.

³ NOTE: All survey results, including verbatim remarks are posted at www.bpha.ca at the NEXT50 TAB subtab THE DATA.

APPENDIX B: NEXT50 Surveys and Idea Collection

1. **The 2020 online survey was completed** by 62% of Local and 60% of Associate members (n=70, n=23), along with a few local non-member households (10 people – 4% response rate). This high level of response adds confidence to the results and reflects enthusiasm for the NEXT50 project.
 - a. This survey asked participants to identify the BPHA's Strengths, Weaknesses, Threats and Opportunities (SWOT).
 - b. The responses are included in the [SPRING 2020 SURVEY RESULTS - Full Report](#) and were used to establish [EMERGING THEMES AND GUIDING PRINCIPLES](#).
2. **Also, in 2020** we used the BPHA website to ask members to provide their ideas/suggestions for the rec centre under three options. These options were designed to gauge interest in the status quo vs. improvements. This method of input was open from March to October 2020. The options were:
 - a. *Continue making repairs as necessary without making major changes to the facility.*
 - b. *In addition to making necessary repairs, what changes to the facility and the activities would you suggest?*
 - c. *If we were starting fresh, what ideas should be considered when we think about the next 50 years?*

OPTION (as above)	# of Responses	Idea Content
a	7	many of these comments suggested improvements rather than the maintaining the status quo
b	13	many detailed suggestions for improvements
c	7	more suggestions for improvement AND clear indications that we do NOT need to start from scratch

The most numerous suggestions focused on improvements rather than maintaining the status quo or starting from scratch (['IDEAS' tab on our BPHA website](#)). Since these ideas were provided by a small number of members (17) the **2021** survey included a clear option for maintaining the status quo along with specific areas for improvement.

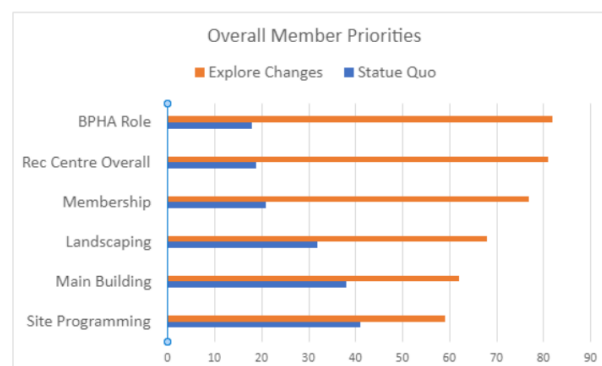
3. **The 2021 online survey** included **Local-only members and past members, and local non-member residents** (Associates were NOT included). This survey was completed by **42%** of current Local members (n=51) and **23%** of past members (n=14) along with a few local, non-member residents (n=3). The lower 2021-member response rate is attributed to COVID fatigue and loss of NEXT50 momentum.

Once again, support for improvements far outweighed support for the status quo.

In 2021 we added a set of questions about the role of the BPHA and about the membership model.

In terms of the *Role of the BPHA*, the *Overall Rec Centre* and *Membership Model*, **the desire to explore changes far outweighed affinity for the status quo.**

Support for the status quo was highest for the current on-site programming (as expected).

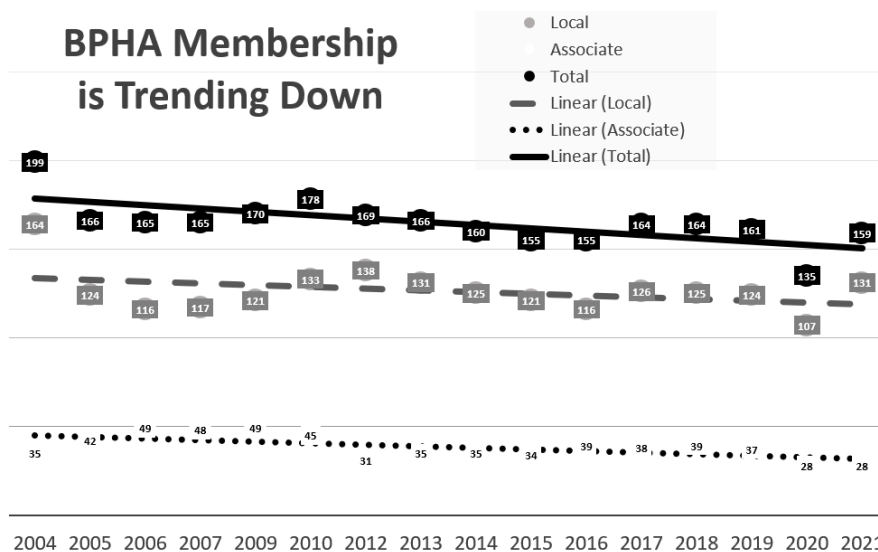


The exciting, 'low-hanging fruit' for the association is the group of past members (approx. 50+ households); 23% of whom responded to the 2nd survey! We are still on their radar screens and with relevant programming/benefits we could attract them back to a membership status.

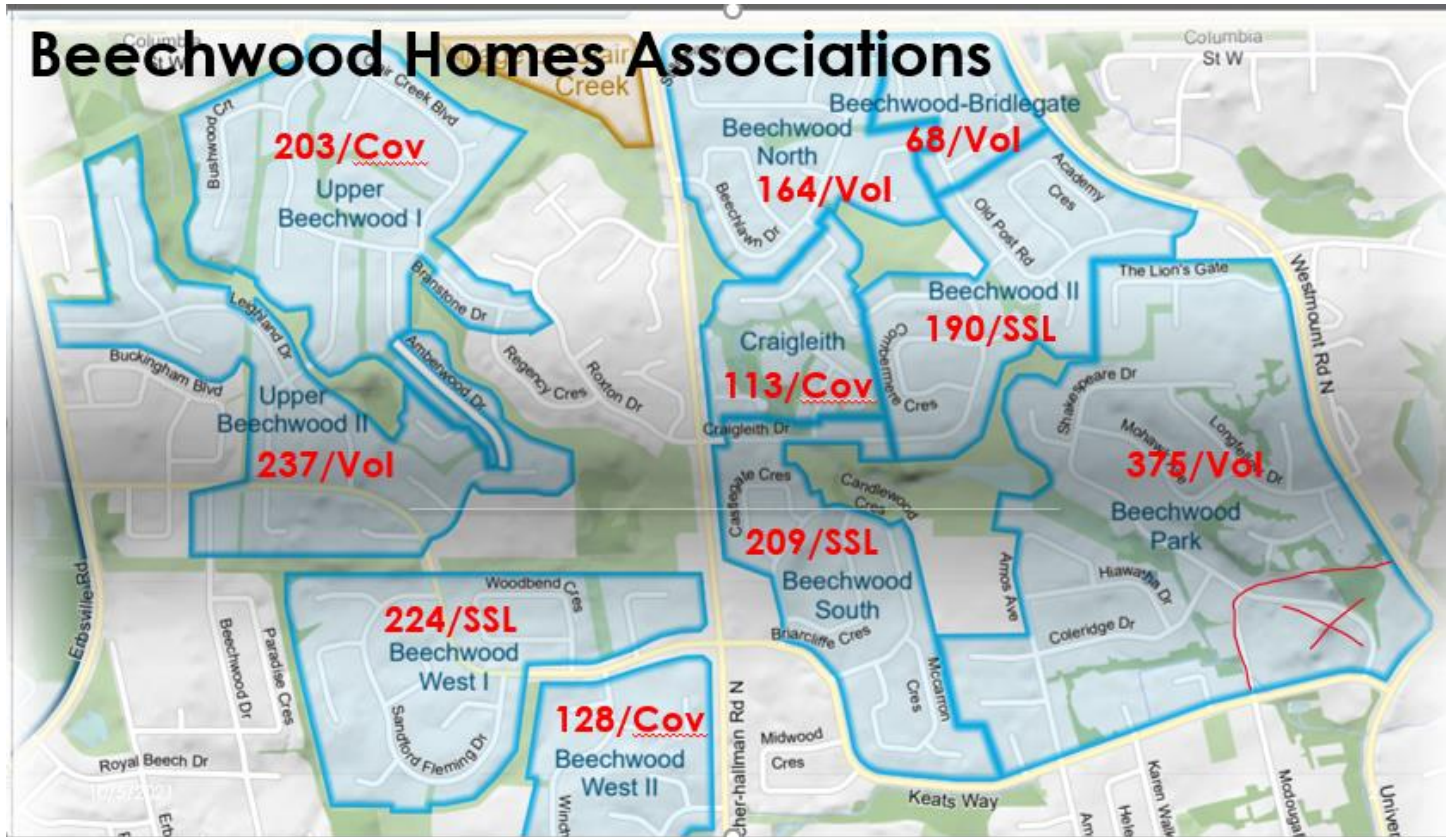
APPENDIX C: BPHA Membership since 2003

1. The original Beechwood Park Homes Association catchment area included only those homes built by Major Holdings Ltd. Approximately 140 homes on Longfellow, Tennyson, parts of Algonquin, Shakespeare Place & Drive, Mohawk, Coleridge Dr., Browning Place and Marlowe Dr. These original members of the BPHA were under 40-year covenants.
2. In 1988 the BPHA created an 'associate' membership category allowing neighbours living on Hiawatha to become members. The asterisk* denotes that many of these 'associates' between 1988 and 2009 lived in the immediate neighbourhood.
3. In 2010 the 'local' catchment area was formally extended to include Hiawatha and other adjoining streets which were not part of the original development by Major Holdings. The "local" catchment area was redefined by the Board adding all homes on Hiawatha, Anatolin Pl, Coleridge Pl, Amos, Glenburn Dr, Karen's Walk, Keats Walk, Lions Gate & Court. The new 'local borders' for the BPHA were redrawn: Keatsway to the south, McDougall/Shakespeare to the East, Lions Gate to the north & both sides of Amos to the west. It created a core area of 375 'local' homes that could potentially qualify for 'Local' member rates/status. Thus, the 'Associate' membership category became defined as ONLY those homes outside of this newly established area. Formal application for this expansion of the catchment was not made to the City, therefore it does not formally recognise the expansion. This would appear to be a problem only if we ever wanted to apply for the SALS/SSL program.
4. Special Area Services levy (SALS), later renamed Special Services levy (SSL), was a program introduced by the City which provided an opportunity for the 10 Beechwood Homes Associations to replace covenants with a special levy/taxes/household to support maintenance and repairs of their rec centres.

Year	# of local members	Associate members* #2	totals	Additional details
2003			195	137 compulsory #1
2004	164	35*	199	137 compulsory
2005	124	42*	166	35 compulsory: covenants began to expire
2006	116	48/49*	164/167	35 compulsory.
2007	117	48*	165	
2008			165/170	
2009	121	49*	170	
2010	133	45	178	All final covenants expire. The 'local' catchment area was redefined by Board. The 'Associate' membership category became defined as households outside of this newly established area #3. City introduces Special Area levy System (SALS), later changed to Special Services Levy (SSL) #4.
2011				Associate members capped at 35
2012	138	31	169	
2013	131	35	166	
2014	125	35	160	
2015	121	34	155	
2016	116	39	155	AGM approval to allow Board discretion in annual # of Associates, up to a max of 40/year.
2017	126	38	164	
2018	125	39	164	
2019	124	37	161	
2020	107	28	135	Impact of COVID
2021	131	28	161	24 new local families. Associates capped at 28.



APPENDIX D: Map of all Beechwood Associations & Membership Models



See '[BETTER TOGETHER](#)' for more detail

Legend:

- Number of households/catchment area
- COV – Under Covenant
- SSL – Special Services Levy
- VOL – Voluntary