MARYLAND RECREATION AND PARKS ASSOCIATION

CPRP Study Group

Prepared by John Henderson

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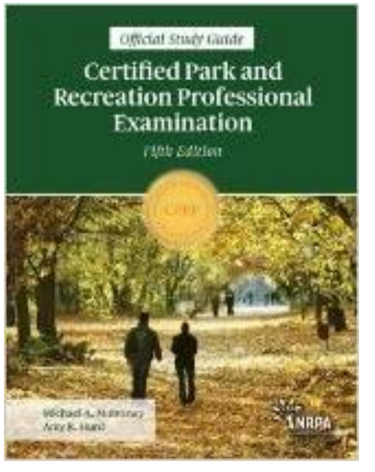
CPRP Training

Based on:

Certified Park and Recreation Professional Examination
6th Edition, 2022

Amy Hurd & Michael A. Mulvaney
National Recreation and Park Association



Your Presenters

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COMMUNICATION

Examination Content

150 Questions over 3 Hours (125 scored and 25 pre-test questions)
Covers 51 Tasks in 5 Categories:

- **Communication (25%) 31-32 Questions**

  e.g., promote benefits, solicit public support, foster internal and external relationships

- **Finance (10%) 12-13 Questions**

  e.g., purchase supplies, equipment, and services, develop fee collection procedures, conduct cost-recovery analysis

- **Human Resources (10%) 12-13 Questions**

  e.g., develop job descriptions, recruitment, managing volunteers, enforcing policies and procedures

- **Operations (30%) 37-38 Questions**

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- **Programming (25%) 31-32 Questions**

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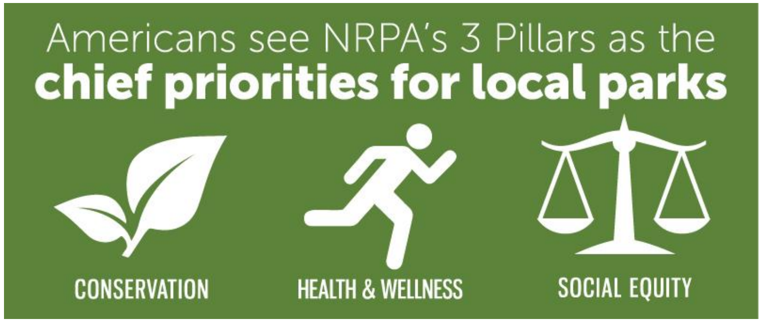
Promoting Benefits

As a profession, we have to demonstrate how we meet the needs of the community through benefits or we will cease to exist.

Making services more valuable to the community can help ensure their continued funding support from governing boards.
If it is not valued, the agency can eliminate it.

BENEFIT	PROGRAMS	PARKS	NATURAL AREAS	FACILITIES
Community				
Individual				

NRPA Pillars



Education Regarding P&R Value

Reposition your agency to be viewed as an essential service by promoting:

- Research and Scientific Evidence
- Testimonial Evidence
- Cost/Benefit Analysis, e.g., cost of fitness program vs cost of medication

Create a position statement that states the benefits provided by your agency

Friends Groups pp 10-11

Purpose is to support P&R agencies

Typically:

- Founded by local community members
- 501(c)(3) tax exempt nonprofits
- Have a federal employer identification number (EIN)
- Are incorporated as nonprofit corporations in the jurisdictions in which they do business

Collecting Public Input pp.10-11

Methods to communicate with the public include:

- **Public Meetings**: Used to inform, consult, and involve -- often conducted by the CEO. The meetings need skilled facilitation.
- **Focus Groups**: Used to ascertain perceptions, opinions, beliefs, and attitudes - Need neutral facilitation - Small groups fewer than 10 people - Last for 45-90 minutes.
- **Citizen Advisory Groups**: Created to gather input and win support
- **Surveys**: Survey development is challenging. Ask only necessary Qs. Most important Qs at the beginning demographic Qs at the end.
- **Referenda**: Item placed on ballot for voters to decide. Ideally non-binding to preserve flexibility.

Vision and Mission P 12

Interrelated statements that should be understood by staff and the public.

Vision: An ideal image of what the agency will look like in the future

Mission: What the agency does and states a) who are the customers, b) what services are provided, and c) how services are delivered

Fostering Structural Integration pp 12-13

Structural Integration = Strong Internal and External Departmental Relationships

- Ensure departments do not compete for resources
- Vet policies through all departments
- Consistently enforce policies across departments
- Emphasize big picture - focus on agency goals
- Communicate with staff openly and frequently
- Provide opportunities for face-to-face staff contact
- Make meetings a positive experience - action follow up

Working with External Groups pp 15

Benefits:

- Providing a higher level of service
- Pooling resources
- Avoiding duplication
- Gaining expertise
- Wise use of tax dollars
- Enhancing flexibility and efficiency

Types:

Collaboration		**Alliance**		**Partnership Integration**
• Short-term – until a problem is solved • Two or more stakeholders working together to solve a problem neither can solve alone		• Requires high-level commitment • Often defined by a formal agreement • Authority is shared among the participants		• Strongest • Creates a new entity • Partners give up responsibilities to the new organization

Formal Relationships p 17 5th Edition

The higher the agency's investment of resources the more formalized the agreement should be

Consider:

- Purpose
- Partner roles and responsibilities
- Decision-making process
- Communication process
- Deliverables
- Timelines
- Resources
- Evaluation
- Exit Strategy

Marketing and Branding pp 15-17 5th Edition

<u>Marketing Plan</u>: Ensures that products and services are tailored to the identified wants of the customer, are affordable, and are accessible

<u>Branding</u>: Creating an image in the minds of consumers of products and services and associating the image with the agency name and logo

Marketing Concepts

Market: A set of actual and potential buyers of a produce who have similar characteristics and the resources to obtain the product

Marketing Mix: 4 Ps <u>product</u>, <u>price</u>, <u>place</u> (access), and <u>promotion</u> (communicating value)

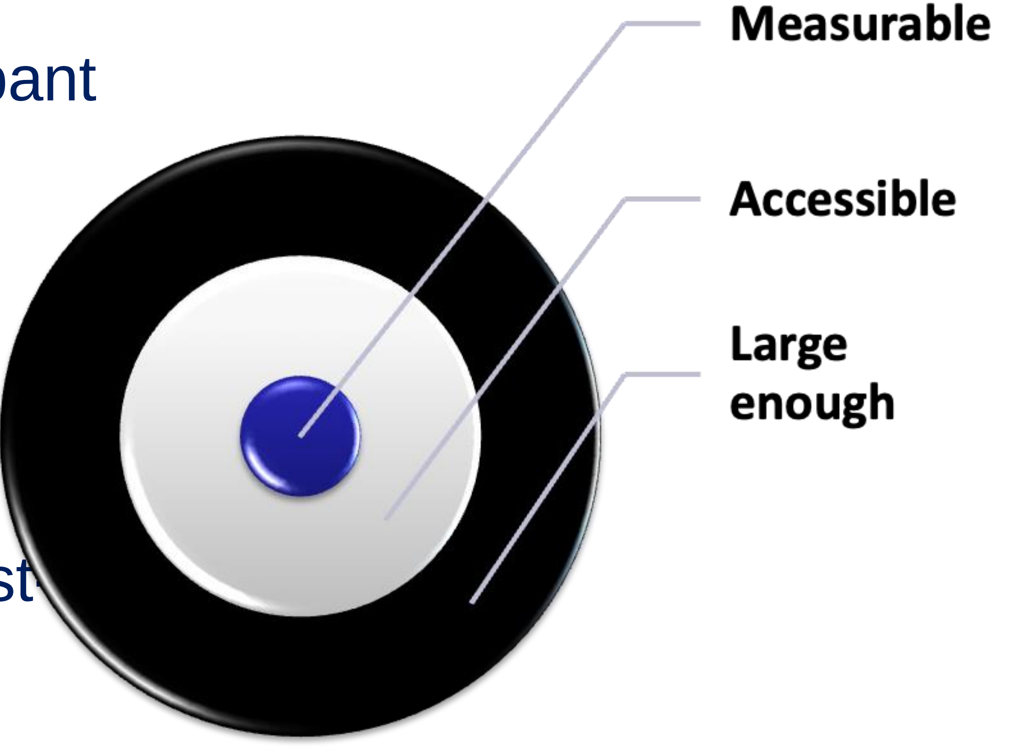
Market Segmentation: Division into smaller homogeneous markets that are measurable, accessible and of sufficient size

Target Marketing: Differentiation of marketing mix and Concentration on selected segments

Market Positioning: Seeking to establish a unique or competitive market

Target Population p 16

- Group of individuals with common interests, demographics, etc.
- Used to identify participant needs
- Measurable (size and characteristics)
- Accessible
  (can be reached)
- Large enough to be cost-effective



Developing a Marketing Plan pp 17-19

Contents:

1. **Executive Summary:** Placed up front -- summary of entire plan
2. **Situational Analysis:** Evaluation of the internal and external environments in which the agency operates
3. **Customer Analysis:** Identifies market segments and establishes target markets for programs and facilities
4. **Branding Goals and Strategies:** Goals provide direction and strategies detail how goals will be accomplished, e.g., advertising and sponsorship plans
5. **Implementation,Monitoring, and Evaluation**

Providing Information to the Public:

- **News Releases:** Prepared in a particular format. Often initiate other coverage.
- **Printed Materials:** Newsletters and brochures. Being replaced with online tools
- **Websites and apps**
- **Social Media**

How to Communicate with Officials, Boards, Commissions

- Provide fact-based information that is easy to understand
- Get to know interests through informal conversation
- Learn their preferred methods of communication
- Always be truthful and transparent
- If an issue is contentious, provide them with talking points
- Keep officials up-to-date
- Maintain relationships with staff aides
- Avoid surprises - make sure they know in advance
- Be diplomatic - Avoid correcting officials in public
- Respond in ways that do not offend the official

Advocacy and Lobbying p. 14

- Advocacy can include education, outcomes-based programming, and involvement in the political process
- Citizens can often be more influential than agency staff
- Public employees are subject to regulation concerning contacts with members of Congress and state legislators.
  - The 1st Amendment protects your right to lobby members of Congress, congressional staff, and state legislators
    - Identify yourself as a concerned citizen presenting your personal views
  - Appropriated federal and state funds may not be used, directly or indirectly, to pay for lobbying activities
    - Anything paid for by government cannot be used for lobbying

Internal Chain of Communication pp 16-17

Organization Chart

- Chain of command is the line of authority between supervisor and employee.
- The chart shows a direct line between the supervisor and employee.
- An employee should have one supervisor
- All of the same job title should be at the same level, e.g., directors and coordinators should never be on the same level

Communicating Policy and Philosophy p 21 5th Ed.

All employees need to be on the “same page” and able to communicate agency policies and philosophies

In-service training is used to update employees on new and existing policies, procedures, and activities - training is

- Planned
- Regularly Scheduled
- Attendance-Tracked
- Evaluated

Communicating Agency Strategies and Tactics

Provide staff input/updates on strategic, marketing, master, and program plans. All should have:

<u>A strategies and tactics section</u> -- that says what the agency is going to do to execute them

<u>A monitoring, review and update section</u> -- that specifies responsibility for monitoring and methods and timing of reporting

Implement Inclusive Communications pp 19-20

Start by developing an equity plan to assess current:

- **Marketing materials, including images**
- **Program offerings**
- **Language used in internal and external communications**
- **Hiring practices**
- **Policy reviews**
- **Park, facility, and program locations**
- **Community demographics**

To create a more welcoming space learn to spot bias, e.g. programming on religious holidays, definition of "family," stereotypical images

Diversity
Equity
Inclusion

Implement Inclusive Communications pp 19-20

Communications guidelines:

- **Be as specific as possible**
- **Use "people-first" language, e.g., person with a disability versus disabled person**
- **Use active voice**
- **Write to with a 6th to 8th grade level in mind**
- **Avoid jargon**
- **Keep in mind that diversity includes disability, gender expression, age, sexual orientation, income, education, etc.**

Diversity
Equity
Inclusion

Organizational Reports p. 17

Recommendations:

- Provide the information requested
- Send in the requested format
- Check for accuracy
- Timely review of drafts
- Meet deadlines
- Tailor report delivery to audience expectations

Advocacy by Employees Including Seasonal/Part-time p 21 5th Ed

Staff who are happy with their jobs are the best advocates for their organization

- Frontline staff
- Face of the agency

Advocacy can be enhanced with customer service training

FINANCE

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Collect Financial and Operating Data p 35

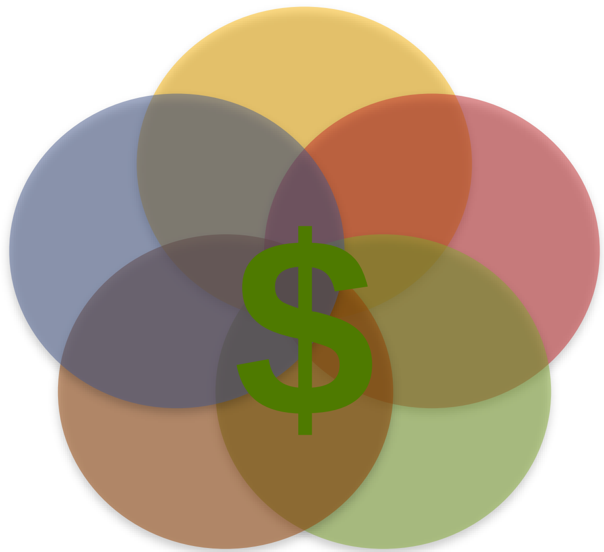
These data assist in accounting for cash handling, revenues, and expenditures:

- Attendance figures for event programs and facilities
- Room counts conducted daily to hourly (busy facilities hourly) show facility use patterns and % of capacity used
- Cash reports including daily revenues reveal, people coming, how much they pay, and purchasing
- Maintenance reports show completed, scheduled and pending work requests

Data Collection

Attendance Figures:
programs, events, facilities.
Registration history

Room Usage:
facility rental and program use figures – daily/hourly



Daily Revenues/ Gate Receipts:
number of facility visitors, members, admissions, sales

Maintenance Report:
work requests completed, pending, scheduled

Activity Reports:
broken down by facility usage: number of participants, lessons, items sold, rentals

Fee-Collection Procedures p 38 5th Ed

Major sources of revenue for park and recreation agencies are fees and charges, rental income, and retail sales.

A department that receives cash payments should have:

1. Revenue collection policies
2. Definitive procedures for each collection location
3. Deposit procedures for revenue processing and security

Cash-Handling Practices p 27-28

Ways to Reduce corruption, discourage dishonesty, and avoid participant criticism:

- **Post a fee schedule**
- **Required 2 employees to be at entrance (or use a cash register) for control**
- **All cashiering areas should have security and separation from customers**
- **Reconcile cash register receipts**
- **Cash handlers should report overages/shortages daily to a supervisor**
- **Rotate attendants responsible for receiving cash payments**
- **Record miscellaneous payments using a numbered receipt in triplicate -- 1) participant, 2) control office, and 3) retained at recreation site**
- **Deposit collections daily or, if not possible, use a safe or a secure locked location**
- **Provide keys to lock boxes, cash registers, and bank bags only to supervisors**
- **Schedule frequent unannounced visits by internal auditors**
- **Separate staff handle cash, check, and credit-card duties**
- **Record all cash, check, and credit-card payments daily**

Purchasing Options pp 28-29 petty cash

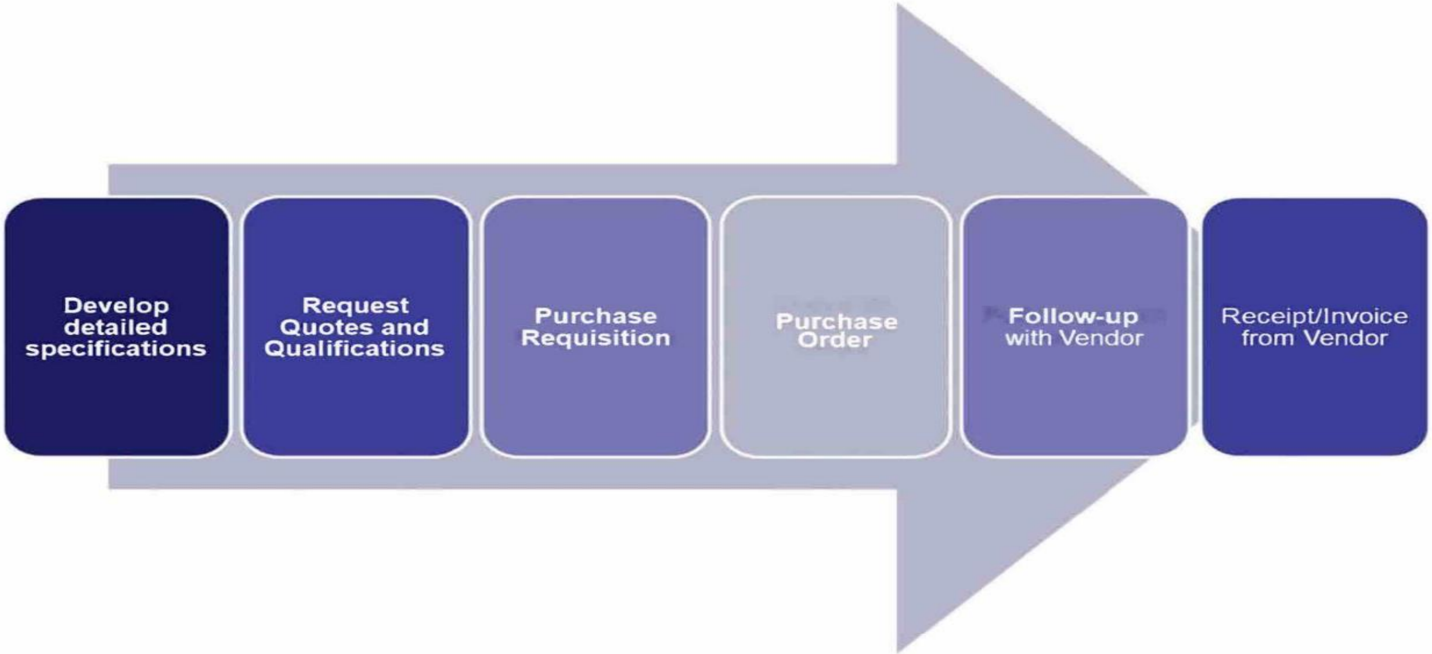
- **Blanket purchase orders**: Monthly billing used for continuing small purchases
- **Standard purchase order**: 1-time for specific good or service, requires authorization
- **Purchasing card** (P-card): Like a personal credit card, spending cap, may be designated for use at a specific business, paid off monthly, has a detailed statement which is easier for accounting
- **Credit Card**: Can carry a balance, general statement, higher fee than P-card
- **Petty Cash**: For miscellaneous items not exceeding a specific amount, e.g. $100; spending limit per item; not used for personal services, meals, or travel; receipts for purchases must show date, amount, item description, and be imprinted with the vendor’s name.

No-Bid Purchasing Process pp 30-32

Process for items under bid threshold:

1. Request purchase requisition
2. Obtain quotes
3. Determine means of purchasing, e.g, P-card, P.O.
4. Make the purchase
5. Submit receipt for payment

Purchasing with Purchase Order



Purchasing Requiring Bids

Develop detailed specifications

↓

Solicit Bids

↓

Award Contract

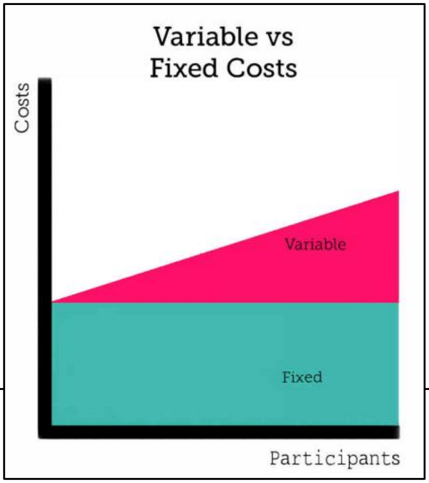
↓

Evaluate Equipment/Services Rendered

Types of Costs pp 38

- **Fixed Costs**: Do not change with the # of participants
  - **Direct Fixed Costs**: Cost of program occurring (i.e., renting a room for an activity, instructor to teach class)
  - **Changing Fixed Costs**: Direct fixed costs can increase with volume,e.g., exceeding room capacity (another room) or instructor to participant ratio (another instructor)
  - **Indirect Fixed Costs (Overhead)**: Shared fees among programs (i.e., administrative expenses, utilities, maintenance, marketing)

- **Variable Costs:** Costs for operating the program change based on the # of participants (i.e., t-shirts, supplies, etc.)

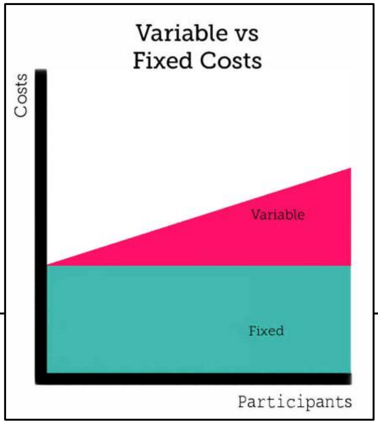


Fixed Indirect (Overhead) Cost Allocation

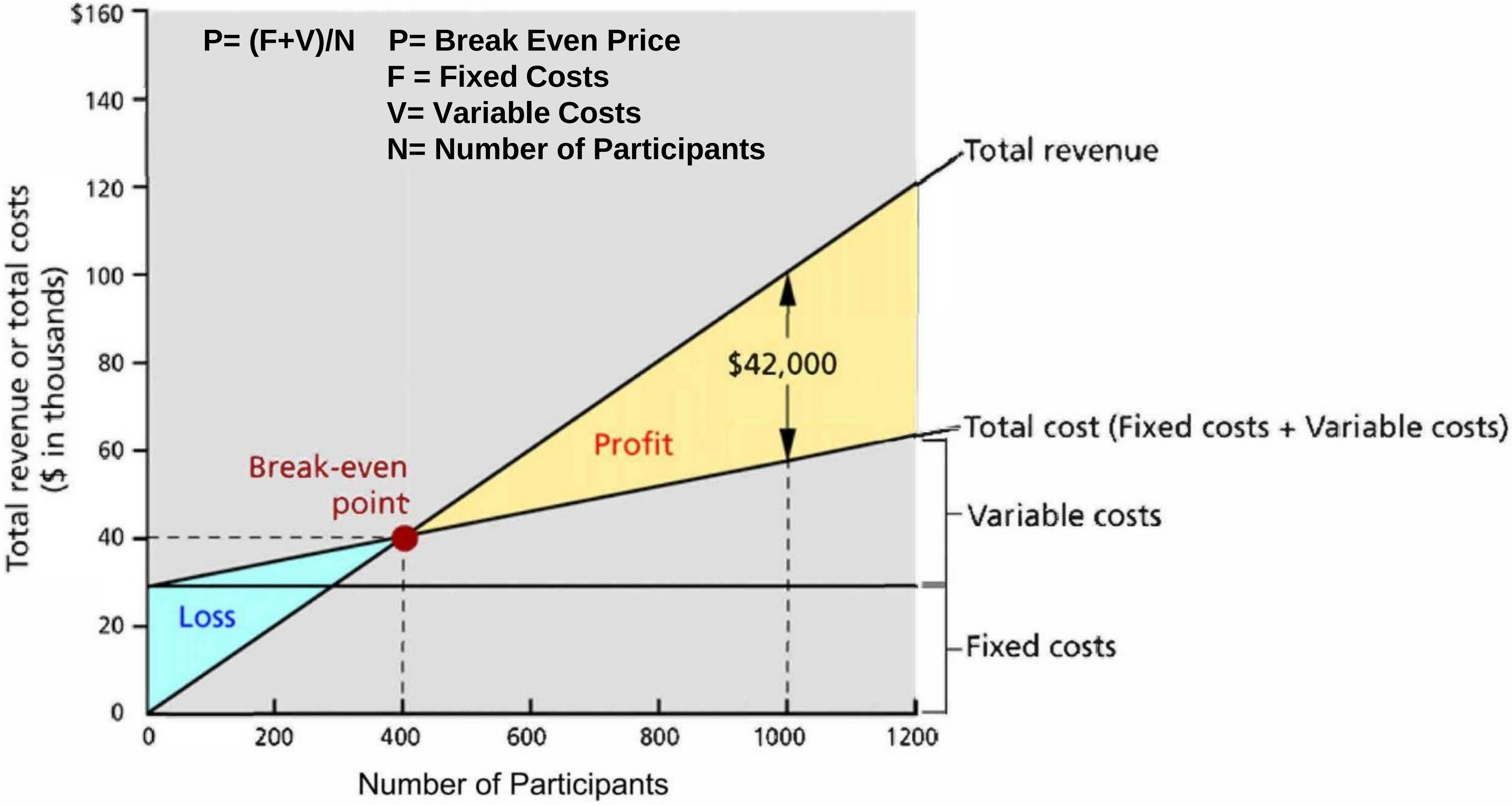
Cost Allocation of Indirect Fixed (Overhead) Costs to Program Area:

- Equal-share -- all pay the same
- Percentage of Budget -- % equal to budget share

Allocation Method ($100 K)	Tennis	Golf	Fitness	Bowling
Equal Share	$ 25,000	$ 25,000	$ 25,000	$ 25,000
Percent of Budget	40% / $ 40,000	25% / $ 25,000	30% / $30,000	5% / $ 5,000



Break-Even Analysis p 39



Cost Recovery p 37

- Financial objectives are key to conducting a cost recovery analysis
- Policies outline what level of cost recovery the different types of programs must achieve -- make a profit, break-even, or be subsidized
- Before establishing cost recovery levels the cost of the program and demand for the program must be understood
- It is best to underestimate demand and overestimate costs
- Cost-recovery levels for each program depend on agency philosophy
  - **Public Service** (no fee - 100% subsidy) - the whole community benefits, e.g., parks, trails, playgrounds
  - **Merit** - (partial subsidy), e.g., teen programming in some jurisdictions
  - **Private** - (100% cost recovery or profit) for programs that benefit primarily the participating individuals, e.g., photography and cooking classes

Cost-Recovery Rate p 40

The cost-recovery rate is the percentage that the program will be either subsidized, break even, or make a profit.

The final price of the program can be set using this formula:

P= Per Hour Unit Cost x (1-S) **S**=Subsidy Rate **P**=Price

A negative subsidy is a profit.

A 100% subsidy means the program is free.

User Group	Subsidy Level	Price/hour	Formula
Sync skating	45%	$ 25.85	$47 x (1 - .45)
Public skating	0%	$ 47.00	$47 x (1 - .00)
Open skating	100%	Free	$47 x (1 - 1.0)
Junior hockey	10%	$ 42.30	$47 x (1 - .10)
Women's hockey	-45%	$ 68.15	$47 x (1 +.45)

Cost-Recovery Rate p 39

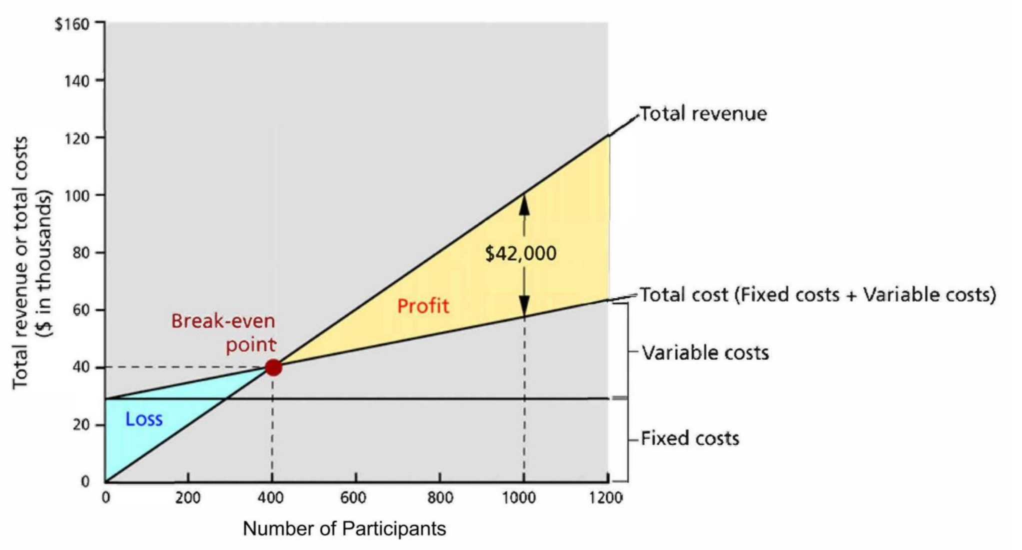
Unit Cost = Break-Even Point

Example:

The break-even cost for a pool patron is $4.00. The agency charges $2.00, i.e., a subsidy of 50%

Price = Per Hour Unit Cost x (1- % of Subsidy)

$2.00 = $4.00 x (1 - .50)



Fee Schedules and Charges pp 38-39 5th Ed

Decisions regarding fees, charges, and cost recovery levels for agencies vary with financial objectives,e.g., some believe that higher-priced programs have higher perceived value.

- **Fee Schedules** -- established annually or seasonally and may require approval from a governing body, especially for fee increases
- **Differential Pricing** (Use of Fees and Charges to Influence Behavior and Recover Costs by Charging Different Prices for the Same Activity) based on the desirability of the facility used, it's location, prime or non-prime time hours of service, and customer characteristics such as age or the ability to pay, and resident versus non-resident users
- **Late Fees and Charges for Use and Replacement**

Resident Fees	Student K - 12th	Adult 18 Yrs. +	Senior 60 Yrs. +	Senior Couple	Family *
Annual Pass	$144	$204	$168	$300	$468
Quarterly Pass	$48	$60	$55	$90	$145
10 Punch Pass Card	$16.50	$27.50	$16	NA	NA
Daily Fee	$2	$3	$2	$3	$10
Auto Debit Monthly	$13	$18	$15	$26	$40
3 Pay	3 @ $50	3 @ $70	3 @ $58	3 @ $102	3 @ $158

Non-Resident Fees	Student K - 12th	Adult 18 Yrs. +	Senior 60 Yrs. +	Senior Couple	Family *
Annual Pass	$168	$252	$204	$360	$564
Quarterly Pass	$55	$72	$65	$110	$170
10 Punch Pass Card	$22	$38	$22	NA	NA
Daily Fee	$3	$4	$3	$5	$13
Auto Debit Monthly	$15	$22	$18	$31	$48
3 Pay	3 @ $58	3 @ $86	3 @ $70	3 @ $122	3 @ $190

Revenue Sources p 36

Compulsory Income – Taxes

- Real Property (land and anything on it)
  - Assessed (appraised) value = 50-70% of market value.
  - Total assessed value of all properties = tax base
  - Tax rate (often expressed in mills - 1,000 mills to the dollar) is applied to the tax base

    1 mill = 0.001,e.g., 30 mills = mill rate of 0.03, mill rate x assessed value = tax bill
- Personal property - tangible (e.g., cars and furniture) and intangible (stocks and bonds)
- Sales
- Excise - on specific goods and services, e.g., hotels/motels, and car rentals, “sin” taxes on alcohol and tobacco
- Income

Gratuitous Income (without expectation of return) – grants, bequests, donations

Earned Income – fees & charges

Investment Income - investing agency funds in stocks, etc.

Contractual Receipts - contractor pays % of income - e.g., concessions, instruction, equipment rental

Alternative Revenue Sources pp 29-32

Grants -

- Government and private
- Several online sites provide source information, e.g. Foundation Center
- Funding lasts for a period of time and will ultimately be terminated - therefore financial responsibility must be assumed
- Agencies often use state and federal grants for capital projects
- Matching Grants - Grant matched agency contribution dollar for dollar
- Application Items: **1) Cover letter, 2) Executive Summary, 3) Problem statement/need description, 4) work schedule, 5) Budget, 6) Qualifications of project staff, 7) Appendices**

Gifts, Donations, and Planned Giving -

- Includes funds and items from wills, life insurance policies, donations of stocks, land and personal property
- Agency policy on what it will and will not accept

Sponsorships -

- Cash or in-kind services in exchange for recognition or a marketing benefit (not a donations because the sponsor expects something in return)

Sponsorship Proposals p 34 5th Ed

Sponsors are seeking: naming rights, public awareness and image enhancement, marketing and hospitality opportunities

Proposal should include:

- History of event/property
- Logistics: date-time, location, goals of the event, activities during the event, layout of the venue,
- Budget,
- Five years of financial statements,
- Marketing plan
- 5 top sponsors last year
- Benefits of the event to the community

Sponsorship packages for large events:

- Typically have several levels of sponsorship for example - Title sponsor with naming rights to the event, Presenting sponsor (25 to 50% of the value of the title sponsor), Official sponsor (10% of the value of the title sponsor), Official supplier (less than 10% of the value of the title sponsor)

Do research to know whether the business is a good match - before bringing it to the business

Benchmarking Like Agencies p 32

Some agencies set prices based on what the competition is charging.

When comparing your agency against others:

- Select agencies with similar demographics, facilities and service delivery
- Beware of collecting information from the internet, which may leave out important variables
- Understand the agency's subsidy and cost recovery policies
- Determine if overhead is included
- If your costs are higher, determine justification for charging more

Budgets pp 35-36

- 3 Budget Stages:
  i. Preparation (best practice - summing the budget proposals for program areas - i.e, “cumulative” preparation -- object classification expenditures from all cost-control centers are added together to provide an estimate of total revenue and expenditures)
  ii. Adoption or Authorization
  iii. Execution or Implementation
- Revenues - vary by season, leisure interests/needs, changes in operations
- Expenditures - largest expense is personnel - also, supplies, equipment, and utilities
- Cost-Control Center - a unit administered by a staff member who is responsible for its activities and budget

Budget Preparation pp 35-36

- The typical budget is completed in three stages: 1) preparation, 2) adoption, and 3) implementation
- The budget process is cyclical - new budgets are in preparation as the exiting budget is executed - planning usually starts one year in advance of the fiscal year
- Budgets are typically a sum of the front line program areas and departments
- One of the most important tasks is justifying budget needs to the supervisor
- Each line item expenditure should have a justification

Object-Classification Budget Format p 42

The object-classification (**not line-item**) budgeting system was among the first budgeting systems to be developed and is still a widely used budget format by park and recreation agencies.

Object -- is the item of financial cost such as personnel, supplies, and equipment.

Classification - a uniform method of grouping like items together (standardization enables comparison of of the objects between departments, functions,, sub-functions, and cost-control centers)

Example: 1000 is the classification and 1100-1600 are the objects/line items:

1000: Services: Personnel

1100 Salaries, Regular (Full Time)

1200 Salaries, Temporary (Part Time)

1300 Wages, Regular (Hourly, FT)

1400 Wages, Temporary (Hourly, PT)

1500 Contractual Employees

1600 Other Compensations

1000: Services: Personnel

1100 Salaries, Regular (Full Time)

01 Administration

02 Recreation

03 Golf

04 Operations

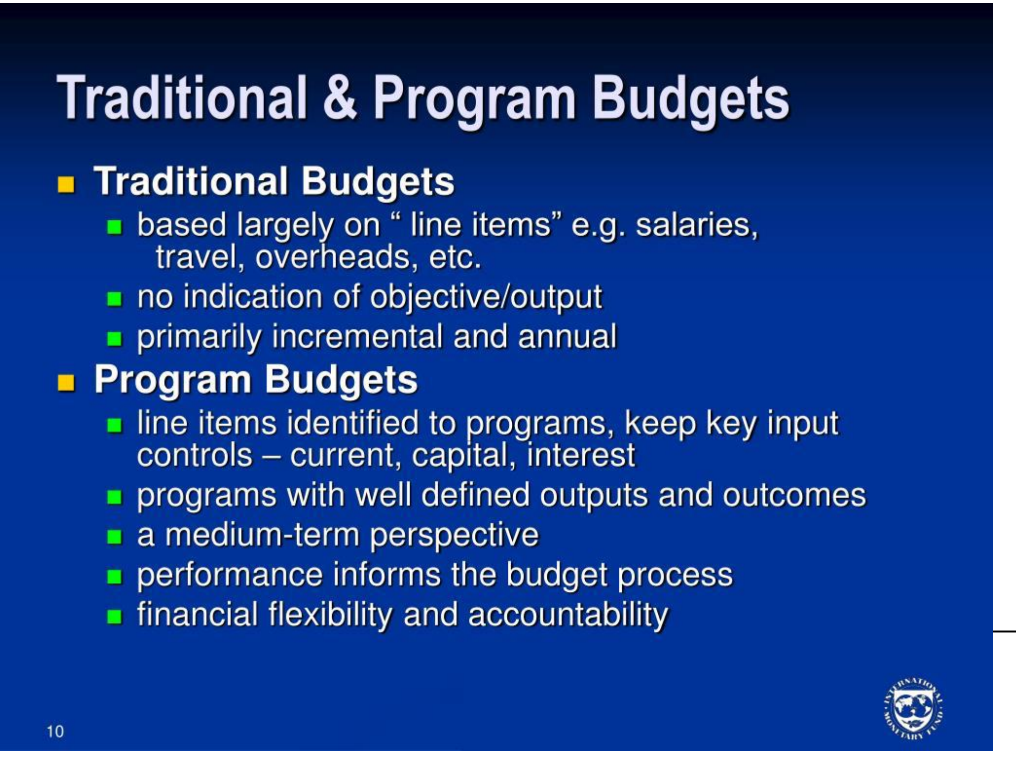
Cost Center (aka Cost-Control Center) p 42

- A unit administered by a staff member who is responsible for its activities and budget
- All financial details are organized separately
- Allows comparison of revenues and expenses
- Agencies often develop subordinate functions that may also be considered cost centers
- Example:

Cost Centers Within an Object-Classification Budget				
1000	Services: Personnel			Classification
	1100 Salaries, regular (Full-time)			Object/Line Item
		01 Administration		Cost Center
		02 Sports		Cost Center
			02.01 Youth Sports	Subordinate Function Cost Center
			02.02 Adult Sports	Subordinate Function Cost Center
			02.03 Aquatics	Subordinate Function Cost Center
			02.04 Swim Lessons	Subordinate Function Cost Center
		03 Golf		Cost Center
		04 Operations		Cost Center
		05 Cultural Arts		Cost Center

Program Budgets pp 40-41

- Budgets are developed for each program with revenues and expenditures detailed
- A manager may supervise a variety of programs
- A summary sheet provides a detailed description of each program and a summary sheet for the overall area of responsibility



Budget Statement p 32-33

- Report of allocated and expended monies
- Allows staff to analyze their budget projection and determine if reductions in spending are needed to operate within budget allocations
- Revenues vary by season and are subject to shifts in leisure interests
- Committed funds (encumbrances) are guaranteed expenditures
- Agencies should have policies and procedure to guide the transfer of funds from one account to another.

XYZ Parks & Recreaton

Budget Statement - 1st & 2nd Quarters - End June 30

	Actual	Budget	Committed	%	Balance
Revenues					
Golf	$ 22,367	$ 72,500	$ -	30.9%	$ 50,133
Tennis	$ 14,456	$ 23,500	$ -	61.5%	$ 9,044
Ice Arena	$ 11,148	$ 30,000	$ -	37.2%	$ 18,852
TOTAL REVENUES	**$ 47,971**	**$ 126,000**	**$ -**	**38.1%**	**$ 78,029**
Expenditures					
Staff	$ 31,963	$ 52,100	$ 1,500	64.2%	$ 18,637
Equipment	$ 3,147	$ 3,100	$ -	101.5%	$ (47)
Utilities	$ 1,610	$ 2,430	$ -	66.3%	$ 820
Bonds	$ 8,051	$ 16,000	$ -	50.3%	$ 7,949
Contracts	$ 2,684	$ 4,300	$ 500	74.0%	$ 1,116
Maintenance	$ 3,221	$ 4,300	$ -	74.9%	$ 1,079
TOTAL EXPENDITURES	**$ 50,676**	**$ 82,230**	**$ 2,000**	**61.6%**	**$ 29,554**

Bids for Commodities, Capital Acquisitions and Improvements pp 43-44 5th Ed

- **Less than Specified Amount "No-Bid"** (e.g., $500) - Items can be purchased without authorization
- **Above No-Bid Limit** (e.g., $500-$5,000) - may require supervisor approval and a specific number of price quotes (e.g., 3)
- **Formal Bids** required over specified about (e.g.,$5,000)
  - A sealed bid is based up advertised specifications
  - A request for proposals (RFP) results in a negotiated contract
  - Advertisements for bids or RFPs typically state that all bids can be rejected.
- Procedures and amounts vary by agency
- Bid specifications should be sufficiently detailed to assure that vendors are bidding for the same item and that the item will meet agency requirements -- but not too detailed to eliminate qualified bidders.

Managing Area-Specific Contracts pp 37-38 5th Ed

- **Some agencies believe that some functions can be done more efficiently and effectively by A) contractors, B) consultants, and C) concessionaires than by in-house staff.**
- **Contracts should be developed when working with any of these groups with:**
  - Scope of service to be provided
  - Methods of agency oversight, and
  - Performance standards
  - Periodic reporting,e.g., on activities completed, revenues and expenses, noteworthy issues, events, or problems.
- **Outsourced functions should be viewed as a temporary expansion of agency staff and skills.**

Financial Analysis and Reports pp 44-46 5th Ed

There are four (4) main types of financial reports that allow employees to manage their budgets:

1. Income Statement
2. Cash-flow Statement
3. Balance Sheet
4. Break-even Analysis

It is essential that each employee supervising a program be able to monitor and operate within an existing budget.

Financial Analysis and Reports - Income Statement pp 44-46

Income statement

- Demonstrates the profitability of the facility or cost center
- Includes Revenue, Expenses, and Net Income

XYZ Parks & Recreation Department			
Income Statement -- June 1-30			
Revenues			
	Special Events	$	12,635
	Concessions	$	10,693
	Rentals	$	29,675
	TOTAL	$	53,003
Expenditures			
	Staff	$	42,895
	Equipment	$	3,300
	Utilities	$	1,375
	Bonds	$	8,051
	Marketing	$	2,684
	Maintenance	$	3,221
	TOTAL	$	61,526
Net Income		$	(8,523.00)

Financial Analysis and Reports - Cash-flow Statement

pp 33-34

Cash-flow statement

- Show money coming into and going out of the agency on a monthly basis
- Depict whether cash flow is negative or positive

Midwest Sports Center

Cash Flow Statement - 1st & 2nd Quarters

	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
A. Revenues	$ 13,000	$ 18,100	$ 27,200	$ 32,800	$ 35,500	$ 36,900	$ 163,500
B. Expenses	$ 18,800	$ 18,600	$ 21,200	$ 23,000	$ 24,200	$ 25,200	$ 131,000
C. Monthly cash flow (A-B)	$ (5,800)	$ (500)	$ 6,000	$ 9,800	$ 11,300	$ 11,700	
D. Cumulative cash flow	$ (5,800)	$ (6,300)	$ (300)	$ 9,500	$ 20,800	$ 32,500	
E. Cash position at beginning of month	$ 10,000	$ 4,200	$ 3,700	$ 9,700	$ 19,500	$ 30,800	
F. Cash position at end of month (E+C)	$ 4,200	$ 3,700	$ 9,700	$ 19,500	$ 30,800	$ 42,500	

Financial Analysis and Reports - Balance Sheet

Balance Sheet - a.k.a Statement of Financial Position

- Shows what the agency owns and what is owes to others
- Equation [Assets = Liabilities + Equity]
- Equity = what is owned free and clear of any debt

Balance Sheet as of December 31, 20XX

Assets			Liabilities		
Current Assets			*Current Liabilities*		
	Cash & Investment	$ 23,000		Accounts Payable	$ 20,000
	Accounts Recivable	$ 18,000		Taxes Payable	$ 850
	Merchandise Inventory	$ 10,000			
	TOTAL CURRENT ASSETS	$ 51,000		TOTAL CURRENT LIABILITIES	$ 20,850
Fixed Assets			*Long-term Debt*		
	Store Fixtures	$ 3,000		Mortgage	$ 45,000
	Office Equipment	$ 40,000			
	Office Equipment	$ 3,000			
	TOTAL FIXED ASSETS	$ 46,000		TOTAL LIABILITIES	$ 65,850
			Equity		$ 31,150
TOTAL ASSETS		**$ 97,000**		**TOTL LIABILITIES AND EQUITY**	**$ 97,000**

Financial Analysis and Reports - Break-Even Analysis

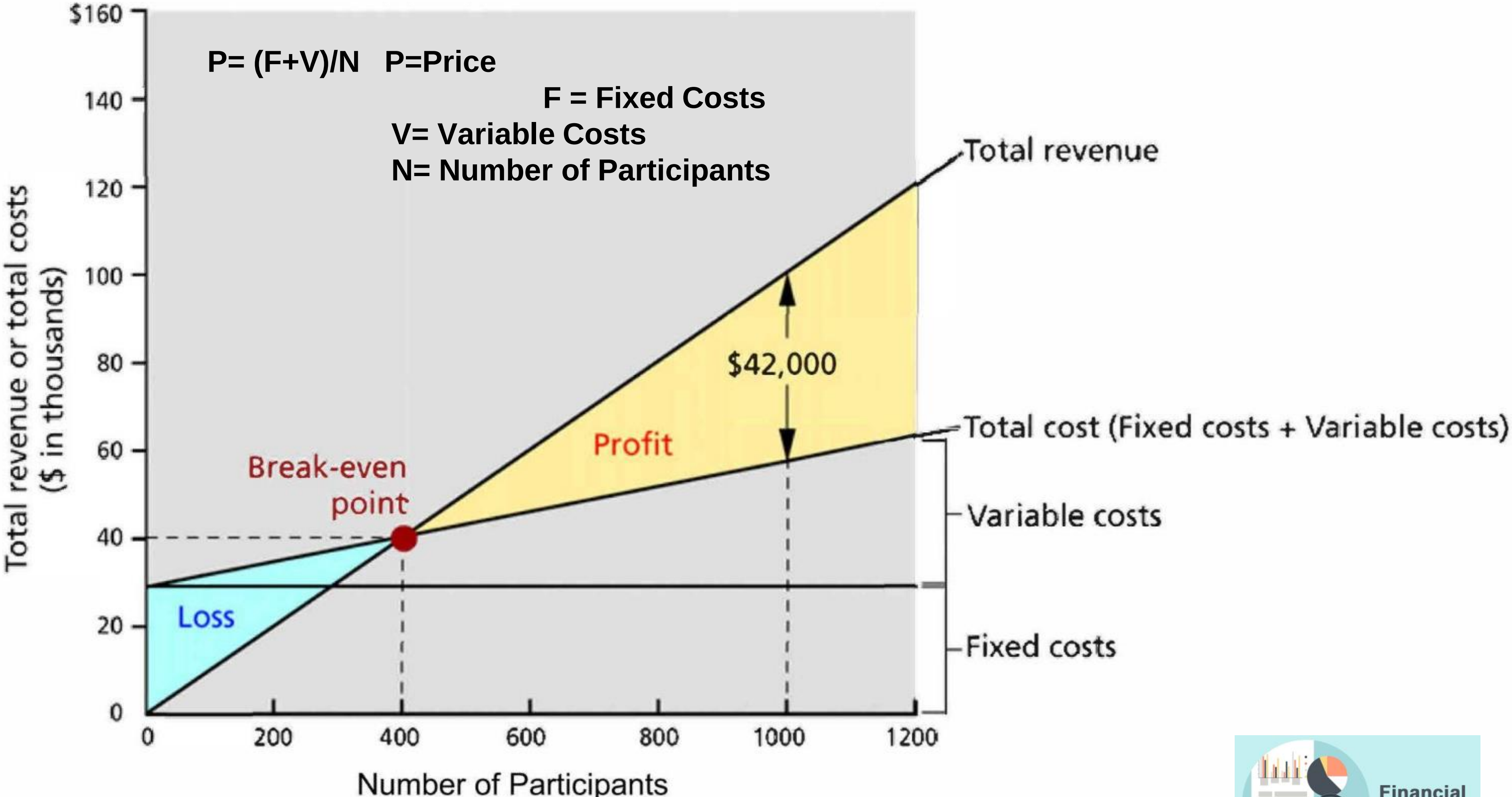
pp 35, and 47 5th Ed

P= (F+V)/N   P=Price

F = Fixed Costs

V= Variable Costs

N= Number of Participants



HUMAN RESOURCES

Examination Content

125 Questions over 3 Hours (125 scored and 25 pre-test questions)
Covers 51 Tasks in 5 Categories:

- **Communication (25%) 31-32 Questions**

  e.g., promote benefits, solicit public support, foster internal and external relationships

- **Finance (10%) 12-13 Questions**

  e.g., purchase supplies, equipment, and services, develop fee collection procedures, conduct cost-recovery analysis

- **Human Resources (10%) 12-13 Questions**

  e.g., develop job descriptions, recruitment, managing volunteers, enforcing policies and procedures

- **Operations (30%) 37-38 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

- **Programming (25%) 31-32 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

Human Resources Management p 47

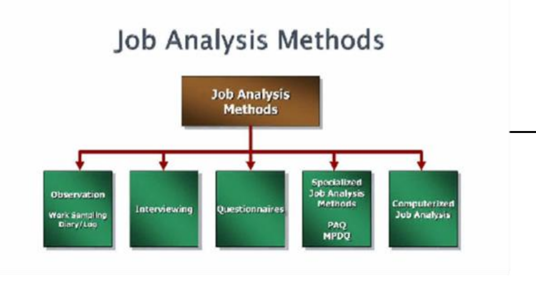
HR management is the design of formal systems in an agency to ensure effective and efficient use of talent to accomplish agency goals.

Job Analysis 1 pp 47-48

Job descriptions are derived from job analyses. The process requires gathering of data in a formal and systematic method about what people do in their jobs. Job analysis represents the foundation for many if not all HR activities.

The job analysis should:

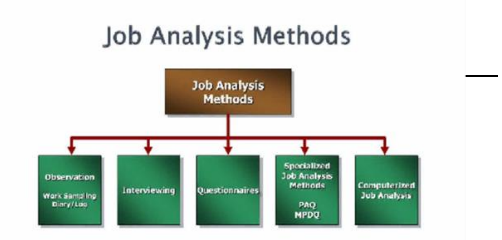
- Identify the job under review
- Establish a list of participants involved in the job analysis - <u>a recognised strategy is to getting staff at all levels involved</u>
- Review existing documentation - such as previous job analysis information
- Determine employment data collection methods - such as tasks to be done and personal characteristics, education, experience, and specialized training necessary to do the task



Job Analysis 2 pp 47-48

Choose a job analysis method that meets the needs of the agency.

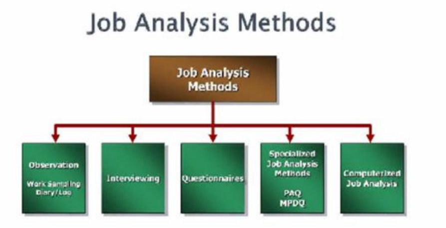
- **Critical Incidents/Observations** - observing and recording employee behaviors over an extended period until the list of behaviors can be categorized into a general job domain and then organized into a comprehensive list of actual requirements for the job title
- **Interview** - speaking with 1) staff performing the job to collect first-hand perspectives on the tasks and responsibilities associated with a job, 2) the supervisor, and 3) in some cases ta panel of experts
- **Job Performance** - a staff member performs the actual job to identify the responsibilities and tasks
- **Structured Questionnaire** - a survey instrument is distributed staff their supervisors
- **Task Analysis Inventory** - <u>the most common form of job analysis</u> used in by governments - it will often utilize a panel of subject matter experts



Job Description 1 p 49

The **job description** presents a summary of the content identified in the job analysis and specifies the major job domains and tasks of a job:

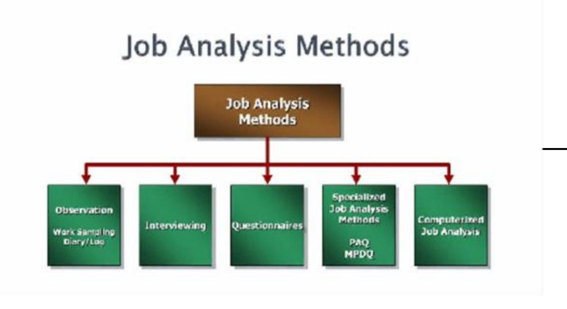
- **Job** - refers to a group of positions that are identical with respect to their major or significant tasks and can be adequately addressed by single job analysis
- **Position** - represents a set of domains and tasks performed by an individual in the agency
- **Domain** - primary area of responsibility for the job, e.g., facility management, community relations, marketing
- **Task** - represent the specific work activity performed on the job by one staff within a limited time. Each task represents a specific activity multiple tasks that are similar in scope are organized into one domain - the typical job will include between 10 and 15 tasks for each domain - each task statement 1) should begin with an action verb, 2) include only one specific task, and 3) describe what the employee does



Job Description 2 p 49

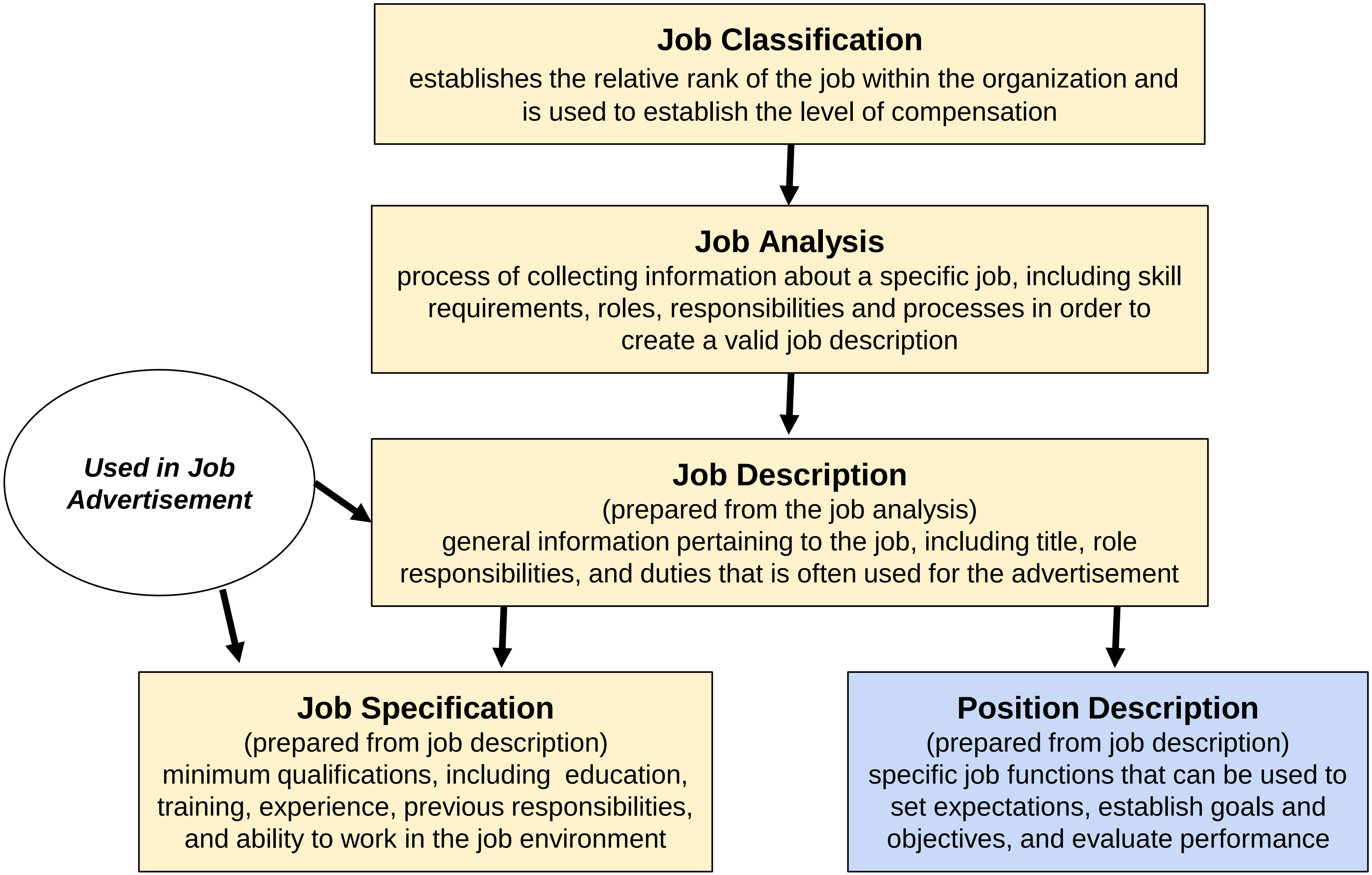
Job description format:

- **Job Title**
- **Job Identification** - includes agency-related information such as department and job classification
- **Job Summary** - a brief description (one or two paragraphs) of a job and its responsibilities
- **Job Domain and Tasks** - a list of the essential work areas and activities
- **Job Specifications** - description of the required qualifications (and may include preferred qualifications) to perform the essential functions of the job including education and experience requirements physical demands and working conditions. Required qualifications are the benchmark for review, but preferred qualifications can be used to streamline the applicant pool.
- **Disclaimers** - statements describing the agency's ability to change or modify the jobs essential duties and or tasks



Job Classification, Analysis, Description

p 49



Recruitment 1: Definition, Policies, Plan p 50

- Recruitment is the set of activities that seeks to attract job applicants with the necessary competencies to fill specific positions.
- Recruitment policies include equal employment, affirmative action, sources for recruitment.
- Ability to recruit is affected by labor market, agency location, agency reputation, legal and governmental regulations, and salary and benefits.
- The process should be guided by a formal recruitment plan that includes:
  - **Agency recruitment philosophy**
  - **Recruitment goals and objectives**
  - **Recruitment policies and procedures, and**
  - **Recruitment staff qualifications, e.g., training.**

Recruitment 2: Objectives and Sources

Recruitment Objectives:

1. Hiring pool of Optimal Size - not too many of too few
2. Realistic job preview (RJP) - informs applicants of both negative and positive job characteristics

Applicant Sources:

- Advertisements -- (special attention to locations with diverse candidates)
- Unsolicited (there should be a process for managing)
- Professional organizations
- Employee referrals (Note: although often of high-quality employee referrals tend to be people of similar backgrounds which can be or perceived to be exclusionary)

Realistic Job Preview (RJP)

Wanted: men and women willing to walk into strange buildings in dangerous neighborhoods, be screamed at by unhinged individuals — perhaps in a language you do not understand — and, on occasion, forcibly remove a child from the custody of a parent because the alternative could have tragic consequences.

NYTIMES

Selection Plan pp 52, 54

Hiring process and tools vary with the type of employee being hired and by park and recreation agency.

A selection plan should guide the entire process:

- **Review job description** - To determine job-specific criteria and questions to include in the interview
- **Determine selection committee** - Interviewers with understanding of the job and required KSAs to be successful
- **Establish applicant review process** - Review is typically conducted systematically in multiple stages to assure fairness and efficiency
- **Train Interviewers** - How to effectively conduct an interview

Applicant Review

p 53

Stages of Application Review (differ by agency)

- **Application screening** - determine if the applicant meets the minimum qualifications (more extensive for full-time positions) - rating forms should include both required qualifications and preferred qualifications
- **Preliminary interview(s)** - determine if the applicants skills, abilities, and task preferences match any of the available opportunities -- typically brief (30 minutes) and exploratory to screen out unqualified candidates
- **Secondary interview(s) -** To make final selection. All candidates should be treated the same, e.g., if one candidate is interviewed in person, they should all be interviewed in person
- **Testing** - Aptitude (capacity to learn to perform tasks), Psychomotor (strength, dxterity, and coordination), Proficiency (job-related knowledge), Interest (compares candidate interests with the interests of others who have been successful), Personality (identify personality traits)
- **Reference checking** - before or after the second interview to check work history, lengths of employment, previous job titles (may be eliminated for positions that are seasonal and require hiring a large number of people, such as 100+ day camp staff)

Avoiding Discrimination in Hiring

pp 57-58

Types of discrimination:

- **Intentional** - Different treatment or standards applied to similar groups
- **Unintentional** - Actions that result in substantial underrepresentation of individuals from a protected class (race/age/gender)

Local, state, and federal laws have been enacted to protect workers in the following areas:

- Race and ethnic origin
- Age (individuals over 40 years of age)
- Individuals with physical or mental disabilities
- Religion
- Sex/gender
- Military experience
- Family status
- Political party affiliation
- National origin
- Sexual orientation

Be careful about information conversations. For example, asking about family status “do you have any children” is not appropriate unless the candidate volunteers the information

Interview Process pp 53-56

1. **Review job description** to determine job-specific criteria and interview questions
2. **Select and Train Interviewers** based on their understanding of the job and required KSAs - train them on their role and how to effectively conduct an interview, e.g., <u>there are topics that no interview question or informal conversations should address</u> such as “do you have any children?” “will you and your wife be willing to relocate?”
3. **Determine format**: <u>one-on-one</u> with candidate and supervisor, <u>committee</u> with candidate and panel of staff, <u>group</u> interview with panel of staff and all potential candidates
4. **Develop questions**:
   a. <u>Structured interview</u> - predetermined questions asked in the same order for all candidates -- 4 types of question: 1) *biographical* (past experience), 2) *behavioral* (how they performed or handled an issue), 3) *competency* (use competency profile to determine strength of the candidate response), 4) *situational* (how they would handle a situation)
   b. <u>Unstructured Interview</u> - questions vary to allow follow up on points of interest - can be time-consuming and more difficult to compare candidates
5. **Develop interview assessment form** to consistently score applicants across the job-specific KSAs

Candidate Selection p 57

Rejection - always notify those who are not selected and thank them for their interest

On-the-Spot Offer - Rare - done because of time pressure, competitive job market, candidate qualifications

Delayed Offer - Most Common - Provide the candidate with tentative timeline

Employee Orientation pp 82-84 5th Ed

- General Agency Orientation - Relevant to all employees
- Specific Department Orientation - Applies to the department and the employee’s job
- 3-Stages - 1) Preliminary between applicant and an agency representative, 2) Pre-duty prior to beginning work, 3) Continuing (most important is pre-duty and the period immediately after)
- Sessions should not exceed two (2) hours to avoid jamming and limitations on ability to absorb information
- Be aware that there is formal “official” orientation and informal orientation conducted by fellow workers
- Hold a formal follow-up session after the employee has been on the job for about a month to address problems and answer questions
- Checklists of items covered should be signed by the HR representative, supervisor conducting the orientation, and the employee. A copy is placed in the employee’s personnel file

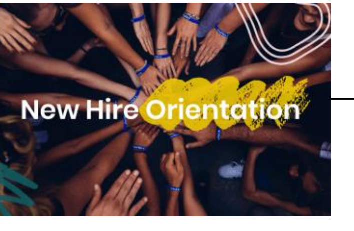
Planning Employee Orientation pp 82-83 5th Ed

Takes 3 to 6 months of planning - items include:

- Program goals
- Topics to include and how to organize and present them (checklist)
- Agency orientation versus department and job orientation
- Timing and duration
- Training of supervisor on how to conduct orientation
- Methods to encourage discussion and feedback
- Tailor to the education and experience of employees

Items in induction kit/packet:

- Organization chart (existing and projected)
- Maps of parks and facilities
- Key terms used by agency
- Policy handbook
- List of holidays
- List of benefits and copies of insurance plans
- Copy of performance evaluation forms and procedures
- Copies of required forms
- Copies of agency publications
- List of contact information and locations for key personnel



Training Steps pp 58-65

Experts recommend six (6) steps to determine the KSAs the agency hopes to receive from training, the characteristics of the trainees, and how to make sure the trainees are ready for training:

1. Conduct Agency & Employee Needs assessment
2. Ensure employee readiness
3. Create learning environment
4. Ensure transfer of training
5. Develop evaluation plan
6. Determine training method

Training Step 1) Conduct a Needs Analysis pp 58-59

Typically has three (3) components:

1. Agency Analysis - available resources and managerial support for training
2. Person/Individual Analysis - are the deficiencies resulting from lack of KSAs (a training issue or lack of motivation or work design problem?
3. Task Analysis - Identification of KSAs needed by the agency

Training Step 2) Ensure Employee Readiness p 59

- Define performance gap (difference between current and desired state)
- Determine cause of performance gap -- lack of motivation or inability to comprehend
- Identify prerequisite learning requirements to screen out those who do not meet necessary requirements

Training Step 3) Ensure Transfer of Training p 59

Five (5) factors of work environment that promote training transfer:

1. Manager support
2. Peer support
3. Opportunity to perform
4. Technological support

Consider strategies if the training fails to deliver the needed skills, e.g., incentives such as pay-for-performance

Training Step 4) Develop an Evaluation Plan p 60

The evaluation plan identifies the outcomes the training is expected to influence on three (3) levels and establishes training objective (measurable competencies):

1) <u>cognitive</u> (knowledge and knowledge application),
2) <u>skills-based</u> (development of technical or motor skills) 3 stages:*initial acquisition*, *compilation* (faster and fewer errors), and *automaticity* (routine)*
3) <u>affective</u> - attitude and motivation

**Note: Only skill compilation and skill automaticity lead to skill implementation in the workplace*

Training Step 5) Select a Method p 61

Agency considerations include the extent that the method:

1) facilitates learning and transfer of training,

2) costs of developing and using the method, and

3) method effectiveness

Appropriate methods depend greatly on the intended training outcomes:

- <u>cognitive-based</u> methods include lecture, on-the-job training, case studies, and video, whereas
- <u>skills-based</u> methods include behavior modeling, on-the-job training, and simulation.

Training Step 6) Monitor and Evaluate pp 63-65

- Evaluation should provide objective evidence of employee behavioral change resulting the program
- Evaluation may occur during the program (formative) or at the end of the training (summative)
- Data may be used to modify or improve the program

Developing Work Schedules p 72 5th Ed

Worker scheduling requires assigning the right person to the right job at the right time. Strive not only for optimal job results but the personal satisfaction of the employee.

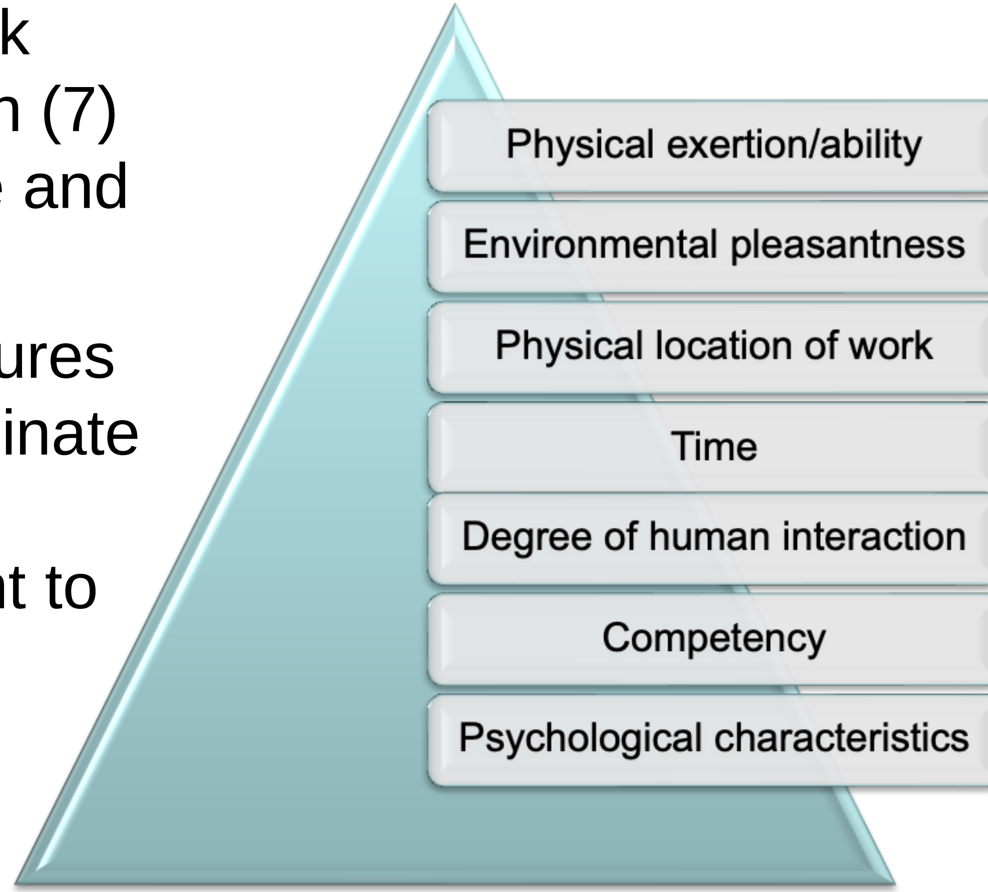
- Identify duties and responsibilities and availability to staff to do them
- Determine how many hours each employee works per week and what days they are available -- this is often constrained by laws and budget limitations
- Plan for alternate schedules in the event of bad weather or other disruptions.

DAILY WORK SCHEDULE

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
7:00 AM							
7:30 AM							
8:00 AM							
8:30 AM							
9:00 AM							
9:30 AM							
10:00 AM							
10:30 AM							
11:00 AM							
11:30 AM							
12:00 PM							
12:30 PM							
1:00 PM							
1:30 PM							
2:00 PM							

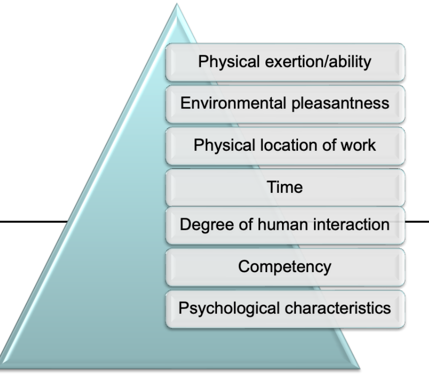
Staff Supervision pp 65-67

- Appropriately assign work tasks based on the seven (7) dimensions that motivate and impact staff retention
- Positive supervision nurtures relationships with subordinate staff by encouraging professional development to the fullest range of the employee’s capacity



7 Dimensions of Work Tasks pp 65-67

1. **Physical Exertion** - strength and dexterity
2. **Environmental Conditions** - safety, heat, air pollution, noise, darkness, odors
3. **Physical Location** - outside or inside, 1 or multiple sites
4. **Time** - hours of the day and days of the week
5. **Degree of Human Interaction** - number and types of interaction, degree of interpersonal conflict
6. **Competency** - possess or will be trained for specialized responsibilities
7. **Psychological Characteristics** - autonomy, degree of responsibility



Supervision of Park & Recreation Staff p 67

- Interpret agency goals and objectives
- Identify the competencies and motivation of each employee
- Conduct field observation to determine if standards are being met
- Improve program delivery, including methods of delivery, equipment, and facilities
- Interact with employee to determine changes to improve efficiency and effectiveness
- Provide facilities, equipment, and supplies that are essential to fulfillment of employee responsibilities
- Provide in-service training and development opportunities
- Conduct performance appraisals of subordinate staff

Supervision of Contractors p 69

Requires clear communication to develop clear expectations. These should be outlined in the contract:

- Scope of services to be performed
- Agency oversight
- Performance standards

Prepare a formal plan for monitoring performance including some of all of the following:

- Review of progress reports
- Inspections
- Review of complaints
- Review of end-user satisfaction

Supervision of Interns pp 85-86 5th Ed

Effective supervision of interns include these practices:

- Serve as the liaison between the university and the agency for the internship program
- Assist in the intern in developing objectives and a timetable for fulfilling internship requirements
- Conduct and orientation program for the intern
- Monitor the intern’s work
- Confer regularly with the intern
- Provide all necessary supplies and equipment
- Evaluate performance and send results to the university
- Communicate the purpose and results of the internship to agency administratives and policy-making personnel

Volunteer Management pp 73-74

Recruitment - 1) develop a recruitment plan, 2) write a job description for each position, 3) advertise available positions, 4) have an application procedure (similar to part-time staff) with application, interview with supervisor, reference checks, criminal background check

Scheduling - once hired, provide training and an agency orientation (goals and objectives, policies, and rules and - when scheduling be aware of personal lives to avoid conflicts.

Supervision - requires closer and more frequent interaction than for employees - being unpaid does not mean poor performance will be tolerated - the effective supervisor provides scheduled meetings, a well-defined job, and delegated duties that increase in responsibility

Evaluation - performed by supervisor and includes review of past performance, current performance, and expectations for the future - gives the volunteer the opportunity to provide feedback on their experience and their perceptions about the volunteer program

Recognition - formal (banquet, gifts, prizes) or informal (verbal praise both one-on-one and in staff meetings - mention in reports)

Performance Appraisal pp 67-88

Performance appraisal is the measurement of job performance.

Basic performance appraisal objectives:

1. Whether to move an employee from probationary to regular status
2. Determine training needs
3. Improve performance
4. Determine compensation

Probation Performance Appraisal p 67

- Performed during the first 30 to 180 days of employment to identify areas in which the individual needs more assistance or control to prevent problems from occurring.
- The frequency of evaluation may be weekly or daily depending on the skill level of the individual and the importance of the job to the organization.

Performance Improvement Appraisal p 68

- A high frequency of evaluation is required -- such as monthly or weekly
- Supervisor and each subordinate, using the job description as a guide, should select 4 to 8 specific behaviors to improve during the next appraisal period
- The supervisor and the employee should agree on a timeline for the measurement of each behavior

Compensation Performance Appraisal p 68

Most frequently used performance appraisal - <u>strictly about measurement</u>

Conditions for a pay-for-performance system:

- Criteria for measurement are agreed to by both employee and agency
- Ability to measure performance in a valid and reliable way based upon job-specific requirements
- Supervisors observe performance to see if standards are being met
- Employees have the opportunity to improve knowledge and skills through methods such as workshops, conferences, and classes
- Pay or merit increase matches performance and performance differentials must match pay differential

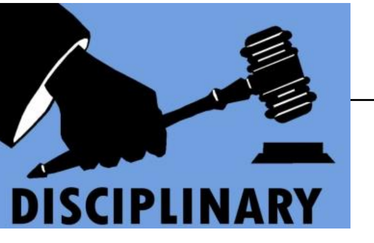
Disciplinary Action p 68

- Disciplinary action is administered to discourage *incompetence*, *misfeasance* (conduct that is legal but inappropriate), *malfeasance* (intentionally doing something that is illegal), *nonfeasance* (failure to act where there was a duty to act), or *any negative behavior*.
- Personnel manuals should clearly describe the required behavior of employees in such area as timelines and punctuality for work assignments as well as unauthorized absences, acts of dishonesty or pilferage, refusal to perform assigned work tasks, violence, or the verbal abuse of patrons or coworkers or unauthorized use of department facilities, vehicles, equipment, or supplies.

Disciplinary Action pp 68-69

Disciplinary action should be described in the agency personnel manual and include the following progressive actions that are selectively administered depending on the nature and degree of the infraction.

- Verbal reprimand/admonishment - given for minor infractions and includes a discussion with the employee about the course of action to be taken
- Written reprimand - statement placed in the employee’s service record for a specific period of time (usually 6 months) specifically identifying the infraction.
- Suspension enforced - relinquishment of job title and duty without compensation for a specific period of time (usually 6 months). Details are signed by the employee and supervisor and placed in the employee’s file. Circumstances may warrant investigation and filing of criminal charges or other action.
- Discharge/termination - only for just cause - often after a suspension and an investigation proves the allegation of wrongdoing.



Grievances p 85 5th Ed

Grievances involve a formal process where a unionized employee files a claim of unfair conduct. The typical steps include:

1. Employee meets with the union representative and supervisor to discuss the grievance
2. Union representative communicates the grievance to the supervisor's manager
3. The union grievance counsel or committee discuss the grievance with the agency management team
4. If the grievance remains unsettled, a third party (an arbitrator) may be consulted to settle the dispute

Termination p 79

Termination is the final act of separation of employment

Advice on handling termination:

- Consider having a lawyer review the documentation and the procedure followed
- Do not leak word of the firing prior to it happening
- Dismissals should always be private -- only the direct supervisor and a witness, if needed
  - Arrange for the supervisor and witness to be in the meeting location prior to arrival of the employee
  - Explain why employment is ending
  - Reiterate the discipline already taken
  - Provide the employee with money owed
  - Explain when the employee should finish work at the agency
  - Assure the former employee that the matter will not be discussed with anyone other than those who are required to know
- If dismissal is immediate, allow the former employee to clean out their office or have the items mailed. Two persons should clean out the office so that there is a witness.
- Have someone take detailed notes and put the notes in the personnel file
- Be firm but understanding since this may be an emotional situation
- During the meeting have the former employee’s computer password changed
- Call security or the police if the situation becomes volatile

Renewal/Retention of Part-Time Employees and Contractors p 72

- Retention and renewal are generally recognized as positive reinforcement actions
- Renewal is the process of offering a new contract at the conclusion of the current contract
- Retention is less formal and does not involve development of a new contract
- Make renewal/retention decisions based on reliable data -- do not use subjective impressions or anecdotes

Managing HR Records pp 84-85

Personnel Files - The employee file should contain a cumulative agency record including performance appraisals, vacation, leaves of absence, absence due to illness, accidents, education, disciplinary action, and commendations

Time cards - Payroll computation based on the time worked and the rate of compensation become part of financial and employee records. Original time sheets, time cards, or online time-tracking are required by most agencies

Payroll - Records are a prescribed form showing the names of all employees to whom payment of salaries and wages are to be made. An employee record must be certified as correct by the employee’s immediate supervisor.

Travel - Destination and odometer records should be maintained by the employee using the prescribed agency form. Use of a personal automobile for work purposes should be reimbursed on a mileage basis

OPERATIONS

Examination Content

125 Questions over 3 Hours (125 scored and 25 pre-test questions)
Covers 51 Tasks in 5 Categories:

- **Communication (25%) 31-32 Questions**

  e.g., promote benefits, solicit public support, foster internal and external relationships

- **Finance (10%) 12-13 Questions**

  e.g., purchase supplies, equipment, and services, develop fee collection procedures, conduct cost-recovery analysis

- **Human Resources (10%) 12-13 Questions**

  e.g., develop job descriptions, recruitment, managing volunteers, enforcing policies and procedures

- **Operations (30%) 37-38 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

- **Programming (25%) 31-32 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

Needs Assessment p 94

Community attitudes, opinions, & perceptions of agency's resources

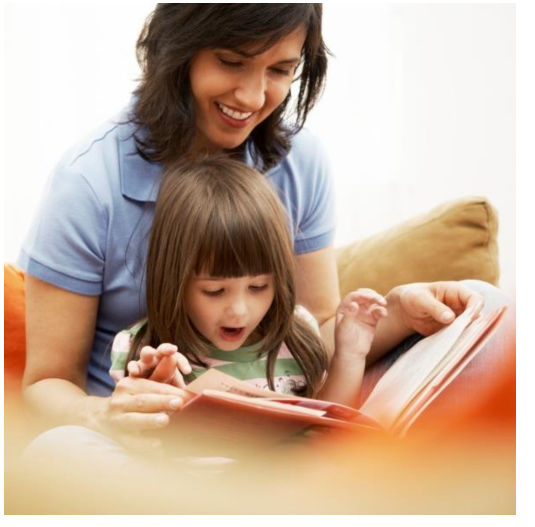
Data collection in the following areas:

- Demographic information
- Current participation patterns and rates
- Attitudes and opinions of current program/facility users
- Barriers facing users
- Future recreation interests and needs
- Satisfaction with existing facilities and services
- Perceptions of safety and/or health hazards
- Suggestions for improvement

Assessment Types

- Quantitative/Objective
  - Observable fact
  - Number/Data based

- Qualitative/Subjective
  - Personal interpretation
  - Narrative/storytelling



Needs Assessment of Programs, Areas, Products, Services pp 94-101

- Purpose is to provide accurate feedback on community attitudes, opinions, and perceptions of the agency’s programming, facilities, parks, and services
- Accepted practice is to assess the attributes of the available resource and the needs of the identified target market of users
- Two conflicting management strategies 1) facilitate access and showcase the attributes or 2) restrict access to preserve them for future generations
- When preparing assessments, consider the following: *Environmental Impact*, *Access* (what will be the impact on the resource and what are the equity issues), *Developmental Features*, *Maintenance and Operation*, *Target Populations* (is the target market viable, i.e., large enough, reachable through marketing, and measurable? What are the programming needs of the target populations?)

Supervision of Independent Contractors p 69

Develop a contract that establishes clear expectations about the scope of services to be performed, agency oversight, and performance standards

Create a plan for monitoring contractor performance. Strategies include:

- Review of progress reports
- Inspections
- Review of complaints
- Review of end-user satisfaction

Monitoring Contractors/Concessionaires pp 93-94 5th Ed

Preparation

- **Request for Proposal (RFP):** framework for work/service to be done or provided
- **Written Agreement:** parameters of hiring including definition of the service to be provided, the expectations, length of service, financial arrangements, agency oversight and performance standards.

Monitoring

- **Monthly Reporting**: revenue/expense reports, issues, attendance
- **Inspections:** announced and unannounced , secret shoppers
- **End-user satisfaction:** surveys

Managing Agreements with Independent Contractors

pp 93-94 5th Ed

Independent contractors (IC) assist in management of risk because agencies are often not liable for negligent practices of an IC and agencies do not have to provide health insurance or other benefits.

An agreement with an IC should contain:

- Scope of services to be performed
- Start and end dates (contract term)
- Amount to be paid (rate and schedule) with indication that state and federal taxes are not withheld
- Responsibility of expenses incurred
- Responsibility for provision of supplies and equipment
- Permit, license, and certification requirements
- Statement that the IC and its employees are not employees of the agency
- Dispute resolution - how disputes will be resolved
- Insurance required to be provided by the IC
- The agency will not provide insurance coverage and will not pay unemployment compensation
- The IC will hold the agency harmless from loss or liability associated with the work (indemnification)
- Process and cause for contract termination
- Signatures of all parties to the agreement

Assets, Equipment, and Supply Inventories pp 101-102 5th Ed

- Inventory provides the professional with a clear picture of state and condition of facilities and equipment
- Determine Quantity, Replacement Cost, and Condition
  - Assets: land, buildings and facilities
  - Supplies: chemicals, trophies, t-shirts, sports equipment, etc.
  - Equipment: vehicles, sound systems, lighting, tools, etc.

Program Inventories (internal and external) pp 103-105 5th Ed

- A community park and recreation system encompasses all agencies and enterprises offering recreation services. It is accepted professional practice to coordinate and integrate an agency's operations with the overall system
- Inventory data are used for short- and long-term planning
- Benefits include reduction in service duplication, increasing networking opportunities, more efficient use of physical, fiscal, and human resources.
- Information Collected Include: 1) type of program, 2) target market, 3) contact person and contact information, 4) dates of operation, 5) # of sessions, 6) registration information, e.g.fees, 7) location(s), 8) program features, 9) equipment and resource requirements
- <u>Internal Inventory</u>: Programming that the agency offers
- <u>External Inventory</u>: All available programming in the community offered by the commercial, nonprofit, and public sectors.

Network with Related Organizations

- **Related Organizations Include:**
  - Districts/Departments
  - State Affiliates
  - Professional Associations

- **Professional Networking Benefits**
  - Keep updated with current trends
  - Share resources
  - Work cooperatively to enhance services and improve efficiencies
  - Qualify for certain funding, grants, that require collaboration

Working with External Groups pp 14-15 and 129-130

Benefits:

- Providing a higher level of service
- Pooling resources
- Avoiding duplication
- Gaining expertise
- Wise use of tax dollars
- Enhancing flexibility and efficiency

Types:

Collaboration		Alliance		Partnership Integration
• Short-term – until a problem is solved • Two or more stakeholders working together to solve a problem neither can solve alone		• Requires high-level commitment • Often defined by a formal agreement • Authority is shared among the participants		• Strongest • Creates a new entity • Partners give up responsibilities to the new organization

Establishing Formal Relationships p 103 5th Ed

Can partner across sectors (public, private, commercial)

Requirements for collaboration and communication:

- Legal responsibilities/liabilities
- Staff and program supervision details
- Quality control
- Partnership dissolution and review processes

Benefits:

- Efficiency
- Avoiding duplication of services
- Better use of resources
- Better to meet needs of clients

Most partnerships fail because of:

- Lack of communication
- Loss of control of resources
- Lack of review/evaluation
- Loss of trust

Energy Efficient and Environmentally Friendly Procedures pp 86-88

- To be successful, green initiatives and environmentally friendly practices require a supportive agency culture. One way to communicate the value is integrating them into the agency mission and goals.
- One global effort to promote sustainable site development, water savings, energy efficiency, materials selection, and indoor environmental quality is Leadership in Energy and Environmental Design (LEED) a program of the U.S. Green Building Council. An agency can obtain LEED certification (Silver, Gold, or Platinum) for new facilities -- for both new construction and renovation of existing buildings.

Energy Efficient and Environmentally Friendly Procedures p 86

The U.S. Environmental Protection Agency (EPA) encourages agencies to reduce the amount of waste requiring disposal through waste prevention, recycling, and composting. Disposal Methods:

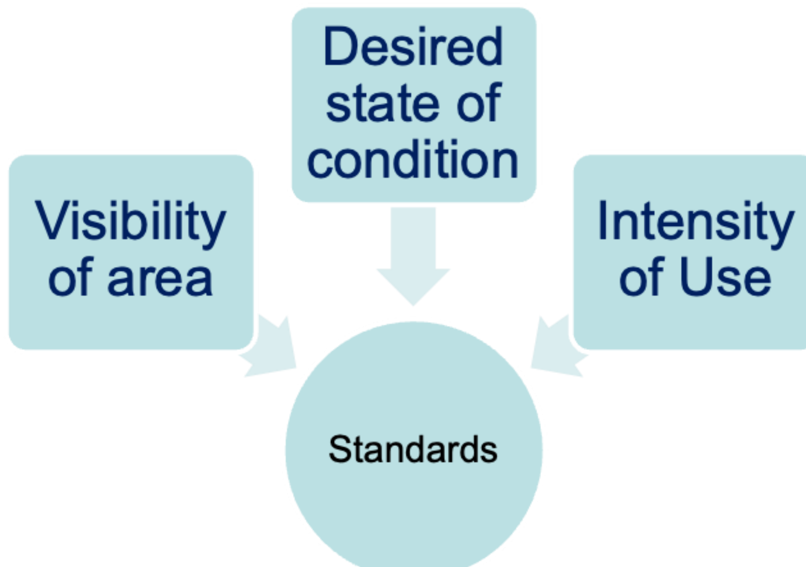
- *Waste prevention* - reduce the amount and make the waste less toxic
- *Recycling* - us a recycling program to increase recovery of useful materials. Considerations include: the types of materials to be included; identification of human and financial resources; collection, storage, and transportation; and an ongoing evaluation system
- *Composting* - materials such as leaves and other organic waste, food scraps, and yard trimmings can be composted to produce natural fertilizer

Energy Efficiency Practices pp 86-87

U.S. Department of Energy 14 best practices:

1. Incorporate energy-efficient goals in agency strategic plan
2. Develop and energy-management plan with 3 elements 1) purchase clean energy at the lowest cost, 2) replace old equipment with new technology, and 3) operate energy-consuming equipment properly
3. Develop and energy accounting system to track and measure success and look for ways to save
4. Have the right quantity of trained staff to operate at high efficiency
5. Ongoing staff training
6. When outsourcing develop contracts that address efficient building operation
7. Implement a cross-sectional approach to energy-efficient management -- to assure that all staff operating the equipment have knowledge and training
8. Maintain documentation of equipment use, problems, and maintenance
9. Ensure the agency has the proper diagnostic tools to identify problems
10. Assess regularly the agency's operation and maintenance practices
11. Use the assessment to identify areas that are effective and those needing improvement
12. Understand the automatic control features on equipment
13. Operate equipment only when needed
14. Track actual performance against expected performance

Park Maintenance Standards pp 89-92



Park Maintenance Standards pp 89-90

Level of maintenance performance that is acceptable must be defined

- *Minimal* - so that is does not present an unsafe or hazardous environment - no premises defects or health hazards present
- *Highest* - provides maximal occupant safety and comfort and a sense of well-being for the occupant
- The park and recreation manager should strive for the high level of maintenance

Standards should be specific in what they require, i.e. 1) level of maintenance to be achieved, and 2) level maintenance worker productivity expected. Standards often vary according to the characteristics of the area to be maintained -- visibility of the area, desired landscape condition, and intensity of use.

- Examples of level-of-maintenance standards:
  - Turf areas in high-traffic areas will be mowed every 5 working days during the optimal growing season or will not be allow to exceed X inches in height
  - Tile floors will be wet-mopped once per day when the facility is operating
- Examples of maintenance worker productivity standards:
  - When using a 21-inch rotary push/trim mower, an employee should be able to trim mow 4,800 sf of turf in one hour
  - When trimming shrub hedges with an electric trimmer, an employee should be able to trim a 100-foot row in 90 minutes including clean-up

Maintenance Standards p 90

Specific clearly-defined performance levels

Maintenance Standard: Tile floors wet mopped 1x per day

Productivity Standard: using a 21-inch rotary mower, employee will mow 4,800 square feet in 1 hour

Park Maintenance Tasks pp 89-92

14 Tasks to Maintain a Park:

1. Turf care
2. Fertilizer
3. Irrigation
4. Litter control
5. Pruning
6. Disease control
7. Snow removal
8. Lighting
9. Surfaces, e.g., walls in need of paint
10. Repairs
11. Inspections
12. Floral
13. Rest rooms
14. Special features

Types of Maintenance:

- Housekeeping - regular everyday
- Routine - less frequent than housekeeping - often scheduled seasonally, on the basis of previous experience or user preference - occasional failure to perform will rarely result in loss of service - requests often done through work orders - examples include changing furnace filters, stripping and waxing floors
- Preventive - done to prolong life of equipment and prevent downtime - done as part of housekeeping - how often depends on how important the equipment is to service delivery, how sensitive it is to misalignment, and the cost to replace
- Repair/Replacement - often done by external contractors - requires bidding to assure good performance at the lowest cost - therefore the bid specification (scope of work) is important - a change order is an amendment to the contract to change the scope of work, schedule, or price.

Routine Maintenance p 90

- Less frequent than housekeeping
- Planned, scheduled, reactionary
- Typically through a work order
- Wax, paint, changing filters, changing light bulbs

Registration and Reservation Methods pp 92-93

Common program registration/reservation methods, forms, and procedures:

- *Walk-In* - two (2) types 1) central location and 2) actual program location (allow the registrant to visit the site and interact with staff but can create cash-handling problems
- *Mail-In* - allows greatest staff flexibility in processing registrations
- *Telephone*
- *Fax-In*
- *Web-Based* - vary depending on agency resources

Registration forms should be simple while obtaining as much information as possible for use in future marketing:

- Date of registration
- Participant contact information
- Program(s) available for registration and fees
- Post-registration specifics - deadlines, wait-list information, etc.
- Payment information
- Instructions on where to send the registration form

Registration and Reservation Process p 95

Registration - A well-organized process is important because it is often the first experience with the agency. The agency should:

- Have enough staff to handle registration needs and volume
- Coordinate with local customs, e.g., before and after work, on weekends
- Train registration staff - customer relations, dealing with dissatisfied customers, program specifics, cash-handling procedures
- Develop a plan for queuing
- Develop clear and concise forms and have adequate supply

Equipment use reservations

- Require forms that specify: use dates, conditions, deposit requirements, pick-up and return dates
- Organize records for quick retrieval, e.g., numerical, alphabetical

Facility Supervision pp 118-119

Daily Procedures - focus on the opening, routine, and closing inspections

They typically use a checklist to assure uniformity and thoroughness
Checklists should include inspection of the site or facility for potential hazards and premise defects should be corrected before opening a facility to the public.

- Opening Inspection - 2 types 1) *daily* (to make sure the facility is ready for intended use) and 2) *seasonal* to turn on and turn off systems
- Routine Inspection - involves observing behaviors to taking relevant action to preserve the facility - monitoring high use areas - taking down and putting up needed equipment - performing emergency cleanups - providing direct supervision for high-risk areas, e.g. swimming pools
- Closing Inspection - focused on security and shutting down systems

Seasonal Inspections - focused on turning on and off appropriate mechanical systems and making certain the facilities are ready for the upcoming season

Activity Monitoring p 98

Developing inspection forms and procedures to reduce agency liability and ensure patron safety is an important duty.

In some facilities an operations checklist is developed to provide systematic surveillance on an area.

- Periodically inspect restroom, kitchen, and other high-use areas where cleanliness is essential
- Take down and set up equipment needed for each activity
- Complete emergency clean-ups
- Systematically walk the facility to create a supervisory presence
- Perform visual inspections prior to each activity

Implementing Security/Safety Plan pp 128-130

Inspections (when, where, why and how often)

Know what is to inspected and how often

- Be consistent, do it on time and when required
- Go by the checklists that are in the plan for the inspection
- Report maintenance problems and follow up

Implement Risk Management

- Develop a procedure for accident reporting and analysis
- Develop procedures for handling emergencies
- Ensure proper releases, waivers and agreements to participate and are used
- Experts agree that well-written waiver does provide some protection from lawsuits

Risk Management pp 128-130

Risk management: Responsibility for reducing or preventing personal injury and financial loss through safety and security practices

Ensure safe sites and facilities:

- Comply with local, national, and state codes, e.g., fire, building, health
- Identify and eliminate hazards as part of daily operations

Safe program development and delivery:

- Employ staff with qualifications who adhere to acceptable standards
- Standard of care observed should be in keeping with a “reasonable and prudent professional”
- Act to remove incompetent employees and volunteers
- Use proper releases, waivers, and agreements

  All forms in clear and understandable language drafted or approved by an attorney

  Releases and waivers include:

  - Recognition of the nature of the activity and the potential risk
  - Reference to to specific rules and regulations with acknowledgment that the participant will obey said rules and regulations
  - Acknowledgement that the participant has the level of physical fitness to participate

Hazardous Materials pp 128-129

- Develop and adhere to specific policies and procedures for safe storage, handling, and application of these materials.
- Primary source of information are Safety Data Sheets (SDS) that manufacturers are required to provide that cover storage requirements, first-aid procedures in the event of exposure, how to flush the chemical off of skin or from eyes, and how to deal with spills and fires
- Chemicals used in parks and recreation:
  - *Types* - chlorine, cleaning supplies, lawn-care chemicals, herbicides, insecticides, fungicides, and fertilizers
  - *Storage* - secure area with access limited to trained personnel
  - *Inventory* - detailed record due to need to dispose of outdated products
  - *Application* - how and when, may required specially trained staff
  - *Public Notification of Application* - when, where, how, and the chemicals being used, and the type of pest being treated
  - *Special Clothing* - for application and for use in case of a spill
  - *Emergency Procedures*
  - *Integrated Pest Management* - techniques for minimal chemical application

Americans with Disabilities Act (ADA) p 100

Enacted January 26, 1992

- Written to guarantee equal opportunities for individuals with disabilities in employment, state and local government services, transportation, public accommodation and telecommunications
- The Access Board is the federal agency responsible for developing accessibility design guidelines (ADA Accessibility Guidelines - ADAAG) relating to recreational facilities
- Title II of ADA addresses public services - ensures that individuals are not excluded from services, programs, and activities because existing buildings are inaccessible - does not require that all existing facilities are accessible -- but some of each type must be accessible
- Requires physical alterations to public accommodations to be readily accessible to and useable by people with disabilities to the maximum extent feasible
- New facilities must be accessible for people with disabilities

Accommodating Participant with Disabilities p 100

All architectural and communication barriers must be removed, if their removal is readily achievable without difficulty or expense. This applies also to agency-owned buildings that are leased to others.

Communication barriers need to be removed so that people with disabilities can gain access to public areas and also benefit from the goods and services provided, e.g., use of Braille inscriptions.

The Department of Justice recommends the following barrier removal priorities:

1. Provide access from parking areas, sidewalks, and entrances to the public accommodation so the person with a disability can "get through the door"
2. Provide access to those areas where programs and services are offered
3. Provide access to restrooms, drinking fountains, and telephones when facilities are open to the public
4. Take other measures to provide access to facilities and program that will assure every individual the opportunity to benefit from the services

Provide Reasonable Accommodation p 100

Disability is a mental or physical impairment limits major life activity

- Cannot refuse participation because of the disability
- Must make Reasonable Accommodation -No special charges - No exclusion from services due to inaccessible facilities
- Even if separate services are offered, there is a right to participate in regular services provided by the agency (inclusion)

Policies, Procedures, and Regulations p 120 5th Ed

Be aware of distinctions among

- “***policy***” (subject to interpretation - usually adopted by a board or council)
- “***procedure***” (chronological sequence of required action) and
- “***rules and regulations***” (specific and directive requirements)

Develop policies, procedures, and rules for specific programs, program areas, and facilities to address specialized operations and equipment -- these address staff, utilization, inspection, hazard, enforcement, and special equipment issues

Implementing Policies and Procedures p 120 5th Ed

Policy

- Agency (District-wide)
- Typically approved by board
- Overview of what is expected/mandated

Procedure

- Task specific
- Usually contains a number of steps
- Identifies how a policy will be followed

Policies, Procedures, and Regulations pp 120-121 5th Ed

Examples

<u>Policy</u>: Model aircraft/boats shall be allowed only upon the issuance of a permit by the Director of the Department of Parks and Recreation.

<u>Procedures</u>: Any individual applying for a permit to operate model aircraft/boats shall:

1. File an application provided by the staff of the Metropolitan Board of Parks and Recreation.
2. Pay an established permit fee.
3. Furnish proof of public liability insurance in amounts to be established by the Metropolitan Department of Law, Division of Insurance.
4. Affix a Metropolitan Park permit number on each model aircraft/boat.

<u>Rules</u>:The Department of Parks and Recreation prohibits the following:

1. Absolutely no flying shall be behind the zero line.
2. No aerobatics or high-speed passes are to be performed over the runway.
3. No flying outside of the flight boundaries specified on attachments to this permit application.

Develop and Recommend Policies p 138 5th Ed

- Boards adopt and set policy
- Agency staff often develop and recommend policy for adoption by the board
- The trend is to “empower employees” by adopting policies that maximize discretion on applying different facts to policy decisions while being specific enough to assure fairness and consistency in interpretation
- Steps in developing a policy include:
  - Determining need, e.g. recurring decisions that need direction
  - Write policy and develop rationale
  - Examine the likely impact
  - Examine feasibility of implementation - costs and acceptability by citizens and staff
  - Research potential conflicts with existing policies
  - Recommend the policy to the board for adoption

Standard Operating Procedures and Manuals pp 105-107

Operational manuals should be developed when programs, program areas, or facilities have special operational aspects. Applicable policies, procedures, and rules are detailed.

Operational responsibility areas often include:

- Security
- Staffing - number and qualifications
- Utilization - appropriate/not appropriate
- Inspection
- Hazards
- Enforcement
- Specialized equipment

Interpreting Policies, Laws, and Regulations for the Public p 139 5th Ed

It is important that the public know about policies, procedures, codes, laws, and regulations

- Place online
- Post in facilities
- Put in seasonal brochures
- Have copies available to any customer

Train employees in the rationale for the policies, etc. so that they can communicate their purpose to the public

Policies and Procedures - Implementation

Why implement policies and procedures?

- Provide fair and consistent treatment
- Maintain compliance with county, state, and federal laws or guidelines
- Protect employees, participants, and agency
- Reduction of confusion

Compliance with Codes and Ordinances p 104

Be able to locate, review and implement applicable laws and mandates:

- Use accurate record-keeping - maintain files for each law or regulation
- Identify and track employees who require specialized training, e.g., pesticide application
- Inform employees of significant safety and health information
- Use audits to assure compliance

Staying Current with Regulatory Agency Policies pp 104-105

Be aware of regulatory policies affecting your agency

Create a communications plan to inform and educate all affected staff when you determine a change will affect your agency

Federal agencies include:

- *Environmental Protection Agency* (EPA) - Monitors pollution-related standards
- *Equal Employment Opportunity Commission* (EEOC) - Enforces anti-discrimination laws
- *Food and Drug Administration* (FDA) - Protects public health by assuring safety of drugs and medical devices
- *National Labor Relations Board* (NLRB) - Safeguards employee rights to organize and remedies unfair labor practices
- *Occupational Safety and Health Administration* (OSHA) - Assures safe working conditions

Analysis of Operating Data pp 107-108

Parks and recreation professionals must analyze data for management and planning purposes:

- Attendance - observation, registrations, on-site counts, projections
- Financial - includes appropriations, revenues, expenditures, timesheets and payrolls, purchase orders, contracts, and concessions
  - *Revenues* - money received for specific programs and services
  - *Expenditures* - encumbrances, contractual services, capital outlay, debt service
- Maintenance - to determine maintenance needs, equipment replacement/repairs
- Marketing - to determine effectiveness of marketing strategies

Information to Defend in Case of Accidents p 100

Accidents - When accidents from traffic to personal injury occur information must be compiled to document the scene in anticipation of legal action:

- Interview witnesses - just facts not opinions and contact information
- Record evidence and information - as soon as possible, record location, factual description and if the activity was supervised (*do not speculate about cause*), and witnesses with contact information
- Preserve physical evidence - if physical evidence cannot be protected, collect a visual record via photos and videos

Incidents - Incident reports are often required for all complaints or occurrences without injuries, e.g., customer complaints and behavior problems

Codes of Conduct pp 98-99

Facility Users and Program Participants

- Communicate expectation as early as possible including enforcement consequences, e.g., during program registration, use of signage
- The enforcement plan should be posted or made available

Coaches and Staff

- Communicate during early stage of employment, e.g., during orientation
- Should be a formal document that is available to all employees -- content may differ from agency to agency

Emergency Operations Planning pp 100-101

- Emergency Plans address threats
  - Weather-related
  - Plants and animals
  - Societal
    - Active shooter
    - Terrorist acts
  - Coordinate with state/local authorities
    - Deterrents - electronic surveillance
    - Effective lighting, fencing, signs and symbols

Emergency Action Planning pp 100-101

To prepare for emergencies:

- <u>Identify potential threats</u> - to identify appropriate security improvements to protect facilities, visitors, and staff.
- <u>Create and emergency operations plan</u> with guidelines on how to respond to various emergencies:
  - Weather-related
  - Plants/Animals - insects, poisonous plants
  - Societal threats - police presence, electronic surveillance, and effective lighting can reduce crime and help identity criminal acts
- <u>Determine inspection system</u> - what, when, how often - develop checklist
- <u>Develop maintenance problem reporting system</u>
- <u>Keep documentation of inspections</u> -- they are evidence of reasonable care
- <u>Prepare for possible terrorist acts</u> - coordinate large events and visits by celebrities with state, local, and federal law enforcement
- <u>Identity/develop evacuation routes</u> for each building and recreation facility and conduct regular drills
- <u>Establish mail-handling precautions</u> to identify suspicious mail

Emergency Preparation and Response

p 101

First Aid/CPR (cardiopulmonary resuscitation)/AED (automated external defibrillation)

- Training for all staff
- First-aid kits with emergency procedure instructions located at all facilities and areas
- Portable first-aid kits for off-site programs
- Emergency phone available at all activities and events

Accident/Incident Reports

- Complete immediately (after victims are cared for)
- Do not include opinions about causes and prevention

Follow emergency action and operations plans

BE READY
MAKE A PLAN

Customer Service (Internal) pp 101-102

- Sharing of information - to perform the job, including policies and procedures, and learn how the job fits into the larger organization
- Convey core values to staff - goals and objectives, too
- Coordination of organizational systems to communicate across the agency
- Crisis communication - in the event of various emergency situations

Customer Service (External) p 102

- Agency definition of "quality" will vary from agency to agency
- A customer's perception of quality is determined by:
  1. Customer expectation formed by
     - Image and reputation of the agency
     - Prior experiences with the agency
     - Marketing and promotional material
     - Word-of-mouth
  1. Expectations vs. actual experience
  2. Post-experience reflection

- Customer service plan to meet expectations of customers, staff, and agency contains 1) definition of customer base, 2) evaluation of current quality, 3) service improvement plan, and 4) monitoring and assessment

Managing Customer Relationships pp 111-112

Service Recovery - The ability to put things right for a customer - poorly resolved complaints will likely lead to ill feelings toward the agency and may affect customer retention

Customer Perceptions - Created by time spent waiting in line, treatment by staff, appearance of park or facility

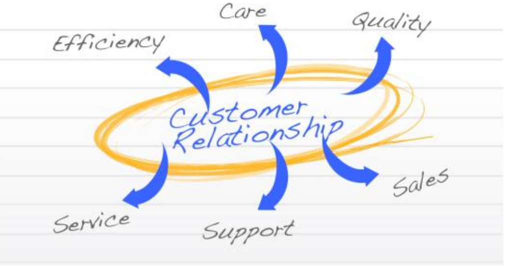
Customer Recognition and Retention - Fewer resources are required to retain than to recruit - provide multiple opportunities for customers to provide positive and negative feedback, have a formal response plan - recognition activities allow the agency to formally acknowledge loyal customers

Customer Service - Handling Complaints p 111

Responding quickly and accurately to requests for information, concerns, and complaints from the public is an established standard of practice.

5 basic steps:

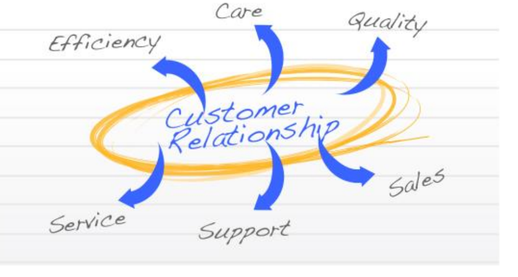
- **Receive without comment**
- **Acknowledge and inform person of the next step**
- **Forward to appropriate person**
- **Handle the complaint**
- **Follow up**



Customer Retention p 111

One customer strategy is to implement a 2-way communication plan.

- Provide formal and informal opportunities for the customer to provide feedback - positive or negative
- Have a formal process for responding to the feedback and that the customer is aware of the process



Property Management pp 113-114

Common management principles

- Safety and Security -
  - 3 elements of safety for the user are setting, activity, and other visitors
  - Primary security measures include security equipment (sprinklers, fire/security doors, video surveillance), fencing, signage, lighting, lock and key security, scheduled patrols
- Property and User Needs - carrying capacity, i.e., the level of use beyond which social, physical, and biological components begin to decline to unacceptable levels
- Development and Operational Resource Needs - costs of development including the ongoing costs of operating and maintenance
- Legal Requirements - building codes, access, environmental, occupational health and safety

Capital Improvements pp 134-136 5th Ed

Capital Budget: Separate from Operating Budget. Includes planned and proposed expenditures for long-term and substantial projects

Capital Project: Project that is extremely costly. Facility Construction, Large Vehicles, Land Acquisition.

Capital Budget Plans: 5-10 year plans for large expense

Policies: Any purchase/project over a considerable amount are considered a capital purchase or project.

Capital Improvement Plan

Large expenses requiring 5-10 years of planning

- Capital acquisitions of land for programs, facility or agency
- Equipment purchases
- Develop areas and facilities
- Repair existing areas or facilities
- Replace equipment for safety purposes
- Enhance/expand recreation opportunities/services
- Improve the natural environment

Capital Improvement Plan should:

- Identify the benefits of the capital item
- Projected life of the capital item
- Address impact on bonded debt
- Possible sources of funding

Monitoring Capital Improvements pp 134-136 5th Ed

Review and understand the agency's schedule of bonded debt

The schedule typically includes a description of all debt issued, the purposes, issue and maturity dates, amounts outstanding at the end of the current fiscal year, and the amounts of principal and interest payments that will be due during the next fiscal year.

Schedule of Outstanding Bonded Debt					
Issue	Purpose	Amount Isssued	Issue Date	Maturity Date	Amount Outstanding
Limited Tax General Obligation Bond	Construction of Maintenance Builidng	$ 100,000	8/1/05	10/1/22	$ 45,000
Limited Tax General Obligation Bond	Acquisition and construction of Parks and Recreation Facilities: Aquatic Center	$ 550,000	11/1/06	11/1/24	$ 277,345
Limited Tax General Obligation Bond	Acquisition and construction of Parks and Recreation Facilities: Sports Complex	$ 450,000	2/15/09	12/1/29	$ 420,000
Limited Tax General Obligation Bond	Acquisition of open space	$ 150,000	8/15/10	7/1/35	$ 135,000

Payments Due During Next Fiscal Year			
Issue	Principal	Interest	Total
Limited Tax General Obligation Bond	$ 45,000	$ 900	$ 45,900
Limited Tax General Obligation Bond	$ 277,345	$ 4,160	$ 281,505
Limited Tax General Obligation Bond	$ 420,000	$ 12,600	$ 432,600
Limited Tax General Obligation Bond	$ 135,000	$ 2,295	$ 137,295

Government Bonds

What are government bonds?

- A government bond is a type of investment where money is loaned to a government in return for an agreed rate of interest.
- The loans are typically paid from real estate property tax revenue.
- Governments use bonds to raise funds that can be spent on new projects or infrastructure.
- investors use them to get a set return paid at regular intervals. Government bonds are generally viewed as a low-risk investment

Monitoring Capital Improvements pp 134-136 5th Ed

- A capital outlays schedule provides a list of each park area,facility, and major piece of equipment.
- It should be part of the long term - at least 5 years - financial plan to forecast spending.

Schedule of Capital Outlays			
Issue	Estimated Cost	Less Trade-in of Existing Equipment	Net Cost
Turf Lawn Mower	$ 8,000	$ 1,000	$ 7,000
Vehicle Radios and Antennas	$ 5,000	$ 500	$ 4,500
Maple Park Sidewalk Improvements	$ 4,000	$ -	$ 4,000
Computer and Registration Software	$ 10,000	$ -	$ 10,000
Pool Pump and Filtration System	$ 11,000	$ 2,000	$ 9,000
Storage Shed Construction in West Park	$ 12,000	$ -	$ 12,000
Placement/Establishment of 7 computer Networked Work Stations	$ 54,000	$ -	$ 54,000

Decisions on Capital Improvements p 103

Decisions on what to fund are drawn from agency's comprehensive, master, and strategic plans. Sources of information for these documents include:

1. Community-wide needs assessment to determine needs and wants from the resident perspective, and
2. Operational needs of the agency

Comprehensive Plan - the overall park and recreation plan for the agency

Master Plan - subset of the comprehensive plan to focus on specific functional areas, e.g., a trails master plan

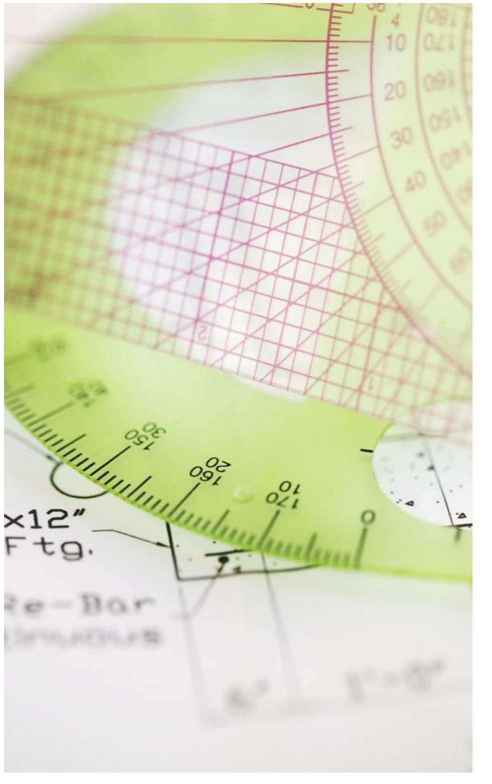
Strategic Plan - development of agency mission and vision - list of goals, objectives, and priorities - action plan for achieving goals and objectives

Comprehensive Plan

- Overall plan for the build environment
- Contains
  - Short and long term goals
  - Policies
  - Standards
  - Assessments
  - Inventories
  - Community Data

Master Plan

- Subset of comprehensive plan (definition can vary by agency)
- Focuses on a physical resource
  - Land
  - Facilities
  - Greenways
  - Trails
- Updated every 10 years



Strategic Plan

Equitable Access and Distribution of Resources pp 103-104

Strategies to promote equitable access:

- Identification of service disparities - review participation data and identify service trends
- Meaningful community engagement - engage populations affected by service disparities
- Establish agency capacity around service quality - ensure the agency is not creating unitientional inequities
- Develop diverse and inclusive community partnerships
- Promote the need for service equity - create a culture that values and communicates equitable access
- Ensure equity efforts are integrated into evaluation practices

Read or Review Site Plans/Maps

Site Plan: A bird's eye view of a property that is drawn to scale

Identifies:
- Property lines
- Outline of existing and proposed buildings and structures
- Distance between buildings
- Distance between buildings and property lines (setbacks)
- Parking lots, indicating parking spaces
- Driveways/trails
- Utilities/Easements
- Surrounding streets
- Landscaped/Natural Areas – existing/proposed
- Ground sign location
- Ground Elevations

Development Planning: Site Plans/Maps

Reading/Reviewing Site Plans/Maps

- **Legitimacy –** does plan meet all requirements set forth by the agency?
- **Compliance –** is the drawing accurate and consistent with any local zoning or code requirements?
- **Consistency –** is the site plan consistent with the agency's master plan?
- **Development review** - checked by other public, private and commercial agencies

jon Benson + associates, inc.

planning + landscape architecture

East Roswell Park Expansion

City of Roswell Recreation and Parks Department

April 15, 2002

Analysis of Trends and Best Practices p 137

- Fad - short-term excitement that is not lasting
- Trend - longer-term tendencies that gain and lose momentum over time with significant implication - aging population, childhood obesity, work-time and leisure-time balance
- Best Practices - strategies that have produces superior results - often adapted from other agencies
- Benchmarking - process to identify and implement a best practice that requires
  - Sufficient knowledge of the agency's current practice
  - A procedure to compare their agency with a potential best practice
  - Knowledge about where to locate best practices
  - Ability to modify the identified best practice
  - Resource support to implementation

Information Systems/Technology pp 113-117 5th Ed

- **Umbrella term:** covers a vast array of computer disciplines allowing organization to manage their information resources

- **Operational and administrative functional areas:** computers, registration systems, reservation system, etc.

- **Functions:** enter data on permits, reservations, registrations, and equipment use

Business Information Systems

Work Management (i.e., Workorder): work orders, work requests, inventories, project management, maintenance schedules.

Transaction Management : activity registration, facility scheduling, membership systems

Case Management (i.e., account): tracking of a specific participant or event.

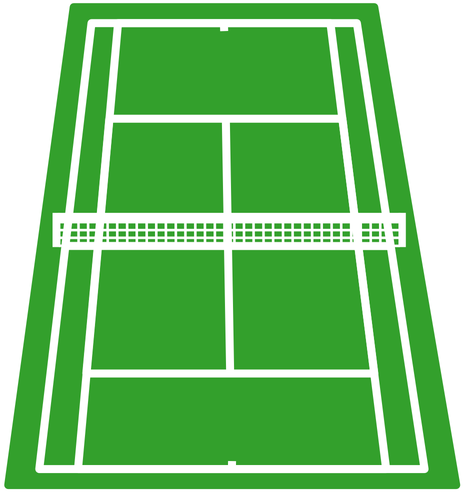
Business Information systems

Information System Processes

Input: collect data	Communication: access/ movement of data	Process: Transfer data
Storage: keep data	Retrieve/Recall data	Output: transform data into usable format

Information Systems Uses

- Permits
- Reservations
- Tracking Maintenance
- Memberships (Fitness, Aquatics)
- Equipment use



PROGRAMMING

Examination Content

125 Questions over 3 Hours (125 scored and 25 pre-test questions)
Covers 51 Tasks in 5 Categories:

- **Communication (25%)** **31-32 Questions**

  e.g., promote benefits, solicit public support, foster internal and external relationships

- **Finance (10%)** **12-13 Questions**

  e.g., purchase supplies, equipment, and services, develop fee collection procedures, conduct cost-recovery analysis

- **Human Resources (10%)** **12-13 Questions**

  e.g., develop job descriptions, recruitment, managing volunteers, enforcing policies and procedures

- **Operations (30%)** **37-38 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

- **Programming (25%)** **31-32 Questions**

  e.g., manage contracts, provide accessibility accommodations, implement maintenance standards

Recreation Program Planning pp 122-123

<u>Needs assessment</u> - provides data on programing needs for the community (target population) and individuals. The typical needs assessment includes

- Target market demographic characteristics
- Current program participation data
- Level of satisfaction with current programming
- Issues or constraints restricting program participation
- Future programming needs and interests

<u>Program plan</u> - is compatible with the agency's programming philosophy and resources and is developed with collaboration among participants and instructors. It has the following components

- Assessment of target population condition including abilities/strengths and problems/needs
- Goals - desired outcomes from participation
- Objectives - At least 4 measurable results per goal
- Implementation Strategies - Services and activities offered and how individuals will participate
- Outcome/Evaluation Plan

<u>Individual-level Assessment</u> -

- Data are collected once participants are registered
- Allows the instructor to tailor the program to the needs of those enrolled
- Observation and interviews with participants and caregivers are most common data collection methods

Program Types

Supervision of Recreation Programming pp 123-124

Two (2) basic types of program operation supervision - specific and general

Specific - involves observing, overseeing, and managing the conduct of a specific activity, facility, or program, e.g., lifeguard or rink guard - assumes staff with more training in the activity and closer supervision for participants, including

- Correct, competent instruction and/or direction
- Oversee the behavior and practices of participants
- Intervene and regulate behavior to ensure safe participation and a safe environment
- Conduct safety inspections
- Respond to traumatic events and render appropriate assistance

General - concerned with on-site supervision of recreation services and programs, but does not provide activity instruction

- Ensure the program is actually delivered
- Observe program operations to make sure they are being delivered as intended - observations can include contact with program participants
- Observe program staff and provide feedback

Supervision of Special Events p 124

Develop a work plan to manage the range of tasks

- Generate a timeline
- Create a budget
- Set task priorities
- Develop a checklist

Common supervisory tasks include

- Ensure all equipment and signs are at proper locations
- Check trash receptacles and restroom facilities frequently
- Set up information/registration booths
- Display permits and a site map
- Test communications equipment
- Make sure all areas are staffed - appropriate number/ratio and qualifications
- Brief security/police
- Coordinate cash pick-up
- Supervise tear-down and inspect the site
- Ensure that all trash is properly disposed
- Thank staff and volunteers
- Prepare evaluation and financial statement

Reporting Requirements pp 126-127

Record Keeping

The purpose of keeping detailed records is to show agency performance over time, e.g., people served, program hours/year, number of volunteer hours. They can often reveal areas of needed improvement, e.g., # of accident and incident reports, drops in attendance and revenue

Typical agency reports

- Program plan - a program-proposal form must be completed and approved before a program may be operated - often tied to agency budget to ensure that the program is financially sound
- Supply requisition - internal requisition forms, purchase order to external vendors, solicitation of bids
- Reservations - obtaining space to offer a program
- Maintenance work order - support to offer a program
- Contractual services - for services that agency cannot provide, e.g., catering - often required requisitioning
- Accident report - all accidents immediately after they occur
- Incident report - all incidents, e.g., customer complaints, behaviour problems
- Evaluation/after-action report - attendance, how well the objectives were accomplished, financial report, assessment and recommendation for future

Program Purpose, Goals and Objectives pp 127-128

A programs is given form and direction through the development of the purpose, goals, and objectives of the program

- Purpose Statement - a rationale and justification for why the program is being developed - should be linked the the mission and vision statements of the agency

- Goal - general statement about what the agency wishes to accomplish - two (2) categories “program management” and “behavioral”
- Objective - specific measurable statement that leads to the accomplishment of the goal - each goal having 2-4 associated objectives - A well-written objective addresses
    - Audience - who is involved
    - Behavior - what is to be accomplished
    - Condition - how the objective will be accomplished
    - Degree - when the objective will be accomplished

Work with Variety of Age Groups

- **Balance of programs to meet needs all demographics**

Work with a Variety of Age Groups pp 128-129

As people age, they change physically, cognitively, and socially

Plan activities that are developmentally appropriate - consider the three (3) domains of learning

- Psychomotor - physical skills and movement ability
- Cognitive - intellectual knowledge and ability
- Affective - attitudes, values, and social pursuits

Offer programs targeted to specific age groups - especially when working with children

Community Resource Coordination p 130

A community park and recreation system encompasses all agencies and enterprises offering recreation services. It is accepted professional practice to coordinate and integrate an agency's operations with the overall system. All available programming in the community offered by the commercial, nonprofit, and public sectors should be coordinated.

Benefits include:

- Stretching physical, fiscal, and human resources
- Reducing duplication
- Creating stronger interagency relationships
- Increasing networking opportunities for staff
- Qualifying for funding opportunities that require collaboration
- Enhancing the quality of life in the community

Evaluation

- **Formative (during); Summative (Conclusion)**
- **Why evaluate?**
  - To determine impact
  - Cost-benefit analysis
  - Satisfaction
  - Marketing mix
  - Effectiveness of the program
  - Value!

Evaluate Participant Satisfaction, Program Outcomes pp 130-131

Evaluating is judging the worth of something

- It is not possible to evaluate all program features with one evaluation - determine who will be the information user an what information that they believe is important to collect to set a direction on what to evaluate
- A program is effective to the extent that the stated outcomes of participation are achieved
- Program impact is the extent that the target market was served
- Cost/benefit analysis is used to judge whether the benefit achieved was worth the cost
- Formative and summative evaluation are the two primary types
  - Formative Evaluation - conducted while the program is operating - feedback program leaders and participants is used to form and shape a program while it is being implemented
  - Summative Evaluation - conducted at the end of the program to document program outcomes - is usually more comprehensive than formative evaluation - provides data to determine if the program should be continues, modified, or dropped

Concepts of Reliability, Validity, and Usability pp 131-132

Reliability - does the tool provide consistent results?

Validity - is the tool measuring what is it supposed to measure? Three types

- Construct - is it measuring specific attribute or construct ?
- Content - is it the specific attribute or construct being measured relevant?
- Face - “on its face” - does it seem to be working?

Usability - Is the tool complete, easy to use (should be able to complete in 15 minutes), cost effective, and are the results easy to analyze?

Triangulation involves using multiple sources of information and data to obtain the whole picture from multiple perspectives

Strategies for interviewing

- Listen more and talk less
- Avoid leading questions
- Don’t interrupt or debate
- Follow up and ask for clarification

Data Collection

- **Random:** Everyone has an equal chance of being selected. All names are put into a hat & names are pulled at random
- **Systematic:** Every “nth” person (i.e., every 5th person who walks in the door)
- **Purposive:** Represents a select group (i.e., day camp participants)
- **Convenience:** Easy for the researcher to poll (i.e., available staff or a questionnaire left on the front desk).

Quantitative and Qualitative Evaluation p 132

Formative and summative evaluations can be either quantitative (numerical data) or qualitative (use of words to produce rich descriptions)

Common quantitative evaluation tools

- Head counts
- Surveys - in-person, mail-back, online, phone

Common qualitative evaluation tools

- Observations - participant (observer is a participant), non-participant
- Interviews - formal structured (specific set of questions), informal unstructured (casual conversation)
- Focus groups - 8-12 pre-selected individuals
- Public meetings
- Document and record review,e.g., brochures, registration forms. financial reports

Participant Assessments - Group and Individual pp 165-167 5th Ed

Assessment is a particular type of evaluation done *prior to implementation of a program* to determine the wants and needs of the community.

- Individual assessment of need is done to custom-tailor the program those who have enrolled - typically through observation or interview
- Group assessment of need - data are collected via focus groups, public meetings, citizen advisory committees, surveys, questionnaires

Surveys pp 132-133

Questions are either open-ended (no predefined answer) or close-ended (choose among possible responses)

Guidelines

- Avoid jargon, slang, abbreviations, and acronyms
- Use simple vocabulary and grammar
- Avoid emotional language
- Avoid bias - “please rate this popular program”
- Avoid double-barreled questions
- Avoid leading questions - “don’t you agree...?”
- Avoid questions that don’t match the skills and knowledge of the target audience
- Provide clear and concise directions
- Use a 10 to 12 point font
- Start with easy questions
- Put demographic questions at the end
- Allow adequate space for answers to open-ended questions

Planning a Program pp 171-172 5th Ed

Outlines how will the program run. Done for each program

Identifies all “activities” (management functions), who is responsible, and the timing

Content outline

- **Program title** - name, type, and format of program
- **Statement of programming philosophy**
- **Need for the program** - why it is being offered
- **Program goal, objectives or benefits statement**
- **Promotion plan**
- **Financial plan**
- **Facility plan** - venues and equipment with layouts
- **Safety/Risk Management**
- **Supplies** - itemized list and suppliers
- **Staffing plan** - number - classification - skills
- **Management plan** - specific activities for management functions - roll up into master schedule
- **Registration** - restrictions such as age and residency - refund process - differential pricing
- **Policies/Rules/Regulations**
- **Operation plan** - script for how the program will be organized and operated
- **Cancellation plan** - plans for cancelling, relocating, and rescheduling
- **Evaluation plan**

Program Goals pp 155 5th Ed

Both types of goals are important, but behavioral goals are critical for documenting the efficacy of a program or service

<u>Management Goal</u>

- To operate a volleyball instructional clinic for adults (30-45 years of age) with at least 100 participants
- To secure sponsorship so that the volleyball program can be offered free of charge
- Increase
- To increase the drop-in use of volleyball courts across the city

<u>Behavioral Goal</u>

- To improve participants' serving skills
- To improve participants' knowledge of volleyball rules
- to increase participants' ability to seet shots

Program Objectives pp 155 5th Ed

A well-written objective addresses 4 elements:

- *Audience* (who is involved),
- *Behavior* (what is to be accomplished)
- *Condition* (how the objective will be accomplished)
- *Degree* (when the objective will be accomplished)

Objective

All participants (audience) will follow all rules of golf (behavior) that were learned from reading the rule book (condition) during the end-of-class tournament (degree)

How Purpose, Goal and Objective Work Together pp 155 5th Ed

Purpose: To provide comprehensive athletic program for athletes with disabilities in order to teach and improve their skills and provide them the opportunity to participate in league and tournament play

Goal: Create a volleyball program where the athletes develop skill to compete in the Special Olympics

Objective: Develop a one-hour volleyball clinic for children with disabilities that focuses on exposing participants to basic volleyball skills taught by experienced coaches. Those registering for the volleyball team will practice once per week to develop skills needed to compete in the spring Special Olympics regional tournament

Adjusting Programming to Available Resources p 135

- Assess availability of *physical* (areas and facilities, equipment, supplies), *fiscal*, *technological*, and *human* resources before designing a program
- Any resource necessary for the operation of a specific program could be the limiting factor
- Most programs have an lower and upper enrollment limit
  - Lower limit ensures economic sufficiency
  - Upper limit is usually based on limited availability of spaces - size, equipment, capacity

BE READY MAKE A PLAN

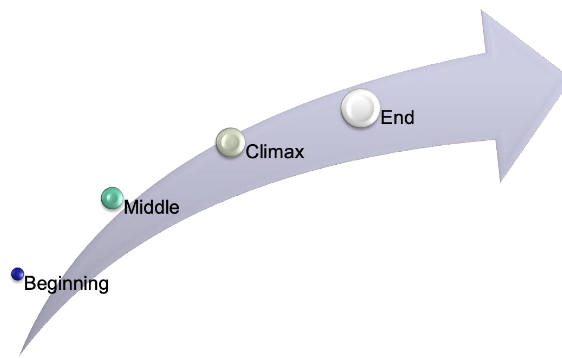
Program and Event Planning pp 135-136

Content - review the structure and order of possible activities

Animation - specify the exact order and interaction of to design the flow that will achieve objectives

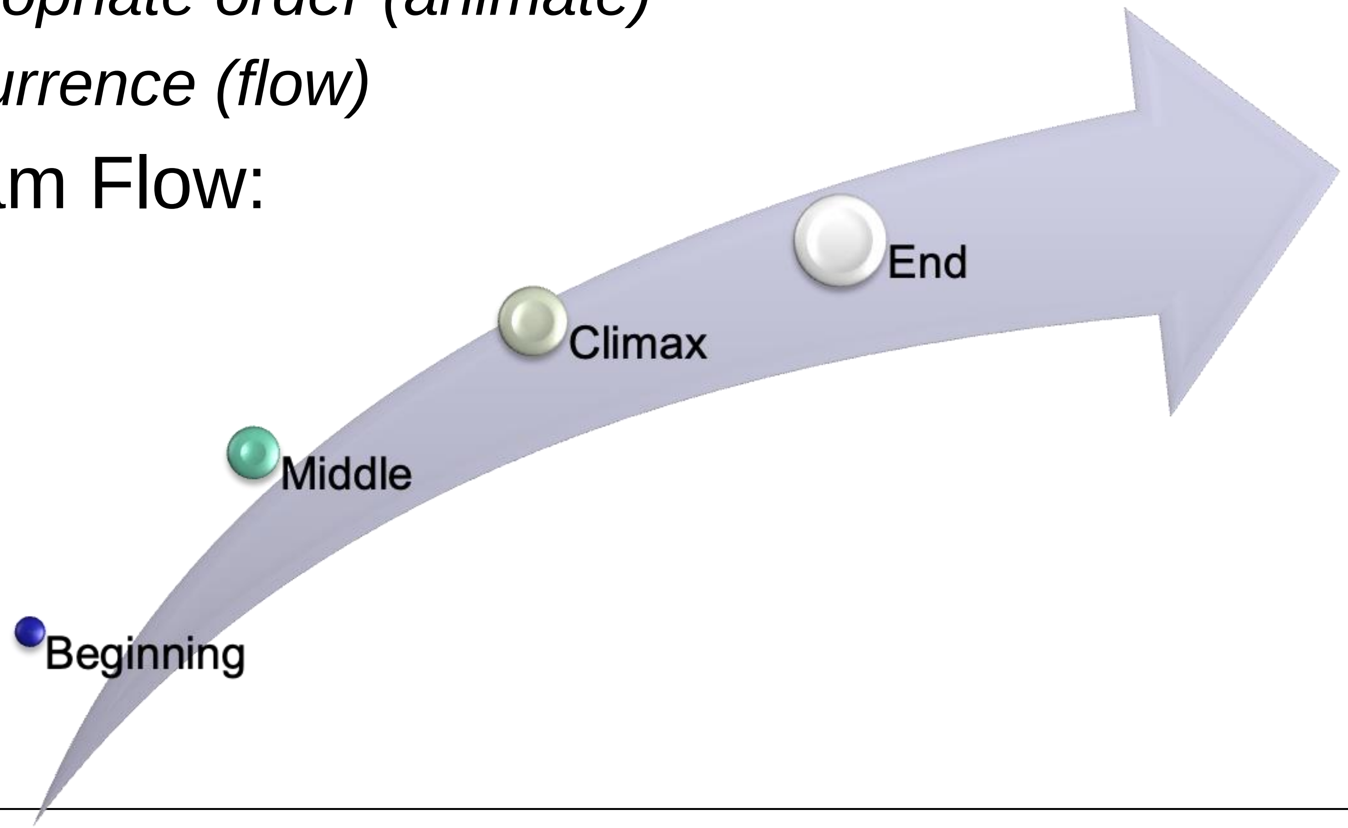
Design principles

- *Anticipate* - imagine what will the experience be like for participants
- *Theme* - provide a consistent thematic presentation
- *Format* - how a service is organized for delivery will influence who will be the customers -- recognized formats include:
  - self-directed
  - special event or performance
  - instructional class
  - clinic
  - league
  - tournament
  - workshop
  - drop-in service
  - open-facility operation
  - club



Program Planning – Creation and Design

- Program Design
  - *Activities (content)*
  - *Appropriate order (animate)*
  - *Occurrence (flow)*
- Program Flow:



Direct Leadership of Recreation Activities pp 137-138

Three (3) phases of direct leadership

- Preparation -
  - Group composition - number, gender, and abilities
  - Goals and objectives
  - Risk management - remove, reduce, or accept the risk - keep participants aware of participation risks
  - Environment
  - Activities chosen - compatible with group composition - participants (especially children) should not have unoccupied time - plan transitions from one activity to another - have extra activities in case some are not successful
- Prime the group - use an icebreaker to get the attention of participants
- Deliver - introduce instructors and staff - describe the activity and goals - provide directions - manage the activity - stop while participants are having fun

Schedules for Leagues, Programs, and Facilities pp 156-158 5th Ed

- Consider seasonality - availability of space in the off season
- Conduct needs assessments - know when people want programs
- Know the community - local events, activities, holidays, and practices, e.g., religion
- Know specific target markets, e.g., home-schooled children
- Establish priorities - essential for scheduling multiple facilities - don’t allow a scheduled block of time to go unused
- Establish deadlines - for requesting space
- Consider impacts of traffic and noise - on both community and other programming
- Consider bundling classes during the same time slot, e.g., adult fitness and youth arts to attract families
- Be aware of tradition - “it’s always been in this room” is not a good method for assigning rooms
- Assure adequate staff for supervision
- Determine adequate number and location of facilities to accom tournament play

Comprehensive Post-Program Report p 162

An post-program report to guide future implementation of the program

Content outline

- **Title of the program**
- **Administrative location** - administrative unit that operated the program
- **Purpose, goals, and objectives**
- **Design/Implementation procedures** - how the program was operated and animated
- **Financial data** - how did performance match the projections?
- **Staffing plan** - how many (classification/skill) were used? - right numberor?
- **Evaluation data** - a summative evaluation report
- **Recommendations for future operation** - repeat in same manner - modify - cancel

Stats Help Market Programs

- Marketing: creates a positive public perception

- Four P's of Marketing Mix
    - **Product**
    - **Price**
    - **Place**
    - **Promotion**

Market Programs pp 164-165 5th Ed

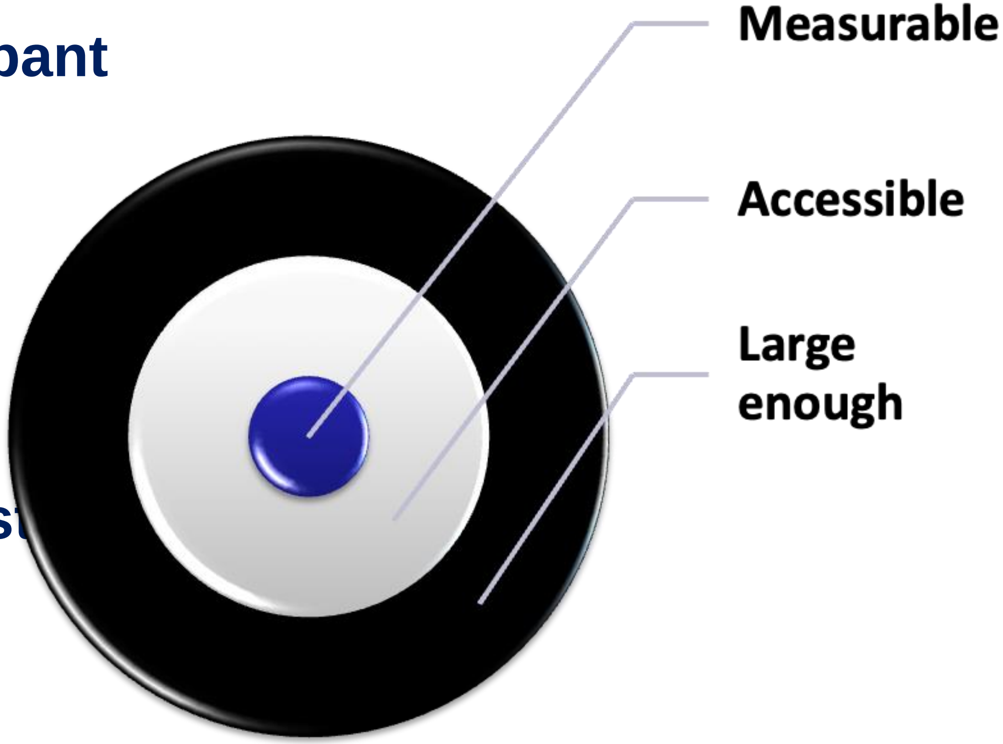
Quantity, accuracy, and timeliness of information are all important.

Sources typically include

- Advertising - paid communication through the media - keep the preferences of the target market in mind - what they watch and what they listen to - which media are most associated with the message
- Promotion - a short-term method to stimulate use of a service or a purchase
- News release - a mini-story written in a prescribed format to create positive publicity for the agency
- Brochures and printed materials - gradually being phased out
- Website
- Social media

Target Population p 16 5th Ed

- Group of individuals with common interests, demographics, etc.
- Used to identify participant needs
- Measurable (size and characteristics)
- Accessible
  be reached)
- Large enough to be cost
  effective



Maintain Customer Relationships pp 163-164

Respond quickly and accurately to requests for information, concerns, and complaints

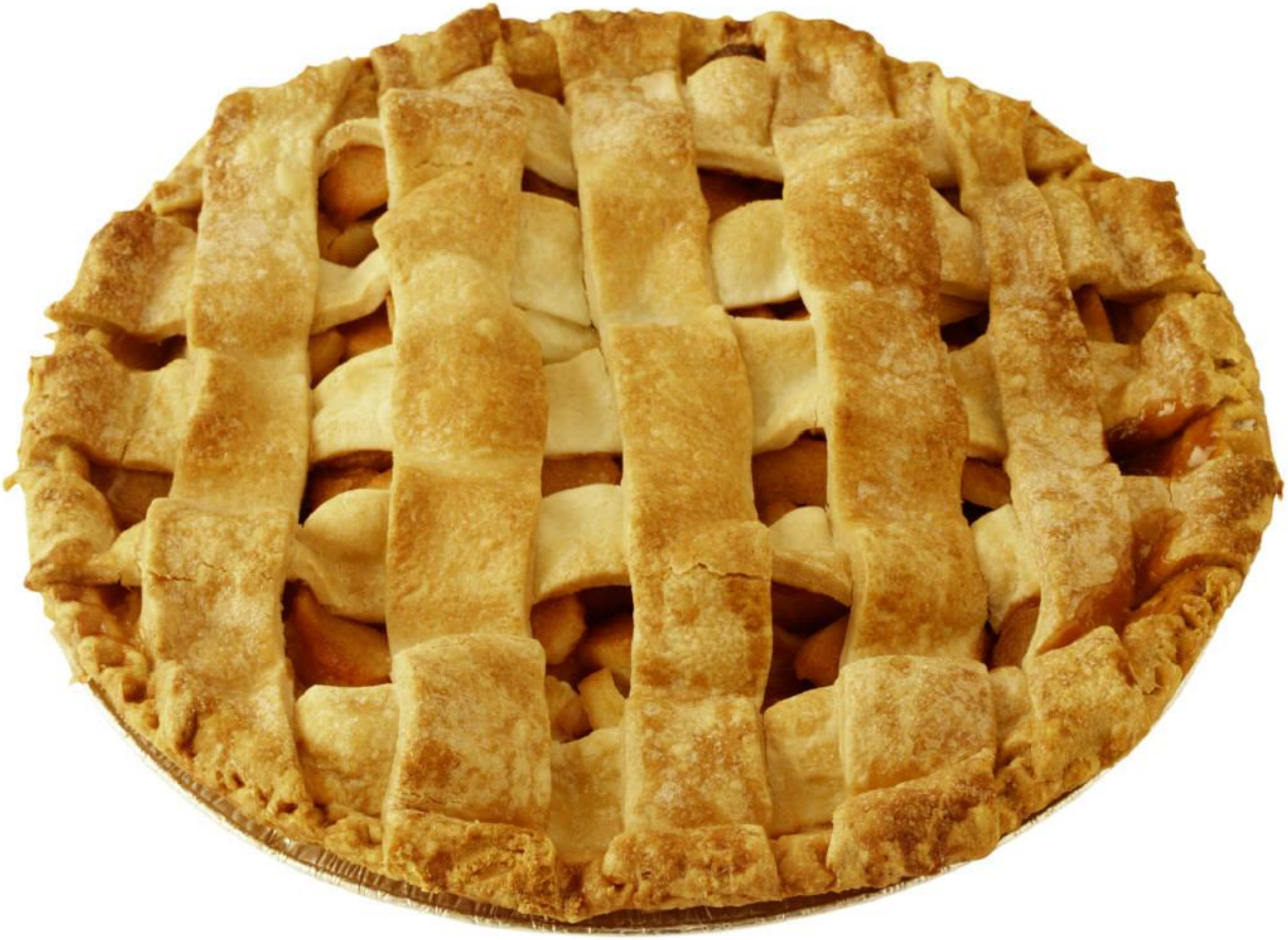
Give information about what other organizations provide - they should not be viewed as competitors - knowing what is going on in the community is essential

- Assure that front-desk staff are will-versed in the inner workings of the agency - first impressions are made with these contacts
- Collect up-to-date information from other service providers
- Meet with service provider on a regular basis

Basic steps to handle complaints

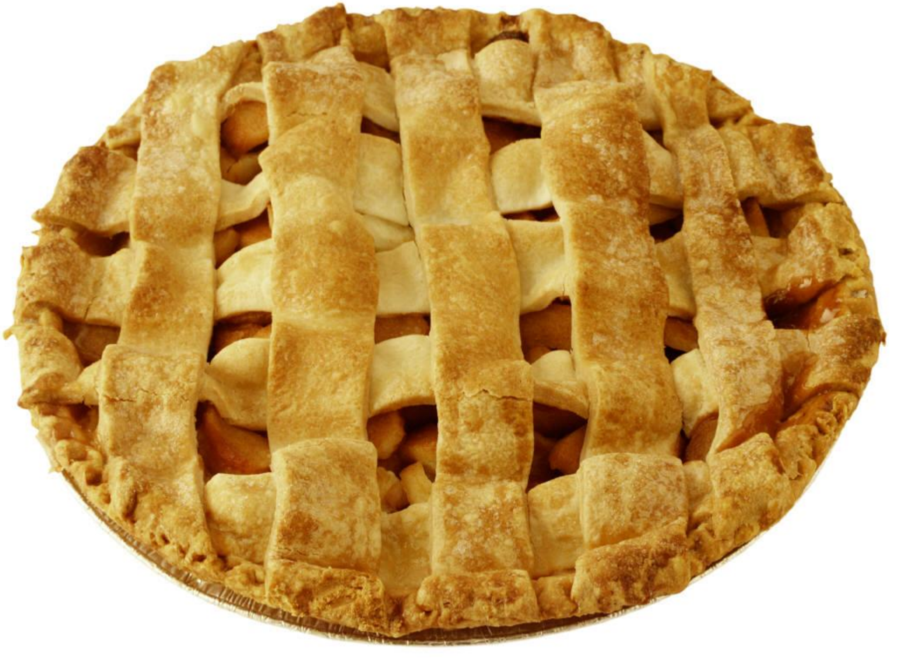
- Review the complaint without comment
- Acknowledge receipt and explain next steps
- Forward the complaint to the responsible staff member
- Respond immediately to resolve the complaint
- Follow-up with the person making the complaint to make sure it was resolved satisfactorily

What is this? p 166 5th Ed



A PIE!

- Assess
- Plan
- Implement
- Evaluate



Assessing Individuals with Disabilities pp 166-167

Implementing the therapeutic recreation (TR) process includes four (4) steps

1) Assessment, 2) Planning, 3) Implementation, and 4) Evaluation - known as APIE (pronounced “a-pie”)

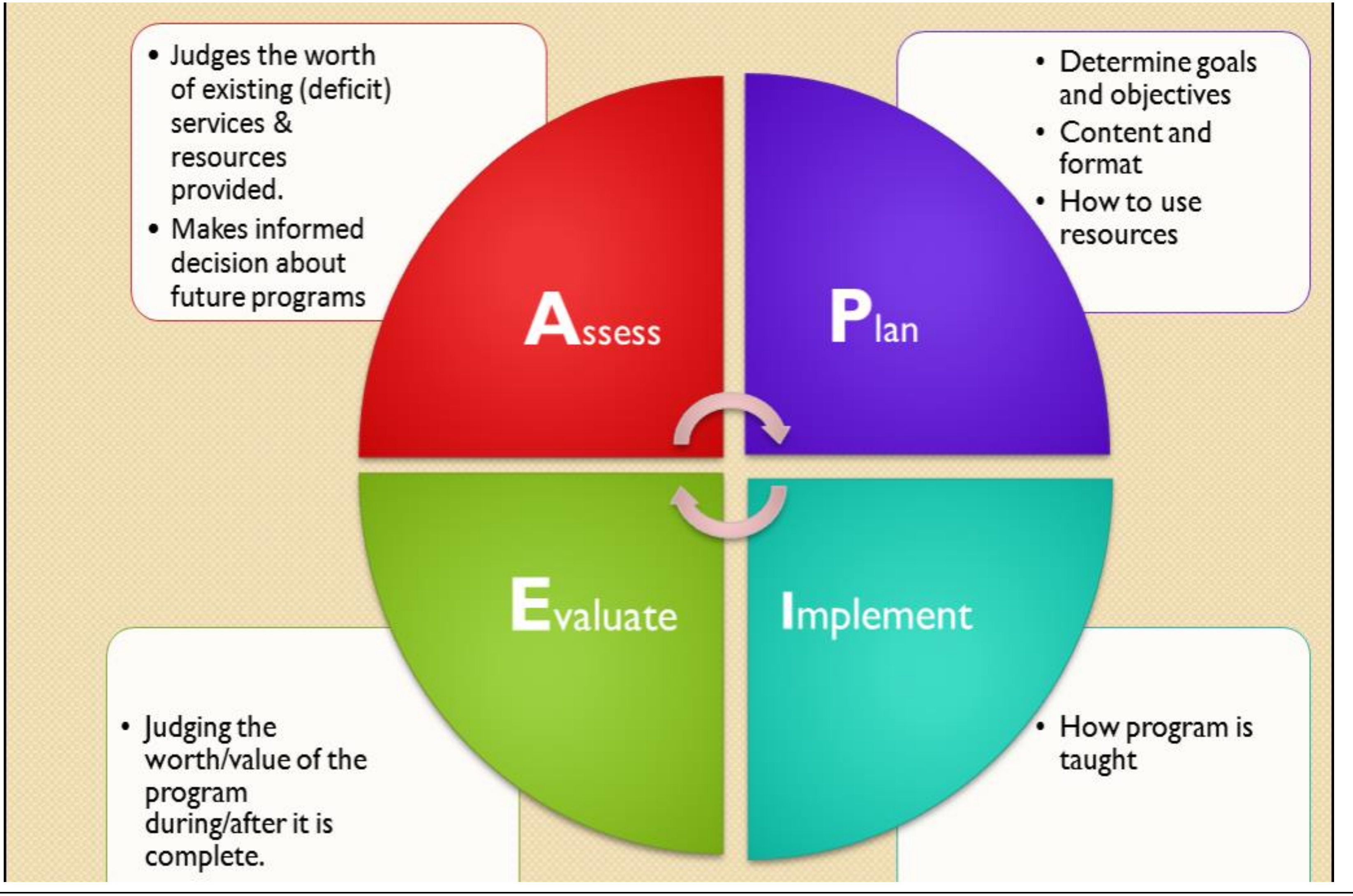
Assessment - a process of collecting information about a person’s condition to create a baseline - 4 domains are typically assessed - physical, cognitive, social, and affective/emotional

Assessment should identify three (3) types of information

- <u>Problems and needs</u> -- limited to what TR services can address
- <u>Strengths and abilities</u>
- <u>Client expectations</u> - interests and desires

Selection of a particular assessment instrument is guided by the therapist’s training and previous experience with the instrument - some in use are Leisure Diagnostic Battery (LDB), Mundy Recreation Inventory, Family Leisure Assessment (FLAG), Recreation Behavior Inventory (RBI), Mirenda Leisure Interest Finder

TR Recreation Planning Process p 166 5th Ed



Thank You!

THE END