

Chapter One – OPERATIONS ASSESSMENT

1.1 1.1 OVERALL PROCESS AND PURPOSE

The overall process and purpose of doing an operational assessment focuses on how efficient and effective the organization operates and what opportunities or policies could be instituted that would make the Department more effective. The Operational Assessment includes the following:

- Summary of findings
- Recommendations for improvement
- Classification of services
- Operational standards
- Performance measures and indicators
- Information systems and technology
- Organizational design and staffing
- Staffing levels
- Partnership/volunteer support for facilities.

1.1.1 SUMMARY OF FINDINGS:

The Department lacks an overall management approach to operations as it applies to the following:

- A clear vision of what the Department wants to be known for and how they want to manage all elements of parks, recreation facilities and program services. This includes an operational policy and procedure handbook versus individual policy pieces that lays out all the elements of an effective organizational approach to parks and recreation services. The Department is interested in becoming accredited with NRPA in the future as part of the overall operations to achieve best practices.
- The Department does not have a clear strategy of policy on how to deal with developers working in the Township as it applies to a land dedication ordinance for parks or using impact fees for acquiring park land and developing those lands acquired to support the population growth in the Township. Example see Park Land Dedication Example on (pages 24 and 25).

1.1.2 RECOMMENDATIONS FOR IMPROVEMENT

The Department should consider the following for improvements to operations of the system:

- Seek NRPA Accreditation over the next five years for best practices in parks and recreation management
- Organize the Department staffing needs around standards based on acres to maintain parks, trails, cemeteries, programs, administration, marketing and management of park amenities that are expected by the community.
- Build an operational budget based on the right person doing the right job with the right skill set for the right benefit and pay to the agency. This can be either fulltime, part-time, seasonal or contracted staff.
- Update staffing and organizational structure that aligns with implementing this master plan.
- Create a new organizational structure for the Department as outlined in the Organizational Design and Staffing section of this operational assessment report.
- Manage the park system to performance measures and expected outcomes that can move the department forward through effective data management and operational standards for improving parks, programs, facilities and services.

- Develop a policy and procedure handbook that is updated yearly. Include new policies on ADA compliance on accessing parks and trails, drones in parks, smoking near playgrounds and private contractors using parks for personal gain, gifting of trees, benches, benches.
- Develop partnership policies for public/public partnerships, public private partnerships and public not for profit partnerships.
- Develop a pricing policy based on a unit cost and classify services on if it is a core essential, important or value-added program.
- Track unit costs to maintain an acre of park property, a mile of park trails, a playground, sports fields, picnic shelter or special use facility.
- Incorporate a land dedication ordinance to acquire park land through development exactions and include impact fees to develop the parks from the type of development to occur in the area of the location of the park.
- Develop a marketing and communication policy.

1.1.3 ORGANIZATIONAL DESIGN AND STAFFING

- The Departments approach to staffing is not based on operational maintenance standards for parks, trails, cemeteries, and sports fields based on a unit cost or a staffing level of care for per park-maintained acreage. The department doesn't track unit costs for what it cost to maintain an acre of maintained acre of park property, a sports fields, a mile of trail, a picnic shelter or a specific program. Most of these costs are driven by the operational budgets and what the staff can reasonable absorb in the time they have available.
- Staffing levels are not determined by function and hours to achieve outcomes as it applies to fulltime staff, part-time staff and seasonal staff. These positions are based on an operational budget that is given to the department and not driven by community need or expectation.
- To achieve a higher level of impact in the community the organization needs to have the appropriate balance of people to maintain its parks, develop programs for people in the township who want to use the parks and recreation facilities.
- The Department is lacking significant program staff to activate the parks and recreation facilities as well as to administer the elements of program registration, marketing of services, contract management of instructors and maintenance contractors working in the parks.
- An updated organizational chart is needed that demonstrates efficiency and effectiveness of these elements and the staffing required to achieve it.
- The Park Maintenance pay structure is based on the requirement of a CDL due to winter assignments for assisting Public Works with snow plow routes. Standard Park Maintenance responsibilities do not require all staff to have this level of certification. The pay rates for this position are higher due to the requirements of a CDL.
- Park Maintenance staff accrue comp time and/or are paid overtime for snow plowing duties. There are no black-out dates for taking comp time and staff may take it during the peak season, which means that parks and recreation department has less staff during the busiest times. Staff are considered on-call for snow duties during the winter. Although this is the slower time for parks, it is difficult to schedule vacation time during the winter as they would still be required to work should there be snow.
- Park Maintenance vehicles are purchased with equipment to support the snow plowing. This equipment is more expensive than what is truly required for standard park maintenance.

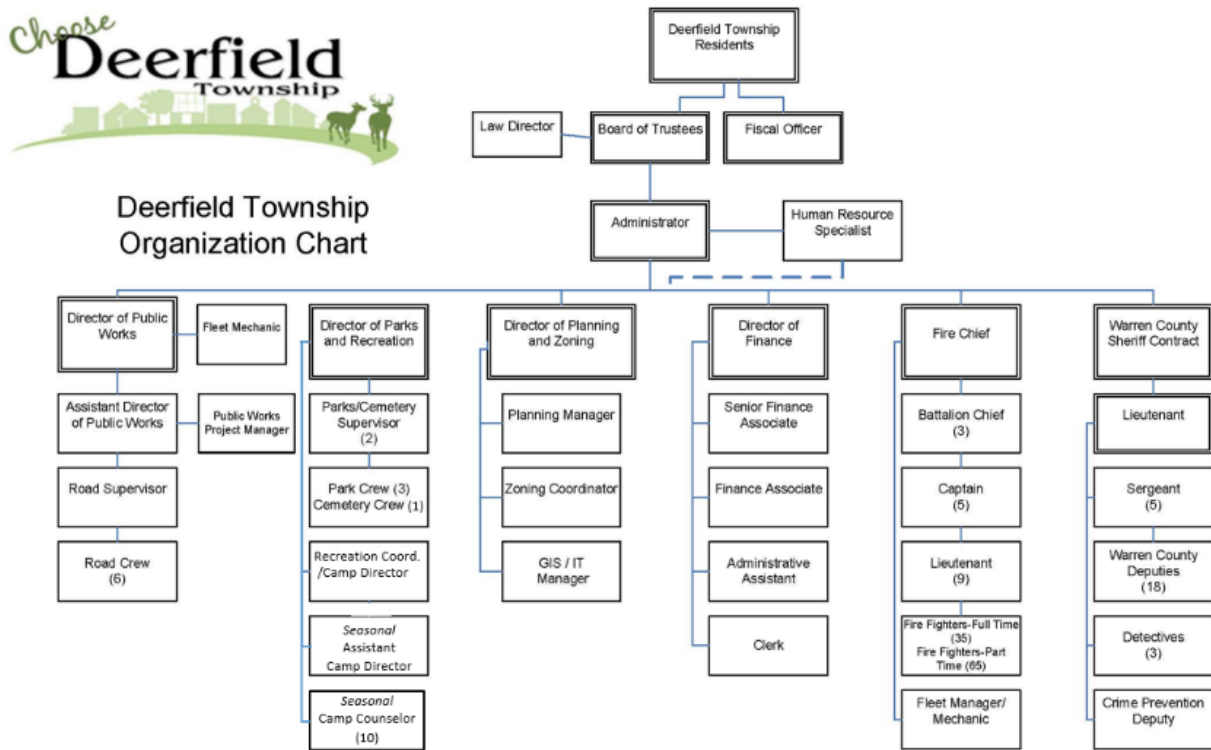
- Park Maintenance snow plow hours are charged to the Parks Department. Public Works assists with special events to help offset these hours, but there is no formal tracking to measure these hours for either department which needs to be addressed.
- Park Maintenance has a higher turn-over as there not many opportunities for advancement. Parks spends significant time and resources training staff. High performing staff tend to transfer to Public Works when positions are open as their structure offers more room for advancement.
- Park Maintenance also assists with supporting the Cemetery. Cemetery staffing is minimal with only 2 staff. When one person is off for vacation or illness, park staff go out to assist which pulls them away from park maintenance duties.

1.1.4 KEY STAFFING RECOMMENDATIONS

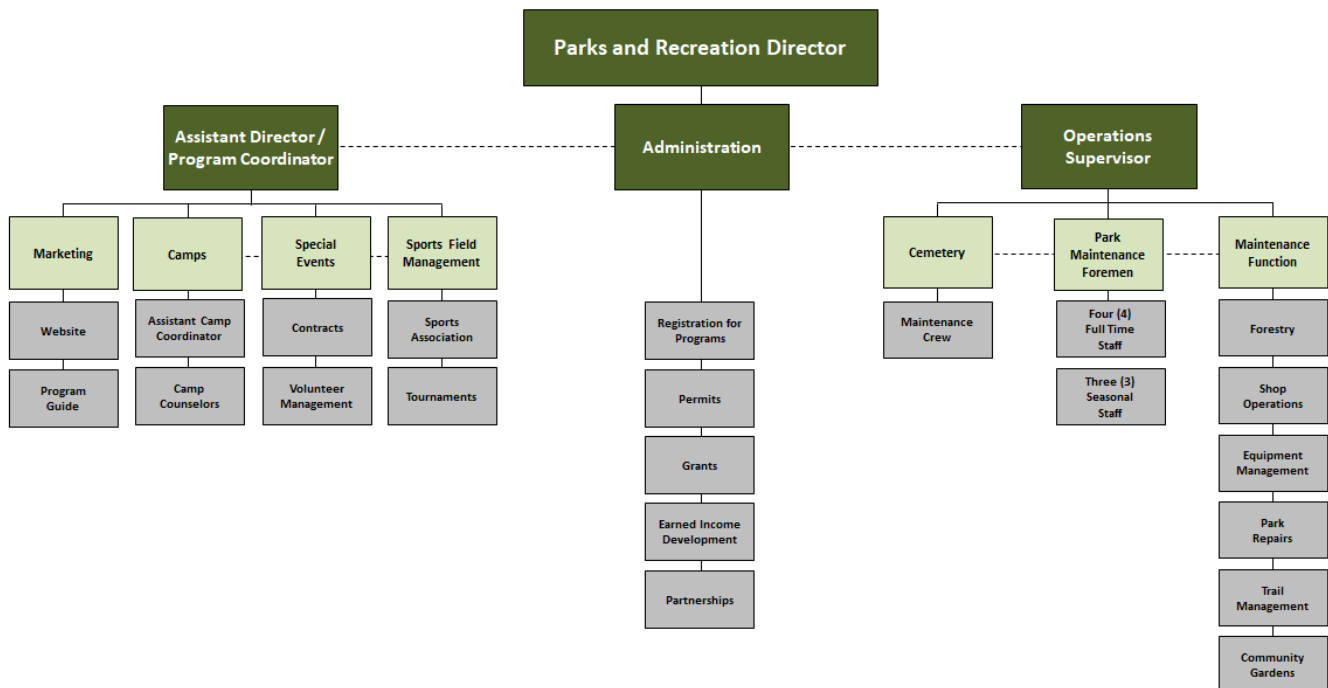
- Staffing needs should be based on operational standards for maintaining parks, trails, cemeteries and sports fields based on hours to do the work which translates into a unit costs and level of care desired with the focus on the right person with the right skill set, for the right job, for the right pay to achieve the desired outcome.
- Staff needs, and costs should be tied to unit costs to prepare a cemetery plot, maintain a mile of trail, a sports field or an acre of park land.
- The Maintenance Division does not need all maintenance staff to have a CDL for winter snow removal. A set number of staff should be required to be certified as a CDL driver based on the number of people required to keep costs in check and not to pay people more than is needed or they are paid that CDL rate only when they are snow plowing.
- Black out dates should be established for peak season for park maintenance work which means that maintenance staff cannot take vacation time off from the end of March to the end of September. This is a normal process in most park and recreation agencies. Maintenance Staff that are not CDL drivers should take vacation time off during the months of October, November, December, January, February and March. Those staff that are CDL drivers should be required take their vacation in October, November and March each year. This should be a requirement of their position.
- Comp time should not be taken off during peak season work but taken off in off season time so as not to cost the Department more money than necessary and to have a higher level of burden on the existing staff not off work.
- Snow plow equipment should be charged to the division they are doing work for not what Department has money.
- Formal tracking of how much the Parks Department helps Public works out and how much Public Works helps parks staff out and each year it is calculated with adjustments made to compensate for the departments that are shorted work time based on the Township's priority of need.
- Public Works staffing classification and Parks Classification work should be classified the same if the work required is the same and paid the same if they are doing similar work in both departments. This will eliminate one department taking staff from one department and leaving that department with constantly having to recruit and train staff for loss positions.

- Update the organizational chart to reflect the organization of the future based on the functional requirements of the Department and then determine the staff needs in hours as it applies to full-time, part-time, and seasonal needs. This then will determine the level of full-time staff needed.

CURRENT ORGANIZATIONAL CHART



The staff would like to have a staffing plan and organizational structure based on the recommendations that come from the Master Plan. PROS developed a new updated functional organizational chart below, based the recommendations for parks, recreation facilities, programs, maintenance and administration as outlined in the master plan report. The goal of the staffing plan will center on staffing costs remaining to be in the 55%-60% of the operational costs. The boxes don't necessarily represent people but represent functions the department provides to the community. In boxes it lists functions such as park and recreation director, assistant director, administration and operations supervisors as functions with no names.



1.1.6 OPERATIONAL STANDARDS

- Operational Standards or policies are not in place for how to effectively partner with public/public partners, public/not-for-profit partners or private partners. This causes the Department to manage these partnerships sometimes in a defensive manner versus a proactive manner. The Department should consider adopting partnership policies to effectively manage partnerships with the Township.
- The Department is not driven by performance measures that focus on outcomes they want to achieve as it applies to parks, programs, partnerships, earned income, cost recovery, meeting customer expectations, meeting maintenance standards or meeting their goals. The Department operates in an effort-based approach to doing their work versus an outcome-based approach.

1.1.7 PERFORMANCE MEASURES AND INDICATORS

Performance measures demonstrate to leaders in the Township and the community how efficient and effective the organization is as well as how well they are meeting the community's expectation. The Township picked the following performance measures to track in the coming years to demonstrate these elements within the system and how well the Department is serving their needs.

- Total number of parks in the system
- Total park acres
- Total maintained acres
- % of undeveloped park land as percent of total park land
- Miles of trails
- FTE's for the department
- Number of volunteers/volunteer hours
- Recreation features (educational, natural, outdoor rec)
- Park attendance by type of park
- Breakdown of users by age segment for all core programs

1.1.8 CLASSIFICATION OF SERVICES

- The Department needs to classify recreation services based on essential, important and value-added programs and services.
- A Pricing Policy and a Policy for Cost of Service needs to be developed to provide consistency across the system in terms of pricing services.
- Currently the Department does not have a cost recovery strategy or pricing policy in place. They don't charge sports teams now for permits to use the fields or for field maintenance for exclusive use of those facilities. This should be accomplished by establishing a true cost of service both direct and indirect for sports fields management and maintenance. This needs to be addressed in the pricing policy and how to deal with select teams who use the sports fields for their own personal gain as it applies to hosting tournaments.
- Teams have contributed to the development of fields which included a \$45,000 contribution for the fields for one Township park in the past.
- The Department has never been expected to recover any cost for private benefit services provided by the Department for sports fields.

SAMPLE COST RECOVERY AND PRICING POLICY**CORE VALUES**

We are committed to these Core Values:

- Environmental Conservation and Stewardship

- Informed Planning
- Quality Service
- Community Responsiveness and Collaboration
- Equity and Fairness
- Dedicated Leadership
- Fiscal Responsibility

PURPOSE

DPR is committed to providing outstanding parks and recreation experiences for the community, which shall include providing quality recreation programs. It is necessary for DPR to have a sound and consistent pricing policy that will serve as a management tool for establishing, implementing and evaluating various fees and revenue options. The establishment of a pricing policy may allow for additional programs and facilities to be made available that would enhance the level of service, or the quality of programs provided. This also allows for DPR to provide higher quality of services due to these limited operational dollars.

The new Pricing Policy for DPR is designed to provide staff with consistent guidelines in pricing admissions, use of facilities, establishing program fees based on the individual benefits a user receives above a general taxpayer. The policy will help DPR address revenue goals to support operational costs, provide greater fairness in pricing services to users, and help support the implementation of future programs and services. This Pricing Policy allows the DPR, users; staff and general taxpayers to better understand the philosophy behind pricing of a program or service. The Pricing Policy is based on the cost recovery goal for the service established by the Township Board to provide the service and whether the service is a core essential, important, or value-added service.

ISSUES ADDRESSED

The pricing policy will help the DPR in establishing appropriate program and service fees for the future operations and maintenance of the programs and facilities that are managed to help meet cost recovery goals established by the DPR Board. A sound pricing justification, philosophy and effective data puts DPR in a positive position when it comes to establishing justifiable pricing and fees to offset operational costs.

EXPECTED OUTCOMES AND BENEFITS

The guiding principles for the creation of an effective pricing policy are as follows:

- Accessibility, Fairness and Affordability
- Supplemental Funding
- Efficiency
- Achieve Cost Recovery Goals

DEFINITION OF TERMS

Essential Services are those services parks and recreation offer that provide all users the same level of opportunity to access the service. The level of benefit is the same to all users. Examples of essential services are open public access to use a regional park, a playground, a trail or a picnic area that cannot be reserved. Essential Services normally have low level, or no user fees associated with their consumption. The cost for providing these services is borne by the general tax base.

Important Services are services whereby the user receives a higher level of benefit than the general taxpayer. The taxpayer benefits because the service provides a more livable community and the service has a good public benefit as well. Examples of important services are swim lessons, youth sports, summer

camp programs for youth, nature education programs and special events that promote healthy active lifestyles.

Important Services can be priced using either a partial overhead pricing strategy or a variable cost pricing strategy. Partial overhead pricing strategies recover all direct operating costs and some determined portion of fixed indirect costs. The portion of fixed indirect costs not recovered by the price established represents the tax subsidy. Whatever the level of tax subsidy, DPR staff needs to inform the users by letting them know that DPR is investing a certain dollar amount and/or what percentage level of investment they are making in their experience.

Value-Added Services are where only the user benefits. This is where DPR needs to implement pricing services using a full cost recovery strategy. The price of this service is intended to recover all fixed costs and variable costs associated with providing the service. Examples of value-added services are food services for resale, retail services, and rental of space for weddings and business meetings.

ACCESSIBILITY, FAIRNESS AND AFFORDABILITY

Equity and fairness mean those who personally benefit from the service above what a general taxpayer receives should pay for that benefit and those who benefit the most should pay the most. Affordability should be based on benefit and ability to pay. This policy recognizes that affordability is in the eye of the user. Public park and recreation agencies offer three kinds of services. Example of Essential services, Important services and Value-Added services are outlined above. The type of service and benefit received will directly determine the cost recovery level or pricing strategy to be used in the pricing of the services and products DPR creates.

SUPPLEMENTAL FUNDING

Supplemental funding means that user fees and prices charged for admissions, programs, food services, retail services, rentals and special events will assist in the overall funding of the DPR operations. The revenue produced through this will give DPR the needed cash for operations, capital costs and marketing dollars to promote programs and services available to the community. These dollars can come from any source that supports operations and include grants, sponsorships, partnerships, permits, special rental uses and many other options. DPR staff looks for these opportunities whenever possible.

EFFICIENCY

DPR staff can evaluate how the service is delivered and if it is delivered in the most effective and efficient manner based on the cost to deliver the service. Priorities to enhance user or visitor experiences are clearly defined because the services provided are clearly made visible and the priorities are established based on the direct user costs that are associated with the activities that users want. Pricing of services correctly can achieve six positive results:

- Reduces congestion and overcrowding
- Indicates user and visitor demand and support for the service
- Increases positive user and visitor feedback
- Provides encouragement to the private sector to invest in DPR type programs through contracts that can bring greater revenue to the DPR
- Ensures stronger accountability on DPR staff and management of the service
- Creates multi-tiered pricing so users who want a higher level of quality can purchase it

DISTRIBUTION OF REVENUE FUNDS TO ACHIEVE COST RECOVERY GOALS

Distribution of Revenue means dollars generated from each activity are redistributed back to the area they came from to pay direct cost and indirect cost in some situations and for future improvements associated with a facility or activity. Examples would be sports leagues pay for improvements to the sport fields or camper fees make improvements to campgrounds.

The staff will document the cost of services provided through a costing model. The true cost of each activity is designated as direct and indirect costs associated with providing a product or service.

A review of all prices periodically is recommended to document the changes that have occurred within the products or services provided by DPR. This will help staff to evaluate which program, product or service should have adjustments based on the Pricing Policy.

DPR and staff will set prices for services based on the following process:

- What is the cost to provide the service and what is the cost on a per experience basis, hourly rate, or unit rate?
- Is the program or service a core program or non-core program based on the criteria established?
- Is the program an essential, important or value-added service based on the established criteria in the pricing policy and the level of personal benefit the user receives over what general taxpayer receives?
- Does this price support the cost recovery goal desired for the program or recreation facility to support sustainability?

PRICING POLICY PROCEDURES

Key Elements in implementing the Pricing Policy include:

- Create value and price accordingly
- Know the costs (direct/indirect) and level of cost recovery goal the Township Board has established for that service
- Understand how the price established compares in the market place
- Price services correctly the first time
- Use differential pricing based on participant, product, and times to encourage greater use of the service or facility
- Educate staff, volunteers, boards and officials on the pricing methodology used
- Communicate price and DPR cost to provide the service to users and how much the user paid to cover the cost of the service
- Eliminate entitlement pricing

ESTABLISH CORE SERVICE CRITERIA

- Does this program/service align with the DPR's Vision and Mission?
- The program/service meets at least one of the strategic directions of the DPR
- Full time staff or approved contractors are responsible for execution of the program
- The program has a strong social value that is part of a solution to an identified strategic direction
- The program has strong economic appeal and creates a strong return on investment for the DPR system
- The program has a high partnering capability to enhance promotional opportunities or to offset operational costs

- The program/service currently meets the capacity performance measures developed by staff
- The program is in a growth or mature stage of its lifecycle and has proven to have long term participation appeal
- If the service is determined to be a core service:
 - What classification does it fall under (Essential, Important or Value Added)?
 - What is the true cost to provide the service and current level of subsidy?
 - What is the current price of the service and what level of cost recovery does it support now? What pricing alternatives are currently being used?

ESTABLISH COST RECOVERY GOALS

Essential Services - 0-10% of direct and indirect costs

Important Services -20%-80% -of direct and indirect costs

Value Added Services- 80%-100% of the costs

Examples:

- Youth Services 30-50% of the direct and indirect costs (summer camps)
- Adult Services -50-100% of the costs (fitness related programs)
- Senior Citizens Services-50 to 75% of the costs (events with live entertainment)
- Rentals of Facilities-100% of the costs (Exclusive use of Soccer Fields for Travel Teams)
- Adult Health, Education Services-100% of the costs (Cooking Classes or Trips to a museum)
- Life Skill programs-100% of the costs
- Archery Range (youth programs -50%, adult programs 100%, events 100%)

USER LANGUAGE IN PRICING SERVICES

In pricing services, the PRD staff should inform users of what they are paying for and what the DPR is paying for in the following type of sample language. “The \$20 dollar you are paying for your child’s recreation experience is covering approximately 50% of the cost (total of \$40) to provide this service for your child; the DPR through the Parks Levy millage is investing the other \$20 dollars in your child’s experience as part of this program.”

OTHER PRICING METHODOLOGIES TO CONSIDER IN PRICING SERVICES

Options to consider:

- Charging non-resident rates
- Prime time/non-prime time rates
- Group rates
- In season/off season rates
- Change the minimum numbers higher to hold program (low cost-high volume approach) to spread cost to more people while keeping price the same
- Reduce the quality of the program/service to keep existing price
- Change the contractor rates to make cost lower

Questions for DDPR Staff to consider:

- Can a sponsor/partner pick up a portion of the program costs?
- Can DPR offer the program/service in a less expensive venue?
- Can DPR reduce the discount levels for selected age segments?
- Can DPR use contractors for the service versus using public employees?

- Can DPR pay a lower rate to employees to provide service?
- Can DPR partner with a local agency to spread the costs?
- Can DPR graduate the price higher over a period? How long?
- Can DPR manage the site or program differently?
- Can DPR negotiate the rate versus keeping the established rate?

EXAMPLE OF A PRICING PROGRAM COSTING FORM

Program Name				Budget Code	
Preparer Name		Year		Expenditure Quarter	1 2 3 4
Type of Service:	Essential	Important	Value-Added		

Expenditures: Only incorporate those costs associated with the program and include direct and indirect costs.

I. Salaries	Estimated \$	Actual \$
Full time with Fringe		
____ hours @ \$		
Part time with Fringe		
____ hours @ \$		
____ hours @ \$		
____ hours @ \$		
Overtime		
____ hours @ \$		
____ hours @ \$		
Clerical Support with Fringe		
____ hours @ \$		
Total	\$	\$

II. Other Operating Expenses	Estimated \$	Actual \$
730429 Contracted Services		
730646 Equipment Maintenance		
730653 Equipment Rental		
731213 Membership Dues		
731241 Misc. Expense		
731339 Periodicals/Books/Publications		
731346 Mileage _____miles @ \$0.55 @ _____ staff		
731941 Training		
732018 Travel & Conference		
750399 Office Supplies		
750504 Small Tools		
750581 Uniforms		
776666 Print Shop		
778675 Telephone Communication		
Other Operating Expenses cont.	Estimated \$	Actual \$
750511 Special Events		
750231 Custodial Supplies		
774677 Insurance Fund		
77661 Motor Pool		



Other Operating Expenses cont.	Estimated \$	Actual \$
Totals		

In-kind Services	Total \$
Facilities	
Buses	
Units	
Volunteer/Staff	
Miscellaneous	

In-kind Services cont.	Total \$
In-Kind Totals	\$

Expenditures Summary	Actual \$
Total Direct Cost	
Total In-kind Services	
Grand Total	\$

ESTIMATED PROGRAM REVENUE - MEANS OF FINANCING THE PROGRAM

I. Participation Fees	Total \$
Cost per Person	
Min # Users x User Fee	
Max # Users x User Fee	
II. League Fees	
Cost per team	
Min # Teams x User Fee	
Max # Teams x User Fee	
III. Resales (Concession/Resale Items)	
Minimum Revenue	
Maximum Revenue	
V. Special Event Fees	
	Fee\$
VI. Sponsorship/Donations/Grants	
Total	

FINANCIAL SUMMARY

	Projected Minimum	Projected Maximum	Actual \$
Revenue			
Expenses			
Total			
Cost Recovery Goal %			
Proposed Fee			

1.1.9 INFORMATION SYSTEMS AND TECHNOLOGY

The Department does not have a technology plan for their system but does utilize a Recreation Management System called (MyRec.com) that offers online registration and permit forms on www.DeerfieldRec.com which is excellent and should continue. The Department should consider developing a technology plan that could include the following:

- Maintenance management work order tracking system
- Cost of service tracking software to determine the true cost to provide programs, facilities and services
- Data tracking on GIS to determine where users are coming from for program and services and who is not being served
- Program user analytics software to determine who uses the system and who is not using the system, tracking participation rates, and future facility memberships if applicable.
- Cash management software
- Performance measure tracking

1.1.8 PARTNERSHIP/VOLUNTEER SUPPORT FOR FACILITIES

- The Department does not have a policy on Partnerships for public/public, public/not-for-profit and public private partners. See appendix for a sample policy to address these elements for the future.
- The department doesn't have volunteer policy for recruiting volunteers, training volunteers and placement of volunteers in the system. However, they do have a Volunteer Code of Conduct in place.
- The organization chart does not show a volunteer position of any kind either part-time or fulltime to help offset existing staff needs within the Department.

1.1.9 IN-DEPTH REVIEW OF CURRENT POLICIES

PARK RULES

Policies that are missing in the park rules include how to address drones in parks, ADA best practices for supporting access to trails via golf carts, smoking in parks, and private individuals using parks for personal gain without a permit through programs they provide to the public. Policies do exist for programming, the Snyder House, field use, and archery.

- The **park user rules and regulations** are well stated but should be evaluated and updated every other year the current policy reviewed was last updated in 2008.

- Penalties are very low for violation. The Township should work with the local probate judge on set fees he/she will enforce on behalf of the township.
- Policy use as it applies to scooters, golf carts in parks should require a doctor permit that outlines why a person is not able to walk and requires a special use vehicle. These support vehicles should incorporate handicap safety elements and awareness elements so other users are aware of them on a path. The users of the special carts must be able to drive a car, have a driver license, the cart will be limited to no more than 5 miles an hour and include a safety flag to warn users that they are coming. Scooters on trails will be limited to the same and be responsible for safety speeds on trails and parking lots. No alcohol can be consumed while riding in a cart on a park trail.
- The Park User Policy doesn't address drones in parks and it should. See Drone policy example in the appendix of this document.
- The Department does not have a Private Lesson policy where by private contractors use parks for personal gain. Most park systems have a policy for this type of activity that outlines that the user must be registered with the Department as a licensed contractor and pay a permit fee for any location they use for exclusive use of a space for personal gain.
- The Department does not have a policy on Free Speech as part of their policy for parks. See appendix for sample policy.
- The Township would like to establish an ADA policy for use of golf carts on park trails including speed limits.
 - Evaluate what other park systems allow on trails for people with disabilities as it applies to golf carts and scooters use, speed, and number of people involved and apply it to what is considered a reasonable accommodation and sign the park accordingly.

PRICING OF PROGRAMS AND SERVICES

- The Department does not have a clear approach to policy development as it applies to pricing of services for programs and services and how to address permits for exclusive use of park facilities such as park shelters, hospitality spaces, and sports fields.

PROGRAMMING POLICIES

- The Programming Policies are spelled out well as it applies to the does and don'ts of a participant.
- The policy is more user focused than program specific focused.
- Pricing policies and what qualifies for financial support is not well spelled out in the policy as written.
- A cost recovery goal is not stated by program type in the programming policy.
- The policy doesn't discuss the Township policy of inclusion when dealing with people with disabilities that want to participate in a program.
- The program policy does not state what the requirements are for instructors to teach, coach, train or guide a program, which should be stated in the policy.
- The policy does not address what is a core service and what is not, nor what their core programs are and when they will open a new core program for the community.
- The Department does not have a new program proposal for an instructor to provide an application for a new program. See appendix item for sample program proposal form.
- The Department does not have an Event Sponsorship Policy for the Department. See appendix items for a policy to consider incorporating into their park policy rules and regulations.

ATHLETIC FIELD USE

- The field use policy is well written and inclusive but should incorporate additional items that include: no groups can sell their permitted time to another group or select team for financial gain, the number

of hours each field will be used to not overplay a field as it applies to practice, recreational play and competitive playfields.

- If someone or group destroys a field it uses during or after inclement weather, there needs to be a process to address the damage and a way to collect fees from the user group who is responsible for the damage.
- The Township should consider an hourly cost for teams involved in renting fields for regional tournaments to support their league, team or traveling group and require a higher level of care for additional dragging, lining and field preparation for team profit as part of their policy. These costs should not be subsidized by the Township.
- The existing policy does not address how you determine new sports or new leagues that want to use existing fields for their sport in providing access to the Township's permit system. It appears that a group will have to wait three years.

FACILITY USE

- The archery range policy and rules are very straight forward on how to use the range in respect to users, safety and protocol. As far as the range and use it is well done.

DONATIONS

- The Department doesn't have a policy on tree donations, benches, bricks and mass tree donations as part of gift policy for their park system. See appendix items for more detail on this policy.
- Currently the Township does not have a Memorial Donation Policy. This policy should include how to address mass tree donations by groups who do not follow through with providing manpower to install the trees, if volunteer manpower is part of the donation agreement.
 - The Staff should institute a policy and cost associated with planting trees or installing memorial elements on the front end. The cost should be established up front and all the costs should be paid up front to the Township. If the volunteers meet their part of the manpower agreement, then the funds will be reimbursed back to them after completion of the installation.

ZONING POLICY FOR NEW DEVELOPMENTS

- The Landscaping and Buffering policy is well written and describes the elements required by the developer. The only suggestion by the consulting team that when a developer develops an area and there are large trees on site that have to be removed that for each tree removed four trees of 2/12 caliber size be replanted on site or in a park to mitigate the loss of those trees or the Township can set up a tree mitigation fund and developers can pay into that fund the value of the trees removed and the Township will use those funds for future park improvements.

1.1.10 GENERAL

SUMMER CAMP

Discussion with staff indicates that they operate half day summer camps at two locations in the Township. The half day camps are limited in the number of participants due to capacity and have a large waiting list. The other camps recover approximately 30 to 60% cost recovery.

PROS suggest that summer camps be offered in two different formats. One camp for half a day for one week offered at one location four times a summer that covers half of the cost to provide the camp based on its level of exclusivity. In addition, PROS recommend a full day camp that is offered at one location starting at 8am and ending at 4pm for five days a week at one location that the cost to provide is 100% recovered from the participant to cover the operational costs and follows other similar park systems in

Ohio who have full day camp. A minimum number of participants are required to hold the camp such as 15 and a max if 30 participants.

SPECIAL EVENT VENDORS

Discussions with staff indicate that they would like to host special events with vendors to help support the event financially.

PROS recommends that the Township staff develop a Request For Interest (RFI) for vendors to respond to that outlines the goal of the special event, targeted audience the Township is looking to come to the event, hours of the event, hours a vendor needs to be on site, requirements for set up and cleaning up after themselves, location, parking requirements for the vendor, code requirements for serving food, and invite special event vendors to support their interest in being part of the event.

Once the interest is established the Township should negotiate individually with each vendor a percentage back to the Township to help finance the event with at least 25% paid up front. All vendors fees need to recover 100+ from vendors to be on site with no vendor subsidized. They must fill out an application fee with required insurance as part of their application. A map of where they can set up needs to be established and guidelines such as expectation of electricity and having any required food permits be made available as part of their agreement with the Township. The Township can pick and choose who submitted their RFI to them based on their value to the anticipated participants who is targeted to be at the event. Food Trucks are included in this process and must follow these guidelines as well.

FREE SPEECH AT SPECIAL EVENTS

Discussion of free speech participants at special events was discussed. At most public special events in park systems these folks are given a site that is not part of the main area where the event is taken place but where they can set up and not bother event goers and if people want to walk over to their location to hear about what they are advocating they are welcome to do so. No accommodation for sound will be provided by the Township. The Township will require approval for all Free Speech Demonstrations prior to the event through an application process.

1.1.11 APPENDIX ITEMS

The following appendix items are listed to provide examples for the Department to consider as it applies to the following:

- Programming and Special Events policy example
- New program proposals policy example
- Program innovation audits and policies
- Marketing and Communication policy example
- Memorial donation policy example
- Land dedication policy example
- Partnership policy example
- Events sponsorship policy example
- Funding sources examples
- Drone policy example

1.2 SAMPLE POLICY: PROGRAMMING AND SPECIAL EVENTS

EVENTS IN THE PARKS POLICY

The purpose of this “Events in the Park” Policy is to provide guidelines for DPR to review all special requests from civic and service organizations, not-for-profits, businesses, and citizens for events, programs and activities desired to be held in Township parks, facilities and properties. This policy will establish procedures to adhere to for all groups who wish to utilize DPR facilities for their events. It is designed to try to ensure that all events support the DPR’s goals for services to the community and remain responsive to the public’s needs and values while keeping the vision and mission of DPR in consideration. DPR parks, facilities and properties may be made available for uses consistent with the policies herein and are subject to availability and review and consideration by the Township Board.

ISSUES ADDRESSED

The “Events in the Park” Policy establishes guidelines and principles to maintain consistency and organization when working with parties interested in providing events in DPR facilities.

Consideration for all events in the park must be evaluated to ensure they are not political, impose on the general public, offensive, discriminatory, or immoral in any way as determined in the sole discretion of the PRD and/or Township Board. In its consideration and approval of an event, DPR may impose certain terms and conditions that must be adhered to by the User Groups, including, but not limited to, that certain insurance be maintained by the User Groups identifying the Township and the DPR as additional insureds, that the User Groups be required to indemnify the Township and DPR from liability resulting from the event and such other terms and conditions as determined necessary by the DPR Board and depending on the details of the proposed event.

EXPECTED OUTCOMES AND BENEFITS

- To maintain a systematic and consistent approach to evaluating all “event in the park” requests.
- To provide individuals, organizations, and businesses with direction on how to apply for and implement an “event in the park” as well as understand the rules and regulations of the Department, Township ordinances, State Code, and understanding of liability as it pertains to the desired event.
- To provide DPR staff with a standardized system to ensure each party is adhering to not only Department rules and regulations but also Town Ordinances, insurance requirements, and any terms and conditions imposed by the DPR while the individuals, organizations, and businesses host their own event or provide events to the community.
- To ensure that events open to the public and provided by User Groups other than the Parks Department align with DPR’s mission of moving the DPR forward.
- To ensure the “events in the park” raise awareness of DPR and contribute to building its positive image in the community.

GUIDING PROCEDURES FOR IMPLEMENTATION, MANAGEMENT AND RENEWAL

“Special Event” includes, but is not limited to, a performance, meeting, assembly, contest, exhibit, ceremony, parade, athletic competition, reading, or picnic involving a number of people greater than a shelter can accommodate and where the desire is to attract the general public to participate that may require additional DPR resources and/or staff as well as a designated facility, space or other amenity of the DPR that would be requested to be reserved in order to accommodate such activities. Special Events do not include casual park use by visitors, or individual rentals.

PRIORITY USES

- Priority shall be given to groups and individuals whose request reflects significant community interest and general value. The DPR will review each request to ensure that applicants adhere to the policies herein.

- Applicants wishing to use the park facilities shall meet requirements as outlined under the determined User Groups. User Groups are classified as the following:
 - User Group 1: Township/Park Related Activities - This Group includes, but is not limited to, Township meetings, classes, special events or activities. This Group will have no fees associated with the use of the Department's facilities and these activities will benefit the community.
 - User Group 2: Township Partnerships and Township Sponsored Events - This Group includes, but is not limited to, Schools, Library, and other Township agencies. This Group may not have fees associated with the use of DPR facilities so long as a written agreement listing the facilities as a contribution has been approved by the Township Board.
 - User Group 3: Civic and Service Organizations, and Not-for-Profits - This Group includes, but is not limited to, Scouts, Youth Athletics, Youth Organizations and Clubs, Lions Club, Kiwanis, Churches, and other Community Groups. This Group will have fees associated with the use of DPR facilities, unless a written agreement listing the facilities as a contribution has been approved by the Township Board.
 - User Group 4: Private Businesses, Organizations and Citizens - Acceptable events will be determined by the DPR. This Group will have fees associated with the use of DPR facilities, unless a written partnership agreement listing the facilities as a contribution has been approved by the Township Board.

PROCESS TO SUBMIT FOR AN EVENT IN THE PARK

- Interested parties should contact the Department in writing at least three months in advance of the proposed date of the event.
- Everyone, organization, and/or business may be required to fill out an Event in the Park Form and submit the completed form for the Special Events Committee to review.
- All requests should be made in writing on the Event in the Park Form and submitted to the Township Parks and Recreation Department at a minimum of 90 days prior to the date of the event.
 - Applications can be found on the Department's website in the Document Center, under the name "Event in the Park Form."
- The application must fully be filled out for the staff to thoroughly review the event. The applicant shall also be required to submit such additional information as may be requested by DPR for the application to be considered. Failure and/or refusal to provide such information may result in immediate denial of any such application.
- The DPR Director, and/or his/her designee will review the proposal and make to draw conclusions. All requests will be presented to the Township Board.
- DPR reserves the right to refuse all requests as well as waive fees associated with the use of the DPR facilities.

EVENT IN THE PARK REVIEW PROCEDURES

Once proposals have been submitted the event will be evaluated as outlined.

- The Department will attempt to determine the costs both (direct/indirect) as it applies to each event, equipment requested, manpower, and the location requested for use.
- The staff will review the application for available dates, necessary permits, compliance with Town Ordinances, DPR policies and procedures and applicable law, needed assistance, liability coverage, fee and areas where more information is needed.

- After the initial review, a DPR employee will contact the applicant with questions and/or comments regarding the information received.
 - If all aspects of the event are in order and the date is available, the event will be approved.
 - If all aspects are not in order the staff may request additional information, documentation, compliance with certain additional terms and conditions as determined necessary, insurance, or decline the request.
 - ⊖ If approved, all fees associated with the event will be identified and due at the time of the reservation unless other arrangements are agreed upon in writing.
 - Parties of the event will be held responsible for any additional charges that are incurred or damages caused by the activities. A security deposit may be required.
- Approved events shall confine their use strictly to the specific area approved and will not be permitted to use any other space, equipment or apparatus unless it is approved in the application. Approved other events must also adhere to any other terms and conditions included by the DPR as part of its approval process.

EVALUATION OF THE EVENT IN THE PARK APPLICATION AND POST EVENT REVIEW

Each application as completed in accordance with this Policy and the DPR's procedures will be reviewed and considered by the Township Board and/or its Committee designee. The DPR reserves the right, to require certain terms and conditions to be included in any approval or a request and to decline any request as determined necessary in DPR sole discretion. Once the "event in the park" has been completed the organizer will need to contact the Department to review the results and discuss changes that need to occur if appropriate and decide about supporting the next event in the park effort. The results of the meeting will be presented to the Township Board.

1.3 SAMPLE: NEW PROGRAM PROPOSALS

As a foundational organizational tool for the creation and development of new program ideas, a program development and planning process was created to standardize the process for staff to use. This planning process tool will be used to take proposed ideas and activities from concept to reality. A template copy of the process form is presented here.

1.3.1 PROGRAM DEVELOPMENT/PLANNING PROCESS FOR STAFF TO FOLLOW IN DEVELOPMENT OF NEW PROGRAMS

- Program Information
 - Title of program:
 - Proposed date/location for program:
 - Description of program:
 - Target Market/Age Group served:
- Rationale for Program
 - Why are you proposing this program?
 - Current program trend _____ Strategic direction met _____
 - Customer feedback _____ Survey results _____
- Financial Planning
 - Program budget (using DPR Cost form):
 - Rationale of program pricing:
 - Cost recovery goal for program:
 - Vendors/outside contractors to be used (Contract, insurance, check request):

- Staff Plan
 - Program staffing plans (Identify lead staff/support staff/additional paid staff/volunteers and responsibilities of each):
 - Training needs for program:
- Logistics
 - Facility reservation:
 - Facility site plan:
 - Risk management assessment:
 - Parking plan:
 - Crowd control:
 - Traffic flow:
 - Signage:
 - Transportation needs:
 - Maintenance work orders:
 - Park work orders:
 - Equipment needs:
 - Inclusion plan:
- Marketing Plan
 - Completed marketing plan (To include markets, methods and cost):
 - Communications contact:
 - Timeline for marketing strategy:
- Partnerships/Sponsorships
 - Identified potential partners/sponsors:
 - Dates of presentations of sponsorship proposals:
- Program Evaluation
- Customer feedback methods to be used (Focus group, pre-evaluation, post evaluation, trailer calls):
- Performance standards to be met:
- Performance indicators to be used (Attendance, cost recovery goal etc.):
- Media/political impact:

1.4 SAMPLE: PROGRAM INNOVATION AUDITS

To revitalize, reinvent and evaluate current programs, a program innovation audit checklist has been developed for staff to review and make recommendations for improvement for each program they administer over the length of the strategic plan. The individual components of the programs that will be reviewed are listed below.

- Marketing and promotion efforts used to drive people to the program or event
- Effectiveness of registration methods
- Pricing strategies used and how effective each pricing strategy was in gaining users
- Budget/Cost Recovery goals were met
- Facility/Maintenance support
- Staff/Volunteers evaluation
- Vendors and Contractors performance
- Content/Quality of Program was well received by participants and noted in the evaluations
- Thank You/Memory Enhancer for participants were created and well received by users
- Use and Effectiveness of Technology in Program was effective and well received by users

- Partnerships and sponsorships helped to deliver the program in the most cost-effective manner

1.4.1 LIST OF CORE COMPETENCIES

Staff assigned to a lead program function must possess the following core competencies:

- Lead Program Staff must be well organized and understand how to develop the programs to drive energy and users to specific recreation facilities to increase visitation and create more operating revenue
- Lead Program Staff must be able to assign specific duties to full-time, part-time, contractors and volunteer staff to make the programs in the specific core area assigned with work plans on program standards to be delivered
- Lead Program Staff must be able to operate and manage a program budget, price services correctly and hold themselves accountable to meeting the budget requirements for the program without exceeding the budget assigned
- Lead Program Staff must hold staff accountable to meeting their requirements for providing a quality experience
- Lead Program Staff must be able to develop a program outline, marketing strategy and communications plan with internal staff in the registration office and marketing office to maximize the community's ability to access the program
- Lead Program Staff must be able to gain user feedback on the program or event created and teach and train staff on how to deliver on what the community expects from the facility and the programs offered
- Lead Program Staff must be creative in the program development approach to energize the community to get involved. This requires understanding selling benefits versus features of programs and facilities

LIST OF SUPPORT COMPETENCIES

The following are the requirements for Support Program Staff to follow. The Support Program Staff must:

- Allow the Lead Programmer to lead and follow their directions
- Implement the standards for the program as directed
- Support the program publicly and provide feedback to the Lead Programmer on issues that could be changed to enhance the program in the future
- Support staff must be able to teach and train part-time staff, contractors and volunteers on their specific duties
- Must be accountable to making meetings, providing program implementation pieces as assigned on time
- Provide constructive feedback as appropriate to the Program Lead when required

PERFORMANCE INDICATORS

The following are performance indicators for program of operations:

- Customer satisfaction levels met
- Retentions of users
- Revenue to expenses of facilities and programs (cost recovery goals) met
- Capacity levels met for programs and recreation facilities
- Cost per experience goals met for programs and facilities
- Programs offered versus programs held meet the goals developed by the Recreation Superintendent

1.5 SAMPLE: MARKETING AND COMMUNICATIONS PLAN

The following Marketing and Communications Template outlines the process for recreation staff and specifically the Program Lead person to follow as they move forward in developing the core program area and the core programs that make up that area. The Template will help staff and the marketing staff within to work together in a timely fashion to achieve the highest level of attendance in the program.

1.5.1 MARKETING PLAN TEMPLATE

Objectives: What are the specific objectives of this marketing plan for your core program area?

- Internal objectives should include: Attendance, retention, growth goals for the program and program areas
- External objectives: Decision to buy the experience, excitement and anticipation of participation in program

Target audiences: Who are you targeting your programs to? How do you want to reach them with this plan?

- Internal objectives should include: Staff awareness and political awareness of the program and where and how it is being provided
- External objectives: Specific market segments you are trying to reach by demographics, age and interests

Budget: How much do you have in your core program budget to spend in time and money to reach your goals and objectives?

- Cost and benefit- Explain the expected results and outcomes of the investment of staff time and funds

Message: What will you communicate to your targeted audiences? How will you demonstrate or display to them the benefits of the program to motivate them to buy your program, service or event?

- What marketing vehicles will you use to get your message out and what distribution efforts will you use to get the message out: Which media and tactics will you use to deliver the message to your target audience?
- Internal audience: Township Newsletter
- External audience: Flyers, advertisements, brochures, posters, social media, sponsorships etc.

Marketing Plan Timeline: Outline the specific timeline for market planning including all facets of the plan previously outlined along with schedule of coordination of plan implementation with Township Communications Division

- Desired Outcomes: Data for statistical comparisons on:
 - Attendance
 - Participant satisfaction
 - Cost/benefit data from participants
 - Importance of program to residents
- Develop specific recommendation on each core program and programs for the future: Should the program be?
 - Continued
 - Repositioned
 - Eliminated

1.6 SAMPLE POLICY: MASS TREE DONATIONS

The Department doesn't have a policy on mass Tree Donations. A policy needs to be established that addresses the following:

- What is the need? Where and Why?
- If a need exists determine the type of trees needed to support a diverse system of trees in the park system.
- Determine size the trees need to be for acceptance that supports a high survival rate.
- Determine the cost to plant each tree and how the donor will pay for the cost or plant them for the Department at the locations agreed to by the Department and the responsible party.
- Determine the cost to maintain the trees for the first year and if the Department has the resources to maintain the trees to enhance survival rates.
- If the Department does not have the resources than the donor can pay the Department to contract for the first-year maintenance of the trees upfront as part of the donation.

1.7 SAMPLE POLICY: PARK LAND DEDICATION

Parkland dedication is a requirement of local governments for the dedication of land for public parks or open space, and/or the payment of a fee in lieu of dedication, which can be used by the local government to acquire land and/or develop park facilities.

- Does the Township not currently require parkland dedication?
- Does the Township require parkland dedication from all residential development, as well as extended stay hotels?
- Can a fee be paid in lieu of parkland dedication, and the formula for calculating the fee is included in the city's code?
- The Township can also require all commercial/industrial/office/nonresidential development to pay a fee of \$400 per acre or dedicate land in lieu of the fee. The payments may be used for parkland acquisition or development and not for operations and maintenance. The Township could consider adopting a parkland dedication ordinance in order to acquire park land and generate funding for park development.

1.7.1 EXAMPLE: COLUMBUS, OH LAND DEDICATION POLICY

PURPOSE

This section creates a requirement for public parkland/open space dedication to assure that public parkland and open space is adequate and that development interests are treated equitably in a rezoning. The goal of the Township is to provide 5.5 acres of appropriate public parkland/open space for every 1,000 residents. Use of this land for purposes other than park uses shall require approval of Township council after notification of all property owners within 125 feet of the parcel in question, notification of any applicable area, and notification of the Township Board.

REQUIREMENTS.

Upon the submission of an application for rezoning of land in excess of one acre, the Township or its designee and the applicant shall determine whether a land or monetary donation shall be required.

If a land donation is required, then land to be dedicated for public parkland/open space shall be identified on a preliminary survey or site plan and deeded to the city at the time of final zoning clearance approval or plat approval by the department. Said dedication shall be exclusive of any street, road,

highway, sidewalk or bikeway. However, the dedicated land may include areas incorporated into the overall development plan for aesthetic purposes, pedestrian bike paths or dedicated open space.

One of two alternatives shall be used for all monetary payments made in lieu of land dedication or to meet the fee requirements of commercial and industrial development. Under the first alternative, payments shall be used exclusively for the purchase or development of public parkland/open space within the service area of a one-mile radius when possible. If not possible, then purchase or development shall occur in the designated planning area as shown on the community planning areas map.

Under the second alternative, payments shall be used for the purchase of shares in a community park land bank. This option shall be used in designated community planning areas, which need community parks, as defined in the Columbus comprehensive plan, and have an established land bank. The applicant's property must be in a designated community planning area.

Payment shall not be used for operating or maintenance purposes.

RESIDENTIAL DEVELOPMENT.

The land dedication requirement shall be computed as follows for residential development:

- Determine the number of proposed dwelling units.
- Single-family: Multiply the number of proposed units by the "median household size for owner-occupied units" established by the most current U.S. Census data for the Columbus, OH MSA.
- Multifamily: Multiply the number of proposed units by the "median household size for renter-occupied units" established by the most current U.S. Census data for the city of Columbus, OH MSA.
- Divide the figure determined in step 2 by 1,000.
- Multiply the figure determined in step 3 by 5.5. This figure is the amount of acreage that shall be dedicated for public parkland/open space.

Dedicated areas that are disturbed during the development process shall be graded and seeded, resulting in a surface capable of being mowed.

EXTENDED STAY HOTELS.

For the purpose of this Parkland Dedication requirement, Hotels, Extended Stay, shall be subject to the same requirements as a multi-unit residential use.

RESIDENTIAL DEVELOPMENT CREDITS.

Additional improvements made to the dedicated land by the applicant may result in credit toward the land dedication requirement. Such credit shall be reviewed on a case-by-case basis by the Township Board or its designee.

Credit may be given for private outdoor recreational facilities provided in residential developments. The maximum credit is 50 percent of the required land dedication. Such credit shall be reviewed by the Township Board or its designee.

If a wet storm water retention area is proposed to be dedicated, it shall constitute no more than 25 percent of the area dedication required. Maintenance shall be provided by the department of public utilities for wet storm water retention areas.

Credit shall be given for previous land dedications for land to be rezoned from one residential classification to another residential classification based on the incremental increase in density.

RESIDENTIAL DEVELOPMENT PAYMENT IN LIEU OF DEDICATION.

To the extent that the proposed land dedication is not acceptable due to size, configuration, location or other characteristics to the Township Board, its designee or city council, then a monetary contribution shall be made.

RESIDENTIAL DEVELOPMENT PAYMENT CALCULATIONS.

Payment shall be computed as follows for parkland acquisition or development:

- Determine the total amount of acreage required for parkland.
- Subtract the total amount of acreage approved as appropriate land, including credits, by the Township Board or its designee.
- Multiply the amount of acreage determined above by a dollar amount, which represents the fair market value of an acre of land as determined by an appraisal obtained by the city or by an acceptable appraisal.

Payment shall be computed as follows for purchase of shares in a community park land bank:

- Determine the total amount of acreage required for parkland.

1.8 SAMPLE POLICY: PARTNERSHIP AGREEMENT

1.8.1 PURPOSE

This policy is designed to guide the process for the Township in their desire to partner with private, non-profit, or other governmental entities for the development, design, construction and/or operation of possibly partnered recreational facilities and/or programs that may occur on Deerfield Township owned or leased property.

Deerfield Township Parks would like to identify for-profit, non-profit, and governmental entities that are interested in proposing to partner with them to develop recreational facilities and/or programs. A major component in exploring any potential partnership will be to identify additional collaborating partners that may help provide a synergistic working relationship in terms of resources, community contributions, knowledge, and political sensitivity. These partnerships should be mutually beneficial for all proposing partners including Deerfield Township Parks, and particularly beneficial for the citizens of the Townships.

1.8.2 ISSUES ADDRESSED

Deerfield Township Parks has developed partnerships over many years that have helped to support the management of parks and recreation facilities and programs services, while also providing educational and recreational opportunities for the citizens of Deerfield Township. The recommended policy will promote fairness and equity within the existing and future partnerships while helping staff to manage against what may cause conflicts internally and externally. Certain partnership principles must be adopted by the Deerfield Township Board for existing and future partnerships to work effectively. These partnership principles are as follows:

All partnerships will require an upfront presentation to the Deerfield Township Parks Recreation that describes the reason for creation of the partnership and establishes an outcome that benefits each partner's involvement

All partnerships will require a working agreement with measurable outcomes that hold each partner accountable to the outcomes desired and to each other and will be evaluated on a yearly basis with reports back to the Township Board on the outcomes of the partnership and how equitable the partnership remains

All partnerships will track direct and indirect costs associated with the partnership investment to demonstrate the level of equity each partner is investing

Each partner will not treat one another as a client-to-client relationship, but will create a partnership culture that focuses on planning together on a yearly basis or as appropriate; communicating weekly/or monthly on how the partnership is working; and annually reporting to each other's board or owners on how well the partnership is working and the results of their efforts to the taxpayers of Indianapolis

Full disclosure by both partners to each other will be made available when issues arise

Annual informing of each other's staff on the respective partner's values and yearly goals and work plans so both partners are in-tune with issues the partners may be dealing with that could affect the partnership policy or agreement as it applies to finances, staffing, capital costs, political elements or changes in operating philosophies

1.8.3 EXPECTED OUTCOMES AND BENEFITS

- Increased visibility
- Increase in services and programs
- Tax dollars spent on services are maximized through collaboration
- Public believes in and supports the role of Deerfield Township Parks in partnerships
- Promotes a positive image
- Public involvement enriches their understanding of Deerfield Township Parks
- Engaged public enhances current and future development of programs and facilities
- Provides alternatives for manpower, recreation sites, financial resources, supplies, materials, etc. for a more comprehensive system
- Shared vision and goals
- Allow us the opportunity to make a vision a reality
- Reach more people, provide more services, reduce expenditures and generate more revenue
- Eliminates duplication of efforts, strengthen communities and achieve greater outcomes

1.8.4 GUIDING PROCEDURES

PUBLIC/PUBLIC PARTNERSHIPS

The policy for public/public partnerships is evident with Deerfield Parks based on their working with other cities, townships, schools, and other municipal services in the area. Working together on the development, sharing, and/or operating, parks and recreation facilities and programs will be as follows:

- Each partner will meet with the Parks staff annually to plan and share activity-based costs and equity invested by each partner in the partnership
- Partners will establish measurable outcomes and work through key issues to focus on for the coming year between each partner to meet the outcomes desired
- Each partner will focus on meeting a balance of 50% equity for each agreed-to partnership and track investment costs accordingly
- Each partner will assign a liaison to serve each partnership agency for communication and planning purposes
- Measurable outcomes will be reviewed quarterly and shared with each partner, with adjustments made as needed
- Each partner will act as an agent for the other partner, thinking collectively as one, not two separate agencies for purposes of the agreement

- Each partner will meet with the other partner's respective governing board or owner annually, to share results of the partnership agreement
- A working partnership agreement will be developed and monitored together on a quarterly or as-needed basis

If conflicts arise between partners, the Director or Chairperson of Deerfield Township Board along with the other public agency's highest-ranking officer will meet to resolve the partnership issue. It should be resolved at the highest level or the partnership will be dissolved

No exchange of money between partners will be made until the end of the partnership year. A running credit will be established that can be settled at the end of the planning year with one check or will be carried over to the following year as a credit with adjustments made to the working agreement to meet the 50% equity level desired

PUBLIC/NOT-FOR-PROFIT PARTNERSHIPS

The partnership policy for public/not-for-profit partnerships with Deerfield Parks and the not-for-profit community of service providers is seen in associations working together in the development and management of facilities and programs within the Deerfield Township Parks system. These principles are as follows:

- The not-for-profit partner agency or group involved with Deerfield Parks must first recognize that they are in a partnership with the Department to provide a public service or good; conversely, the Department must manage the partnership in the best interest of the community, not in the best interest of the not-for-profit agency
- The partnership working agreement will be year-to-year and evaluated based on the outcomes determined for the partnership agencies or groups during the planning process at the start of the partnership year. At the planning workshop, each partner will share their needs for the partnership and outcomes desired. Each partner will outline their level of investment in the partnership as it applies to money, people, time, equipment, and the amount of capital investment they will make in the partnership for the coming year
- Each partner will focus on meeting a balance of 50% equity or as negotiated and agreed upon as established in the planning session with Deerfield Parks. Each partner will demonstrate to the other the method each will use to track costs, and how it will be reported on a monthly basis, and any revenue earned
- Each partner will appoint a liaison to serve each partnering agency for communication purposes
- Measurable outcomes will be reviewed quarterly and shared with each partner, with adjustments made, as needed
- Each partner will act as an agent for the other partner to think collectively as one, not two separate agencies. Items such as financial information will be shared if requested by either partner when requested to support a better understanding of the resources available to the partnership
- Each partner will meet the other's respective board on a yearly basis to share results of the partnership agreement
- If conflicts should arise during the partnership year, the Township Parks Director and the highest-ranking officer of the not-for-profit agency will meet to resolve the issue
- It should be resolved at this level, or the partnership will be dissolved. No other course of action will be allowed by either partner

Financial payments by the not-for-profit agency will be made monthly to Deerfield Parks as outlined in the working agreement to meet the 50% equity level of the partnership

PUBLIC/PRIVATE PARTNERSHIPS

The policy for public/private partnerships is relevant to Deerfield Township Parks and includes businesses, private groups, private associations, or individuals who desires to make a profit from use of Department facilities or programs. It would also be evident if the business, group, association, or individual wishes to develop a facility on park property, to provide a service on Department-owned property, or who has a contract with the Department to provide a task or service on the Department's owned facilities. The partnership principles are as follows:

- Upon entering into an agreement with a private business, group, association or individual, Deerfield Township Parks staff must recognize that they must allow that entity to make a profit
- In developing a public/private partnership, the Deerfield Township Board and staff, as well as the private partner will enjoy a designated fee from the contracting agency, or a designated fee plus a percentage of gross dollars less sales tax on a monthly, quarterly or yearly basis, as outlined in the contract agreement
- In developing a public/private partnership, the Deerfield Township Board and staff, as well as contracted partners will establish a set of measurable outcomes to be achieved. A tracking method of those outcomes will be established and monitored by Deerfield Township Parks Staff and Township Board. The outcomes will include standards of quality, financial reports, customer satisfaction, payments to the Department, and overall coordination with the Department for the services rendered
- Depending on the level of investment made by the private contractor, the partnership agreement can be limited to months, a year or multiple years
- The private contractor will provide on a yearly basis a working management plan they will follow to ensure the outcomes desired by the Deerfield Township Board and staff to achieve the goals of the partnership set out in the partnership recital. The work management plan can and will be negotiated, if necessary. Monitoring of the work management plan will be the responsibility of both partners. The Deerfield Township Board and staff must allow the contractor to operate freely in their best interest, if the outcomes are achieved
- The Department has the right to advertise for private contracted partnership services, or negotiate on an individual basis with a bid process based on the professional level of the service to be provided

If conflicts arise between both partners, the Director of Deerfield Township Parks and the highest ranked officer from the other partnership will try to resolve the issue before going to each partner's legal councils. If none can be achieved, the partnership shall be dissolved

1.8.5 THE PARTNERING PROCESS

The steps for the creation of a partnership with Deerfield Township Parks are as follows:

- Deerfield Township Parks will create a public notification process that will help inform any and all interested partners of the availability of partnerships with Deerfield Township Parks. This will be done through notification in area newspapers, listing in the brochure, or through any other notification method that is feasible.
- The proposing partner takes the first step to propose partnering with Deerfield Township Parks.

- To help in reviewing both the partnerships proposed, and the project to be developed in partnership, Deerfield Township Parks asks for a Preliminary Proposal according to a specific format as outlined in Part Two - Proposed Partnership Outline Format.
- If initial review of a Preliminary Proposal yields interest and appears to be mutually beneficial based on Deerfield Township Parks Mission and Goals, and the Selection Criteria, a Deerfield Township Parks staff person or appointed representative will be assigned to work with potential partners.
- The Deerfield Township Parks representative is available to answer questions related to the creation of an initial proposal, and after initial interest has been indicated, will work with the proposing partner to create a checklist of what actions need to take place next. Each project will have distinctive planning, design, review and support issues. The Deerfield Township Parks representative will facilitate the process of determining how the partnership will address these issues. This representative can also facilitate approvals and input from any involved Deerfield Township Parks staff member, providing guidance for the partners as to necessary steps.
- An additional focus at this point will be determining whether this project is appropriate for additional collaborative partnering, and whether this project should prompt Deerfield Township Parks to seek a Request for Proposal (RFP) from competing/ collaborating organizations.
- Request for Proposal (RFP) Trigger: In order to reduce concerns of unfair private competition, if a proposed project involves partnering with a private "for profit" entity and a dollar amount greater than \$5,000, and Deerfield Township Parks has not already undergone a public process for solicitation of that particular type of partnership, then Deerfield Township Park will request Partnership Proposals from other interested private entities for identical and/or complementary facilities, programs or services. A selection of appropriate partners will be part of the process.
- For most projects, a Formal Proposal from the partners for their desired development project will need to be presented for the Deerfield Township Park's official development review processes and approvals. The project may require approval by the Legal Counsel of the City.
- Depending on project complexity and anticipated benefits, responsibilities for all action points are negotiable, within the framework established by law, to assure the most efficient and mutually beneficial outcome. Some projects may require that all technical and professional expertise and staff resources come from outside the Deerfield Township Parks staff, while some projects may proceed most efficiently if Deerfield Township Parks contributes staff resources to the partnership.
- The partnership must cover the costs the partnership incurs, regardless of how the partnered project is staffed, and reflect those costs in its project proposal and budget. The proposal for the partnered project should also discuss how staffing and expertise will be provided, and what documents will be produced. If Deerfield Township Parks staff resources are to be used by the partnership, those costs should be allocated to the partnered project and charged to it.
- Specific Partnership Agreements appropriate to the project will be drafted jointly. There is no specifically prescribed format for Partnership Agreements, which may take any of several forms depending on what will accomplish the desired relationships among partners. The agreements may be in the form of:
 - Lease Agreements
 - Management and/or Operating Agreements
 - Maintenance Agreements
 - Intergovernmental Agreements (IGAs)
 - Or a combination of these and/or other appropriate agreements

- Proposed partnership agreements might include oversight of the development of the partnership, concept plans and project master plans, environmental assessments, architectural designs, development and design review, project management, and construction documents, inspections, contracting, monitoring, etc. Provision to fund the costs and for reimbursing Deerfield Township Parks for its costs incurred in creating the partnership, facilitating the project's passage through the Development Review Processes, and completing the required documents should be considered.
- If all is approved, the Partnership begins. Deerfield Township Parks is committed to upholding its responsibilities to Partners from the initiation through the continuation of a partnership. Evaluation will be an integral component of all Partnerships. The agreements should outline who is responsible for evaluation; the types of measures used, and detail what will occur should the evaluations reveal Partners are not meeting their Partnership obligations.

1.9 SAMPLE POLICY: EVENT SPONSORSHIPS

The following is an example of a sponsorship policy for the Township to incorporate into their daily practices as it applies Title Sponsors, Presenting Sponsors, Program Sponsors, Food Sponsors, and Retail Sponsors.

1.9.1 EXTERNAL SPONSORSHIP POLICY

CORE VALUES AND GUIDING PRINCIPLES

1. We are committed to the core values of Environmental Conservation and Stewardship.
We believe in these guiding principles:
 - a. Environmental awareness
 - b. Sensitivity to natural resources
 - c. Long-term care & stewardship of parks and natural areas
 - d. Respect and concern for the environment
 - e. Conservation of natural areas
2. We are committed to the core values of Informed Planning.
We believe in these guiding principles:
 - a. Learning and sharing information
 - b. Thinking towards the future
 - c. Educated decision-making based on best and current information
 - d. Plans and actions based upon knowledge and careful consideration
 - e. Flexibility in considering new ideas
3. We are committed to the core values of Quality Service.
We believe in these guiding principles:
 - a. Quality parks, programs, facilities, and services
4. We are committed to the core values of Community Responsiveness and Collaboration.
We believe in these guiding principles:
 - a. Teamwork and agreement
 - b. Collaboration with residents, boards, and organizations
 - c. Accountability
 - d. Responsiveness to our community
 - e. Equity and fairness

5. We are committed to the core values of Dedicated Leadership.

We believe in these guiding principles:

- a. Dedication and loyalty
 - b. Respect for others
 - c. Integrity in our conduct
 - d. Creativity
 - e. Leadership
 - f. Innovation
6. We are committed to the core values of Fiscal Responsibility.

We believe in these guiding principles:

- a. Use of electronic technology
 - i. Business model
 - ii. Costing model
- b. Business planning and financial management
- c. Financial sustainability
- d. Variety of income sources

PURPOSE

The goal of this External Sponsorship Policy is to provide guidelines for Deerfield Township Parks and Recreation to gain support from external financial resources. It will establish procedures to coordinate efforts to seek sponsorships with the corporate community, business partners, and not for profit partners to enhance parks and recreations services and facilities in the Township. It is designed to ensure that all marketing of sponsorships supports the DPR's goals for services to the community and remains responsive to the public's needs and values. This External Sponsorship Policy will recognize that corporate and business sponsorships provide an effective means of generating new revenues and alternative resources to support PRD's facilities and programs. The policy will ensure that the corporate, business or not for profit sponsorships will not result in any loss of DPR's jurisdiction or authority.

ISSUES ADDRESSED

The institution of the External Sponsorship Policy will establish guidelines and principles to maintain flexibility in developing mutually beneficial relationships between DPR and corporate businesses, small businesses and the not for profit sector.

The recognition for sponsorships must be evaluated to ensure that; (1) DPR is not faced with undue commercialism; (2) that is consistent with the Character and intent of the Townships facilities and programs, and (3) that the recognition is consistent with the scale of each sponsor's contribution.

There will be restrictions on sponsors whose industries and products do not support the goals of the DPR on the services provided to the community and to remain responsive to the public's needs and values.

EXPECTED OUTCOMES AND BENEFITS

- Acquire revenue from sources to enhance DPR programs and environmental stewardship
- Sponsorship is a way of contributing to the community while promoting the sponsor's business and brand awareness
- A number of DPR events and programs may take place in the community because of the sponsor's financial contribution
- Sponsors will get a "return on sponsorship." The sponsor looks forward to the Township and greater community becoming familiar with the sponsor and/or its services and becomes a customer through the partnership with DPR

- Sponsorship help to raise the awareness of the DPR and builds its image in the community
- Events, programs, facilities, plus maintenance of properties and natural areas will be more affordable to the community because of the financial contributions that sponsors can provide to the DPR

GUIDING PROCEDURE FOR IMPLEMENTATION AND MANAGEMENT

- Annually advertise the opportunities for sponsorships
- DPR may also auction sponsorships hosted by DPR

PROCESS SUBMIT FOR A SPONSORSHIP PROPOSAL

- All proposals for sponsorship must be submitted in writing on a Sponsorship Proposal form to DPR. (see attached)
- The DPR Director or his/her designee will review the proposal. The Director may use, but is not limited to, the following criteria when evaluating a sponsorship proposal. In all cases, the Director will have the prerogative to reject a proposal based on the following:
 - Compatibility of the sponsor's products, customers and promotional goals with DPR's goals.
 - The sponsor's past record of involvement in DPR and other community projects.
 - The timeliness or readiness of the sponsor to enter into an agreement.
 - The actual cash value, or in-kind goods or services of the proposal in relation to the benefit to the sponsor and DPR.
 - Potential community support for or opposition to the proposal.
 - Any Parks and Recreation development, operating and maintenance costs associated with the proposal on behalf of DPR.
 - The sponsor's record of responsible environmental stewardship.
 - Preferences for previous successful similar sponsorship projects
- If a proposal is not rejected, the Director will present it to the Township Board and together they will decide on the proposal.
- All sponsorship activities once approved will be coordinated by the DPR Director. The Director will draft a sponsorship agreement, with assistance by the proposed sponsor as needed. The agreement will include the contract relationship; the terms and renewal opportunities; description of the program, facility, property, natural area or event to be sponsored; timelines of implementation; description of fees and/or benefits provided to DPR; the marketing rights and benefits provided to the sponsor; termination provisions; and performance measures expected by the sponsor and the DPR.
- All sponsorships require payment to DPR in advance by the sponsor at the signing of the sponsorship agreement if there is money involved.
- All approved sponsorship activities will be coordinated by the Director in the following manner:
 - Work with staff on making sure the terms of the agreement are followed as outlined.
 - Provide guidance to the sponsor regarding the interpretation and application of this policy.
 - Provide assistance and advice to staff of DPR and the sponsors.
 - Review and assist in the development of the sponsorship agreement as requested.
 - Track and report the results and outcomes of the sponsorship agreement as outlined.
- All sponsors will have a responsible party and an executed agreement.
 - Each sponsor involved in the sponsorship will designate a person to be responsible for their portion of the contract and/or agreement.

- The contract or agreement will outline appropriate terms and timeliness to be implemented by each party.

SPONSORSHIP PRICING POLICY PROCEDURES

Once the proposals have been submitted the staff will evaluate these proposals as outlined.

- Set objectives, baselines and articulate measurable objectives to be achieved with the sponsorship dollars.
- Know the sponsorship costs both (direct/indirect) and level of cost recovery as it applies to DPR.
- Create a measurement plan and determine what will be measured and what measures will be used to demonstrate the effectiveness of the sponsorship.
- Implement the measurement plan—visibility, communications and visitor behavior.
- Calculate “return on sponsorship”—analyze, communicate and revise as needed.
- Meet with the sponsor to review the final contract and expectations with timelines to be completed
- All promotional pieces developed by the sponsor for their involvement with DPR must be approved in advance before it goes public

EVALUATION OF THE SPONSORSHIP

Once the sponsorship effort has been completed staff from DPR will meet with the sponsor to review the results and discuss changes that need to occur if appropriate and decide about supporting the next sponsorship effort. The results of the meeting will be presented to the Township Board.

The following opportunities have been identified as sponsorship opportunities for the coming year by the DPR staff:

- Program Guide
- Music in the Parks
- Food for Programs and Events
- Drink Sponsor
- Event Sponsor
- Give-a-ways at events
- Mile of trail in the parks
- Adopt-a-kid
- Adopt-a-park
- Adopt-a-playground
- Music trailer
- Banner or Web-site
- Gardens
- Performers at events
- Fireworks
- Seasonal sports
- Natural area in the parks
- Promotional signage

Sponsorship Request Form
Completed by Sponsor Interested in Working with the Deerfield Township Parks and Recreation
Form 1

Name: _____ Title: _____ Phone: _____

Email: _____ Work Location: _____

Years in Existence: _____ Purpose of the Organization or Business: _____

Customer Profile: _____

Legal Status: _____

Person Authorized to Negotiate on Behalf of the Organization: _____

Name of Project, Program or Event: _____

Brief Description of Project: _____

Date of Project, Beginning: _____ End: _____

Target Market of Participants: _____

Number of Spectators/Users/Participants Anticipated: _____

Describe Community Need Being Addressed (100 words or less): _____

What is Being Proposed in Terms of Capital Development or Program Needs? _____

Existing Partners	Their Contribution	Approx. \$ Value
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



Potential Partners	Their Potential Contribution	Approx. \$ Value
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

Deerfield Township Parks and Recreation Contributions

(Include staff time, maintenance costs, supplies, etc.)

Approx. \$ Cost

<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

What do You need funded by Deerfield Township Parks and Recreation

(Cash Needs...Supplies, Equip, Items Cash, etc.)

Cost

<hr/>	<hr/>
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Other Sources of Funding (Foundations, Individuals, etc.):

Why is Your Organization or Business interested in Sponsoring this program, event, park or amenity with Deerfield Township Parks and Recreation ?

What are the Benefits (monetary and non-monetary) for Your Organization and the Deerfield Township Parks and Recreation?

Understanding of Agreement

Sponsorship Fact Sheet Proposal Prospective Template Filled out by Deerfield Township Parks and Recreation Staff and the Sponsorship Proposer Submitted for Review and Approval by Sponsorship and Policy Team

Form 1

The Sponsorship Fact Sheet should be filled out by Deerfield Township Parks and Recreation staff seeking a sponsor for a specific activity or event. Information must be submitted to the Sponsorship Team prior to review with the Director of Deerfield Township Parks and Recreation. Staff will not solicit sponsorship from an external agency without prior approval from the Director.

Name of Project/Program/Event: _____

Description of Project/Program/Event: _____

Target Market of Project/Program:

Spectators _____ Age Groups _____ Specialty Groups _____ Gender _____

Geographic _____ Program Type Participants _____

Top Goal/Needs of Sponsorships for this Project/Program:

Deerfield Township Parks and Recreation In-Kind Contributions/Agreed-Upon Expenses:

Staff Time (Cost & Hours) _____

Marketing/Promotions Cash Investment _____

Supplies/Equipment/Materials Investment _____

Marketing/Promotions Staff Time _____

Fee Waiver/Facility Trade-outs: _____

1.10 FUNDING SOURCES

The following are examples of funding sources to help increase the operational and capital budgets for the department.

- Hotel/Lodging Tax
- Parcel Tax
- Real Estate Transfer Tax
- Tax Increment Financing (TIF)
- Utility Fees
- Water Surcharge
- Stormwater Management Fee
- Alcohol/Liquor Tax Cell Phone Tax
- Exaction Fees
- Fuel Tax
- Parking Revenue
- Green Benefits District
- Local Improvement District
- Local Income Tax Option
- Food and Beverage Tax

1.11 SAMPLE POLICY: CLEVELAND METROPARKS DRONES POLICY

Cleveland Metroparks has adopted Regulations which control drone activity within our jurisdiction, and they are based upon our legal research and direction from the FAA General Counsel's Office. In general, it is accurate to summarize that 3rd parties are not permitted to launch, land or operate drones within Cleveland Metroparks unless they do so within specifically designated areas. Cleveland Metroparks has adopted a Policy (earlier post and in the Connect Library) which identifies those designated areas. Also, Cleveland Metroparks staff may "sponsor" a drone flight if it is needed for Cleveland Metroparks related business issues. For example, our Marketing Department may need/want media to use a drone, and in that scenario, the Marketing Department will complete the Drone Authorization Form (not a permit since our staff is requesting), and our CEO (Natural Resources, Ranger and Legal Depts.) authorize. The form is attached to the Drone Policy.

Below are Cleveland Metroparks Regulations for your convenience:

745.01 DEFINITIONS.

As used in this chapter, certain words and terms are defined as follows:

(a) "Aircraft" means any contrivance invented, used, or designed to navigate, or fly in the air (49 U.S.C. @40102).

(b) "Drone" or "Unmanned Aircraft" (UA) means an aircraft that is operated without the possibility of direct human intervention from within or on the aircraft (P.L. 112-95, Section 331);

(c) "Unmanned Aircraft System" or "UAS" means an unmanned aircraft and associated elements, including communication links and components that control the unmanned aircraft, that are required for the pilot in command to operate safely and efficiently in the national airspace system (P.L. 112-95, Section 331).

745.02 PURPOSE AND INTENT.

This chapter is intended to provide direction for the use of UAS in a manner that is consistent with the Park District's conservation and protection of natural resources and wildlife and in a manner that promotes public safety and enjoyment. In consideration of these principles, the Park District is restricting the use of UAS to specific uses and to specific areas. This chapter is not intended to preempt Federal Aviation Administration (FAA) rules and regulations, but to operate in conjunction with those rules while utilizing its land use authority and its police power proscribed in Chapter 1545 of the Ohio Revised Code.

745.03 RESTRICTIONS.

(a) No person shall launch, land or operate, or cause to be launched, landed or operated, any UAS weighing more than 4.4lbs/2.2kg in any airspace within the Park District.

(b) No person shall launch, land or operate, or cause to be launched, landed or operated, any UAS weighing less than 4.4lbs/2.2kg in any airspace within the Park District except in designated areas and must possess a current certificate of aircraft registration issued by the FAA for the UAS or is flying the UAS strictly for hobby or recreational use.

(c) No person shall launch, operate, or cause to be launched or operated, any unmanned aircraft system in any airspace within or over any area within the Park District that the FAA determines to be a restricted area, either by way of a Notice to Airmen (NOTAM), Temporary Flight Restriction, No Drone Zone, or other means.

(d) Division (b) of this section shall not apply to any person who has previous approval from the FAA to operate a UAS in a restricted area and is complying with all terms and conditions of their approval.

745.04 EXEMPTION FOR PARK DISTRICT.

This Chapter shall not apply to any UAS that are operated by the Park District, or its designee, for governmental purposes in compliance with federal laws and regulations and in compliance with Park District policies.