



## CHAPTER ONE - REC PROGRAM ASSESSMENT

### 1.1 Evaluating the Current System: Programs

As part of the master planning process, the consulting team performed a Recreation Program Assessment of the programs and services offered by the Township. The assessment offers an in-depth perspective of program and service offerings and helps identify strengths, weaknesses, and opportunities regarding programming. The assessment also assists in identifying core programs, program gaps within the community, key system-wide issues, areas of improvement, and future programs and services for residents.

The consulting team based these program findings and comments from a review of information provided by the Township including program descriptions, financial data, website content, web survey feedback, demographic information, and discussions with staff. This narrative addresses the program offerings from a systems perspective for the entire portfolio of programs, as well as individual program information.

#### 1.1.1 Framework

The Deerfield Township Parks & Recreation Department does not currently have a mission statement. As such, this recreation program assessment is developed to help assist with the creation of the Department's mission statement.

The Township manages approximately 469 park acres, many of which fall into the "open space/natural area" designation. There are, however, many community and neighborhood park acres within the system. With no designated indoor recreation facility, the Department focuses on outdoor experiences that includes activities for adults, youth, special interests, and community gathering. Programs provide an opportunity for participants to have fun, learn new skills, and develop friendships and life-long leisure interests.

### 1.2 Core Program Areas

To help formulate the Department's mission, it is important to identify *core program areas* to create a sense of focus around specific program areas of greatest importance to the community. Public recreation is challenged by the premise of being all things to all people. The philosophy of the core program area assists staff, policy makers, and the public focus on what is most important. Program areas are considered *core* if they meet a majority of the following categories:

- The program area has been provided for a long period of time (over 4-5 years) and/or is expected by the community.
- The program area consumes a relatively large portion (5% or more) of the organization's overall budget.
- The program area is offered 3-4 seasons per year.
- The program area has wide demographic appeal.
- There is a tiered level of skill development available within the programs area's offerings.
- There is full-time staff responsible for the program area.
- There are facilities designed specifically to support the program area.
- The organization controls a significant percentage (20% or more) of the local market.

#### 1.2.1 Existing Core Program Areas

In consultation with Township staff, the consulting team identified the following core program areas currently being offered:

### Adult Enrichment

The adult enrichment core program area includes wellness, arts, and cultural activities. This core program area aims to improve the quality of life and enhance the overall health of the community. Example programs include:

- Women's self defense
- Creative exchange workshops
- Art bar

### Community Events

The community events core program area includes concerts, movies, family holiday events, and festivals. These events are typically free for all participants. This core program area aims to strengthen community identity, encourage outdoor activities, and connect people to place, self, and others. Example events include:

- Movies in the park
- Touch-A-Truck
- Comet Bluegrass All Stars

### Special Events

The special events core program area includes races, fundraising events, and hosted events. These events are typically associated with a user/participant fee. This core program area aims to connect with the community, strengthen community identity, and connect people to place, self, and others. Example events include:

- Butterfly Walk
- Run for the Green
- PowderKeg Trail Race

### Volunteerism

The volunteerism core program area includes park clean up days, special event volunteers, and special projects. This core program area aims to strengthen the connection with the community, reduce Township expenses and extend reach of levy funds, and build positive life skills for teens. Example volunteerism activities include:

- Kingswood Clean-up
- Teen Volunteer – Touch-A-Truck
- Special Projects – 2018 Archery Range

### Youth Camps

The youth camps core program area includes traditional and specialty camp programs. This core program area aims to improve the quality of life and enhance the overall health of the community, encourage an active and healthy lifestyle, build positive life skills, and develop knowledge of nature and the environment. Example camp programs include:

- Deerfield Doll Camps
- iDaP Technology Camps
- The Arts Alliance Summer Art Camps

### Youth Enrichment

The youth enrichment core program area includes family, arts, cultural, literacy, and holiday activities. This core program area aims to improve the quality of life and enhance the overall health of the community. Example enrichment programs include:

- Santa’s Workshop
- Paint-Your-Own Pottery
- Summer Story Time

### 1.3 Community Needs (Recreation Programs)

A statistically-valid community survey was distributed in 2018 to ascertain the community’s preferences for recreation programming. Three critical questions were asked that formulate programmatic focus areas:

1. Do you have a need for a given program?
2. If yes, how well is your need being met currently?
3. How important is a given program to you and your household?

#### 1.3.1 Program Need

Community residents identified three program areas that stood out above all other programmatic areas:

- Community special events
- Nature programs
- Adult fitness & wellness programs

Of those three areas, only community special events are a large focus area for the Township. Nature programs and adult fitness & wellness programs are not currently a part of the Township’s inventory.

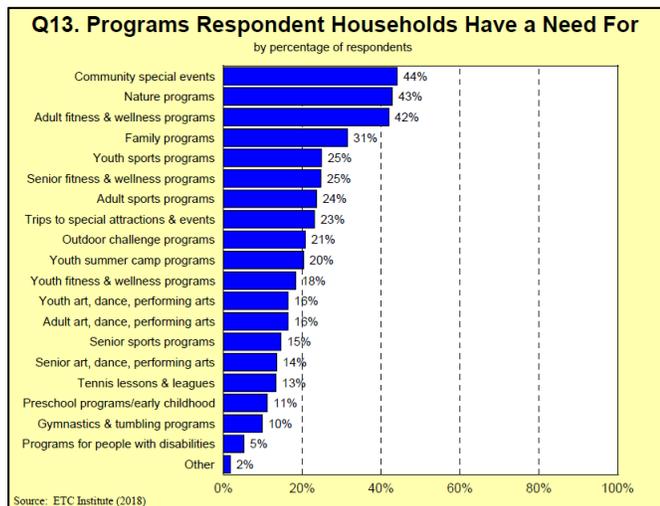


Figure 1-Program Need

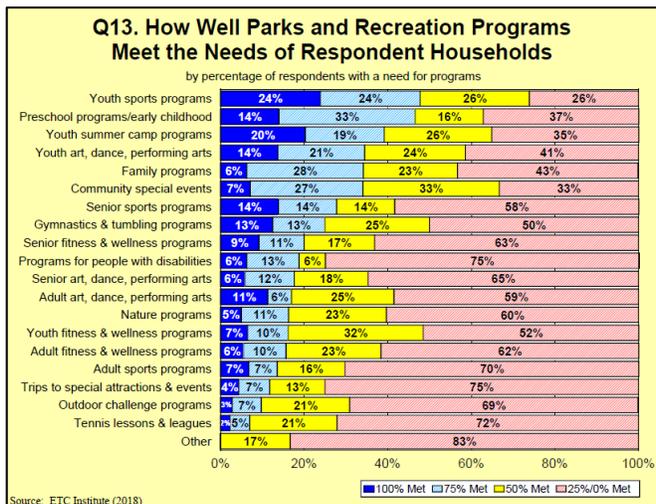


Figure 2-Program Unmet Need

#### 1.3.2 Program Unmet Need

Respondents also responded to the same list as Figure 1 but identified how well their needs are currently being met. The four-point scale used helps identify truly *unmet* needs (50% met or less). Of the three programs identified by the community as the most “needed” programs, community special events have 66% unmet need, nature programs have 83% unmet need, and adult fitness & wellness programs have 85% unmet need. Additionally, all programs were reported to have at least 50% unmet need. This indicates that there are a lot of programmatic needs in general within the community.

**1.3.3 Program Importance**

After analyzing programmatic needs, respondents identified how important the various program areas are to their household. Six program areas were statistically above every other area:

1. Nature programs
2. Community special events
3. Family programs
4. Adult fitness & wellness programs
5. Youth sports programs
6. Senior fitness & wellness programs

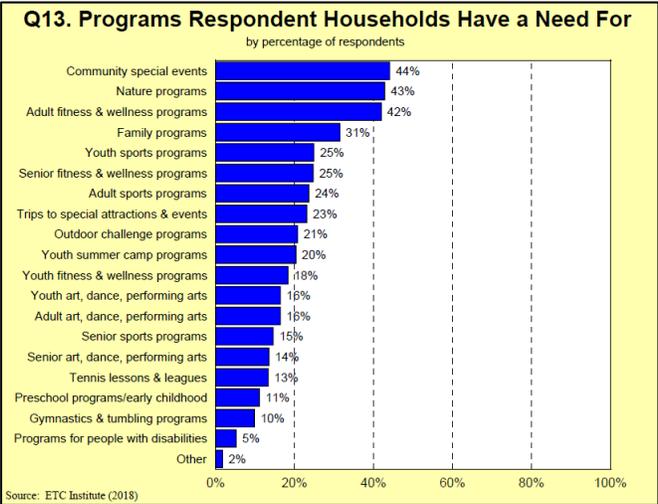


Figure 3-Program Importance

Out of the “most important” list, community special events and family programs (namely, community events in the Deerfield inventory) are the only areas offered. Therefore, matching the importance and need lists, nature programs, adult fitness & wellness programs, and senior fitness & wellness programs are priority areas for the Township to consider.

**1.3.4 Focus Areas**

Analyzing the previous three questions together, Priority Investment Ratings (PIR) were developed that provides the Township three tiers (high, medium, and low) in terms of programmatic priority magnitude. Figure 4 provides a hierarchy that the Township should refer to when considering new program investments in the future.

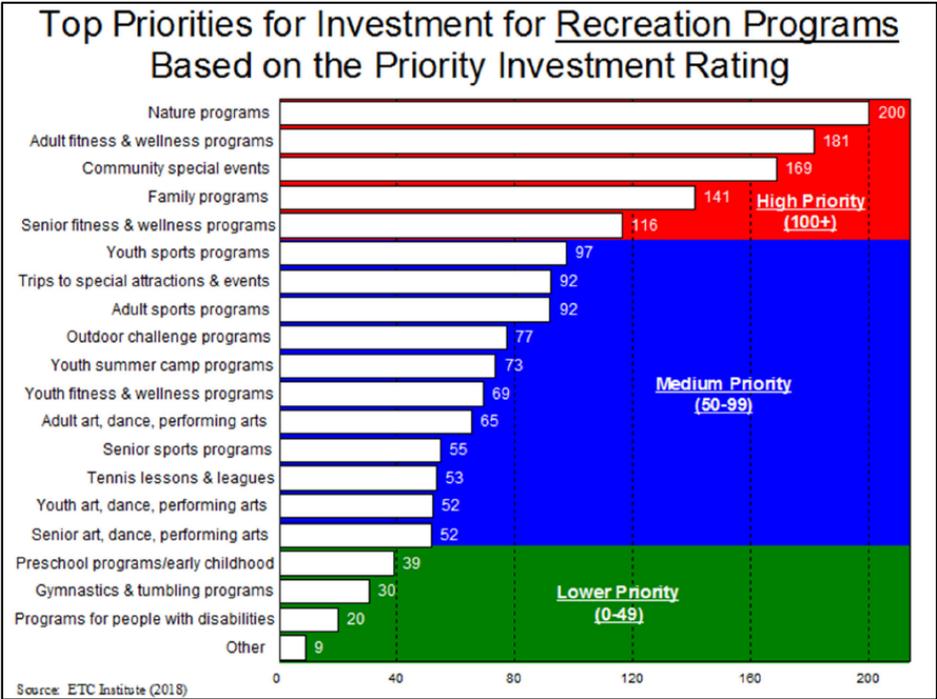


Figure 4-Priority Investment Rating (Programs)

## 1.4 Core Program Area Recommendations

### 1.4.1 Evaluate Core Program Area Relevance Regularly

These existing core program areas provide a generally well-rounded and diverse array of programs that serve the community at present. Based upon the observations of the consulting team and demographic and recreation trends information, Deerfield Township staff should evaluate core program areas and individual programs, ideally on an annual basis, to ensure offerings are relevant to evolving demographics and trends in the local community. Implementing additional surveys to program participants and the larger community is a good way to help differentiate between national vs. local trends and ensure the Township’s programs are relevant to the local user.

### 1.4.2 Expand Core Program Areas

After evaluating the existing programmatic inventory and the community’s program preferences (and demographics), it is recommended to expand the program offerings provided by the Township to include:

- Nature programs
- Adult fitness & wellness programs
- Senior fitness & wellness programs

Additionally, the Township should monitor the need for youth & adult sports and trips to special attractions & events as they are higher “medium” priorities.

It should be noted that all core program area enhancements should be done incrementally and capital investment/facility design should be driven by the core program areas. Therefore, if nature programs become the Township’s next core program area, infrastructure should be created or enhanced to help facilitate the implementation of that core program area.

## 1.5 Program Strategy Analysis

### 1.5.1 Age Segment Analysis

The table below depicts each core program area and the most prominent age segments they serve. Primary (noted with a ‘P’) and Secondary (noted with an ‘S’) markets are identified for each core program area. Looking at blank boxes will help Deerfield Township examine potentially “underserved” age segments.

Core Program Area	Preschool (<5)	Elem. School (6-12)	Teens (13-19)	Adult (18+)	Senior Adults (55+)	All Ages
Adult Enrichment			S	P		
Community Events	S	P	S	P	S	
Special Events	S	S	S	P	S	
Volunteerism			P	S	S	
Youth Camps		P	S			
Youth Enrichment	S	P	S	S	S	

Figure 5-Core Program Area Age Segment Analysis

Based on the Township’s demographics, there will be an aging trend experienced over the next 15 years. As such, it will become more important to transition to older adults being a *primary* market segment in one or more core program area. Additionally, it is important to examine *all ages* programming because great park and recreation systems attract new families into the community. Staff should monitor the demand for preschool programming and adjust the focus in this area as necessary/appropriate.

Program staff should include this information when creating or updating program plans for individual programs. An age segment analysis can also be incorporated into mini-business plans for comprehensive program planning.

### 1.5.2 Program Lifecycle

A program lifecycle analysis involves reviewing each program offered by the Township to determine the stage of growth or decline for each. This provides a way of informing strategic decisions about the overall mix of programs managed by the Township to ensure that an appropriate number of programs are “fresh” and that relatively few programs, if any, need to be discontinued. This analysis does not need to be based on strict quantitative data but, rather, can be based on staff members’ knowledge of their program areas. The following table shows the percentage distribution of the various life cycle categories of the Township’s programs. These percentages were obtained by comparing the number of programs in each individual stage with the total number of programs listed by staff.

Lifecycle Stage		Description	Actual Program Distribution		Recommended Distribution
1st Stage	Introduction	New program; modest participation	25%	37%	50-60%
	Take-Off	Rapid participation growth	6%		
	Growth	Moderate, but consistent participation growth	6%		
2nd Stage	Mature	Slow participation growth	14%	14%	40%
3rd Stage	Saturation	Minimal to no participation growth; extreme competition	39%	42%	0-10%
	Decline	Declining participation	3%		

\*8% not classified due to lack of available program data at time of analysis

**Figure 6-Program Lifecycle Distribution**

The total number of programs falling into the 1<sup>st</sup> and 2<sup>nd</sup> lifecycle stages are below the recommended distributions while the number of programs in the 3<sup>rd</sup> stage exceeds the recommended distribution. There are three factors that are directly related to these trends:

1. There is a lack of programmable indoor recreation space; there is a need for expanded space
2. Park space may be able to be programmed more
3. The number of staff is a challenge which potentially limits recreation programming opportunities

It is important to move programs across the lifespan (especially moving programs into the maturation stage). It is useful to have a strong percentage in the early stages to make sure there is innovation in programming and that the Township is responding to changes in community need.

About 42% of all programs are in the 3<sup>rd</sup> stage, which does not align with industry best practices. Therefore, the Township will need to pay attention to opportunities to sunset programs, re-program activities, or seek additional facility space as appropriate. If a program is in Saturation stage, it may not necessarily need to be retired – it could be that it is a legacy program that is beloved by the community. However, it is useful to look at attendance trends – do you have fewer participants over the last few offerings? If so, the community may be looking for a different type of program. While there are exceptions (such as facility space), most programs in the Saturation and Decline stages are ready to retire.

Township staff should complete a Program Lifecycle Analysis on an annual basis and ensure that the percentage distribution closely aligns with desired performance. Furthermore, the Township could include annual performance measures for each core program area to track participation growth, customer retention, and percentage of new programs as an incentive for innovation and alignment with community trends. The figure on the following page can assist staff with completing a Program Lifecycle Analysis.

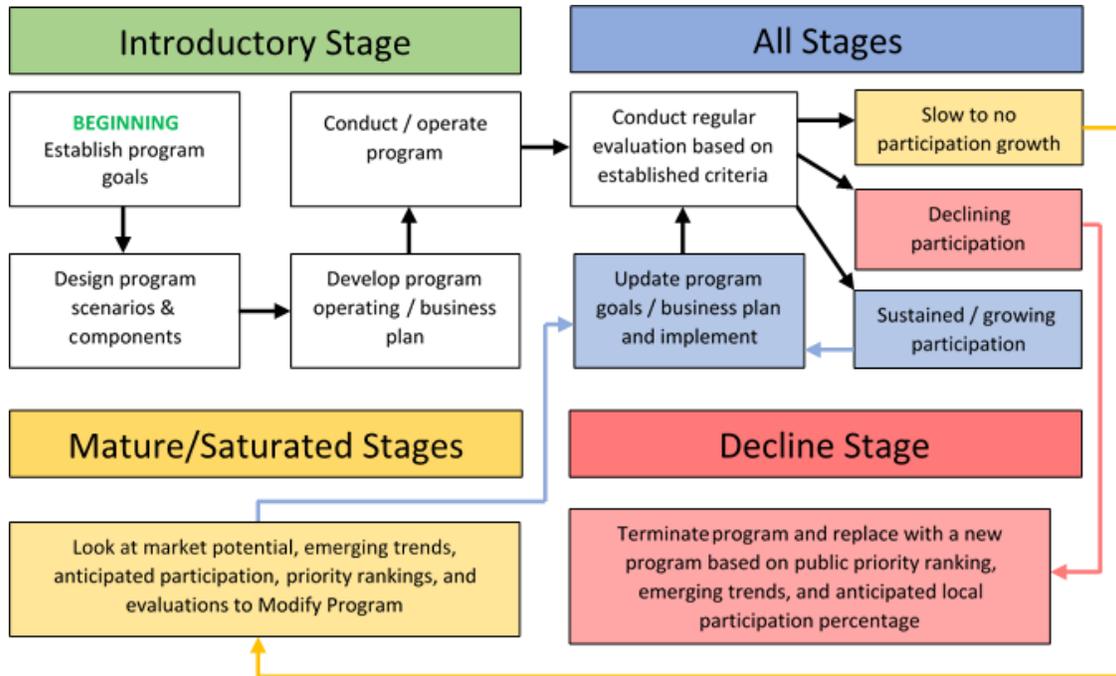


Figure 7-Program Lifecycle Decision Matrix

### 1.5.3 Program Classification

Conducting a classification of services for all programs informs how each program attributes to fulfilling the Township’s mission. Even though the mission is yet to be developed, it is important to recognize the goals and objectives of each core program area, who the program areas serve, and how the program areas should be funded with regard to tax dollars and/or user fees and charges. How a program is classified can help to determine the most appropriate management, funding, and marketing strategies.

Program classifications are based on the degree to which the program provides a public benefit versus a private benefit. Public benefit can be described as everyone receiving the same level of benefit with equal access, whereas private benefit can be described as the user receiving exclusive benefit above what a general taxpayer receives.

The consulting team uses a classification method based on three indicators: Essential, Important, and Value-Added. Where a program or service is classified depends upon alignment with the organizational mission, how the public perceives a program, legal mandates, financial sustainability, personal benefit, competition in the marketplace, and access by participants. The figure on the following page describes each of the three program classifications.

	<i>ESSENTIAL Programs</i>	<i>IMPORTANT Programs</i>	<i>VALUE-ADDED Programs</i>
<i>Public interest; Legal Mandate; Mission Alignment</i>	<ul style="list-style-type: none"> <li>• <i>High public expectation</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>High public expectation</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>High individual and interest group expectation</i></li> </ul>
<i>Financial Sustainability</i>	<ul style="list-style-type: none"> <li>• <i>Free, or nominal fee tailored to public needs</i></li> <li>• <i>Requires public funding</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Fees cover some direct costs</i></li> <li>• <i>Requires a balance of public funding and a cost recovery target</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Fees cover most direct and indirect costs</i></li> <li>• <i>Some public funding as appropriate</i></li> </ul>
<i>Benefits (i.e., health, safety, protection of assets).</i>	<ul style="list-style-type: none"> <li>• <i>Substantial public benefit (negative consequence if not provided)</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Public and individual benefit</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Primarily individual benefit</i></li> </ul>
<i>Competition in the Market</i>	<ul style="list-style-type: none"> <li>• <i>Limited or no alternative providers</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Alternative providers unable to meet demand or need</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Alternative providers readily available</i></li> </ul>
<i>Access</i>	<ul style="list-style-type: none"> <li>• <i>Open access by all</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Open access</i></li> <li>• <i>Limited access to specific users</i></li> </ul>	<ul style="list-style-type: none"> <li>• <i>Limited access to specific users</i></li> </ul>

Figure 8-Classification of Services Criteria Definitions

Another way to describe these three classifications is to analyze the degree to which the program provides a community versus an individual benefit. These categories can then be correlated to the Essential, Important, and Value-added classifications.

	<b>Classification</b>	<b>Typical CR</b>	<b>Notes</b>
I	<b>PURE COMMUNITY</b>	0-25%	Basic services intended to be accessible and of benefit to all; supported wholly or significantly by tax subsidies.
III	<b>MIX</b>	25-75%	Benefit accrued to both individual and general public interests, but to a significant individual advantage.
V	<b>PURE INDIVIDUAL</b>	75-100%+	Exclusive benefit received by individual(s) and not the general public; individual pays at least the full cost of service provision.

Figure 9-Program Cost Recovery by Classification Definitions

The following figure shows how the two classification systems correlate, and includes example programs that fall into each category. To increase granularity, the classification system is expanded into five categories for the Township to consider in the future.

I	II	III	IV	V
<i>Essential</i>		<i>Important</i>	<i>Value-Added</i>	
PURE COMMUNITY	MOSTLY COMMUNITY	MIX	MOSTLY INDIVIDUAL	PURE INDIVIDUAL
Basic services intended to be accessible and of benefit to all; supported wholly or significantly by tax subsidies.	Benefit accrued to both the general public and individual interests, but to a significant community advantage.	Benefit accrued to both individual and general public interests, but to a significant individual advantage.	Nearly all benefit received by individual(s), with benefit provided to the community only in a narrow sense.	Exclusive benefit received by individual(s) and not the general public; individual pays at least the full cost of service provision.
Touch-A-Truck	Women’s Self-Defense	Thanksgiving Day Race	iDaP Technology Camps	Specialty Camps
<i>Cost Recovery</i>				
0%	25%	50%	75%	100% 100%+

**Figure 10-Program Cost Recovery by Classifications**

With assistance from staff, a classification of programs and services was conducted for all of the recreation programs offered by the Township (**Figure 11**). The programs were classified using a three-tiered system. Approximately 89% of all programs were categorized as Essential. The Important category had the second most with 8% followed by Value-Added with 3%. This range indicates that current Township programming is largely community benefit-driven, meaning, there is not a focus (currently) on cost recovery. However, with the 11% identified as non-essential, there should be some sort of cost recovery expectation associated. This is an important distinction to understand because these classifications help the Township align programs with community values while paying attention to cost recovery levels.

Core Area	Program	Program Classification		
		Essential	Important	Value-Added
Adult Enrichment	Women's Self-Defense (WCSO)	X		
	Creative Exchange Workshops (TAA)	X		
	Art Bar (TAA)	X		
Community Events	WCPD Summer Concert Series	X		
	Movies in the Park	X		
	Touch-A-Truck	X		
	Halloween Treat Street	X		
	Holiday Lights	X		
	FallFair Arts Festival (TAA)	X		
	Easter Egg Hunt	X		
	MadCap Puppets	X		
	Kentucky Symphony Orchestra	X		
	Comet BlueGrass All-Stars	X		
	Shakespeare in the Park	X		
	Soundy Body Jazz Orchestra	X		
Special Events	Butterfly Walk (CancerFree Kids)	X		
	Thanksgiving Day Race (LifeTime)		X	
	Run for the Green		X	
	PowderKeg Trail Race		X	
Volunteerism	Kingswood Clean-Up	X		
	Teen Volunteer - Touch-A-Truck	X		
	Teen Volunteer -MadCap Puppets	X		
	Special Projects - 2018 Archery Range	X		
Youth Camps	Deerfield Kindergarten Summer Camps	X		
	Deerfield 1st - 5th Grade Camps	X		
	Deerfield 6th - 8th Grade Camps	X		
	Deerfield Doll Camps	X		
	The Arts Alliance Summer Art Camps	X		
	iDaP Technology Camps			X
	Archery Camp (GMA)	X		
Safety Town (DFR)	X			
Youth Enrichment	Santa's Workshop	X		
	Family Clay Class (new for 2019)	X		
	Paint-Your-Own Pottery	X		
	Archery Classes (GMA)	X		
	Summer Story Time (MPL)	X		
<b>Total Program Percentage By Classification</b>		<b>89%</b>	<b>8%</b>	<b>3%</b>
<b>Classification Cost Recovery Target</b>		<b>CR Target: 0-25%</b>	<b>CR Target: 25-75%</b>	<b>CR Target: 75-100+%</b>

Figure 11-Program Classification Distribution

### 1.5.4 Cost of Service & Cost Recovery

The Township does not currently operate under any cost recovery mandates. As a result, the recreation program assessment is designed to help begin the conversation and process for identifying programmatic costs. Any future philosophical shifts should be made based on data-driven decisions and with an understanding of full costs of delivering programs and services.

Therefore, cost recovery targets should be identified and tracked for each core program area (at minimum) and for specific programs or events where possible. The previously identified core program areas would serve as an effective breakdown for tracking cost recovery metrics, which would theoretically group programs with similar cost recovery and subsidy goals. Determining cost recovery performance and using it to inform pricing decisions involves a three-step process:

1. Classify all programs and services based on the public or private benefit they provide (as completed in the previous section)
2. Conduct a cost of service analysis to calculate the full cost of each program
3. Establish a cost recovery percentage, through Township policy, for each program or program type based on the outcomes of the previous two steps, and adjust program prices accordingly

The following provides more detail on steps 2 & 3 above.

#### Understanding the Full Cost of Service

To develop specific cost recovery targets, full cost of accounting needs to be created on each class or program that accurately calculates direct and indirect costs. Cost recovery goals are established once these numbers are in place, and program staff should be trained on this process.

A cost of service analysis should be conducted on each program, or program type, that accurately calculates direct (i.e., program-specific) and indirect (i.e., comprehensive, including administrative overhead) costs. Completing a cost of service analysis not only helps determine the true and full cost of offering a program, but provides information that can be used to price programs based upon accurate



**Figure 12-Program Cost Recovery Model**

delivery costs. **Figure 12** illustrates the common types of costs that must be accounted for in a cost of service analysis.

The methodology for determining the total cost of service involves calculating the total cost for the activity, program, or service, then calculating the total revenue earned for that activity. Costs (and revenue) can also be derived on a per unit basis. Program or activity units may include:

- Number of participants;
- Number of tasks performed;
- Number of consumable units;
- Number of service calls;
- Number of events;
- Required time for offering program/service.

Agencies use cost of service analyses to determine what financial resources are required to provide specific programs at specific levels of service. Results are used to determine and track cost recovery as well as to benchmark different programs provided by the Township between one another. Cost recovery goals are established once cost of service totals have been calculated.

### Current Cost Recovery

With regard to Deerfield Township’s programs, services, and events, the method and mechanism used to document cost recovery is direct costs. The figure below shows current cost recovery levels based on the most recent fiscal year data. It should be noted that the Township does not currently have identified cost recovery goals for core program areas. The figure also presents recommended cost recovery goals, based on best-practice, that are in line with parks and recreation systems. Additionally, the recommended cost recovery goal ranges are including indirect cost calculations. Setting, tracking, and reaching cost recovery goals for every core program area will also help the Township justify program expense and make a case for additional offerings in the future.

Core Program Area	Current Cost Recovery Goal	Actual Cost Recovery	Recommended Cost Recovery %
Adult Enrichment	0%	0-100%	50-100%
Community Events	0%	0-12%	0-25%
Special Events	0%	0-75%	75-100%
Volunteerism	0%	0%	0%
Youth Camps	0%	0-113%	50-100%
Youth Enrichment	0%	0-120%	25-75%

Figure 13-Program Cost Recovery Goals

### 1.5.5 Pricing

The pricing of programs should be established based on the cost of service analysis, overlaid onto programs areas or specific events, and strategically adjusted according to market factors and/or policy goals.

Overall, the degree to which pricing strategies are used currently is consistent, but not expansive. Current pricing tactics include age segmentation, residency, and by market rate (competition).

Adding additional pricing strategies not currently employed such as by cost recovery goals, prime/non-prime time, and by location would be useful to help stabilize usage patterns and help with cost recovery for higher quality amenities and services. It should be noted that since the Township does not operate recreation services under a cost recovery mandate, these pricing tactics should be added in combination with any financial philosophical shifts.

Pricing Tactic	Adult Enrichment	Community Events	Special Events	Volunteerism	Youth Camps	Youth Enrichment
Age Segment		✓	✓			
Family/Household Status						
Residency	✓				✓	✓
Weekday/Weekend						
Prime/Non-Prime Time						
Group Discounts						
By Location						
By Competition (Market Rate)		✓	✓		✓	
By Cost Recovery Goals						
By Customer's Ability to Pay						

**Figure 14-Program Pricing Tactics Used**

Additionally, some of pricing strategies used for one core program area may be useful in another area as well. For example, age segment pricing may be useful for youth camps or youth enrichment. Other example pricing strategies from peer agencies include military, emergency responder personnel and police, or education (teacher) discounts. Finally, the consulting team recommends that all core program areas use cost recovery goals as a factor in determining pricing.

Staff should continue to monitor the effectiveness of the various pricing strategies they employ and make adjustments as necessary within the policy frameworks that guide the overall pricing philosophies. It is also important to continue monitoring for yearly competitor and other service providers benchmarking.

## 1.6 Program Strategy Recommendations

In general, Deerfield Township’s program staff should begin a cycle of evaluating programs on both individual merit as well as the program mix as a whole. This can be completed at one time on an annual basis, or in batches at key seasonal points of the year, as long as each program is checked once per year. The following tools and strategies can help facilitate this evaluation process:

### 1.6.1 Mini Business Plans

The planning team recommends that Mini Business Plans (2-3 pages) for each core program area be updated on a yearly basis. These plans should evaluate the core program area based on meeting the outcomes desired for participants, cost recovery, percentage of the market and business controls, cost of service, pricing strategy for the next year, and marketing strategies that are to be implemented. If developed regularly and consistently, they can be effective tools for budget construction and justification processes in addition to marketing and communication tools.

### 1.6.2 Program Evaluation Cycle

Using the age segment and lifecycle analyses, and other established criteria, program staff should evaluate programs on an annual basis to determine program mix. This can be incorporated into the Mini Business Plan process.

### 1.6.3 Program Decision-making Matrix

When developing program plans and strategies, it is useful to consider all of the core program areas and individual program analyses. Lifecycle, age segmentation, classification, and cost recovery goals should all be tracked, and this information along with the latest demographic trends and community input should be factors that lead to program decision-making. A simple, easy-to-use tool similar to the table below will help compare programs and prioritize resources using multiple data points, rather than relying solely on cost recovery. In addition, this analysis will help staff make an informed, objective case to the public when a program in decline, but beloved by a few, is retired.

Program	Core Program Area	Age Segment	Lifecycle	Classification	Cost Recovery	Other Factors

Figure 15-Program Decision-Making Matrix

### 1.6.4 Program Standards and Performance Measurement

The relationship between meeting the needs of the community, achieving the organization mission (yet to be developed), and executing service delivery is of critical importance. With an understanding of this important dynamic, the following section provides an analysis of the service system and includes building on the foundation that already exists within the Township’s recreation programs and events. Based on the consulting team’s observations, and staff input, Deerfield Township’s program offerings are similar (although they can be enhanced/expanded) to other systems of its size, but enhancements to performance management practices would yield overall improvements to the services provided to the community. This section is intended to provide resources and insight to move the Township to a higher level of sophistication in quality management.

The practice of using program standards is essential for agencies desiring to perform at high levels and that aspire to be community and industry leaders. One of the most significant issues in managing a recreation program system includes the challenges faced with the complexity associated with service transactions (in-person and online), from multiple staff members, within the organization and with outside partners, and dealing with a diverse audience at a variety of locations within the system. Basically, it is a challenge to bring consistency to park and recreation agencies.

Currently, Deerfield Township measures participation numbers, participant to staff ratios, program cancellation rates, and customer satisfaction levels. This indicates the Township’s strong commitment to developing and tracking performance measures. However, it has been noted that there needs to be more consistency with data tracking and more formal processes in place to do so. Additionally, one performance measure not used that will enhance these performance measures is tracking customer retention rates. It is important to know if the Township is serving a consistent user base or if it is ever-changing.

Surveys can be very useful indicators of success if used in the right way – keeping the number of questions to a minimum and avoiding survey fatigue. Deerfield Township currently conducts post-program surveys to solicit feedback. Additionally, a statistically-valid community survey was utilized as part of the 2018 Parks Master Plan development process. There are several additional ways to collect customer feedback that include a pre-program survey (used with a post-program survey to measure change), recurring user surveys, and lost customer surveys. Digital technology also provides for using crowdsourcing intelligence tools such as Peak Democracy, Chaordix, Mightycause, and Mind Mixer to collect customer feedback. An online planning website was created for the 2018 Parks Master Plan and using this platform in perpetuity to incorporate an ongoing customer feedback portal is encouraged.

#### Quality Management Methods

In addition to measuring satisfaction, it is useful to have procedures in place to ensure that core program standards are being met across the spectrum of program offerings. This is particularly important when managing part-time, contractor, seasonal, and, where applicable, partnership staff. While all staff should be trained to perform to a core set of standards, it is useful to have extra training and checks in place for staff who are not as regularly exposed to the standards as full-time staff are. For staff who are delivering programs that require an extra layer of health and safety knowledge or training, training and quality checks should be extra rigorous.

Currently, Deerfield Township has systems in place to:

- Regularly and consistently updating policies and procedures
- Develop lesson plans
- Customer service training
- Basic life safety training
- Specialty skill training
- Encourage and support continuing education
- Complete performance reviews for all full-time, part-time, and seasonal staff

Deerfield Township has the following systems, but needs to do a better job of:

- Formalizing the recreation program evaluation process
- Staff diversity training

Deerfield Township needs or should consider implementing the following performance/quality standards:

- Check on the quality of instructors
- Train staff on enhanced life safety
- Train staff on marketing
- Train staff on calculating total cost of facility operations and cost of service

### 1.6.5 Program Standards Recommendations

The consultant team recommends the following regarding program standards:

#### Implement additional customer feedback methods

Identify performance metrics and goals. Use additional survey methods to track performance against goals; incorporate this information into the Mini Business Plan process.

#### Provide greater consistency and breadth of quality management

Train staff on how to calculate a full cost of facility operations and service. Additionally, measures should be put in place to formalize both the instructor quality check process and the recreation program evaluation process. These two processes are important to transition from an informality to a formality. Enhance and/or implement staff training in the areas of diversity and marketing. The Township should also regularly assess different staff competencies or knowledge, skills, and abilities (KSAs) areas to determine if other training is warranted.

## 1.7 Marketing and Communication

Identifying the proper mix of recreation programs is an important first step to delivering community services. The second step is identifying program strategies as identified in the previous sections. A major component of an overarching program strategy is having an appropriate marketing and communications plan.

### 1.7.1 Barriers to Participation

Township residents were asked to identify what is preventing them from using parks, recreation facilities, and/or programs (**Figure 16**). The number one barrier reported is “I do not know what is being offered.” This indicates Township residents lack a comprehensive program awareness of Township offerings.

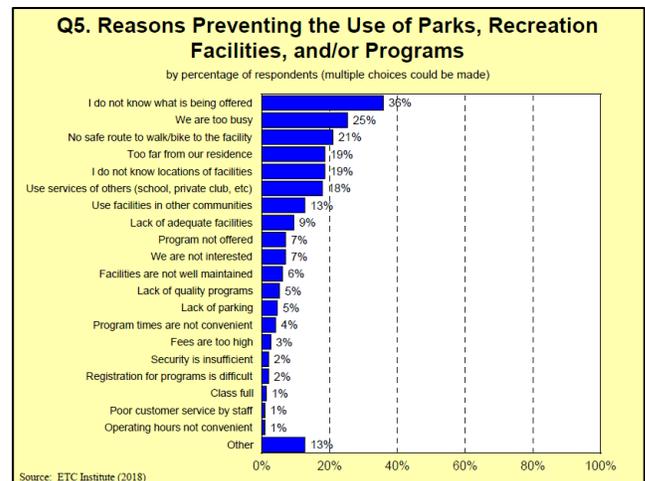


Figure 16-Barriers to Participation

### 1.7.2 Marketing Practices

Understanding that there is a potential disconnect between the Township’s marketing efforts and the effectiveness they have, residents were asked to indicate what sources their households use to learn about parks and recreation programs and activities (Figure 17). Out of the 13 sources examined, the leading sources are:

1. Friends & neighbors
2. Deerfield Township website
3. Parks sign boards
4. Activity guide program catalog
5. Facebook

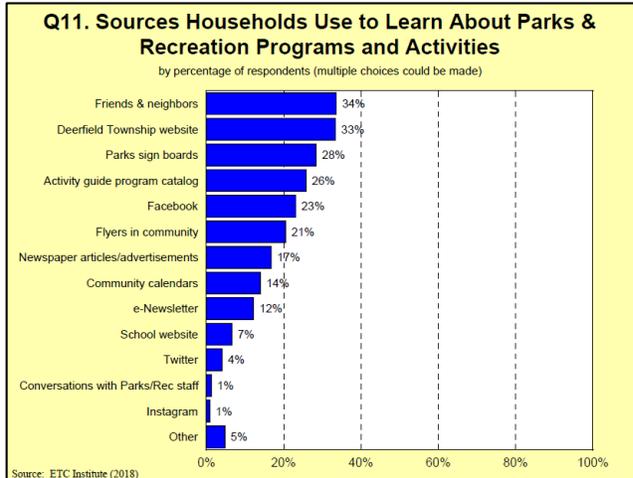


Figure 17-Current Marketing Sources Used

There are several important themes identified when assessing how residents learn about programs and parks. First, there is a lot of personal communication happening within the Township which is encouraging because it indicates that parks and recreation is talked about often. Second, two of the top five areas involve technology (website and Facebook). Capitalizing on an ever-increasing technological world is paramount. Third, more traditional mediums such as park sign boards and physical program catalogs are still used by residents. This indicates there is still a need for a combination of digital and physical marketing mediums.

### 1.7.3 Preferred Marketing Practices

Residents were then asked to assess the same list of marketing sources to help identify how they would most prefer to learn about parks and recreation programs and activities (Figure 18). The top five most preferred sources are:

1. Deerfield Township website
2. Activity guide program catalog
3. E-newsletter
4. Facebook
5. Parks sign boards

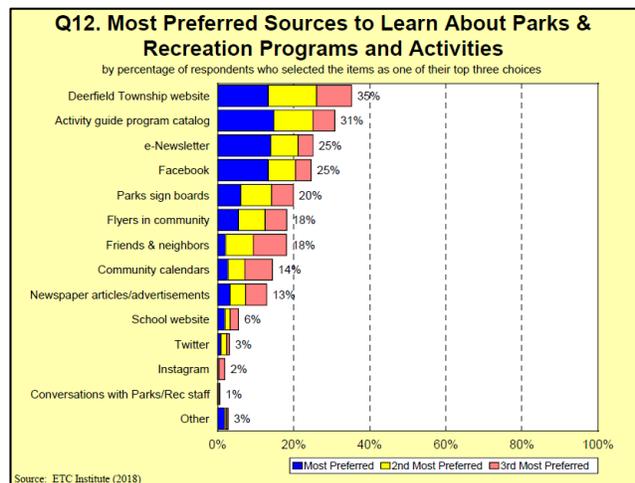


Figure 18-Preferred Marketing Sources

Results indicate a difference between how residents currently learn about parks and recreation programs and parks and how they prefer to learn about these things. Interestingly, friends & neighbors dropped out of the top five and e-newsletters entered. This makes sense given three of the top five preferences all pertain to technology (website, social media, and email). Given this information, it is important for the Township to concentrate on the technological side of parks and recreation services.

### 1.7.4 Marketing and Communication Recommendations

The consultant team recommends the following regarding marketing and communication:

#### Reduce barriers to participation through marketing efforts via appropriate channels

Residents indicate a need for the Township to alter its current marketing efforts/approach. Fortunately, the existing approach has led to positive word of mouth communication within the community. Unfortunately, it is hard for community's to rely heavily on word of mouth communication because it is often hard to communicate in a timely fashion and often times intended messages can be misconstrued or misrepresented from person to person. There is an identified need to enhance marketing practices by concentrating on technology use and integration. This means a focus on website functionality and navigation, social media use, and registration software should be enhanced to help support both the existing and future core program areas.

## 1.8 Volunteer and Partnership Management

Today's realities require most public park and recreation departments to seek productive and meaningful partnerships with both community organizations and individuals to deliver quality and seamless services to their residents. These relationships should be mutually beneficial to each party to better meet overall community needs and expand the positive impact of the agency's mission. Effective partnerships and meaningful volunteerism are key strategy areas for the Township to meet the needs of the community in the years to come.

### 1.8.1 Current Volunteer Management

When managed with respect and used strategically, volunteers can serve as the primary advocates for the Township and its offerings. Currently, the Township informally tracks volunteerism. The Township does not have a formal/adopted volunteer policy. Tracking volunteer hours can be used in budget discussions showing how well the Township is able to leverage limited resources. Engaging and rewarding volunteers will enhance community ownership and pride in the recreation programs and facilities the Township provides.

### 1.8.2 Best Practices in Volunteer Management

In developing the policy, some best practices that the Township should be aware of in managing volunteers include:

- Involve volunteers in cross-training to expose them to various organizational functions and increase their skill. This can also increase their utility, allowing for more flexibility in making work assignments, and can increase their appreciation and understanding of the Township.
- Ensure a Volunteer Coordinator (a designated program staff member with volunteer management responsibility) and associated staff stay fully informed about the strategic direction of the Township overall, including strategic initiatives for all divisions. Periodically identify, evaluate, or revise specific tactics the volunteer services program should undertake to support the larger organizational mission.
- A key part of maintaining the desirability of volunteerism in the agency is developing a good reward and recognition system. The consultant team recommends using tactics similar to those found in frequent flier programs, wherein volunteers can use their volunteer hours to obtain early registration at programs, or discounted pricing at certain programs, rentals or events, or any other Township function. Identify and summarize volunteer recognition policies in a Volunteer Policy document.

- Regularly update volunteer position descriptions. Include an overview of the volunteer position lifecycle in the Volunteer Policy, including the procedure for creating a new position.
- Add end-of-lifecycle process steps to the Volunteer Policy to ensure that there is formal documentation of resignation or termination of volunteers. Also include ways to monitor and track reasons for resignation/termination and perform exit interviews with outgoing volunteers when able.
- In addition to number of volunteers and volunteer hours, categorize and track volunteerism by type and extent of work, such as:
  - **Regular volunteers:** Those volunteers whose work is considered to be continuous, provided their work performance is satisfactory and there is a continuing need for their services.
  - **Special event volunteers:** Volunteers who help out with a particular event with no expectation that they will return after the event is complete.
  - **Episodic volunteers:** Volunteers who help out with a particular project type on a recurring or irregular basis with no expectation that they will return for other duties.
  - **Volunteer interns:** Volunteers who have committed to work for the agency to fulfill a specific higher-level educational learning requirement.
  - **Community service volunteers:** Volunteers who are volunteering over a specified period of time to fulfill a community service requirement.

Encourage employees to volunteer themselves in the community. Exposure of staff to the community in different roles (including those not related to parks and recreation) will raise awareness of the Township and its volunteer program. It also helps staff understand the role and expectations of a volunteer if they can experience it for themselves

### 1.8.3 Partnership Opportunities

Deerfield Township currently does not maintain a list/database of all partner organizations and they have an inconsistent written agreement process for all partnerships in place. These recommendations are both an overview of existing partnership opportunities available to the Township, as well as a suggested approach to organizing partnership pursuits. This is not an exhaustive list of all potential partnerships that can be developed, but can be used as a tool of reference for the Township to develop its own priorities in partnership development. The following five areas of focus are recommended:

1. **Operational Partners:** Other entities and organizations that can support the efforts of the Township to maintain facilities and assets, promote amenities and park usage, support site needs, provide programs and events, and/or maintain the integrity of natural/cultural resources through in-kind labor, equipment, or materials.
2. **Vendor Partners:** Service providers and/or contractors that can gain brand association and notoriety as a preferred vendor or supporter of the Township in exchange for reduced rates, services, or some other agreed upon benefit.
3. **Service Partners:** Nonprofit organizations and/or friends groups that support the efforts of the agency to provide programs and events, and/or serve specific constituents in the Township collaboratively.

4. **Co-Branding Partners:** Private, for-profit organizations that can gain brand association and notoriety as a supporter of the Township in exchange for sponsorship or co-branded programs, events, marketing and promotional campaigns, and/or advertising opportunities.
5. **Resource Development Partners:** A private, nonprofit organization with the primary purpose to leverage private sector resources, grants, other public funding opportunities, and resources from individuals and groups within the Township to support the goals and objectives of the agency on mutually agreed strategic initiatives.

#### 1.8.4 Policy Best Practice for All Partnerships

All partnerships developed and maintained by the Township should adhere to common policy requirements. These include:

- Each partner will meet with or report to Township staff on a regular basis to plan and share activity-based costs and equity invested.
- Partners will establish measurable outcomes and work through key issues to focus on for the coming year to meet the desired outcomes.
- Each partner will focus on meeting a balance of equity agreed to and track investment costs accordingly.
- Measurable outcomes will be reviewed quarterly and shared with each partner, with adjustments made as needed.
- A working partnership agreement will be developed and monitored together on a quarterly or as-needed basis.
- Each partner will assign a liaison to serve each partnership agency for communication and planning purposes.
- If conflicts arise between partners, the Township-appointed lead, along with the other partner's highest ranking officer assigned to the agreement, will meet to resolve the issue(s) in a timely manner. Any exchange of money or traded resources will be made based on the terms of the partnership agreement.

Each partner will meet with the other partner's respective board or managing representatives annually, to share updates and outcomes of the partnership agreement.

#### 1.8.5 Policy Recommendations for Public/Private Partnerships

The recommended policies and practices for public/private partnerships that may include businesses, private groups, private associations, or individuals who desire to make a profit from use of Township facilities or programs are detailed below. These can also apply to partnerships where a private party wishes to develop a facility on park property, to provide a service on publically-owned property, or who has a contract with the agency to provide a task or service on the agency's behalf at public facilities. These unique partnership principles are as follows:

- Upon entering into an agreement with a private business, group, association or individual, Township staff and political leadership must recognize that they must allow the private entity to meet their financial objectives within reasonable parameters that protect the mission, goals and integrity of the Township.

- As an outcome of the partnership, Deerfield Township must receive a designated fee that may include a percentage of gross revenue dollars less sales tax on a regular basis, as outlined in the contract agreement.
- The working agreement of the partnership must establish a set of measurable outcomes to be achieved, as well as the tracking method of how those outcomes will be monitored by the agency. The outcomes will include standards of quality, financial reports, customer satisfaction, payments to the agency, and overall coordination with the Township 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.
- If applicable, the private contractor will provide a working management plan annually they will follow to ensure the outcomes desired by the Township. The management plan can and will be negotiated, if necessary. Monitoring of the management plan will be the responsibility of both partners. The agency must allow the contractor to operate freely in their best interest, as long as the outcomes are achieved and the terms of the partnership agreement are adhered to.
- The private contractor cannot lobby agency advisory or governing boards for renewal of a contract. Any such action will be cause for termination. All negotiations must be with the Deerfield Township Director or their designee.
- The agency 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 highest-ranking officers from both sides will try to resolve the issue before going to each partner's legal counsels. If none can be achieved, the partnership shall be dissolved.

### **1.8.6 Volunteer and Partnership Recommendations**

The planning team recommends the following regarding volunteers and partnerships:

#### **Track volunteers, volunteer hours, and partners**

Formalize the volunteerism process by establishing a database that tracks all volunteers, volunteer hours, partners, and partner resources leveraged (dollar value of partnering, if possible). Assign volunteer and partner tracking responsibility to one staff person; include this in the job description.

#### **Establish formal volunteer and partnership policies and agreements**

Following the best practice listed in the previous section, establish volunteer and partner policies and agreements that are tailored to the different types of volunteers and partnerships the Township encounters. Assign management of the policies and agreements to one staff person and include this in his or her job description.