CHAPTER 10 – POLICY REVIEW AND RECOMMENDATIONS

Introduction

This chapter provides a definition for policies and procedures, the appropriate process for considering and approving policies, types of policies that park and recreation departments must consider, existing BREC policies, review of two BREC policies, a list of recommended new policies and a recommended funding level of staff training and development.

A review of existing policies as compared with best practices around the country shows that the department is in line with others.

Recommended new policies include the need for: a) a cost recovery policy; b) a partnership agreement; and, c) a staff training and development policy. The staff training and development policy for recreation staff would include the following:

- customer service
- activity based costing
- performance measures
- creative thinking
- establishment of standards
- secret shopper program
- conflict resolution
- team work
- personal development
- communication

The recommended funding level for staff training and development is 1.8% of the annual salary budget for the department.

DEFINITION

A policy is a broad mandate for handling situations that arise. For example, an aquatic facility policy might deal with accommodation of people with disabilities or how to rent the pool to an outside club.

A procedure is the accepted method for implementing a policy. For example, the procedure for testing swimming pool water quality per the policy of the State Health Department would be to require a lifeguard to check the water quality three times a day and to record the chemical levels of the water on a form each time the water is checked.

Process

Policies are often initiated by a problem brought to the governing board. The board makes a decision, thereby creating a policy. The procedures for implementing the policy are then added to the administrative manual. This allows easier delegation of authority, as senior management can be sure that middle mangers and service providers will ct in a preferred manner. Decisions will be consistent across all levels of the organization.

Types of Policies by Category

Policies and procedures cover a variety of topics, these being determined by the nature of the organization. For BREC, it appears that the five categories listed in the table are appropriate.

Table 10.1: – Types of Policies by Category

Personnel	Facility	Program	Membership	Finance
Job descriptions	Maintenance	Types	I.D. cards	Budget
Hiring & firing	Risk management	Starting a new program	Eligibility	Requisitions
Fringe benefits	Lease agreement	Evaluation	ADA needs	Disbursement
Evaluation	Hours	Fees	Dues	Petty cash
Grievance	Reservations	Special events	Discipline	records
Training	Repair processes	Emergency procedures	Injuries	Collection methods

Existing Policies

As previously mentioned under the Process Section of this chapter, BREC has a formal process for recommending new policies, or changes to existing policies. Policy recommendations are provided to the Commission by the Chairman of a standing committee or a special committee. If the policy is approved, it is read into the minutes of the meeting and becomes a permanent part of the record.

Policy manuals within the various departments include:

- Administrative – Commission By-Laws
- Finance – Financial Procedures Handbook and BREC Fees and Information Manual
- Human Resources – BREC Personnel Rules and Regulations Manual
- Maintenance – Maintenance Clerks' Manual and Park Operations Manual
- Safety & training – Health, Safety and Risk Management Manual
- Recreation & Facilities – Fees and Charges Handbook
- Golf – Golf Course Procedures
- Tennis - Tennis Procedures Handbook
- Zoo – Animal Keepers Manual and Zoo Docents Directory of Animals

General Observations about Policies

BREC policies appear to be in good order. Typically, there are two issues with policies: a) sufficient time and energy is not dedicated to sharing the contents of them with staff; and, b) the training required of staff to fully implement the policy is not funded adequately, or at all. As a result, problems occur during the year which keep the department from achieving excellence.

Criteria to evaluate Policies

Not to be over-simplistic, but the true test for evaluating the success of a policy is if it is working. If it does what it is suppose to do, then it is successful. The development of policies is linked to the Commission and senior management's responsibility to protect its parks, facilities and natural resources; to provide staff with the guidance it needs to manage the department; to provide citizens with the guidance they need to ensure that their use of parks, programs and services are appropriate; and, that the department is managed in a manner which is consistent with best practices from similar organizations around the country.

Policy Review

The consultant was asked to review two policies: a) Acceptance of Gifts; and, b) the Cooperative Endeavor Agreement.

Acceptance of Gifts

This BREC policy sets standards by which it will measure requests for naming and endorsements to ensure they are consistent with BREC's mission. The current policy identifies four categories of donor recognition:

- Facilities/property
- Memorials/physical items
- Special programs/activities
- Branding

This policy includes its legal authority, general considerations, procedures and scope. BREC's policy, when compared with national perspectives appears to be consistent with best practices.

Nationally, the following comments are typical for similar policies:

- Authority – most municipalities have some type of advisory board which collects, analyzes and recommends names for parks and facilities to their governing body for official approval.

- Naming after people who are living or an organization – Most municipalities name parks and facilities after people, and the mechanisms for qualifying vary, it appears that all require that the

person or organization have made a major contribution to the community in either deed or monetary contribution.

- Naming after those who have deceased – Most municipalities are adamant about insisting that to name a park or facility after a person, that person must be deceased.

Cooperative Endeavor Agreement

This BREC policy sets forth the conditions which make park land available for approved activities. Under no condition are commercial activities permitted and, in every case, the activities must be consistent with BREC's mission to serve the citizens of the Parish.

The Cooperative Endeavor Agreement includes:

- Purpose of the policy
- Prohibited activities and uses
- Designates the area where the activity will occur
- Requires a description of the activity which will occur
- Identifies the user's contact person
- Identifies BREC's contact person
- Identifies the dates and times for the activity
- Stipulates the insurance requirements

Nationally, the following comments are typical for similar policies:

- Scheduling priorities are listed to be used when there are multiple requests for the same space; for example,

    ◊ The contractor is based in the Parish of East Baton Rouge
    ◊ The contractor's request is appropriate for the space that has been identified
    ◊ There is a "history" in the Parish of similar types of activities
    ◊ The contractor has a good reputation for leaving the space as he found it
    ◊ Attendees at the event are primarily based in the Parish

- Fee requirements are listed

- Penalties are listed for those who are in non-compliance of the agreement

New Policy Recommendations

One of the outcomes of the strategic planning process was the identification of need for some new policies. In each instance, new policies are recommended to address issues which will improve the management and operation of the department while, ultimately, providing citizens with the level of services which they expect. BREC has a number of active policies which are serving the department very well at this time, however, the addition of a few new policies will be helpful.

Cost Recovery Policy

One of this Plan's principal recommendations is to increase internal revenue, possibly by 25%. To guide the department through the community involvement process as it strives to increase user fees, the consultant has authored a Cost Recovery Policy. The policy is attached in the appendices of this report. The policy's key elements are as follows:

> The department must know what its costs are for everything it does. Once costs are known, they are categorized into direct costs, indirect costs and fixed costs

> Services are categorized into three functions:

> a) public services – services made available by the department whose primary benefits go to the public at large. Typical public services are openly available to all residents on an equal basis and there is little individual consumptive use of the product or service. Example: parks, trails, playground equipment, non-reserved picnic and activity areas, restrooms and open space

> b) merit services – services made available by the department whose primary benefits accrue partially to the Parish and partially to the individual. Typical merit goods are generally available to all residents but space, time or consumptive use restrictions may be present which limit an individual's ability to participate. Examples of merit goods are: youth-at-risk programs, senior programs, youth sports, youth programs, recreation facilities, special events

> c) private services – services whose primary benefits accrue directly to the individual with only nominal public benefit. Private goods may be evenly available to the public but significant time, space, consumption and cost limit the number of users at any one time. Examples of private goods are: competitive team sports, golf, recreation classes, facility rentals, rental fees and tournaments

> Fees and charges are calculated by using seven criteria:

> - Service demand
> - Quality of the parks and recreation experience
> - Traditional or common practice indicators
> - Anticipated amount of revenue
> - Implementation costs
> - Market analysis and elasticity
> - Program life cycle (growth, stable or exit)

Partnership Agreement

The elements of a partnership agreement were addressed in great detail in Chapter 11. A model partnership agreement is also included in the Appendices of this report.

Staff Training and Development

- As BREC knows, its key to success is through its staff. The Strategic Master Plan will succeed if staff is supportive and qualified to implement its recommendations. Keys to the design of a strategic staffing plan are:

  ◊ Evaluate who is currently on staff and their needs
  ◊ Review employees who are qualified to be promoted
  ◊ Develop an action plan for each staff person
  ◊ List the individual's biggest challenge/opportunity
  ◊ List the individual's biggest asset/strength
  ◊ Rate the individual's desire to be promoted from 1-10

- Staff development and training needs for recreation staff were detailed in Chapter 6 of this report. The park staff was not evaluated in this report, however, it can be assumed that they also have a long list of training needs which will need to be identified and addressed as the Plan unfolds. The recreation staff needs include: a) customer service; b) activity based costing; c) performance measures; d) creative thinking; e) establishment of standards; f) secret shopper program; g) conflict resolution; h) team work; personal development; and, i) communication.

Recommended Funding Level for Staff Training and Development

The fiscal target for funding staff development and training is 1.8% of the department's annual salary budget. The percentage was developed by human resource specialists across the country who monitor and evaluate the level of spending to do an adequate job.