

# COMMISSION FOR ACCREDITATION OF PARKS & RECREATION AGENCIES (CAPRA)

VISITOR TRAINING REFRESHER WORKSHOP  
Laura T. Wetherald, CPRP - Presenter  
[lwetherald@howardcountymd.gov](mailto:lwetherald@howardcountymd.gov) 410-313-4661  
August 28th 2017 at FRPA



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## AGENDA

- ☐ INTRODUCTION
- ☐ WHY ACCREDITATION?
- ☐ DOCUMENTS TO ASSIST
- ☐ FOCUS IS ON SAMPLING OF 151 CURRENT STANDARDS
- ☐ OTHER QUESTIONS WILL BE ENTERTAINED ON ALL STANDARDS AS WE GO
- ☐ FOCUS ON VISITORS COMMENT AND FOCUS ON AGENCY SELF ASSESSMENT COMMENTS
- ☐ ROLE OF VISITORS AND TEAM CHAIR
- ☐ VISITOR TIPS AND INFO
- ☐ THE TEAM REPORT
- ☐ RE-ACCREDITATION PROCESS
- ☐ DO'S & DON'TS
- ☐ QUESTIONS/



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## Why Accreditation?

- ☐ There are things we know we know
- ☐ There are things we know we don't know
- ☐ There are things we don't know that we don't know



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Agency Benefits	
<p><b>Agency</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide for an internal Self-Assessment process.</li> <li><input type="checkbox"/> Document actual practices and action research.</li> <li><input type="checkbox"/> Verbal policies are upgraded to written policies.</li> <li><input type="checkbox"/> Establish new procedures with assessable outcomes.</li> <li><input type="checkbox"/> Allow for discussions about process not personal</li> </ul> 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Agency Benefits	
<p><b>Agency</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Create and/or updates procedural plans with marketed results.</li> <li><input type="checkbox"/> Produce hardcopy and electronic policy manuals.</li> <li><input type="checkbox"/> Develop new Marketing and Risk Management Plans.</li> <li><input type="checkbox"/> Network with other accredited agencies and preliminary agency applicants.</li> <li><input type="checkbox"/> Know where everything is in a consistent format</li> <li><input type="checkbox"/> Helps you get several things done that you know you need to do but never made it a priority</li> </ul> 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

Staff Recognized Benefits	
<p><b>Staff (Notable Quotes)</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Created a safer environment.</li> <li><input type="checkbox"/> Our reputation soared.</li> <li><input type="checkbox"/> Enhanced our staff's understanding of why things are done as the are.</li> <li><input type="checkbox"/> Created approval and recognition for the community.</li> <li><input type="checkbox"/> Restructured management and how we do business.</li> <li><input type="checkbox"/> New director wanted to have an overall assessment</li> <li><input type="checkbox"/> Staff learning a lot more eligible for promotion</li> <li><input type="checkbox"/> Retiring director legacy project (knowledge transfer)</li> </ul> 	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>

## Staff Recognized Benefits

### STAFF (Notable Quotes)

- ❑ The park board, employees and city council share in our acknowledgements
- ❑ Gives us confidence
- ❑ The process give us the tools to measure and identify concerns and correct problems
- ❑ Increases employee morale and pride
- ❑ Stopped the critics!



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## CAPRA Video



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## CAPRA Mission

- ❑ The mission of the Commission for Accreditation of Park and Recreation Agencies (CAPRA) accreditation program supports the achievement of the National Recreation and Park Association (NRPA) mission and is to:
- ❑ 1. Provide standards and procedures for the evaluation of public park and recreation agencies through a program of self-evaluation and outside peer review for the purpose of national accreditation;
- ❑ 2. Enhance the performance of park and recreation services; and
- ❑ 3. Promote an agency which will serve more effectively the citizens in providing quality recreation.

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## CAPRA Purpose

- CAPRA is committed to the:
- **1. Development of quality park and recreation agencies:** The agency accreditation program focuses on the education and evaluation of park and recreation agencies utilizing standards considered to be the essential elements for effective and efficient Standards. These Standards promote improved performance for all park and recreation agencies and signify **minimum** standards.

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## CAPRA Purpose

- **2. Education:** The agency accreditation standards are the benchmark for the accepted level of practice in the industry. Through the comprehensive and systematic self assessment process and on site visitation and peer review, park and recreation professional(s) will gain knowledge and information about the baseline operations of a park and recreation agency.

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## CAPRA Purpose

- **3. Determination of the accreditation status of park and recreation agencies:** Standards provide the tool used to identify compliance with accepted professional practices. While accreditation standards effectively distinguish between agencies that should and should not be accredited, they are not a guarantee of quality, safety, or ethical practice. Accreditation is an assurance that the park and recreation agency has voluntarily subjected itself to outside evaluation by other professionals

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## WHAT IS AGENCY ACCREDITATION?

Agency Accreditation is a process of appraisal whereby parks and recreation agencies of all types and sizes can demonstrate that they meet the requirements (standards) to provide ongoing quality programs, services and facilities to their citizens.




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## History

Commission formed by the American Academy for Parks and Recreation Administration (AAPRA) and National Recreation and Park Association (NRPA) in 1993.

- ❑ **First pilot agencies in 1994**
- ❑ **Celebrating 23 years!**

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## CAPRA Board Members

- ❖ National Recreation and Park Association (NRPA)
- ❖ American Academy for Park and Recreation Administration (AAPRA)
- ❖ International City/County Management Association (ICMA)
- ❖ Council of State Executive Directors (CSED)
- ❖ National Association of County Park and Recreation Officials (NACPRO)
- ❖ American Association of Physical Activity and Recreation (AAPAR)
- ❖ Armed Forces Recreation Society (AFRS)




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**155 CAPRA Accredited Agencies**  
**39 States, 6 MWR Installations**



Arkansas (1)	North Carolina (10)
Arizona (7)	North Dakota (1)
California (5)	Nevada (1)
Colorado (8)	New Hampshire (1)
Connecticut (1)	New Jersey (1)
Florida (23)	New Mexico (1)
Georgia (10)	New York (1)
Hawaii (1)	Ohio (10)
Iowa (1)	Oklahoma (1)
Illinois (7)	Oregon (3)
Indiana (4)	South Carolina (3)
Kansas (3)	South Dakota (1)
Kentucky (3)	Tennessee (1)
Louisiana (1)	Texas (12)
Maryland (3)	Utah (1)
Massachusetts (1)	Virginia (7)
Michigan (4)	Vermont (1)
Minnesota (5)	Washington (3)
Missouri (5)	Washington, D.C. (1)
	Wisconsin (2)

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**Additional Resources to Learn more about the CAPRA process**

- Advanced Training Workshop – each year at Congress
- [nrpa.org/CAPRA](http://nrpa.org/CAPRA)
- NRPA Webinars and NRPA Connect
- Commission mentors for each new agency
- Accreditation Handbook (16<sup>th</sup> edition)
- Management Book- Brand New
- List of accredited agencies- Contact them and request info



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**Key issues related to 2014 standard revisions**

- Clarification of should and shall
- Merged commentary
- Review of documents by appropriate authority
- Clarification of different types of plans
- Preamble of each chapter
- Americans with Disabilities Act focused to recognize the importance

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### Key issues - continued

- ☐ Emergency Management
- ☐ Reference to "Parks and Recreation Management" book
- ☐ Completion of PRORAGIS profile(What does Proragis stand for? Park and Recreation Operating Ratio and Geographic Information System)
- ☐ Support for the NRPA Strategic Plan
  - ☐ What are the three Pillars?

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### The Self Assessment

- ☐ Engages the entire agency (employees, volunteers, citizen boards, and committees) in assessing the agency's effectiveness and efficiency
- ☐ 24 months from the date of the preliminary application to submit the completed self-assessment
- ☐ In January of the year in which the accreditation review takes place, the agency is invoiced for the review fee

Annual Operating Budget	Review Fee
Less than \$500,000	\$165
\$500,000 - \$1 million	\$275
\$1 million - \$2.5 million	\$550
\$2.5 million - \$5 million	\$1,100
\$5 million - \$10 million	\$1,650
\$10 million - \$15 million	\$2,200
\$15 million - \$25 million	\$2,750
More than \$25 million	\$3,300

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### Steps in process

- ☐ Submit Initial Application
- ☐ Complete Self Assessment for CAPRA Commission Review
- ☐ Self Assessment Released to Visitation Team
- ☐ Visit Scheduled
- ☐ Visit Takes Place
- ☐ Visitation Team Report Completed and Released
- ☐ Visitation Team Report Response
- ☐ CAPRA Hearing
- ☐ Accreditation Decided




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### Developing the Self assessment

- ☐ Form a team
- ☐ Key manager in lead
- ☐ Develop a time line and calendar
- ☐ Teams for each chapter
- ☐ May add committees for key documents
- ☐ Prepared in one voice
- ☐ Attaching evidence of compliance




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## The Current Standards Updated 2014

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### CAPRA Standards

- 151 standards in 10 major categories
- 100% of the 36 fundamental standards must be achieved
- 90% (103 of remaining 115) standards must be met for initial accreditation and 95% (108) for reaccreditation
- Commentary/suggested evidence of compliance is provided
- Met, Not Met
- Accreditation is for 5 years




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## Understanding Standards

- ☐ A standard is a statement of desirable practice as set forth by experienced professionals.
- ☐ If one acts a certain way, then it is expected there will be a certain outcome.
- ☐ If the agency complies with the vast majority of standards then it is understood the agency is performing a quality operation
- ☐ Standards deal with all aspects of the agency
- ☐ Standards provide an effective and credible means of evaluating a park and recreation agency's system.

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## CAPRA Cycle

- ☐ CAPRA Accreditation is a 5 year cycle and includes 3 phases
  - ☐ Development of the Agency Self Assessment Report
  - ☐ Onsite Visitation
  - ☐ Commission Review and Decision
- ☐ The Agency completes a new Self Assessment every 5 years.
- ☐ Submit Annual Reports to address continued compliance.

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## Self assessment Responses

### 1.3 Source of Authority

General Statute Article 18 160A, "The Recreation Enabling Law", establishes the authority for cities and counties to provide parks and recreation services.

Town Code Section 12-22 establishes parks and recreation as a line department under the supervision of the town manager, dated 2/17/71.

The Powers and Responsibilities of the department and director are defined in Town Code Section 12-24.

#### List of Evidence of Compliance

1.1-1 Recreation Enabling Law

1.1-2 Sec 12-22 Town Code

1.1-3 Sec 12-24 Town Code

### 1.3 Jurisdictions

The Town jurisdiction map is maintained by the Planning Department. The Town Limit and ETJ Map is in the File. Additionally, a map of the department's facilities can be found on the Town Limit Map with Facilities. A copy of the Town Limit Map with Facilities and a key to said map are included in the File.

#### List of Evidence of Compliance

1.3-1 Town Limits and ETJ Map

1.3-2 Town Limits Map with Facilities

1.3-3 Key to Town Limits Map with Facilities




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## Visitation Report Responses

**1.5** The District has a Vision Statement adopted by the Board on December 16, 2014. Minutes of this meeting were provided. The Vision Statement is communicated through the District website, employee website, and brochure.

**1.6** Evidence of compliance is shown through the PRCR Director job description (2010) who has the authority to create policies and procedures for the programs offered and facilities operated by the department. The Department has a policy manual that provides a framework for accomplishing the administrative tasks of the organization. The manual was last updated 3/15 and is set to be reviewed and updated again 3/16. The Policy Manual is available at each department facility.




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### 1.0 Agency Authority, Role, and Responsibility 14 Standards: 6 Fundamental ☆, 3 New

- ☐ 1.1 – Source of Authority ☆
  - ☐ 1.1.1 – Approving Authority/Policy Body
  - ☐ 1.1.2 – Citizen Advisory Boards/Committees
- ☐ 1.2 – Periodic Timetable for Review of Documents (New)
  - ☐ 1.2.1 – Document Approval Authority (New)
- ☐ 1.3 – Jurisdiction
- ☐ 1.4 – Mission ☆
  - ☐ 1.4.1 – Agency Goals and Objectives ☆
  - ☐ 1.4.2 – Personnel Involvement
- ☐ 1.5 – Vision ☆ (New)
- ☐ 1.6 – Policies, Rules, Regulations, and Operational Procedures
  - ☐ 1.6.1 – Administrative Policies and Procedures ☆
- ☐ 1.7 – Agency Relationship ☆
  - ☐ 1.7.1 – Operational Coordination and Cooperation Agreements

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### Review of Section 1.0 – New Standards

#### 1.2 Periodic Timetable for Review of Documents

- ☐ **Standard:** All documents designated for periodic review shall be reviewed on a regular basis according to an established agency review schedule. For example, if the agency has determined that a document should be reviewed annually, the agency shall provide evidence that the document is reviewed annually and include a copy of the most recent annual review. Several standards in the accreditation process require that adopted plans, policies and procedures be reviewed and updated at various intervals. In those cases, the agency shall provide evidence that the document was reviewed and updates pursuant to the period specified in the standard.

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## Review of Section 1.0 – New Standards

### 1.2 Periodic Timetable for Review of Documents

#### Standards with a review requirement are:

- 1.4.1 Agency Goals and Objectives
- 1.6.1 Administrative Policies and Procedures
- 2.4 Park and Recreation System Master Plan
- 2.5 Strategic Plan
- 3.4.2 Community Relations Plan
- 3.4.3 Marketing Plan
- 3.6 Records Management Policy and Procedures
- 3.6.1 Records Disaster Mitigation and Recovery Plan and Procedures
- 4.1 Personnel Policies and Procedures Manual
- 4.1.2 Recruitment Process
- 4.1.8 Compensation Plan
- 4.3 Job Analyses for Job Descriptions
- 4.5 Workforce Health and Wellness Program
- 4.6.1 Employee Training and Development Program

## Review of Section 1.0 – New Standards

### 1.2 Periodic Timetable for Review of Documents

#### Standards with a review requirement are (Cont'd):

- 5.1.1 Comprehensive Revenue Policy
- 6.1 Recreation Programming Plan
- 6.2 Program Objectives
- 6.4 Community Education for Leisure Process
- 7.1 Parkland Acquisition Procedures
- 7.2 Area and Facilities Development Policies and Procedures
- 7.5 Maintenance and Operations Management Standards
- 7.5.1 Facility Legal Requirements
- 7.9.1 Recycling and/or Zero Waste Plan
- 8.5 General Security Plan
- 8.6.2 Emergency Risk Communications Plan
- 9.1 Risk Management Policy
- 10.4 Needs Assessment
- 10.5.1 Recreation and Leisure Trends Analysis

### Example: 1.2 Periodic Timetable for Review of Documents

CAPRA Standard	CAPRA Standard Description	Standard Chairperson	Document Reviewer	Review Period	Review Date
1.4.1	Agency Goals and Objectives	Ellie Carter			6/30/2012, 1/31/2015
1.6.1	Administrative Policies and Procedures	Ellie Carter			6/30/2012, 1/31/2015
2.4	Park and Recreation System Master Plan	Brenda Mercado			6/30/2012, 1/31/2015
2.5	Strategic Plan	Brenda Mercado	A	1/31/2012, 1/31/2013, 1/31/2014, 6/30/2015, 1/31/2016	
3.4.2	Community Relations Plan	Rachel Hall			6/30/2012, 1/31/2015
3.4.3	Marketing Plan	Rachel Hall			6/30/2012, 1/31/2015
3.6	Records Management Policy and Procedures	Rachel Hall			6/30/2012, 1/31/2015
3.6.1	Records Disaster Mitigation and Recovery Plan and Procedures	Rachel Hall			6/30/2012, 1/31/2015
4.1	Personnel Policies and Procedures Manual	Norda Margul			6/30/2012, 1/31/2015
4.1.2	Recruitment Process	Norda Margul			6/30/2012, 1/31/2015
4.1.8	Compensation Plan	Norda Margul			6/30/2012, 1/31/2015
4.3	Job Analyses for Job Descriptions	Norda Margul			6/30/2012, 1/31/2015
4.5	Workforce Health and Wellness Program	Norda Margul			6/30/2012, 1/31/2015
4.6.1	Employee Training and Development Program	Norda Margul			6/30/2012, 1/31/2015
5.1.1	Comprehensive Revenue Policy	Angie Yaffe			6/30/2012, 1/31/2015
6.1	Recreation Programming Plan	Danielle Bennett			6/30/2012, 1/31/2015
6.2	Program Objectives	Danielle Bennett			6/30/2012, 1/31/2015
6.4	Community Education for Leisure Process	Danielle Bennett			6/30/2012, 1/31/2015
7.1	Parkland Acquisition Procedures	Dan McNamara			6/30/2012, 1/31/2015
7.2	Area and Facilities Development Policies and Procedures	Dan McNamara			6/30/2012, 1/31/2015
7.5	Maintenance and Operations Management Standards	Dan McNamara			6/30/2012, 1/31/2015
7.5.1	Facility Legal Requirements	Dan McNamara	A	1/31/2012, 1/31/2013, 1/31/2014, 1/31/2015, 1/31/2016	
7.9.1	Recycling and/or Zero Waste Plan	Dan McNamara			6/30/2012, 1/31/2015
8.5	General Security Plan	John Marshall			6/30/2012, 1/31/2015
8.6.2	Emergency Risk Communications Plan	John Marshall			6/30/2012, 1/31/2015
9.1	Risk Management Policy	John Marshall	A	1/31/2012, 1/31/2013, 1/31/2014, 1/31/2015, 1/31/2016	
10.4	Needs Assessment	Adam Winkler			6/30/2012, 1/31/2015
10.5.1	Recreation and Leisure Trends Analysis	Adam Winkler			6/30/2012, 1/31/2015

P= Periodic Review, every 2.5 years  
 A= Annual Review, once a year  
 R= Regular Review, once a year

Review of Section 1.0 – New Standards	
1.2 Periodic Timetable for Review of Documents	
<input type="checkbox"/>	<p>□ <b>Suggested evidence of compliance:</b> Provide the agency review schedule for the document, program, policy or procedure referenced in the enumerated standards.</p>

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Review of Section 1.0 – New Standards	
1.2.1 Document Approval Authority	
<input type="checkbox"/>	<p>□ <b>Standard:</b> All documents designated for approval by the appropriate approving authority shall be approved or adopted in a manner consistent with the agency process and procedure for adoption of policies, rules, regulations, and operational procedures, except that the agency budget and park and recreation system master plan must be adopted or approved by the entity responsible for policy-making.</p>

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Review of Section 1.0 – New Standards	
1.2.1 Document Approval Authority	
<input type="checkbox"/>	<p><b>Standards with an adoption or approval requirement are:</b></p> <ul style="list-style-type: none"> <li>□ 1.5 Vision</li> <li>□ 2.3.1 Community Comprehensive Plan with Park and Recreation Component</li> <li>□ 2.4 Park and Recreation System Master Plan</li> <li>□ 2.5 Strategic Plan</li> <li>□ 2.10 ADA Transition Plan</li> <li>□ 3.4 Public Information Policy and Procedure</li> <li>□ 4.4.1 Leadership Succession Procedure</li> <li>□ 5.4 Annual or Biennial Budget</li> <li>□ 8.1 Codes, Laws, and Ordinances</li> <li>□ 9.1 Risk Management Policy</li> <li>□ 9.1.1 Risk Management Plan and Procedures</li> </ul>

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## Review of Section 1.0 – New Standards

### 1.2.1 Document Approval Authority

- ☐ **Suggested Evidence of Compliance:** Provide documentation that the agency budget and park and recreation system master plan have been duly adopted or approved by the entity responsible for policy-making and that other documents designated for approval by the appropriate approving authority have been approved in a manner consistent with the agency process and procedure for approval of policies, rules, regulations, and operational procedures

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## Document Approval Authority Example

CAPRA Standard	CAPRA Standard Description		
1.5	Vision		
2.3.1	Community Comprehensive Plan with Park and Recreation Component		
2.4	Park and Recreation System Master Plan		
2.5	Strategic Plan		
2.10	ADA Transition Plan		
3.4	Public Information Policy and Procedures		
4.4.1	Leadership Succession Procedure		
5.4	Annual and Biennial Budget		
8.1	Codes, Laws and Ordinances		
9.1	Risk Management Policy		
9.1.1	Risk Management Plan and Procedures		
Adoption Date	Review Date	Approving Authority	Title
		John Byrd	Director - Dept of Recreation & Parks
10/1/2012		John Byrd	Director - Dept of Recreation & Parks
		John Byrd	Director - Dept of Recreation & Parks
7/17/2014	9/14/2015	John Byrd	Director - Dept of Recreation & Parks
7/9/2015		John Byrd	Director - Dept of Recreation & Parks
		John Byrd	Director - Dept of Recreation & Parks
4/6/1981	3/1/2011	Louise Robbins	Chief Administrative Office - Office of CAO
2001	2015	John Byrd	Director - Dept of Recreation & Parks

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## Review of Section 1.0 – New Standards

### 1.5 Vision ☆

- ☐ **Standard:** The agency shall provide an adopted Vision Statement that is aspirational, far reaching, and states where the agency is going. It should be available to the approving authority, staff, and participants.
- ☐ **Suggested Evidence of Compliance:** Provide evidence of adopted Vision statement that is available to the approving authority, staff, and participants.

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### 1.5 Vision: Example



### Review of Section 1.0 – Revised Standards 1.6 – Policies, Rule and Regulations, and Operational Procedures

- **Standard:** There shall be delegation of responsibilities among approving authority, chief administrator, and staff regarding development and implementation of policies, rules, regulations, and operational procedures.
- **Suggested Evidence of Compliance:** Show delegation of responsibilities among approving authority, chief administrator, and staff regarding development and implementation of policies, rules, regulations, and operational procedures.

*Note: This section was revised by combining former 1.1.3- Responsibilities of Approving Authority, Chief Administrator, and Staff, previous 1.4 – Policies, Rules and Regulations, and 3.2 – Operational Procedures, Administrative Policies and Procedures.*

### Review of Section 1.0

#### 14 Standards

- 6 fundamental standards
  - Authority
  - Mission
  - Agency Goals & Objectives
  - Vision (NEW & fundamental standard)
  - Administrative Policies & Procedures (formerly Policy Manual)
  - Agency Relationships
- 3 New Standards
  - 1.2 Periodic Timetable for Review of Documents
  - 1.2.1 Document Approval Authority
  - 1.5 - Vision
- Revised Standards
  - 1.6 Policies, Rules, Regulations and Operational Procedures- Comprised of the following former standards:
    - 1.1.3 Responsibilities of Approving Authority, Chief Administrator, and Staff
    - 1.4 Policies, Rules & Regulations
    - 3.2 Operational Procedures Administrative Policies & Procedures

<b>2.0 Planning</b> <b>11 Standards: 4 Fundamental ☆, 2 New</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	2.1 – Overall Planning Function within Agency
<input type="checkbox"/>	2.2 – Involvement in Local Planning ☆
<input type="checkbox"/>	2.3 – Planning with Regional, State, and Federal Agencies
<input type="checkbox"/>	2.3.1 – Community Comprehensive Plan with Park and Recreation (New)
<input type="checkbox"/>	2.4 – Park and Recreation System Master Plan ☆
<input type="checkbox"/>	2.5 – Strategic Plan ☆
<input type="checkbox"/>	2.6 – Feasibility Studies
<input type="checkbox"/>	2.7 – Site Plans
<input type="checkbox"/>	2.8 – Historical and Cultural Resource Management Plans
<input type="checkbox"/>	2.9 – Community Involvement ☆
<input type="checkbox"/>	2.10 – ADA Transition Plan (New)

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<b>Review of Section 2.0 – New Standards</b> <b>2.3.1 – Community Comprehensive Plan with Park and Recreation Component</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	<b>Standard:</b> The jurisdiction with land use authority within which the agency operates shall have a comprehensive plan adopted by the governing authority that dictates public policy in terms of transportation, utilities, public facilities, land use, recreation, and housing. In some jurisdictions the comprehensive plan is called the general plan or the land use plan. Zoning for the jurisdiction is based upon the comprehensive plan. To meet this standard, the comprehensive plan shall have a park and/or recreation component that discusses how the jurisdiction intends to meet the needs for parkland and public recreation facilities in concert with other land use priorities.
<input type="checkbox"/>	<b>Suggested Evidence of Compliance:</b> Provide the current plan, with date of official approval.

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<b>Review of Section 2.0 – New Standards</b> <b>2.10 – ADA Transition Plan</b>	
<input type="checkbox"/>	
<input type="checkbox"/>	<b>Standard:</b> The agency shall develop and adopt a phased plan for the removal of barriers at existing recreation facilities, parks, and amenities owned or operated by the agency, pursuant to the requirements of the US Department of Justice Title II regulation issued September 14, 2010 and effective March 15, 2011.
<input type="checkbox"/>	<b>Suggested Evidence of Compliance:</b> Submit minutes of the approving authority meeting approving the transition plan, or a copy of the plan noting the dates and times when plan tasks were completed.

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ADA Plan Resource	
<input type="checkbox"/>	<p>□ ADA Plan must include:</p> <ul style="list-style-type: none"> <li>▣ Description of every barrier at every site</li> <li>▣ Description of how every barrier will be removed</li> <li>▣ Person responsible for the barrier removal</li> <li>▣ Date at which barrier occurs</li> <li>▣ Smart Practice to add cost reference</li>   <li>▣ Contact consultants if you need more specifics</li> </ul>

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Review of Section 2.0 – Revised Standard 2.4 – Park & Recreation System Master Plan (formerly 2.4 Comprehensive Plan)	
<input type="checkbox"/>	<p>□ <b>Standard:</b> The agency shall have a comprehensive park and recreation system plan that provides recommendations for provision of facilities, programs and services; parkland acquisition and development; maintenance and operations; and administration and management. The plan shall be officially adopted by the policy-making body, updated periodically and linked with a capital improvement budget and a phased development program. The system master plan shall implement policies adopted in the comprehensive plan for the jurisdiction. Interested and affected agencies, organizations, and groups shall be engaged in the planning process.</p>

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Review of Section 2.0 – Revised Standard 2.4 – Park & Recreation System Master Plan (formerly 2.4 Comprehensive Plan)	
<input type="checkbox"/>	<p>□ <b>Suggested Evidence of Compliance:</b> Provide the current plan with documentation of official approval; describe update process; and describe a phased implementation program with linkage to the agency's capital improvement budget. The system master plan shall include:</p> <ul style="list-style-type: none"> <li>a. Agency mission (1.4);</li> <li>b. Agency objectives (1.4.1);</li> <li>c. Recreation and leisure trends analysis (10.5.1);</li> <li>d. Needs assessment (10.4);</li> <li>e. Community inventory (10.5.2); and</li> <li>f. Level of service standards (10.3.1).</li> </ul> <p><i>Note: In tandem with new standard 2.3.1 – Community Comprehensive Plan with Park and Recreation Component, the distinction between a Comprehensive Land Use or General Plan for the jurisdiction and a Parks and Recreation System Master Plan is clarified.</i></p>

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## Review of Section 2.0 – Revised Standard 2.8 – Historical and Cultural Resource Management Plans

- **Standard:** Historical and cultural plans include an inventory of historical, cultural resources and strategies for how they will be managed. These resources may be addressed as part of the jurisdiction's comprehensive plan or the agency's park and recreation system master plan.
- **Suggested Evidence of Compliance:** Provide the historical and cultural plan(s).

*Note: Formerly 2.8 – Historical, Cultural and Natural Resource Management Plan. The Natural Resources Management Plan was taken out of the Suggested Evidence of Compliance.*

## Self assessment Responses

### 2.2 Investment in Local Planning

Members of the Parks, Recreation and Cultural Resources Department are involved in a number of local planning efforts. Various department staff members provide leadership to Town committees involving the planning of parks and recreation programs, facilities and events. A matrix located in the File outlines the roles of PRCR Staff on committees and boards involving parks and recreation-related planning efforts.

The Parks, Recreation and Cultural Resources Director attends annual Town Council retreats to participate in comprehensive and strategic planning workshops. The Council discusses future planning of facilities and programs. The Director regularly presents parks and recreational project information to the Town Council for review and consideration such as the Parks and Recreation Road Project Update. Documentation from recent meetings may be found in the File. The department provides leadership to the Parks, Recreation Advisory Committee and the Senior Advisory Committee, who provide recommendations to the Town Council on recreation services, facilities and fee policies, demonstrated in minutes of Indoor Recreation Center Building Committee located in the File. Also, the Director meets yearly with Town Administration to review and update parks and recreation related capital improvement plans as a part of the annual budget process.

The Director and Assistant Director maintain regular communications with programming partners of the Town to discuss community recreation needs. Recently, department staff met with programming partners to discuss project planning for new concessions buildings and ball field dugout covers. Documentation from recent meetings may be found in the File. Department staff works with Revitalization Association on strategic planning efforts, such as the new Indoor Recreation Center to gain feedback from board members on the exterior design of the facility, since it will be located in the downtown area. Documentation from recent meetings may be found in the File.

The Planning Department and Parks, Recreation and Cultural Resources Department work cooperatively on plans for park space in proposed developments. Article V, Section 6.6, of the Unified Development Ordinance addresses fee-in-lieu requirements for recreational areas and facilities. Town Council may establish a fund into which payments from developers or property owners may be deposited for the purpose of providing recreational areas or facilities and from which appropriations shall be made exclusively for the purpose of acquiring or improving recreational areas or facilities that are reasonably expected to benefit or serve the residents of the development generating such funds. Fee in lieu ordinance is found in the File.

List of Evidence of Compliance  
2.2-1 Staff Matrix of Planning Involvement PRCR  
2.2-2 Town Council Planning Retreat  
2.2-3 Town Council Work Session Minutes Jan 2015 - Parks Board Update  
2.2-4 PRCR Advisory Committee Meeting Minutes Nov 2014  
2.2-5 Senior Advisory Committee Minutes May 2014  
2.2-6 IRC Planning Meeting with Advisory Committee Chairs  
2.2-7 IRC Planning Meeting with Revitalization Association  
2.2-8 Program Partners Project Meeting Minutes  
2.2-9 Fee in lieu of recreational facilities



## Visitation Report Responses

- 2.4** Since 1974, the Agency developed and managed all public parks and recreation facilities within the Agency. In January 2009, the Agency Area General Plan incorporated by reference the Parks, Recreation, and Green Spaces Comprehensive Plan as the guiding document for recreation facility standards, and future community park and recreation planning.

The Agency 1980 introductory comprehensive plan has undergone review and revision in each of the following years: 1986, 1995, 1998, 2001, 2005 and 2012. The Board of Directors adopted the 2012 update by Resolution No. 351 on February 5, 2013.

- 2.8** The Agency provided copies of plans for the management of historical and cultural resources, including for downtown agency, another agency, as well as the County.

- 2.10** The Agency provided their current ADA Transition Plan, which was approved by the Assistant Town Manager on 4-8-15. The plan includes a list of ADA improvements completed as well as two facilities currently scheduled for improvement at a future date.



## Review of Section 2.0

### 11 Standards

- 4 fundamental standards
  - Involvement in Local Planning
  - Park and Recreation System Master Plan (Revised & Renamed; formerly Comprehensive Plan)
  - Strategic Plan
  - Community Involvement
- 2 New Standards
  - 2.3.1 – Community Comprehensive Plan with Park and Recreation
  - 2.10 – ADA Transition Plan
- Renamed and Revised Standard
  - 2.4 Park & Recreation System Master Plan was formerly Comprehensive Plan – In tandem with new standard 2.2.1 Community Comprehensive Plan with Park and Recreation Component, the distinction between a Comprehensive Land Use or General Plan for the jurisdiction and a Parks and Recreation Systems Master Plan is Clarified.
  - 2.8 Historical and Cultural Resource Management Plans was previously 2.8 – Historical, Cultural and Natural Resource Management Plan. The Natural Resource Management Plan was taken out of the Evidence of Compliance.

## 3.0 Organization and Administration

### 13 Standards: 4 Fundamental ☆

- 3.1 – Organizational Structure ☆
- 3.2 – Administrative Offices
  - 3.2.1 – Support Services
- 3.3 – Internal Communication ☆
- 3.4 – Public Information Policy and Procedure ☆
  - 3.4.1 – Public Information and Community Relations Responsibility
  - 3.4.2 – Community Relations Plan
  - 3.4.3 – Marketing Plan
    - 3.4.3.1 – Marketing Responsibility
- 3.5 – Utilization of Technology
  - 3.5.1 – Management Information Systems ☆
- 3.6 – Records Management Policy and Procedures
  - 3.6.1 – Records Disaster Mitigation and Recovery Plan and Procedures

## Review of Section 3.0 – Revised Standard

### 3.1 – Organizational Structure

- **Standard:** The agency shall establish a staff organizational structure that reflects its methods of operation, its relationship to the community, and the relationships among the different organization components.
- **Suggested Evidence of Compliance:** Provide a chart showing the agency's organizational structure, interrelationships among organizational components, and the function of each component. Organizational components are the major subdivisions of the organization, e.g. departments and divisions. Indicate how this information is made available to staff and the public.

*Note: Previous 3.1- Organizational Structure and 3.1.1 – Statement of Purpose for Each Organizational Component were combined to create new 3.1-Organizational Structure*

Review of Section 3.0 – Revised Standard  
3.2 – Administrative Offices (revised & renumbered)

- ☐ **Standard:** The agency administrative offices shall be accessible to the public and staff. There shall be administrative, meeting and storage space, and equipment adequate to perform the agency's functions and responsibilities.
- ☐ **Suggested Evidence of Compliance:** Provide documentation that describes the types of office space and administrative equipment used by the agency and how access is provided to the staff and the public.

*Note: This Standard (Previously 3.2.1 now requires administrative offices to be accessible to the public)*

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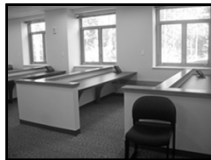
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Review of Section 3.0 – Revised Standard  
3.2 – Administrative Offices (revised & renumbered)

- ☐ **Example of Evidence of Compliance**  
Photos of Office Space & Accessibility




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Review of Section 3.0 – Revised Standard  
3.3 – Internal Communication

- ☐ **Standard:** A communication system shall be established to ensure the accurate and timely transfer of internal information among staff.
- ☐ **Suggested Evidence of Compliance:** Provide a communication matrix illustrating how internal communications are managed by the agency.

*Note: Former 3.3.-Communication System was revised. External Communications was moved to 3.4 – Public Information Policy and Procedure.*

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## Review of Section 3.0 – Revised Standard

### 3.4 – Public Information Policy and Procedure

- **Standard:** The agency shall have approved policies that govern what information shall be released, when it should be released, and by whom it should be released and that demonstrate the agency's commitment to inform the community and news media of events involving the agency.
- **Suggested Evidence of Compliance:** Provide the written statement of policy and procedure, indicating approval by the proper authority.

*Note: External Communications moved from 3.3 – Communication System to be included in this standard.*

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## Review of Section 3.0 – Revised Standard

### 3.4.1 – Public Information & Community Relations Responsibility

- **Standard:** A specific position in the agency shall be designated to direct the public information and community relations functions. The position serves as a point of control for information dissemination to the community and the media. The intent of the standard is to establish the authority and responsibility for developing and coordinating the agency's community relations function in an identifiable position.
- **Suggested Evidence of Compliance:** Provide the position description that reflects responsibilities for public information and community relations functions.

*Note: This Standard was revised (Combined previously Public Information [3.4.1] and Public Information & Community Relations Responsibility [3.4.1.1.]) and requires policy and procedure instead of statement.*

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## Self assessment Responses

### 3.4.3 Marketing Plan

Parks, Recreation and Cultural Resources Department has developed a marketing plan for events, programs and activities to increase awareness and attendance. The plan outlines the history of the department; its structure; an environmental analysis that explores forces like politics, competition and economics; the department's target markets; a SWOT (strengths/weaknesses/opportunities/threats) analysis; marketing objectives; and media contact information. This document is meant to guide the department in the strategic and operational foundations of marketing. A copy of the plan is in the File.

The Marketing and Events Coordinator has also developed timelines for events and other projects. These are tailored to the unique attributes of each event and are updated regularly. The timeline for the Groundhog Day event is in the File as an example of the linear process that is used for planning, implementing and marketing Town events.

List of Evidence of Compliance  
3.4.3-1 PRCR Marketing Plan  
3.4.3-2 Groundhog Day Master Timeline




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## Visitation Report Responses

- 3.1** A complete staff organization chart of the management staff was provided.
- 3.2** The District provided documentation that showed office space allocation. In addition, we were able to see the administrative area to document that the offices are accessible to the public and staff and are adequately equipped.
- 3.4** The agency provided a copy of their Strategic & Crisis Communication Plan that details the type of information, methods of release and distribution, as well as staff responsibilities concerning regular communication with the public as well as communication during a crisis. Meeting minutes from the 12-3-12 Board meeting showed approval by the Town Council of the most recent updated version of the plan.
- 3.4.1** The agency provided a copy of the Communication Manager's job description, which includes a list of responsibilities that include public information and community relations.



## Review of Section 3.0

### 13 Standards

- 4 fundamental standards
  - Organization Structure
  - Internal Communication
  - Public Information Policy and Procedure
  - Management of Information Systems
- Renamed and Revised Standard
  - 3.1 Organization Structure – formerly Organizational Structure and 3.1.1 Statement of Purpose for Each Organizational Component.
  - 3.2 Administrative Offices – formerly 3.2.1 now requires administrative offices to be accessible to the public
  - 3.4 Public Information Policy and Procedure – formerly Process for Public Information, Community Relations, Marketing revised to include External Communication (previously part of former 3.3 Communication) and becomes fundamental standard.
  - 3.4.1 Public Information and Community Relations Policy (3.4.1 Public Information Statement and 3.4.1.1 Public Information and Community Relations Responsibility combined to create new 3.4.1) requires policy and procedure instead of a statement.
  - 3.5 Utilization of Technology (formerly 3.5.1 Application of Technology) shifts emphasis to new uses of technology.

## 4.0 Human Resources

### 30 Standards: 7 Fundamental ☆, 2 New

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|---|---|
| <ul style="list-style-type: none"> <li>□ 4.1 – Personnel Policies and Procedures ☆</li> <li> <ul style="list-style-type: none"> <li>■ 4.1.1 – Code of Ethics</li> <li> <ul style="list-style-type: none"> <li>■ 4.1.1.1 – Staff Acceptance of Gifts and Gratuities (New)</li> </ul> </li> <li>■ 4.1.2 – Recruitment Process ☆</li> <li>■ 4.1.3 – Equal Opportunity Employment and Workforce Diversity ☆</li> <li>■ 4.1.4 – Selection Process</li> <li>■ 4.1.5 – Background Investigation</li> <li>■ 4.1.6 – Employee Benefits</li> <li>■ 4.1.7 – Supervision</li> <li>■ 4.1.8 – Compensation Plan</li> <li>■ 4.1.9 – Performance Evaluation</li> <li>■ 4.1.10 – Promotion</li> <li>■ 4.1.11 – Disciplinary System</li> <li>■ 4.1.12 – Grievance Procedures</li> <li>■ 4.1.13 – Termination and End of Employment</li> </ul> </li> <li>□ 4.2 – Staff Qualifications</li> </ul> | <ul style="list-style-type: none"> <li>□ 4.3 – Job Analyses for Job Descriptions ☆</li> <li>□ 4.4 – Chief Administrator ☆</li> <li> <ul style="list-style-type: none"> <li>■ 4.4.1 – Leadership Succession Procedure (New)</li> </ul> </li> <li>□ 4.5 – Workforce Health and Wellness Program</li> <li>□ 4.6 – Orientation Program</li> <li> <ul style="list-style-type: none"> <li>■ 4.6.1 – Employee Training and Development Program</li> <li>■ 4.6.2 – Professional Certification and Organization Membership</li> </ul> </li> <li>□ 4.7 – Volunteer Management</li> <li> <ul style="list-style-type: none"> <li>■ 4.7.1 – Use of Volunteers</li> <li>■ 4.7.2 – Volunteer Recruitment, Selection, Orientation, Training, and Retention</li> <li>■ 4.7.3 – Supervision and Evaluation of Volunteers</li> <li>■ 4.7.4 – Recognition of Volunteers</li> <li>■ 4.7.5 – Liability Coverage for Volunteers</li> </ul> </li> <li>□ 4.8 – Consultants and Contract Employees</li> </ul> |
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Review of Section 4.0 – New Standards

4.1.1.1 – Staff Acceptance of Gifts and Gratuities

☐ **Standard:** The agency shall have an established policy for the acceptance of gifts and gratuities by staff members.

☐ **Suggested Evidence of Compliance:** Provide the policy on acceptance of gifts and gratuities by staff members.

☐ **ACTIVITY.....**Review the Document Provided as EOC from an Agency and does this meet the standard? (See next slide)

☐ Discuss within small groups

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Review of Section 4.0 – New Standards

4.1.1.1 – Staff Acceptance of Gifts and Gratuities

**4.1.1.1 Staff Acceptance of Gifts and Gratuities**  
*Standard:* The agency shall have an established policy for the acceptance of gifts and gratuities by staff members.

*Evidence of Compliance:*  
The Howard County Department of Recreation and Parks accepts gifts and contributions to support facilities and programs. The Department has developed a Memorial and Gift brochure. The Howard County Charter and the Howard County Code contain policies related to Ethics and Conflict of Interest and Gifts.

Howard County Ethics Code for contingent (non-beneficial) and part-time beneficial employees are subject to the Howard County Ethics Code. In general, employees are prohibited from soliciting and accepting any gift or compensation from a person whose interests are different from the public interest that could be affected by the employee's actions. Unsolicited gifts of nominal value that do not exceed \$20 in cost or total value of informational value are permitted.

For the purpose of the Howard County Public Ethics Law, "gift" does not include ceremonial gifts or awards of insignificant monetary value or unsolicited gifts of nominal value or trivial items of informational value. Employees who receive unsolicited gifts from anyone doing business with or intending to do business with the County should reject or return such gifts and immediately report the situation to their immediate supervisor. If a gift is accepted in excess of \$20 in value (or a series of gifts totaling \$100 or more) from anyone doing business with the County, the nature of the gift, its value and the donor's identity must be reported to the Howard County Ethics Commission.

*Suggested Evidence of Compliance:* Provide the policy on acceptance of gifts and gratuities by staff members.

*Evidence of Compliance on file:*

- Howard County Public Law
- Conflict of Interest and Impersonal Influence, text from the Howard County Employee Manual
- Code of Ethics, text from the Howard County Part Time Staff Manual
- Code of Ethics, text from the Howard County Summer Camp Manual
- Code of Ethics, text from the Howard County Summer Camp Contractor Manual

*Self Review: May*

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Review of Section 4.0 – New Standards

4.4.1 – Leadership Succession Procedure

☐ **Standard:** The agency shall have an established procedure to ensure that leadership is available when the agency's chief administrator is incapacitated, off duty, out of town, or otherwise unable to act.

☐ **Suggested Evidence of Compliance:** Provide the written procedure, such as continuity plan, which indicates approval by the proper authority.

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## Review of Section 4.0 – Revised Standard

### 4.1.7 – Supervision

- **Standard:** There shall be constructive and effective supervision of all personnel to help them grow professionally and improve programs and services. Supervision is an on-going and systematic process that is helpful for the well-being of the individual and agency. Important characteristics of effective supervision are the ability to communicate expectations, delegate authority commensurate with the assigned tasks, provide feedback, and motivate. There should be supervisory processes, procedures, or tools that highlight staff orientation, staff coaching, mentoring and training, performance review, and human resource policies affecting supervision of staff such as those dealing with harassment and discipline.
- **Suggested Evidence of Compliance:** Provide examples of processes, procedures, or tools used to assure constructive and effective employee supervision.

*Note: Suggested Evidence of Compliance changed to ask for examples rather than providing a narrative as in the previous section.*

## Review of Section 4.0 – Revised Standard

### 4.6.1 – Employee Training and Development Program

- **Standard:** There shall be a program of employee development which is available to employees throughout the agency. It should be based on needs of individual employees, future organizational needs, and is evaluated and updated periodically. The program must notify personnel of available and/or required training, maintain training records, and assure that required training programs are attended. The program should incorporate in-service training and succession planning to ensure the continued effective performance of the organization after the departure of key staff.
- **Suggested Evidence of Compliance:** Describe the scope and components of the employee development and training program, provide an outline of training offered (mandatory and discretionary), and provide lists of participants for the prior calendar year, and last review.

*Note: Former 4.6.1 – In-Service Training Function, 4.6.2 – Employee Development, and 4.6.3 – Succession Planning merged to form this Standard.*

## Example: Training and Development Program



**State:** Maryland  
**County:** Howard  
**Department:** Recreation & Parks  
**Division:** Recreation & Parks  
**Unit:** Recreation & Parks  
**Position:** Recreation & Parks  
**Job Title:** Recreation & Parks  
**Job Description:** Recreation & Parks  
**Job Duties:** Recreation & Parks  
**Job Responsibilities:** Recreation & Parks  
**Job Requirements:** Recreation & Parks  
**Job Qualifications:** Recreation & Parks  
**Job Experience:** Recreation & Parks  
**Job Education:** Recreation & Parks  
**Job Training:** Recreation & Parks  
**Job Certification:** Recreation & Parks  
**Job License:** Recreation & Parks  
**Job Salary:** Recreation & Parks  
**Job Benefits:** Recreation & Parks  
**Job Contact:** Recreation & Parks  
**Job Address:** Recreation & Parks  
**Job Phone:** Recreation & Parks  
**Job Email:** Recreation & Parks  
**Job Website:** Recreation & Parks  
**Job Social Media:** Recreation & Parks  
**Job Other:** Recreation & Parks

**Howard County**  
**RECREATION + PARKS**

**Employee Training and Development Plan**  
 FY2016

**Name:** John R. Boyd

**Date Approved:**

## Review of Section 4.0 – Revised Standard

### 4.6.2 – Professional Certification and Organization Membership

- **Standard:** Professional staff shall be active members of their professional organization(s) and pursue professional certifications within their respective disciplines. "Active" means more than holding membership, including attendance at meetings, making presentations, participating in committee work, holding elected and appointed positions, and participation in educational opportunities.
- **Suggested Evidence of Compliance:** Provide a list of staff with professional certifications and also provide a list of staff that have actively participated in a professional organization during the prior calendar year, indicating the nature of participation. The following are examples for park and recreation professionals e.g. Certified Park and Recreation Professional (CPRP), Certified Park and Recreation Executive (CPRE), Certified Therapeutic Recreation Specialist (CTRS) for park and recreation professionals.
- **Note:** This standard was previously 4.6.4 Professional Organization Membership. It was revised as 4.6.2 – Professional Certification and Organization Membership to include professional certification.

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## Self assessment Responses

### 4.1.1 Code of Ethics

The Town has an established statement of ethical principles that provide a clear understanding of ethical responsibility and this statement can be found on pages 14 and 15 in PART V, (Sections 4 and 5) of the Personnel Policies Manual and is located in the File.

The Parks, Recreation and Cultural Resources Department employees are held to high standards of conduct and the expectations are listed and explained in the Parks, Recreation and Cultural Resources Department's Mission Statement, Values and Code of Ethics. A copy of the Code of Ethics can be found in the File.

List of Evidence of Compliance

4.1.1-1 Code of Ethics – HR Personnel Policy

4.1.1-2 PRCR Mission Statement Values and Code of Ethics




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## Visitation Report Responses

**4.1.1** Evidence provided and examined included The Agency statement of ethical principles with a clear understanding of ethical responsibility found on pages 14 and 15 in PART V, (Sections 4 and 5) of the Personnel Policies Manual.

**4.1.1.1** Evidence of compliance provided by the Oregon Revised Statute (ORS) 244 that was last updated in their records on December 1, 2014. It is covered in their Code of Conduct that was last amended on May 16, 2012.

**4.6.2** Agency tracks licenses and certificates using two methods – HRIS Self-Reporting and a data base tracking log. Spreadsheet was added to evidence during visits showing certification and active participation from agency staff in a professional organization, primarily MRPA and NRPA.

**4.7.1** A lengthy list of volunteer opportunities with position responsibilities were provided and reviewed




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## Review of Section 4.0

### 30 Standards

- 7 fundamental standards
  - Personnel Policies and Procedures Manual
  - Code of Ethics
  - Equal Opportunity Employment and Workforce Diversity
  - Background Investigation (changed to fundamental)
  - Staff Qualifications
  - Job Analysis for Job Descriptions
  - Chief Administrator
- 2 New Standards
  - 4.1.1.1 – Staff Acceptance of Gifts and Gratuities
  - 4.4.1 – Leadership Succession Procedures
- Renamed and Revised Standard
  - 4.1.7 – Supervisor was modified so that examples of processes, procedures or tools used to assure constructive and effective employee supervision were added to the Evidence of Compliance. This standard previously only required a narrative of the systematic process for supervising personnel.
  - 4.4 – Chief Administrator was modified to strengthen qualifications
  - 4.6.1 – In Service Training Function – former 4.6.1 – In Service Training Function, 4.6.2 – Employee Development and 4.6.3 – Succession Planning merged to form this standard.
  - 4.6.2 – Professional Certification and Organization Membership – Former 4.6.4 – Professional Organization Membership revised to this standard to include professional certification.

## 5.0 Financial Management

### 20 Standards: 7 Fundamental ☆, 0 New

- 5.1 – Fiscal Policy ☆
  - 5.1.1 – Comprehensive Revenue Policy ☆
  - 5.1.2 – Agency Acceptance of Gifts and Donations
  - 5.1.3 – Grants Procedures
  - 5.1.4 – Private, Corporate, and Non-Profit Support Procedures
- 5.2 – Fiscal Management Procedures (new fundamental standard) ☆
  - 5.2.1 – Authority and Responsibility for Fiscal Management
  - 5.2.2 – Purchasing Procedures ☆
    - 5.2.2.1 – Emergency Purchase Procedures
- 5.3 – Accounting System
  - 5.3.1 – Financial Status Reports
  - 5.3.2 – Position Authorization Procedures
  - 5.3.3 – Fiscal Control and Monitoring Procedures
  - 5.3.4 – Independent Audit
- 5.4 – Annual or Biennial Budget
  - 5.4.1 – Budget Development Guidelines
  - 5.4.2 – Budget Recommendations
- 5.5 – Budget Control Procedures
  - 5.5.1 – Supplemental/Emergency Appropriations Procedures
  - 5.5.2 – Inventory and Fixed Assets Control

## Review of Changes to Section 5.0 – Revised Standard

### 5.1.1 – Comprehensive Revenue Policy (Renamed & Combined)

- **Standard:** There shall be an established revenue policy that is periodically updated regarding fees and charges for services and the strategies and methodologies for determining fees and charges and levels of cost recovery.
- **Suggested Evidence of Compliance:** Provide the policy on fees and charges, the current fee schedules or cost-recovery procedures, and the most recent review or update.
- **Note:** 5.1.1 – Fees and Charges merged with 6.1.6 – Fee-Based Programs and Services into new 5.1.1 Comprehensive Revenue Policy that accommodates cost recovery approaches and requires periodic review.

## 5.1 Fiscal Policy

- **Standard:** Fiscal policies setting guidelines for management and control of revenues, expenditures, and investment of funds shall be set forth clearly in writing, and the legal authority must be clearly established.
- **Suggested Evidence of Compliance:** Provide fiscal policies and legal authority.

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### 5.1.1 Comprehensive Revenue Policy

- **Standard:** There shall be an established revenue policy that is periodically updated regarding fees and charges for services and the strategies and methodologies for determining fees and charges and levels of cost recovery.
- **Suggested Evidence of Compliance:** Provide the policy on fees and charges, the current fee schedules or cost-recovery procedures, and the most recent review or update.

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### 5.2.2 Purchasing Procedures

- **Standard:** Agencies shall have established procedures for the requisition and purchase of agency equipment, supplies, and services.
- **Suggested Evidence of Compliance:** Provide the procedures for the requisition and purchase of agency equipment, supplies, and services, including:
  - a. Bidding procedures;
  - b. Criteria for the selection of vendors and bidders; and
  - c. Procedures for disbursement of petty cash and issuance; and
  - d. Use of procurement cards, if applicable.

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Self assessment Responses	
<p>The Park &amp; Recreation District <u>Revenue Policy</u>, adopted by the Board of Directors, provides the guidance to maximize and diversify the District's revenue base to generate sufficient revenue to support and maintain essential services, and prevent undue reliance on any one source of revenue. The Revenue Policy defines the District's revenue sources including property tax revenue, fees and charges, system development charges (SDCs), grants, contributions and one-time revenues.</p> <p>The <u>Fees &amp; Charges Policy</u> adopted by the Board of Directors defines fees and charges for District programs, facilities and other services. A "Tax Use Model" is applied to determine community vs. individual benefit levels provided by each service. This information feeds into the <u>Cost Recovery/Subsidy Allocation</u> that defines the District's expectation of cost recovery by service or program based upon public benefit levels, resulting pricing levels and expected subsidy percentages. The Board of Directors annually review and approve the level of tax support for each category of services and determine the percentage of service cost to be recovered through user fees. The <u>Recreation Programs &amp; Services Development and Delivery Process Manual</u> include operational guidance for staff in evaluating fees and charges for their programs.</p> <p>System Development Charges (SDC) fees are assessed by the District for residential development within the District's boundary. SDC fees are used to maintain the current level of park and recreation service as the population increases. <u>Oregon Revised Statutes 223.207, 223.314</u> provide a uniform framework for the imposition of SDC fees by local governments. The Board of Directors has adopted the BPRD SDC Methodology by <u>Resolution No. 311 – Adopting 2009 Park SDC Methodology and BPRD Ordinance No. 8 – System Development Charges</u> to comply with the prescribed framework of the state statutes. The <u>Park SDC Fee Schedule 2014-15</u> illustrates the current SDC fee by property type.</p> <p>Agency Evidence of Compliance:</p> <ol style="list-style-type: none"> <li>1. <u>Revenue Policy</u></li> <li>2. <u>Fees &amp; Charges Policy</u></li> <li>3. <u>Cost Recovery/Subsidy Allocation</u></li> <li>4. <u>Recreation Programs &amp; Services Development and Delivery Process Manual</u></li> <li>5. <u>ORS 223.207 – 223.314</u></li> <li>6. <u>Resolution No. 311 – Adopting 2009 Park SDC Methodology</u></li> <li>7. <u>System Development Charges - Ordinance No. 8</u></li> <li>8. <u>Park SDC Fee Schedule 2014-15</u></li> </ol>	

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Visitation Report Responses	
<p><b>5.1.1</b> The District provided a Revenue Policy that brings together the different methods they collect revenue. On March 3, 2009 the District Board approved a Methodology for Calculating Park System Development Charges and System Development Charges. On November 11, 2012 the District Board approved a Cost Recovery and Subsidy Allocation Model for programming. The Revenue Policy approved on November 18, 2014 showed a review of previously approved revenue plans and set out the review period for them.</p> <p><b>5.1.3</b> The Grants Policy and Procedures, dated 1-1-15, along with the two grants received in the last 5 years were reviewed.</p> <p><b>5.2.2.1</b> Agency Procurement Procedures Manual – Section 13 was provided as evidence of how to process emergency purchases.</p>	

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Review of Section 5.0	
<p><b>20 Standards</b></p> <p><input type="checkbox"/> 7 fundamental standards</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Fiscal Policy</li> <li><input type="checkbox"/> Comprehensive Revenue Policy</li> <li><input type="checkbox"/> Fiscal Management Procedures</li> <li><input type="checkbox"/> Purchasing Procedures (new fundamental)</li> <li><input type="checkbox"/> Accounting System</li> <li><input type="checkbox"/> Independent Audit</li> <li><input type="checkbox"/> Annual or Biennial Budget</li> </ul> <p><input type="checkbox"/> Renamed and Revised Standard</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 5.1.1 – Comprehensive Revenue Policy was renamed and is made up of former standards 5.1.1 Fees &amp; Charges and 6.1.6 Fee-Based Programs and Services</li> <li><input type="checkbox"/> 5.3.4 – Independent Audit – Allows CAFR as evidence of compliance</li> <li><input type="checkbox"/> 5.4 – Annual or Biennial Budget – Accommodates biennial budgeting</li> </ul>	

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## 6.0 Programs and Services Management

### 13 Standards: 3 Fundamental ☆, 2 New

- ❑ 6.1 – Recreation Programming Plan ☆
  - ❑ 6.1.1 – Program and Service Determinants
  - ❑ 6.1.2 – Participant Involvement
  - ❑ 6.1.3 – Self-Directed Programs and Services
  - ❑ 6.1.4 – Leader-Directed Programs and Services
  - ❑ 6.1.5 – Facilitated Programs and Services
  - ❑ 6.1.6 – Cooperative Programming
- ❑ 6.2 – Program Objectives ☆
- ❑ 6.3 – Scope of Program Opportunities
  - ❑ 6.3.1 – Outreach to Diverse Underserved Populations ☆
- ❑ 6.4 – Community Education for Leisure Process
  - ❑ 6.4.1 – Community Health and Wellness Education and Promotion
- ❑ 6.5 – Participant and Spectator Code of Conduct

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## 6.1 Recreation Program Plan

- ❑ **Standard:** The agency shall have a recreation programming plan covering 3-5 years that is updated periodically and a current-year implementation plan. The plan shall address all programs and services of the agency's programming functions, including activity selection, type and scope of programs and outreach initiatives.
- ❑ **Suggested Evidence of Compliance:** Provide the current recreation programming plan and describe the update process. This plan shall address how the agency delivers services to persons of all ages and abilities, how it develops program offerings and it shall include the following elements:
  - ❑ Program objectives (6.2);
  - ❑ Program and service statistics (10.5);
  - ❑ Program and service determinants (6.1.1);
  - ❑ Recreation and leisure trends analysis (10.5.1); and
  - ❑ Community inventory (10.5.2).

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## Example Recreation Program Plan

Program Plan | FY2017

**Contents**

- Introduction.....2
- Conceptual Foundations of Environmental Education, Historical Education and Interpretation.....3
- Programming that Meets Constituent Needs.....4
- Community Opportunities.....7
- Department's Role in the County's Philosophy and Goals.....10
- Departmental Goals for Clients.....10
- Program Evaluations / Customer Service Surveys.....14
- Financial Assistance Procedures.....14
- Recreation Programming in Howard County.....18
- Bureau of Recreation.....20
- Bureau of Parks.....20
- Program Coordination between Recreation & Parks Bureaus.....20
- Department Program Function Assignments.....20
- Bureau of Recreation.....20
- Bureau of Parks.....42
- Guidelines for Programming at Indoor Facilities.....42
- Guidelines for Rentals of Community and Recreation Facilities.....44
- Guidelines for Rentals of Indoor Facilities.....46
- Appendix 1 - Program Matrix.....48
- Appendix 2 - Program Strategy Plan.....51
- Appendix 3 - Program Statistics.....56
- Appendix 4 - Goals and Objectives.....75

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### 6.3.1 Outreach to Diverse underserved Populations

- **Standard:** The agency shall proactively extend programs and services to residents who may be underserved in the community. To encourage participation in parks and recreation programs and services, agencies shall identify and address barriers that may limit access including physical, social and mental abilities and financial, geographic and cultural barriers. Financial barriers may be addressed through reduced fees and scholarships. Agencies should offer inclusionary support services to ensure access to programs and services for people of all abilities and socioeconomic status.
- **Suggested Evidence of Compliance:** Identify underserved populations (provide methodology and data used for this analysis), describe specific barriers within the community that limit participation and provide examples of outreach programs and services offered by the agency to meet the needs of these populations and overcome barriers to access.

### 6.4 Community Education for Leisure Process

- **Standard:** The agency shall have a process to educate the general citizenry about the use of leisure time and the outcomes, benefits, values, and positive impacts of leisure and recreation services. The process shall be periodically evaluated for effectiveness. Educating the public about leisure and recreation shall be ongoing and systematic and should be done in cooperation with the community, e.g., schools, other leisure agencies, business, industry, and commercial recreation establishments.
- **Suggested Evidence of Compliance:** Provide examples of the methods utilized by the agency to educate the community on the benefits, values, and impacts of leisure and recreation services to a diverse range of participants and non-participants. Provide the last review of effectiveness.

### Example: Community Leisure Ed Process



**COMMUNITY EDUCATION FOR LEISURE**

Standard 6.4

**Introduction**

The Howard County Department of Recreation and Parks embraces the concept of leisure education. Promoting the benefits of recreation is a important priority for this organization. The Department is constantly challenging itself to find new and creative ways of educating and involving the public with positive leisure pursuits.

Thus this plan presents an outline of the Department's efforts to educate and inform both itself and the public as a whole.


Since not all employees are formally trained in the field of recreation and parks, this document also includes leisure opportunities that are available to those staff who could benefit from a greater understanding of the profession. Why is it so important that our staff and the public have a better understanding of leisure education? Let's look at four issues that this document faces locally.

*(Excerpted from the document's body)*

- Public officials often overlook the value of recreation and parks from economic, physical, mental and social perspectives.
- The public often fails to realize the importance of supporting recreation and park facilities (park development, program funding, open space planning, preservation, etc.). This undermines the importance of the parks, and education and strongly affects these traditional services as "essential".
- The department must compete against the less desirable leisure time choices (alcohol, television, video games, etc.).
- The public needs assistance in determining their leisure participation.
- The Department of Recreation and Parks recognizes that we may not meet the leisure needs of all residents, but we can provide a resource to help persons to other agencies and leisure providers.

This plan is divided into the six components of leisure education design as determined by John Smith and William Morley's Leisure Education Process (Planning of Systems) (1990). (Smith, State College P.A. Venture Publishing, Inc. 1991).

- 1. Leisure Identification - Resources
- 2. Assessment of Self in Leisure
- 3. Self-Expression in Leisure
- 4. Involvement in Leisure Participation
- 5. Leisure Decision Information
- 6. Social Interaction



Established 2011  
Revised 2015  
Approved by John A. Ayers, Director  
June 2016

**Review of Section 6.0 – New Standards**  
**6.4.1 – Community Health and Wellness Education and Promotion**

☐ **Standard:** The agency shall have policies, procedures, or programs to educate and promote health and wellness in the community.

☐ **Suggested Evidence of Compliance:** Provide the agency's policies, procedures, or programs to educate and promote health and wellness in the community such as:

- a. Physical activity;
- b. Healthy food and beverage offerings;
- c. Nutrition education;
- d. Substance abuse prevention.

Also provide examples of implementation.

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**Review of Section 6.0 – New Standards**  
**6.5 – Participant and Spectator Code of Conduct**

☐ **Standard:** The agency shall have "code of conduct" guidelines for appropriate participant and spectator conduct at programs and events, and the agency shall proactively inform and remind staff, coaches, participants and spectators about the code of conduct.

☐ **Suggested Evident of Compliance:** Provide the code of conduct for participants and spectators and describe how program participants, coaches, and spectators are informed of the code of conduct. The agency should collaborate with affiliate groups providing training for youth and coaches to inform and educate about the participant and spectator code of conduct.

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**Review of Section 6.0 – New Standards**  
**6.5 – Participant and Spectator Code of Conduct**

☐ **Example of Evidence of Compliance: Rules of Conduct from Program Guide**

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Self assessment Responses	
<div>6.2 Program Objectives</div> <p>The Parks, Recreation and Cultural Resources Department is structured by program divisions, which the department refers to as teams. Each team within the department has specific goals and objectives that are set annually with the budget. These teams are Parks Administration, Cultural Arts and Events, Youth and Athletics, Adult and Senior and Outdoor and Adventure. While each team has its own unique and specific goals and objectives, ultimately each works toward the same departmental mission and vision. The current goals for each team are included in the File. There is a brief explanation of the responsibilities for that programming area, followed by goals, objectives, performance measures and workload indicators. Parks Administration focuses on more strategic-level goals, including departmental leadership, capital improvements and standards of quality for various services. Cultural Arts and Events puts an emphasis on building the reputation of the Performing Arts Center, the quality of programs and performances offered at the agency and offering memorable events. The Youth and Athletics team stresses providing athletic programming opportunities and quality facilities. Similarly, the Adult and Senior team's goals and objectives address facilities and programming, as well as the importance of partnerships with outside resources. The Outdoor and Adventure Team goals focus on programming and events as well as departmental marketing. Finally, the goal with Program Partners is to maximize the opportunities offered with outside agencies to ensure efficient and effective provision of services.</p> <p>List of Evidence of Compliance</p> <p>6.2-1 Parks Administration Goals and Objectives          6.2-2 Cultural Arts and Events Goals and Objectives          6.2-3 Youth and Athletics Goals and Objectives          6.2-4 Adult and Senior Goals and Objectives          6.2-5 Outdoor and Adventure Goals and Objectives</p> 	

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Visitation Report Responses	
<div>6.1 The following documents were provided as evidence of compliance with this Standard</div> <p>Agency Comprehensive Plan          Agency Comprehensive Plan          Recreation Programming Plan          Recreation Programming Plan was last updated in 2015.</p> <p>Recreation Programming Plan meets the broadest intent of the standard and the agency is encouraged to incorporate more detailed information related to program objectives, program and service statistics, program and service determinants, recreation and leisure trends analysis, and community inventory.</p> <p>6.1.2 The District demonstrates that the six (6) program and service determinants are used in providing programs and services through their Recreation Programming Plan pages 16-17. Follow up EOC provided specific examples for each of the 6 determinants.</p> <p>6.4 Evidence of compliance was shown by reports from social media postings which provided community education information on parks and recreation. The bi-annual printed program brochure was also provided. Effectiveness of efforts is reviewed based on performance measures as a part of the annual budget process.</p> 	

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Review of Section 6.0	
<div>13 Standards</div> <p><input type="checkbox"/> 3 fundamental standards</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Recreation Programming Planning</li> <li><input type="checkbox"/> Program Objectives</li> <li><input type="checkbox"/> Outreach to Diverse Underserved Populations</li> </ul> <p><input type="checkbox"/> New Standards</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> 6.4.1 – Community Health and Wellness Education and Promotion</li> <li><input type="checkbox"/> 6.5 – Participant and Spectator Code of Conduct</li> </ul>	

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## 7.0 Facility and Land Use Management

### 17 Standards: 1 Fundamental ☆, 3 New

- 7.1 – Parkland Acquisition Procedures
- 7.2 – Areas and Facilities Development Policies and Procedures
  - 7.2.1 – ADA Existing Facility and Site Access Audit
- 7.3 – Defense Against Encroachment Procedures
- 7.4 – Disposal of Lands Procedures
- 7.5 – Maintenance and Operations Management Standards ☆
  - 7.5.1 – Facility Legal Requirements
  - 7.5.2 – Preventative Maintenance Plan
- 7.6 – Fleet Management Plan
- 7.7 – Agency-Owned Equipment, Materials, Tools, and Supplies Policies and Procedures
  - 7.7.1 – Building Plans and Specifications
  - 7.7.2 – Land and Lease Records
- 7.8 – Environmental Sustainability Policy and Program
- 7.9 – Natural Resource Management Plans and Procedures
  - 7.9.1 – Recycling and/or Zero Waste Plan
  - 7.10 – Maintenance Personnel Assignment Procedures
  - 7.11 – Capital Asset Depreciation and Replacement Schedule

## Review of Section 7.0 – New Standards

### 7.2.1 – ADA Existing Facility and Site Access Audit

- **Standard:** The agency shall complete an access audit of all existing sites and facilities. Pursuant to the US Department of Justice Title II regulation at 35.105, the agency must evaluate its existing facilities and sites against the most current final and enforceable Standard for Accessible Design.
- **Suggested Evidence of Compliance:** Submit completed checklists, digital images and site reports as evidence of completion of the access audit.

## 7.5 Maintenance and Operations Management Plans

- **Standard:** The agency shall have established maintenance and operations standards that are reviewed periodically for management of all park and recreation areas and facilities, including specialty facilities such as marinas, ice rinks, golf courses, zoological facilities, equestrian facilities, aquatic or athletic facilities, nature centers, where applicable. Parks, facilities and other recreational elements should be identified according to the intended use of the area, ranging from heavily used and high developed areas to those that are lightly used and less developed via a park classification or maintenance classification system. Each of these areas should be assigned an appropriate set of maintenance standards including both recommended frequency and acceptable quality.
- **Suggested Evidence of Compliance:** Provide the maintenance standards for all parks, facilities and specialty areas, including evidence of park maintenance classification according to the intended use of the area, ranging from heavily used and high developed areas to those that are lightly used and less developed. Provide the most recent review or update.

## Review of Section 7.0 – New Standards

### 7.7.1 – Building Plans and Specifications

- ☐ **Standard:** The agency shall have on file floor plans, specifications, and/or as-built drawings for major facilities constructed since 1965. These records contain information necessary for efficient programming, quality facility maintenance and effective capital project programming. Projects funded with funds from governmental grant programs such as LAWCON and UPARR place restrictions on use and disposition.
- ☐ **Suggested Evidence of Compliance:** Provide evidence that plans and specifications for facilities with greater than 10,000 square feet of indoor space constructed since 1965 are on file.

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## Review of Section 7.0 – New Standards

### 7.7.2 – Land and Lease Records

- ☐ **Standard:** The agency shall have records on file of all lands owned or property leased by or for the agency. Each record shall include ownership, leases, legal description, and easements and covenants that restrict use or disposition. The records shall also include date and manner of acquisition. The manner of acquisition can limit right to use and dispose of parkland, for example acquisitions funded with funds from governmental grant programs such as LAWCON and UPARR place restrictions. Gifts and bequests often contain restrictive covenants that reflect the desires of donors.
- ☐ **Suggested Evidence of Compliance:** Provide evidence that land records for land acquired since 1965 are on file.

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## Review of Section 7.0 – Revised Standards

### 7.8 – Environmental Sustainability Policy and Program

- ☐ **Standard:** The agency shall have an established policy on environmental sustainability that states the agency position on energy and resource conservation. The policy should address sustainable product purchasing; reduction and handling of waste; wise use and protection of land, air, water and wildlife; and sustainable design/construction of buildings and facilities.
- ☐ **Suggested Evidence of Compliance:** Provide the agency's environmental sustainability policy and examples of projects and initiatives that demonstrate the agency's commitment to implementation. Examples include ecosystem and green infrastructure plans/programs, capital improvements utilizing green/sustainable designs, carbon footprint analysis and reduction goals, internal/external communication and outreach programs.
- ☐ **Note:** Previous 7.8 – Natural Resource Management and Environmental Stewardship and 7.9 – Environmental Sustainability were merged to create 7.8 – Environmental Sustainability, which is not a fundamental standard, with an emphasis on environmental sustainability and stewardship and 7.9 with a focus on natural resource management.

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Review of Section 7.0 – Revised Standards	
7.9.1- Recycling and/or Zero Waste Plan	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>Standard:</b> There shall be a recycling and/or zero waste plan for park and recreation facilities and administrative offices that is systematically monitored and periodically reviewed. The plan shall also include an educational component for both users and employees. The recycling and/or zero waste plan should include all major products suitable for recycling in the given region with an emphasis on making the recycling process easy and convenient for park and recreation users.</p> <p><b>Suggested Evidence of Compliance:</b> Provide a description of the recycling and/or zero waste plan for facilities and administrative offices and provide the last review with statistics on the amounts of materials recycled or the percent of total waste recycled for the most recent reporting period.</p> <p><b>Note:</b> Previous 7.5.3 – Recycling, renumbered and renamed to 7.9.1 – Recycling and/or Zero Waste Plan, adds concept of zero-waste planning.</p>

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Self assessment Responses	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>7.3 Defense Against Encroachment</b></p> <p>The Park &amp; Recreation District's first line of defense against encroachment involves placement of boundary markers on District properties. If signage is not effective or sufficient, physical barriers define property boundaries and areas of District properties that are not open to the public.</p> <p>The Park &amp; Recreation District's Board of Directors adopted an <u>Encroachment Policy</u> to prevent and manage infringement on District properties through adverse development within parks, trail corridors, and natural areas; provide the Executive Director with a course of action in the event encroachment occurs; and manage temporary authorized encroachment to ensure safe public use of District property.</p> <p>The <u>Procedures for Handling Encroachment on District Property</u> defines roles, responsibilities and specific steps followed in addressing potential and/or actual encroachment. If the District's process does not resolve an encroachment, legal action may be taken in accordance with <u>Revised Statute (ORS) 266.410</u> and <u>ORS 266.450</u>. The Executive Director may omit steps in the process, as deemed appropriate, depending upon the type or severity of the encroachment.</p> <p><b>Agency Evidence of Compliance:</b></p> <ol style="list-style-type: none"> <li>1. <u>Encroachment Policy</u></li> <li>2. <u>Procedures for Handling Encroachment on District Property</u></li> <li>3. <u>ORS 266.410</u></li> <li>4. <u>ORS 266.450</u></li> </ol> 

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Visitation Report Response	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>7.2.1</b> The District has a complete ADA Transition Plan that was completed in November 2014. The plan includes a checklist of projects to meet ADA standards including cost and projected date to complete</p> <p><b>7.7.1</b> Agency has a good system for maintaining building plans and specifications for all facilities. A snapshot of the electronic folder was included in the self-assessment along with an example of a facility. The live folder on their Global drive was demonstrated on site.</p> <p><b>7.7.2</b> Evidence of compliance is shown by all deeds for park properties being provided.</p> <p><b>7.8</b> Evidence is shown by a Sustainability Policy (6-23-15) that encourages compliance with the state Environmental Policy Act of 1971.</p> 

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## Review of Section 7.0

### 17 Standards

- 1 Fundamental Standard
  - Maintenance and Operations Management Standard
- New Standards
  - 7.2.1 – ADA Existing Facility and Site Access Audit
  - 7.7.1 – Building Plans and Specifications
  - 7.7.2 – Land and Lease Records
- Revised and Renumbered Standard
  - Previous 7.8 – Natural Resource Management and Environmental Stewardship and 7.9 – Environmental Sustainability were merged and synthesized to recreate new 7.8 – Environmental Sustainability Policy and Program with an emphasis on environmental stewardship and focus on Natural Resources Management (Note: This is no longer a fundamental standard).
  - Previous 7.5.3 – Recycling, revised and renumbered/renamed 7.9.1 – Recycling and/or Zero Waste Plan adds concept of zero-waste planning.

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## 8.0 Public Safety, Law Enforcement, and Security

### 14 Standards: 3 Fundamental ☆, 2 New

- 8.1 – Codes, Laws, and Ordinances ☆
  - 8.1.1 – Staff Liaison to Law Enforcement Officers
- 8.2 – Authority to Enforce Laws by Law Enforcement Officers ☆
- 8.3 – Law Enforcement Officer Training
- 8.4 – Public Information on Laws, Ordinances, Rules, Regulations, and Policies
  - 8.4.1 – In-Service Training for Staff on Public Safety and Law Enforcement
  - 8.4.2 – Handling of Disruptive Behavior Procedures
  - 8.4.3 – Traffic Control, Parking Plans, and Crowd Control
  - 8.4.4 – Handling of Evidentiary Items Procedures
- 8.5 – General Security Plan ☆
- 8.6 – Emergency Management Planning
  - 8.6.1 – In-Service Training for Staff on General Security and Emergency Management
  - 8.6.2 – Emergency Risk Communications Plan
  - 8.6.3 – Care and Shelter Procedures

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## Review of Section 8.0 – New Standards

### 8.6.2 – Emergency Risk Communications Plan

- **Standard:** There shall be a communications plan that is reviewed and updated periodically, to accurately and effectively communicate with the public and experts during a catastrophic event that attracts significant media attention, such as a health emergency, terrorist attack, earthquake or storm. The crisis communication plan shall delineate individuals responsible for communicating with the press, chain of command on notifying proper people of the incident and communicating status updates.
- **Suggested Evidence of Compliance:** Provide a copy of the Emergency Risk Communications Plan and the most recent review.

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## Review of Section 8.0 – New Standards

### 8.6.3 – Care and Shelter Procedures

- **Standard:** There shall be procedures to coordinate with agencies designated to provide care and shelter to those in need during disasters or emergencies.
- **Suggested Evidence of Compliance:** Provide procedures to coordinate with agencies designated to provide care and shelter during emergencies.

## Review of Section 8.0 – Revised Standards

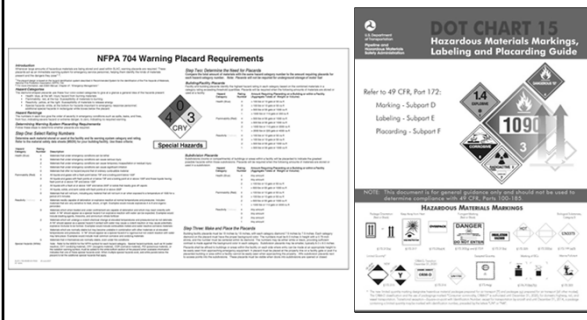
### 8.5 – General Security Plan

- **Standard:** The agency shall have a comprehensive general security plan addressing areas, buildings and facilities under its jurisdiction that is updated periodically. Plans for each major area, building or facility should be available at each site. The general security plan may be a compilation of security plans from each major area, building or facility. Hazardous or flammable materials storage areas should be clearly identified in plans and at each specific site. Signage at each site should be installed in accordance with the unified signage system. To be effective, the security plan should be updated when a new area, building or facility is added, security systems are modified or when legislation requires change.
- **Suggested Evidence of Compliance:** Provide the agency's general security plan or compilation of security plans from each major area, building or facility with the most recent review or update. At a minimum, these plans should include:
  - a. Locking key systems and associated assignments;
  - b. Alarm system and assignment of security codes;
  - c. Opening and closing procedures;
  - d. Fire alarm and fire suppression systems;
  - e. Emergency evacuation procedures; and
  - f. Critical incident response procedures.

*Note: This standard was revised to include the specific list of items in Suggested Items of Compliance above.*

## Example of Evidence of Compliance: Example of 8.5

### "Unified Signage System"



## 8.6.2 Emergency Risk Communications Plan

- **Standard:** There shall be a communications plan that is reviewed and updated periodically, to accurately and effectively communicate with the public and experts during a catastrophic event that attracts significant media attention, such as a health emergency, terrorist attack, earthquake or storm. The crisis communication plan shall delineate individuals responsible for communicating with the press, chain of command on notifying proper people of the incident and communicating status updates.
- **Suggested Evidence of Compliance:** Provide a copy of the Emergency Risk Communications Plan and the most recent review.

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## Review of Section 8.0

### 14 Standards

- 3 Fundamental Standards
  - Codes, Laws, and Ordinances
  - Authority to Enforce Laws by Law Enforcement Officers
  - General Security Plan
- New Standards
  - 8.6.2 - Emergency Risk Communications Plan
  - 8.6.3 – Care and Shelter Procedures
- Revised and Renumbered Standard
  - Previous 8.4 – Public Safety and Law Enforcement Role of Agency was renamed as Public Information on Laws, Ordinances, Rules, Regulations and Policies and is **no longer a fundamental standard**.
  - 8.5 – General Security Plan now includes a specific list of evidence of compliance that plans must include at a minimum.

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## Self assessment Responses

### 8.1.1 Staff Liaison to Law Enforcement

In October 2014, Name, with the Parks, Recreation and Cultural Resources Department, was named staff liaison to the Police Department, and name, Police Department, was named staff liaison to the PRCR. Emails are in file documenting the appointment of the liaisons. The PD liaison appoints other points of contact as needed.

List of Evidence Compliance  
 8.1.1-1 Email Notifying PRCR Staff of Liaison  
 8.1.1-2 Email Notifying PD of Liaison  
 8.1.1-3 Email from PD Announcing Liaison




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Visitation Report Response	
<input type="checkbox"/>	<p><b>8.5</b> Evidence of compliance provided by the District Security Plan. This plan was created in October 2014 and reviewed in November 2014. This Security Plan is reviewed by the Facilities and Construction Manager. It includes Facility Access – Keys &amp; Locks, Security Alarm Systems, Fire Alarm and Suppression Systems, Opening &amp; Closing Procedures, Emergency Evacuation Procedures and their Emergency Response and Action Plan.</p> <p><b>8.6.2</b> The Crisis Communication Plan was reviewed. It was adopted in 2010 and updated in November 2012</p> <p><b>8.6.3</b> The City Emergency Operations Plan delineates emergency congregate care. That section of the plan is included as evidence. In summary, the City and agency partner with the American Red Cross for management and operations of emergency shelters</p>
	

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9.0 Risk Management 6 Standards: 1 Fundamental ☆, 1 New	
<input type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 9.1 – Risk Management Policy                             <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> 9.1.1 – Risk Management Plan and Procedures ☆</li> <li><input type="checkbox"/> 9.1.2 – Accident and Incident Report Procedures</li> <li><input type="checkbox"/> 9.1.3 – Personnel Involvement and Training</li> </ul> </li> <li><input type="checkbox"/> 9.2 – Risk Manager</li> <li><input type="checkbox"/> 9.3 – ADA Compliance and Face-to-Face Resolution</li> </ul>

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Review of Section 9.0 – Revised Standards 9.1.1 – Risk Management Plan and Procedures ☆	
<input type="checkbox"/>	<ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Standard:</b> The agency shall have an established risk management plan and operating procedures that are reviewed periodically, accessible to all agency personnel and approved by the proper authority that encompasses analysis of risk exposure, control approaches and financial and operational impact for the agency. The plan shall analyze the programs/services offered and facilities/areas managed for personal injury and financial loss potential and identify approaches to manage such injury, loss, and business and operational impact.</li> <li><input type="checkbox"/> <b>Suggested Evidence of Compliance:</b> Provide the current risk management plan with approval by the proper authority, the most recent review, and indication of how the plan and procedures are available to staff. The risk management plan shall reflect all three phases of risk management:                             <ul style="list-style-type: none"> <li>a. Identification and assessment;</li> <li>b. Response strategies; and</li> <li>c. Management planning.</li> </ul> </li> </ul> <p><i>Note: Former 9.1 – Risk Management Plan and 9.1.2 – Risk Management Operations Manual are combined to create the new and fundamental 9.1.1 – Risk Management Plan and Procedures</i></p>

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Review of Section 9.0 – New Standards
9.3 – ADA Compliance and Face-to-Face Resolution

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**Standard:** There shall be a policy or procedure available to all members of the public and staff which address issues pertaining to ADA compliance, either in a written or electronic format.

**Suggested Evidence of Compliance:** Provide a written policy or procedure available to the public and staff that outlines the steps to resolve questions, concerns, or complaints of accessibility along with a reasonable timeline for completion and have a process for face-to-face meetings is in place.

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Self assessment Responses

9.3 ADA Compliance Face-to Face Resolution

The Parks, Recreation and Cultural Resources Department adheres to the Town's ADA Grievance Procedure. The grievance procedure is a part of the Town's ADA Survey and Transition Plan. A copy of the grievance procedure is located in the File.

List of Evidence of Compliance  
9.3-1 Town ADA Grievance Procedure



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Visitation Report Responses

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**9.1** Evidence of compliance provided by the District Risk Management Plan that covers identification and assessment, response strategies and management planning. This document is available on the employee website to all employees and was last reviewed by the Executive Director on January 23, 2015.

**9.1.3** The agency met this standard showing several examples of safety training with sign in sheets. A listing of required safety trainings by position is located on their intranet site.

**9.3** The Agency ADA Grievance Procedure, that was reviewed, explicitly details how individuals may address ADA issues including face to face meetings.



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## Review of Section 9.0

### 6 Standards

- 1 Fundamental Standard
  - ▣ Risk Management Plan and Procedures
- ▣ New Standard
  - ▣ 9.3 – ADA Compliance and Face-to-Face Resolution
- ▣ Revised and Renumbered Standard
  - ▣ Previous 9.1 – Risk Management Plan and 9.1.2 – Risk Management Operations Manual are combined to create the new and fundamental 9.1.1 – Risk Management Plan and Procedures.

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## 10.0 Evaluation, Assessment, and Research

(new title - previously named 'Evaluation & Research')

13 Standards: 1 Fundamental ☆, 3 New

- 10.1 – Systematic Evaluation Processes ☆
  - ▣ 10.1.1 – Responsibility for Evaluation
  - ▣ 10.1.2 – Staff Training on how to Evaluate Programs, Services, and Facilities
- 10.2 – Outcomes Assessment
- 10.3 – Performance Measurement
  - ▣ 10.3.1 – Level of Service Standards
- 10.4 – Needs Assessment
- 10.5 – Program and Services Statistics
  - ▣ 10.5.1 – Recreation and Leisure Trends Analysis
  - ▣ 10.5.2 – Community Inventory
  - ▣ 10.5.3 – PRORAGIS
- 10.6 – Research Investigation
  - ▣ 10.6.1 – Quality Assurance

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## Review of Section 10.0 – New Standards

### 10.3 – Performance Measurement

- **Standard:** The agency shall have a procedure for tracking and monitoring data trends and measuring performance against targets linked to achievement of goals and objectives.
- **Suggested Evidence of Compliance:** Provide performance targets and measurement in use by the agency. Describe the process and frequency of performance measurement and cite examples for how the results have been used by the agency to affect decisions. The measures may include data gathered from the following qualitative and quantitative sources:
  - a. Recreation and demographic trends;
  - b. Needs assessment;
  - c. Community inventory;
  - d. Surveys;
  - e. Program and service statistics;
  - f. Inspections;
  - g. Customer feedback;
  - h. Program evaluation;
  - i. Risk management reports; and
  - j. Budget and financial reports.

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## Review of Section 10.0 – New Standards

### 10.3.1 – Level of Service Standards

- ☐ **Standard:** The agency shall have level of service (LOS) standards for provision of land, facilities and services within the jurisdiction. LOS standards are a type of performance measure associated with equitable provision service, such as the number of facilities per 1,000 residents in a service area or facilities available within a designated travel distance or travel time, e.g. percent of population that have a park within a 10 minute walk. LOS standard can also address other dimensions of equitable access, such as connectivity, maintenance and affordability, e.g. percent of parkland connected to the trail network.
- ☐ **Suggested Evidence of Compliance:** Provide the LOS standards and describe how LOS standards are used to establish facility and service priorities.

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## Review of Section 10.0 – New Standards

### 10.3.1 – Level of Service Standards Examples

Determine the *park classifications* to which the LOS will apply. Parks and open space classifications include:

- Class I: mini-park
- Class II: neighborhood park
- Class III: school-park
- Class IV: community park
- Class V: large urban park
- Class VI: sports complex

LOS does not apply to natural resources area or greenways.

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## Review of Section 10.0 – New Standards

### 10.3.1 – Level of Service Standards Examples

1. Determine the *recreation activity* menu for each park classification. The Recreation Activity Menu (RAM) is the list of all recreation facilities, i.e., tennis courts, tot lots, picnic units, etc., that go into each park classification and for which a specific amount of space will be needed. The RAM determines the facilities space requirements of the LOS formula.
2. Use the *open space size standards* for each park classification for which LOS standards will apply.
3. Determine the present *recreation facility supply* (RFD) of these recreation activity choices.

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Review of Section 10.0 – New Standards  
10.3.1 – Level of Service Standards Examples cont.

4. Determine the *recreation facility demand* (RFD) for these recreation activity choices given in number of facilities needed per population unit. This usually obtained from a needs assessment.
5. Determine the *minimum population service requirements* (MPSR) for these recreation activity choices.
6. The individual LOS for each park class. (LOS C)
7. The collective LOS for the entire park and recreation system. (TLOS)

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Review of Section 10.0 – New Standards  
10.5.3 - Proragis

- **Standard:** The agency shall create an online profile and enter operating data into PRORAGIS, the national park and recreation database.
- **Suggested Evidence of Compliance:** Provide a copy of the agency Custom Report from the PRORAGIS database.

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Review of Section 10.0 – New Standards  
10.5.3 - Proragis

NAME CHANGE FROM PRORAGIS which is the national recreation and pars database and The source for critical data designed to assist park and recreation professionals in the effective management and planning of their recourses and facilities.

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Review of Section 10.0 – Revised Standards	
10.2 – Outcomes Assessment	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>Standard:</b> The agency shall use evaluation results to assess the outcomes of park and recreation programs, services, and facilities and assess the operational effectiveness of the organization. Outcomes show the relationship between resource inputs and the resulting impacts and benefits of the outputs. Outcomes are measurable changes in behaviors, attitudes, knowledge, conditions or skills.</p> <p><b>Suggested Evidence of Compliance:</b> Provide examples of how evaluation results are used to determine levels of performance and effectiveness in the organization and how evaluation are used to determine if specific programs, services or facilities are achieving planned or projected results.</p> <p><i>Note: Previously covered by former 10.1 – Evaluation Analysis.</i></p>

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Review of Section 10.0 – Revised Standards	
10.4 - Needs Assessment	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>Standard:</b> The agency shall periodically conduct an assessment of assets and needs to identify existing and projected gaps in service and determine land, facility and service priorities. Need assessments are used to help determine priorities for developing services with the agency. Needs assessments can use a variety of methods to obtain input from the community, including focus groups, advisory boards, forums, and surveys.</p> <p><b>Suggested Evidence of Compliance:</b> Provide the current needs assessment, describe the procedural steps in conducting the assessment, describe the frequency of updates, and describe the use of the assessment.</p> <p><i>Note: Former Standards 2.4.2 – Community Assessment and 2.4.4 – Needs Index were combined in 10.4 – Needs Assessment</i></p>

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Self assessment Responses	
<input type="checkbox"/>	
<input type="checkbox"/>	<p><b>10.1.1 Responsibility for Evaluation</b>            The Park, Recreation and Cultural Resources Director is ultimately responsible for the evaluation program. The director's job description states the director should "evaluate the comprehensive and individual facility and program progress."</p> <p>The director accomplishes this task through subordinate supervisors that serve as team leaders and facility managers. These supervisors include the Assistant Director of Parks, Recreation and Cultural Resources, the Cultural Arts and Events Manager, the Recreation Center and Programs Managers (there are two positions with this title) and the Outdoor Education Parks Manager. These managers work with their individual employees to survey their constituents and help determine the needs of the community members they serve. Data is collected from their programs and events and is reported to the Parks, Recreation and Cultural Resources Department Director in bi-weekly Executive Team meetings. The director, in conjunction with the assistant director compiles the data, prepares reports, and works with the staff to analyze and develop strategies to address issues that arise from these evaluations. These directors and managers regularly attend conferences and events offered by agencies such as the North Carolina Parks and Recreation Association to learn the best way to collect and distribute data for their departments.</p> <p>List of Evidence of Compliance            10.1.1-1 PRCR Director Job Description            10.1.1-2 Assistant Director Job Description</p>




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## Visitation Report Responses

- ❑ **10.1** A detailed Evaluation Matrix was provided showing what is evaluated, the frequency, outcome being measured and how it is used, and who is responsible for the evaluation process. This is a very good document!
- ❑ **10.2** The agency provided a copy of their needs assessment in which community results demonstrated that the parks & recreation services produced desired outcomes. Additionally, several program surveys were provided that demonstrated evaluation of benefits gained through recreation programs
- ❑ **10.4** The agency contracts with firms that specialize in opinion research and public policy analysis in order to understand and identify gaps in service and be informed of issues facing the community. Contracted firms develop a telephone survey tool in coordination with agency staff. Participants are selected using random digit dialing of both cell and land line telephone numbers, and survey responses inform current and future project work, update the Board of Commissioners, and prioritize community recreation needs and issues. Citywide surveys are usually conducted every two years or in advance of major referendum.



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## Review of Section 10.0

### 13 Standards

- ❑ **1 Fundamental Standard**
  - ❑ Systematic Evaluation Processes
- ❑ **New Standards**
  - ❑ 10.3 – Performance Measurement
  - ❑ 10.3.1 - Level of Service Standards
  - ❑ 10.5.3 - Proragis
- ❑ **Revised and Renumbered Standards**
  - ❑ 10.1 – Systematic Evaluation Processes was revised/rename and created by merging former 6.3 – Program Evaluation and 10.1 – Evaluation Analysis
  - ❑ 10.2 – Outcomes Assessment was previously covered by 10.1 – Evaluation Analysis
  - ❑ 10.4 – Needs Assessment is made up of former 2.4.2 – Community Assessment and 2.4.4 – Needs Index
  - ❑ 10.5 – Program and Service Statistics was previously 6.8.
  - ❑ 10.5.1 – Recreation and Leisure Trends Analysis was previously 2.4.1 – Trends Analysis
  - ❑ 10.5.2 – Community Inventory was previously 2.4.3.
  - ❑ 10.6 – Research Investigation was previously 10.2 -Experimental and Demonstration Projects.

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## Role of the Agency Visitor



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### Situational Cases for Discussion- What would you do?

- ☐ □ Going on site and there is not enough info in files?
- ☐ □ Agency over programming your work team and you cannot complete your review statements?
- ☐ □ Agency not having something onsite in the EOC when you arrive but can create while you are there?
- ☐ □ Agency not meeting a required standard that you notice the first day
- ☐ □ Not getting along with your agency visitor work team?
- ☐ □ Share examples of situations that may have happened to you on a visit or what your afraid of.

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### Team Chair

- Contacts and organizes visit with team members and agency.
- Makes sure all visitors have the Self Assessment.
- Determines breakdown of assignments of Categories in advance with the team.
- Discuss Agenda in advance with team and Agency.
- Discuss feedback from Commissioners of any concerns prior to visit.
- Works closely with the lead and second.
- Leads discussion with agency team members and officials.
- Has responsibility to see that the report is completed accurately and is knowledgeable on all aspects of it.

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### Team Chair

- ☐ □ Represents Visit Team at the Commission meeting.
- ☐ □ Reminds team to evaluate self assessment against evaluative criteria standard-by-standard.
- ☐ □ Develop the acceptable timetable and onsite agenda and follow as closely as possible.
- ☐ □ Serve as spokesperson for the team.
- ☐ □ Understand all aspects of the visitor's report and be able to speak to the judgments of the team.
- ☐ □ Submit the report in a timely manner (2 weeks from visit) and review and modify report as requested by Commissioners. Keep team informed.

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## Team Chair

- ☐ When a team chair communicates with the agency, verify that evidence of compliance is easily found. It is unacceptable for an agency to provide a plethora of information and expect you to find it.
- ☐ Team chairs need to work closely with agency to make sure enough work time is put into the visit.
- ☐ Team Chairs- when presenting to CAPRA, less details on the visit and more about standards and concerns.
- ☐ Make sure that a comment is provided for each standard.

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## The Final Onsite Team Meeting

- ☐ The Visitor Chair will discuss with Team how to prepare overview comments for the final exit meeting and draft without any handouts an overview of general comments from the report to share at exit interview.
- ☐ Complete the Visitors tasks and report and agree on the preliminary report before leaving the sight.
- ☐ Proofing each section and other team's section to assist with accuracy.
- ☐ The findings shared at the exit interview should be general as the information contained in your report are recommendations to the Commissioners. You are the eyes and ears for them onsite.

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## Role of the Visitor

- ☐ Verification of Agency documentation
- ☐ Ascertain whether an agency is in compliance with the standards
- ☐ Representation of CAPRA
- ☐ Not a consultant
- ☐ Recognition of Agency accomplishments
- ☐ Promotion of Accreditation process

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### Activities and Events Onsite

- ☐ These have been played down in recent years.
- ☐ Visitors should not be treated to unnecessary luxuries that would risk the creditability of not only the agency, but the reputation of the Accreditation.
- ☐ The Accreditation Manager is the best person to discuss what is appropriate if there are questions.
- ☐ Questions from the Visitors in the group on recent visits.

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### Sample: On Site Team Schedule

- ☐ Team should meet with the Agency Director, Agency Lead and Leadership Team as early as possible on Day 1
- ☐ Initial Meeting
- ☐ First Day
- ☐ Second Day
- ☐ Third Day
- ☐ Exit Meeting

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### CAPRA On-site Info

- ☐ Thoroughly review the self assessment and any other materials the agency sends.
- ☐ Use the Lead and Second for assistance.
- ☐ Find out as much as possible about the applicant agency.
- ☐ Do as much work ahead of time as possible
  - ☐ The Chair should assign standard categories or finalize suggestions

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### CAPRA On-site Info

- ☐ Tours are required, but make sure they do not detract from the work of reviewing the documentation.
- ☐ Since new standards will be electronically submitted, technically a review can be done remotely. The tours are critical for observable standards.
- ☐ It is often one of the highlights of the trip for the visitor and provides a visual confirmation of standards
- ☐ Stay focused on the task at hand and don't get side-tracked.

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### CAPRA On-site Info

- ☐ Work with the Agency - be accommodating and flexible
- ☐ Know that the trip is hard work
- ☐ Maintain professionalism at all times
- ☐ Its OK to borrow good ideas
- ☐ Wear business attire unless told otherwise

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### CAPRA On-Site Info

- ☐ Once on site, defer to the Agency's "culture"
- ☐ Confidentiality
- ☐ Be open and honest with the Agency
- ☐ Work quickly and efficiently
  - ☐ Everyone bring a laptop/or they should be provided
- ☐ Know the material - develop a thorough understanding of the standards
- ☐ Thoroughly re-read each standard and suggested evidence of compliance. Don't rely on just the standard title or your own opinion

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### CAPRA On-site Info

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- ❑ Insure that hard evidence is found to substantiate that the standard is met. Unless the standard specifically allows for such documentation, verbal confirmation by staff, elected leaders or community participants that the agency meets the standard **DOES NOT SUFFICE**.
- ❑ Go with the attitude that the Agency *should* be accredited but no freebees.
- ❑ Be an Ambassador - You are a representative of a national Commission in an important process.

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### CAPRA-On-site Info

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- ❑ Lead, second and team chair need to review the self-assessment prior to visit to identify areas of concern.
- ❑ Areas of concern should be sent to agency to work on prior to the visit.
- ❑ If concerns are severe, agency may be notified and recommend postponing the visit.
- ❑ Self assessment needs to be in your hands 6 weeks prior to the visit- this is a change from 4 weeks

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### CAPRA-On-site Info

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- ❑ Report should be sent to Accreditation Manager for dissemination for review by lead and second.
- ❑ Team chair should not state to the agency that the report is final- it can be changed prior to official submittal back to them.
- ❑ Agency has 30 days to respond to the report, if...
- ❑ Share with them that their response should outline action steps to address fundamental standards and below 85% compliance- not providing a ton of additional information to the commission
- ❑ If agency needs to provide future documentation- make sure it is done properly.

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## CAPRA On-site Info

- ☐ No information will be accepted within 30 days of the scheduled CAPRA meeting.
- ☐ A paperless procedure is required for new standards. The team chair needs to make sure prior to the visit, that all documentation can be viewed on site- hot links directly to the information is not required.
- ☐ When the standard calls for a "plan", make sure that it includes dates of development, revision, and adoption/approval and include this in the report to CAPRA.

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## CAPRA On-site Info

- ☐ When the standard calls for a "manual", it should be the one-stop source for the information in a consolidated format, not loose documents spread over multiple locations
- ☐ When the standard asks for a plan, policy, or manual, and the agency states that it is in the process of approval, seek what stage they are in at the moment. Agency needs to prove that a review system does exist.
- ☐ The agency needs to meet the *intent* of the standards that require these plans. It is sometimes semantics or judgment calls on the part of the visitor. We strive for consistency but the agency's culture and content of the standard needs to be taken into consideration

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## Team Report Format

### **The Self Assessment Report and Visitation Report**

CAPRA - 2014 Standards Self-Assessment and Visitation Report Template 05-29-14.docx

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## The Team Report

- ☐ Specified format
- ☐ Confidential
- ☐ Does NOT grant or deny
- ☐ Relates directly to standards
- ☐ Follows preliminary review with Agency
- ☐ Draft written on site
- ☐ May be modified
- ☐ Notes and materials
- ☐ 5 sections
  - Cover sheet
  - Introduction of Self Assessment and also Visitation Report
  - Evaluation of Compliance
  - Summary and Signatures
  - Submission

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## Team Report

- ☐ Focus on:
  - ☐ Agency Strengths
  - ☐ Agency Preparedness
  - ☐ Standards Overview
  - ☐ Other Concerns related to maintain accreditation
- ☐ Follow specifics in Handbook on Times New Roman 12 point font to using an active voice, eliminate spelling errors and don't use abbreviations

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## Agency Response

- ☐ Commission does not accept a follow up response if all the fundamentals are met and 97 or more of the non-fundamentals have been met.
- ☐ If Fundamental(s) are not met the agency must submit a response in 30 days of receipt of report.
- ☐ The Agency will need to provide:
  - ☐ Executive Summary
  - ☐ Narrative that addresses each standard in question
  - ☐ Additional documentation
  - ☐ Commissioners have 30 days to respond

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Do's and Don'ts for Visitors	
<input type="checkbox"/>	
<input type="checkbox"/>	DO be as thorough as possible, ask questions.
<input type="checkbox"/>	DON'T assume that the Agency has the evidence of compliance and that it meets your interpretation of the standard.
<input type="checkbox"/>	DO add the name of each reviewer of each section.

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Do's and Don'ts for Visitors	
<input type="checkbox"/>	
<input type="checkbox"/>	DO be consistent with standards and comments.
<input type="checkbox"/>	DON'T document a standard as met and then indicate it is not met in the summary.
<input type="checkbox"/>	DON'T get sidetracked discussing agency operations, yours or theirs.

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Do's and Don'ts for Visitors	
<input type="checkbox"/>	
<input type="checkbox"/>	DO put the State (location) of the agency on the report.
<input type="checkbox"/>	DON'T just put "met" on standard <ul style="list-style-type: none"> <li><input type="checkbox"/> There <u>MUST</u> be comments under each and every standard. Two or Three sentences suffices for most.</li> </ul>

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### Do's and Don'ts for Visitors

- ☐ DO restrict your comments to the standard.
- ☐ DON'T inject your personal opinion or experience.
- ☐ NO— *"I FEEL.....I BELIEVE...AS I UNDERSTAND IT"*
- ☐ ABSOLUTELY NO—"IT MEETS STANDARD marginally, for the most part"

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**Standard:** The Agency shall establish an organizational structure, specifying in detail the interrelationships of the system from the highest authority to all staff positions.  
**Suggested evidence of compliance:** Provide a copy of an organizational structure chart which shows interrelationships.



**Good:** Organizational structure needs to be reviewed as the present chart does not depict proper flow.



**Not so good:** The Assistant to the Director should be given additional secretarial help. With his broad range of assigned responsibilities, he could be more effective with this assistance.

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### Commission Business and Meeting/Hearing

- ☐ Commission meets 5 times a year and once in person at NRPA Congress
- ☐ Initial Accreditation Hearing Procedure
- ☐ Re-Accreditation Hearing Procedure
- ☐ The Commission may request agency director to participate via teleconference for specific reasons regarding Re-Accreditation.

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### In conclusion

- ☐ Framework from top to bottom during visit  
Commissioner to Visitor
- ☐ Don't be a consultant
- ☐ Number of Standards(151)
- ☐ Number of Fundamentals(37)
- ☐ Preparing for your First visit
- ☐ Plans, Manuals, Policies, Guidelines, Evaluations.  
Statements, updates.....
- ☐ What happens if you do not meet a fundamental?

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### In conclusion...

- ☐ What did you learn today?
- ☐ What needs more information?
- ☐ Are you ready to go out and be a Visitor is you  
have not gone before?
- ☐ Do you feel you have the knowledge to update  
your own agency's evidence and self assessment?
- ☐ Do you feel you have the knowledge to determine  
how you start the process for your own agency?
- ☐ Further Communication

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CAPRA MANAGER FOR NRPA  
JENNIFER STROMBERG

NATIONAL RECREATION AND PARK ASSOCIATION  
22377 BELMONT RIDGE ROAD  
ASHBURN, VA 20148

PHONE: 703-858-2150  
FAX: 703-858-0794

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LAURA T. WETHERALD, MS, CPRP  
lwetherald@howardcountymd.gov  
410-313-4661

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