

# COUNTY COUNCIL OF BEAUFORT COUNTY

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CHAIRMAN

STEWART H. RODMAN  
VICE CHAIRMAN

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COUNTY ADMINISTRATOR

JOSHUA A. GRUBER  
DEPUTY COUNTY ADMINISTRATOR  
SPECIAL COUNSEL

SUZANNE M. RAINEY  
CLERK TO COUNCIL

## AGENDA COMMUNITY SERVICES COMMITTEE

Monday, November 10, 2014

2:00 p.m.

Executive Conference Room, Administration Building  
100 Ribaut Road, Beaufort

### Committee Members:

William McBride, Chairman  
Tabor Vaux, Vice Chairman  
Rick Caporale  
Gerald Dawson  
Steve Fobes  
Laura Von Harten

### Staff Support

Morris Campbell, Division Director

1. CALL TO ORDER – 2:00 P.M.
2. DISCUSSION - "PARKS AND LEISURE SERVICES PERFORMANCE AND ORGANIZATIONAL ASSESSMENT STUDY" BY BALLARD\*KING & ASSOCIATES, LTD. ([backup](#))
3. ADJOURNMENT

### 2014 Strategic Plan: Committee Assignments

Daufuskie Island Ferry: Outside Report and Direction

Parks and Leisure Services Organization/Programs: Evaluation and Direction



# *Parks and Leisure Services*

Presentation to Beaufort County Council's  
Community Services Committee  
November 10, 2015

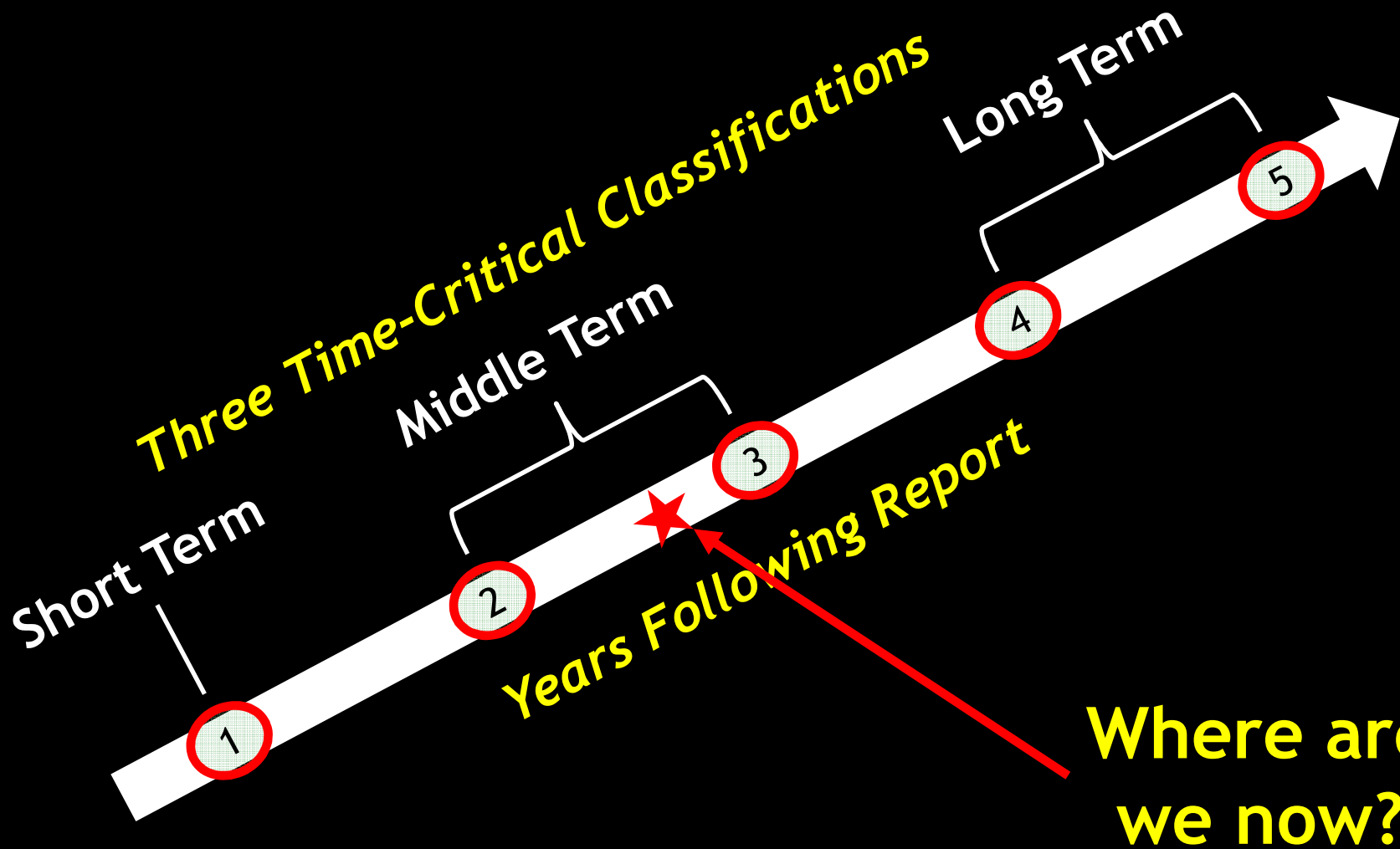
Presented by:  
Scott Marshall  
Director, Beaufort County PALS

# Ballard \* King Assessment Study

- Purpose: Critically assess PALS and provide recommendations
- Information gathered from two site visits to county in October and December 2012
- Final report dated March 12, 2014
- Section IX of report - ACTION PLAN with specific recommendations



# Action Plan Recommendations



# Action Plan Recommendations

Seven Categories in each time-critical class



# Section IX - Action Plan Breakdown

Categories	Short Term	Middle Term	Long Term	Total
General	5	4	4	13
Staffing	10	4	2	16
Policies & Procedures	3	5	2	10
Budget	2	6	5	13
Maintenance	3	5	3	11
Marketing	3	3	5	11
Programs & Services	3	5	4	12
<i>Total</i>	<b>29</b>	<b>32</b>	<b>25</b>	<b>86</b>

# *Bins of Activity*



Strategic  
Planning  
and  
Decisions

Organization  
and  
Staffing

Processes  
and  
Procedures

Business  
Practices

# *Strategic Planning and Decisions*

- Beaufort County Council decision / vision regarding commitment to parks and recreation services
  - Demographics and populations have changed
  - Consideration of new service delivery model
- Development of Strategic Plan
  - New vision...mission...rebranding
  - Define core competencies
  - Plan should drive all things \$\$



# Report Card

Strategic  
Planning and  
Decisions

D-

# Strategic Planning Progress Report

## Initiatives

- PALS Advisory Board established Strategic Planning Committee
- Examining continued county interest in recreation properties and resources located in municipalities

## Challenges

- Lack of strategic planning production
- Fiscal arrangements

# *Organization and Staffing*

- New management culture
  - Clear identification
  - Esprit de corps
- Structure to support services offered
- Authority to manage PALS operations
- Formal training for staff

# Report Card

Organization  
and Staffing

C

# Organization and Staffing Progress Report

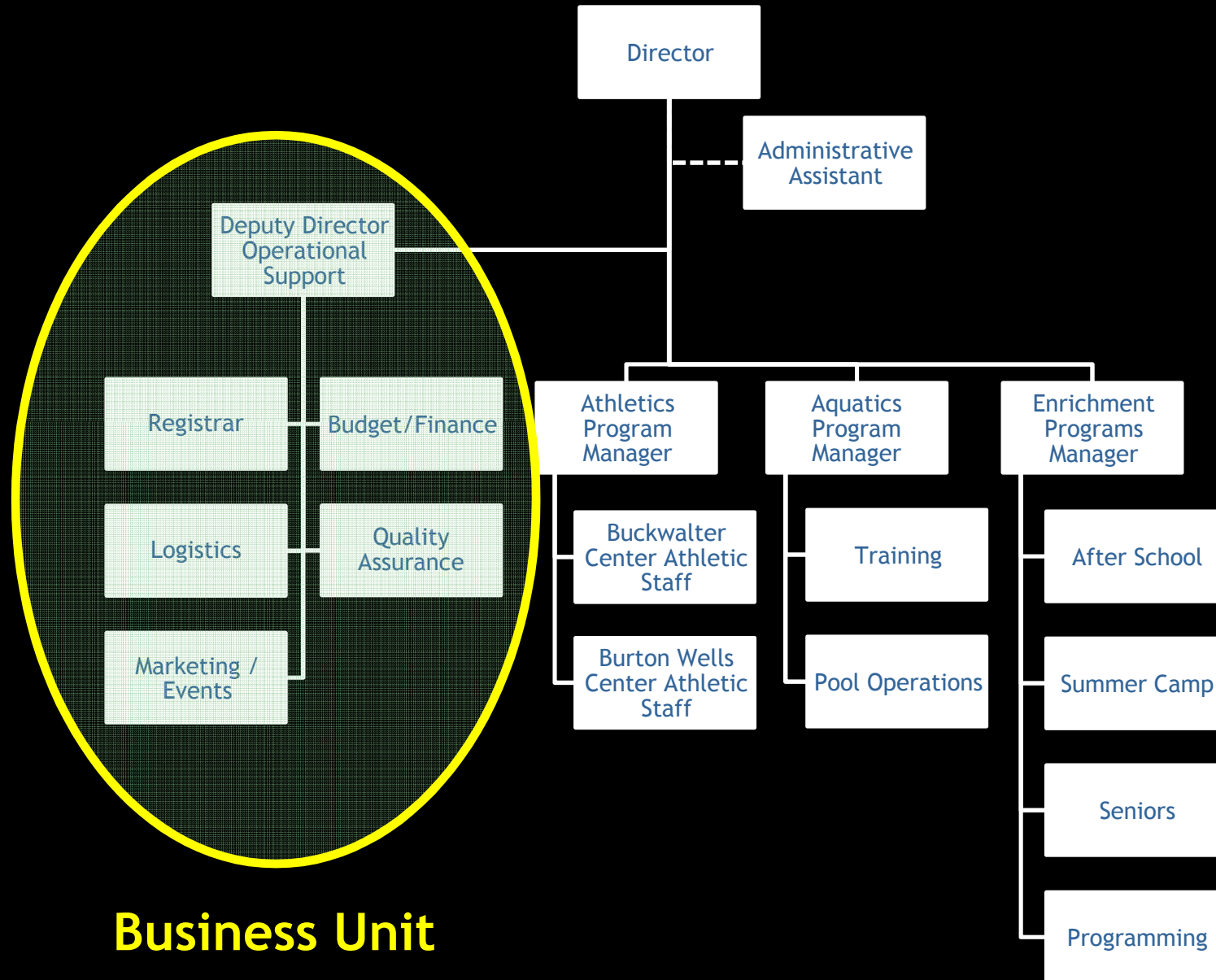
## Initiatives

- New Director hired
- Organization restructured to best support existing activities

## Challenges

- Adjustment to Parks and Rec world
- Organization is not staffed in accordance with the new organizational structure
- Constraints under the Affordable Health Care Act

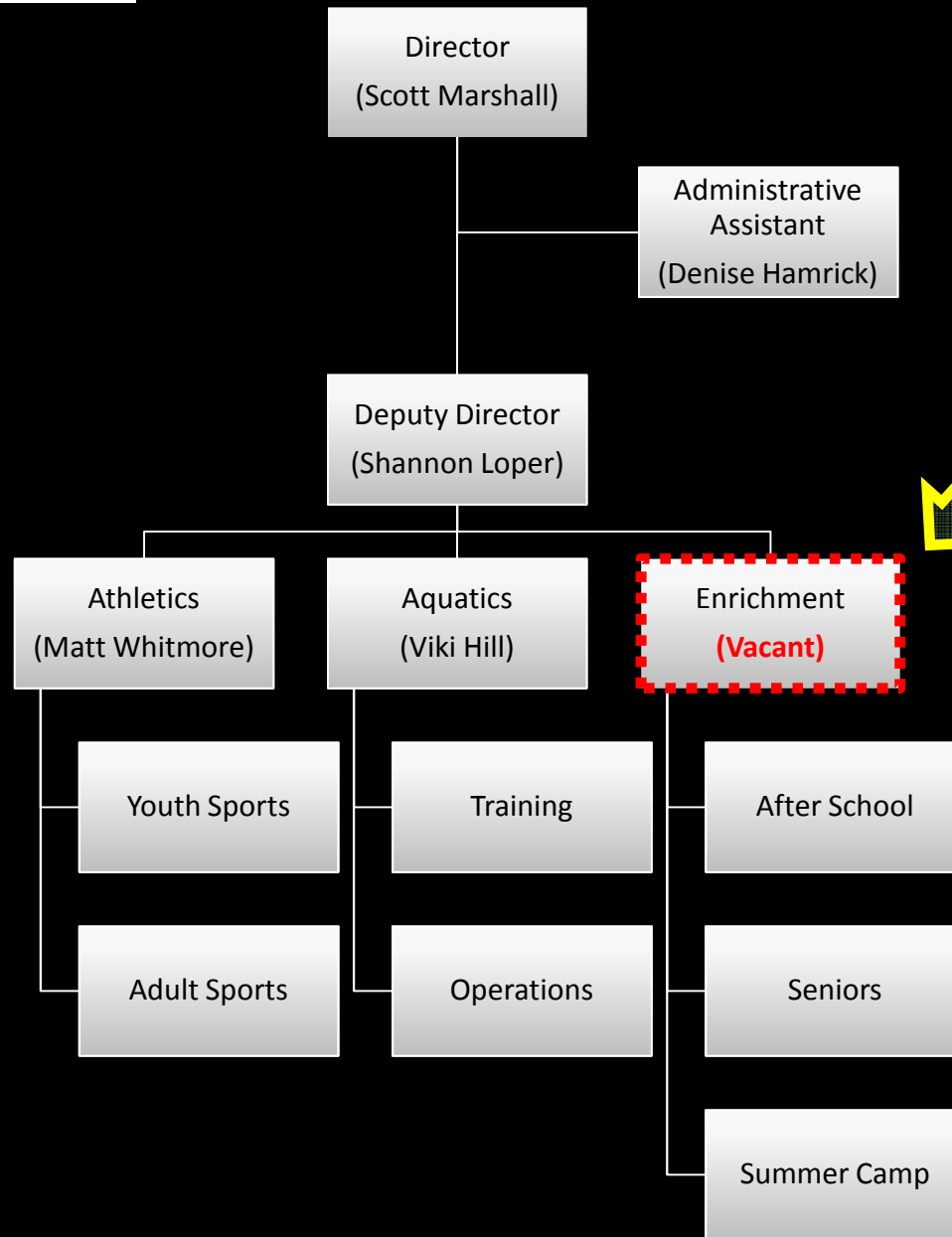
# Desired Organizational Structure



# Actual Structure

**DOES  
NOT  
EXIST**

**Business Unit**

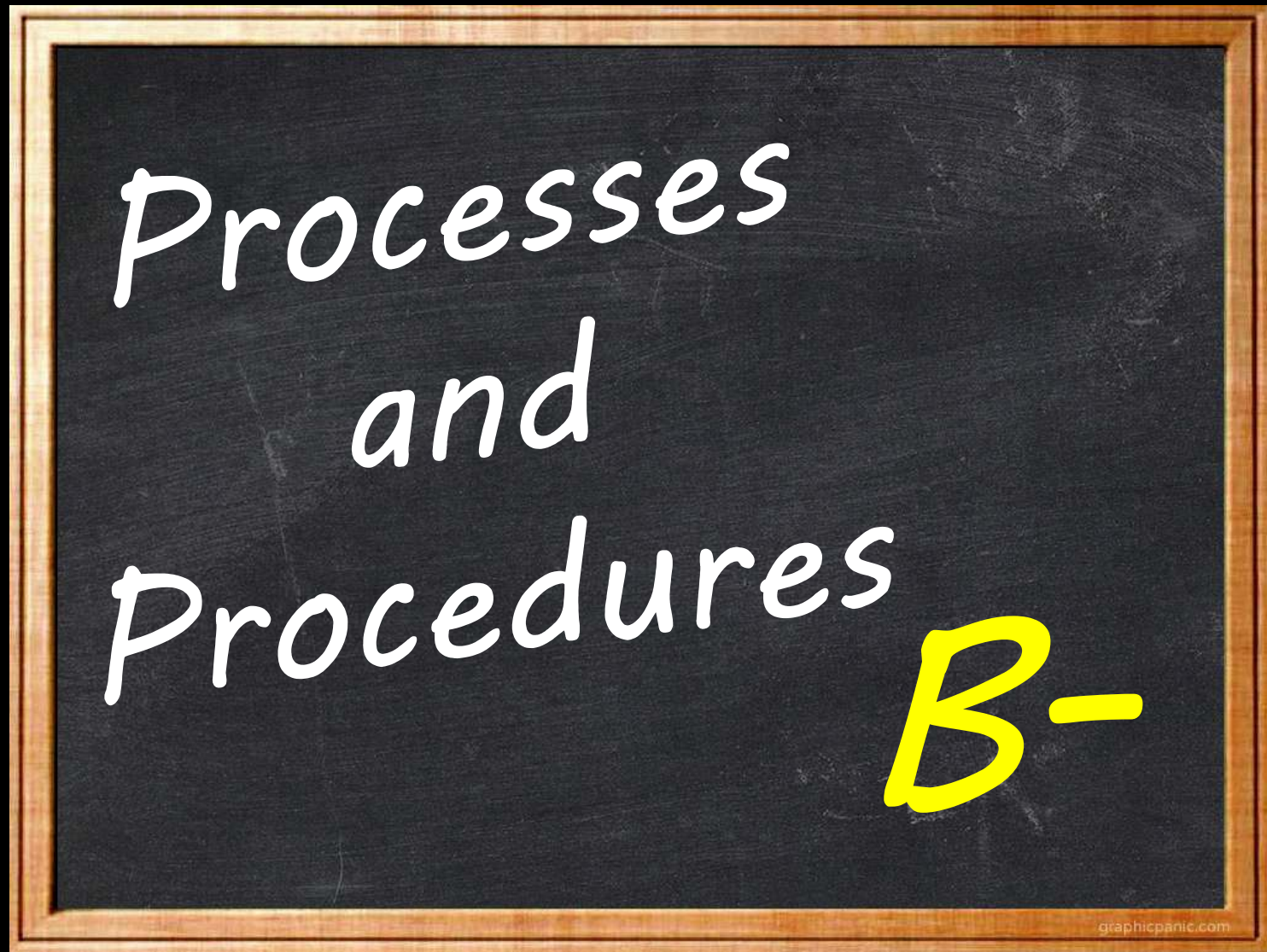


## *Processes and Procedures*

- Communications protocol for staff
- Stronger budget practices
- Sound logistics
- Formal written agreements
- Field and facility maintenance schedules
- Evaluation of activities and functions
- Structured volunteer support



# Report Card



# Processes & Procedures Progress Report

## Initiatives

- Several departmental policies implemented
- Department procedures manual in draft
- Athletic field maintenance schedules

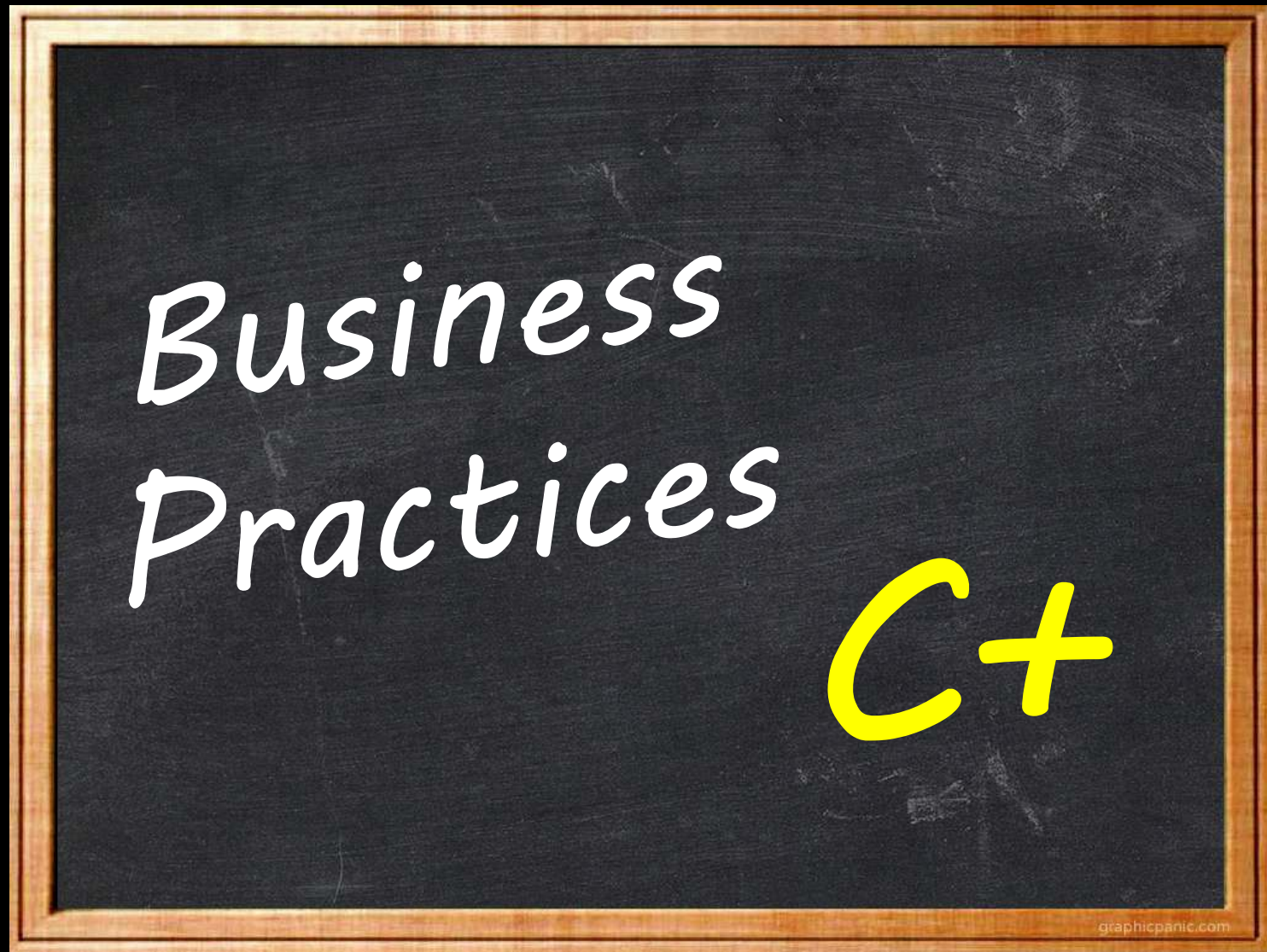
## Challenges

- No formal departmental training for staff
- Vacancies in key positions leaves little time for non-critical administrative activities
- Lack of logistical infrastructure

# *Sound Business Practices*

- Marketing Plan
  - Website
  - Social Media
  - Advertising campaign(s)
- Community meetings
- Online registration
- Strong sponsorship program

# Report Card



# *Sound Business Practices Progress Report*

## Initiatives

- Phase 1 of MUNIS Systems online registration program
- New PALS website
- Robust Facebook page and Twitter account

## Challenges

- Integrating new online registration capability with current business practices
- No staff dedicated to marketing activities

## *Where do we go from here?*

- Foster strategic planning process
- Recognize constraints and reassess ability to provide services
- Pursue a new service delivery model recognizing the demography and geography involved
  - Recreational independence for municipalities?
  - Partnerships with public and private entities for delivery of services

# Questions



Ballard | King Assessment Spreadsheet of Recommendations / Master List

Index #	Recommendation	Class	Category
1	Beaufort County will need to make a strategic decision regarding its future commitment to parks and recreation amenities and services.	Short Term	General
2	There must be a new management culture established with the staff of PALS that emphasizes strong leadership and a team approach. This will require the hiring of a strong Director with outstanding organizational and leadership skills.	Short Term	General
3	Establish a new mission statement for PALS with specific goals and objectives.	Short Term	General
4	Purchase and begin using a computer software system that supports program registration, pass management, point of sale, facility scheduling and use. From this, develop a comprehensive record system for programs and services that easily documents program and service numbers and demographic characteristics.	Short Term	General
5	Establish a clear policy and fee directive regarding County maintenance of facilities that are not owned by the County. Also determine the long term position of the County regarding the continued ownership and operation of facilities that are essentially being utilized by other governmental agencies or community organizations.	Short Term	General
6	Establish a definitive staffing philosophy for PALS based on the new mission statement.	Short Term	Staffing
7	PALS staff needs to be reorganized with clear job roles and responsibilities that cover, administration, programming, operations/maintenance, and marketing. This should be followed up with comprehensive staff performance appraisals and individual work plans.	Short Term	Staffing
8	Update all job descriptions to reflect the job responsibilities and requirements of all full-time and part-time staff.	Short Term	Staffing
9	Establish a clear communications protocol for and between all staff.	Short Term	Staffing
10	As part of the reorganization, convert the existing Fiscal Technician to an Assistant Director/Operations Manager and hire for this position.	Short Term	Staffing
11	Focus on establishing a "team" approach to staff management including a number of specific team building exercises.	Short Term	Staffing
12	Insist that weekly staff meetings are held (and documented) at the administrative and supervisory level.	Short Term	Staffing
13	Require all line staff (full and part-time) to wear staff shirts and name tags. They should also have County identification visible at all times.	Short Term	Staffing
14	Develop a comprehensive staff training program for both full-time and part-time staff.	Short Term	Staffing
15	Work with Human Resources to streamline the process and time that is necessary to hire new full-time and part-time staff.	Short Term	Staffing
16	Update and develop a comprehensive operations manual. This should include clear staff policies and procedures.	Short Term	Policies & Procedures
17	Establish well defined safety and security measures for staff and participants. This plan should include an updated emergency action plan.	Short Term	Policies & Procedures
18	Streamline the policies for purchasing and pick-up of supplies and services within PALS.	Short Term	Policies & Procedures



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20	Assign a level of basic funding for staff training and marketing.	Short Term	Budget
21	Determine the specific roles and responsibilities of PALS and Facility Management in the cleaning and maintenance of parks and recreation facilities. This should also include the management of all contract services in this area.	Short Term	Maintenance
22	Develop a basic maintenance management plan for each major facility that ensures that the all amenities are adequately maintained. This should be accomplished by Facility Management.	Short Term	Maintenance
23	Complete an analysis of what specific tasks and services should be contracted and which should be completed in-house. This analysis should be completed by Facility Management.	Short Term	Maintenance
24	Develop a basic marketing plan with specific marketing tools to promote the Department and its activities and services that are available to the community.	Short Term	Marketing
25	Update the PALS website to be more interactive with more information and pictures of program/facility users.	Short Term	Marketing
26	Conduct a number of community meetings or focus groups to determine future needs and priorities for parks and recreation programs and services as well as facilities.	Short Term	Marketing
27	Develop a comprehensive program and service development plan that increases the level and diversity of program offerings and generates higher revenue numbers.	Short Term	Programs & Services
28	Determine the clear roles of other recreation program providers in offering services to PALS.	Short Term	Programs & Services
29	Establish a clear program participation reporting system (utilizing the new computer software program) to track and summarize quarterly and annual levels of service.	Short Term	Programs & Services
30	Establish stronger partnerships with other community organizations to expand the services of the County as it relates to parks and recreation.	Middle Term	General
31	Clearly define the role of the PALS Advisory Board and host an annual board retreat.	Middle Term	General
32	ocus on long range planning tasks for PALS rather than just the day to day operations.	Middle Term	General
33	Update or establish formal written agreements with other governmental units or community organizations including: <ul style="list-style-type: none"> <li>o School District – ensuring greater access to school facilities.</li> <li>o Towns and Cities – management and maintenance of County facilities.</li> <li>o Island Recreation - management and maintenance of County facilities.</li> </ul>	Middle Term	General
34	Empower and give full authority to PALS management and supervisory staff to manage their areas of responsibility but hold these same individuals accountable for the performance of their areas.	Middle Term	Staffing
35	Increase the dependence on part-time staff for facility operations and program instruction.	Middle Term	Staffing
36	Develop an automated time card system.	Middle Term	Staffing
37	Hire a Facilities Coordinator and a Marketing Coordinator.	Middle Term	Staffing

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38	Develop a comprehensive annual report template that is utilized by PALS to summarize department accomplishments, identify operational issues, and document facility program and facility use. This template should also allow for the summary of expenses and revenues association with the Department.	Middle Term	Policies & Procedures
39	Develop long term leases with any contract operators of PALS facilities.	Middle Term	Policies & Procedures
40	Continue to improve the record keeping practices for all aspects of PALS operation. This should be accomplished through the use of the computer software program.	Middle Term	Policies & Procedures
41	Ensure that all outside groups that utilize PALS facilities sign a contract with the County.	Middle Term	Policies & Procedures
42	Develop a code of conduct for all PALS employees as well as users of County facilities or PALS programs.	Middle Term	Policies & Procedures
43	Establish a comprehensive fee policy to guide fee setting for all facilities and programs.	Middle Term	Budget
44	Develop and document specific budget practices that must be followed by PALS staff. This should start with the establishment of new budget categories to better track financial performance by individual cost centers.	Middle Term	Budget
45	Review and benchmark rates of compensation for full-time and part-time staff and make any necessary adjustments to individual position rates.	Middle Term	Budget
46	Rates of use and program participation are tracked by facility and time of day utilizing the new computer software program to determine where possible changes need to be made in staffing, resource allocation, and hours of operation.	Middle Term	Budget
47	Pursue 3-5 grants a year to fund recreation programs or facility improvements.	Middle Term	Budget
48	Complete an analysis of the most cost effective method to provide concession services, in-house vs. contract.	Middle Term	Budget
49	Track all maintenance and cleaning costs by Facility Management by individual facility on a time and material basis. These costs should be shown as a line-item cost for PALS facilities in their budget.	Middle Term	Maintenance
50	Institute a comprehensive playground inspection program utilizing a Certified Playground Safety Inspector (CPSI) in Facility Management.	Middle Term	Maintenance
51	Establish a sports field rotation policy that ensures that fields are not over used and have time to reestablish turf.	Middle Term	Maintenance
52	Purchase and utilize a maintenance management computer software program.	Middle Term	Maintenance
53	Ensure that at least one Facility Management staff member becomes a Certified Pool Operator (CPO).	Middle Term	Maintenance
54	Develop a semi-annual printed and electronic program brochure that details PALS programs and services as well as the facilities where they take place.	Middle Term	Marketing
55	Establish on-line registration capabilities for all PALS programs and services.	Middle Term	Marketing
56	Utilize social media (Facebook, Twitter, etc.) to promote PALS programs and facilities.	Middle Term	Marketing
57	Establish PALS as a clearinghouse for all County parks and recreation service providers.	Middle Term	Programs & Services
58	Determine what will be Core, Secondary and Support programs for PALS.	Middle Term	Programs & Services
59	Develop a quarterly calendar system for all programs.	Middle Term	Programs & Services

Ballard | King Assessment Spreadsheet of Recommendations / Master List

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60	Establish basic program procedures including: o Completing a program projection and reporting form for each program. o Minimum numbers to run programs. o Cancellation rates and program tracking. o Cost recovery ratios.	Middle Term	Programs & Services
61	Improve the youth sports program by: o Developing a comprehensive coach's manual and training program. o Establishing a code of conduct for all participants and spectators. o Continuing background checks for all coaches, officials and volunteers	Middle Term	Programs & Services
62	Update the County's Comprehensive Plan and the Parks, Recreation and Open Space Master Plan.	Long Term	General
63	Establish a 501(c)3 foundation for PALS.	Long Term	General
64	Complete a cost/benefit analysis regarding the possibility of transferring operation and even ownership of many of the County's smaller recreation buildings and pools to other governmental units or community organizations.	Long Term	General
65	Complete a cost/benefit analysis of operating a transportation program in-house vs. contracting for these services.	Long Term	General
66	Establish a strong volunteer program that is directed by a full-time Volunteer Coordinator.	Long Term	Staffing
67	Hire a General Program Leader to manage the increase in PALS recreation programs.	Long Term	Staffing
68	Establish specific priorities of use for each PALS facility to improve the efficiency and operation of each amenity.	Long Term	Policies & Procedures
69	Develop a comprehensive field and facility use policy to cover all PALS facilities.	Long Term	Policies & Procedures
70	Develop a funding plan for the large list of deferred maintenance items in PALS facilities.	Long Term	Budget
71	Explore alternate funding sources for parks and recreation services.	Long Term	Budget
72	Establish and fund a scholarship program for those who cannot afford the fees that are required to participate in parks and recreation activities.	Long Term	Budget
73	Complete an economic impact study for events and activities that attract non-residents to the County.	Long Term	Budget
74	Establish equity partnerships with other governmental units and community organizations to renovate or add additional parks and recreation facilities.	Long Term	Budget
75	Complete a study to determine if parks and facility maintenance and cleaning responsibilities should be returned to PALS from Facility Management.	Long Term	Maintenance
76	Complete a comprehensive asset inventory of all equipment and furnishings in PALS facilities. This should be completed by Facility Management in concert with PALS.	Long Term	Maintenance
77	Establish a depreciation schedule for all major PALS facility equipment. This should be completed by Facility Management in concert with PALS	Long Term	Maintenance

Ballard | King Assessment Spreadsheet of Recommendations / Master List

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78	Develop a sponsorship and advertising program.	Long Term	Marketing
79	Complete a survey of County residents to determine satisfaction with existing facilities and programs as well as priorities for the future. This type of survey should be conducted every 3-4 years in the future.	Long Term	Marketing
80	Complete a parks and recreation fee survey for like communities in the southeast United States.	Long Term	Marketing
81	Place flat screen monitors in key PALS facilities that can be used to promote parks and recreation services and activities.	Long Term	Marketing
82	Utilize social media (Facebook, Twitter, etc.) to promote parks and recreation programs and facilities.	Long Term	Marketing
83	Complete a lifecycle analysis of all PALS recreation programs to determine the distribution of programs between new, mature and old status.	Long Term	Programs & Services
84	Continue to expand the level of recreation program offerings by developing agreements with other providers in the area.	Long Term	Programs & Services
85	Establish a comprehensive program evaluation process that gathers key information from participants and from staff as well.	Long Term	Programs & Services
86	Plan and fund long range capital improvements and renovations for the County's indoor pools.	Long Term	Programs & Services

## Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Time Class

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22	Develop a basic maintenance management plan for each major facility that ensures that the all amenities are adequately maintained. This should be accomplished by Facility Management.	Short Term	Maintenance
23	Complete an analysis of what specific tasks and services should be contracted and which should be completed in-house. This analysis should be completed by Facility Management.	Short Term	Maintenance
24	Develop a basic marketing plan with specific marketing tools to promote the Department and its activities and services that are available to the community.	Short Term	Marketing
25	Update the PALS website to be more interactive with more information and pictures of program/facility users.	Short Term	Marketing
26	Conduct a number of community meetings or focus groups to determine future needs and priorities for parks and recreation programs and services as well as facilities.	Short Term	Marketing
27	Develop a comprehensive program and service development plan that increases the level and diversity of program offerings and generates higher revenue numbers.	Short Term	Programs & Services
28	Determine the clear roles of other recreation program providers in offering services to PALS.	Short Term	Programs & Services
29	Establish a clear program participation reporting system (utilizing the new computer software program) to track and summarize quarterly and annual levels of service.	Short Term	Programs & Services
		<b>Short Term Count</b>	29
		<b>Grand Count</b>	86

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
19	Establish stronger Budget practices including “cost center” accounting for both expenses and revenues.	Short Term	Budget
20	Assign a level of basic funding for staff training and marketing.	Short Term	Budget
43	Establish a comprehensive fee policy to guide fee setting for all facilities and programs.	Middle Term	Budget
44	Develop and document specific budget practices that must be followed by PALS staff. This should start with the establishment of new budget categories to better track financial performance by individual cost centers.	Middle Term	Budget
45	Review and benchmark rates of compensation for full-time and part-time staff and make any necessary adjustments to individual position rates.	Middle Term	Budget
46	Rates of use and program participation are tracked by facility and time of day utilizing the new computer software program to determine where possible changes need to be made in staffing, resource allocation, and hours of operation.	Middle Term	Budget
47	Pursue 3-5 grants a year to fund recreation programs or facility improvements.	Middle Term	Budget
48	Complete an analysis of the most cost effective method to provide concession services, in-house vs. contract.	Middle Term	Budget
70	Develop a funding plan for the large list of deferred maintenance items in PALS facilities.	Long Term	Budget
71	Explore alternate funding sources for parks and recreation services.	Long Term	Budget
72	Establish and fund a scholarship program for those who cannot afford the fees that are required to participate in parks and recreation activities.	Long Term	Budget
73	Complete an economic impact study for events and activities that attract non-residents to the County.	Long Term	Budget
74	Establish equity partnerships with other governmental units and community organizations to renovate or add additional parks and recreation facilities.	Long Term	Budget
		<b>Budget Count</b>	13

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
1	Beaufort County will need to make a strategic decision regarding its future commitment to parks and recreation amenities and services.	Short Term	General
2	There must be a new management culture established with the staff of PALS that emphasizes strong leadership and a team approach. This will require the hiring of a strong Director with outstanding organizational and leadership skills.	Short Term	General
3	Establish a new mission statement for PALS with specific goals and objectives.	Short Term	General
4	Purchase and begin using a computer software system that supports program registration, pass management, point of sale, facility scheduling and use. From this, develop a comprehensive record system for programs and services that easily documents program and service numbers and demographic characteristics.	Short Term	General
5	Establish a clear policy and fee directive regarding County maintenance of facilities that are not owned by the County. Also determine the long term position of the County regarding the continued ownership and operation of facilities that are essentially being utilized by other governmental agencies or community organizations.	Short Term	General
30	Establish stronger partnerships with other community organizations to expand the services of the County as it relates to parks and recreation.	Middle Term	General
31	Clearly define the role of the PALS Advisory Board and host an annual board retreat.	Middle Term	General
32	ocus on long range planning tasks for PALS rather than just the day to day operations.	Middle Term	General
33	Update or establish formal written agreements with other governmental units or community organizations including: o School District – ensuring greater access to school facilities. o Towns and Cities – management and maintenance of County facilities. o Island Recreation - management and maintenance of County facilities.	Middle Term	General
62	Update the County’s Comprehensive Plan and the Parks, Recreation and Open Space Master Plan.	Long Term	General
63	Establish a 501(c)3 foundation for PALS.	Long Term	General
64	Complete a cost/benefit analysis regarding the possibility of transferring operation and even ownership of many of the County’s smaller recreation buildings and pools to other governmental units or community organizations.	Long Term	General
65	Complete a cost/benefit analysis of operating a transportation program in-house vs. contracting for these services.	Long Term	General
		<b>General Count</b>	<b>13</b>

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
21	Determine the specific roles and responsibilities of PALS and Facility Management in the cleaning and maintenance of parks and recreation facilities. This should also include the management of all contract services in this area.	Short Term	Maintenance
22	Develop a basic maintenance management plan for each major facility that ensures that the all amenities are adequately maintained. This should be accomplished by Facility Management.	Short Term	Maintenance
23	Complete an analysis of what specific tasks and services should be contracted and which should be completed in-house. This analysis should be completed by Facility Management.	Short Term	Maintenance
49	Track all maintenance and cleaning costs by Facility Management by individual facility on a time and material basis. These costs should be shown as a line-item cost for PALS facilities in their budget.	Middle Term	Maintenance
50	Institute a comprehensive playground inspection program utilizing a Certified Playground Safety Inspector (CPSI) in Facility Management.	Middle Term	Maintenance
51	Establish a sports field rotation policy that ensures that fields are not over used and have time to reestablish turf.	Middle Term	Maintenance
52	Purchase and utilize a maintenance management computer software program.	Middle Term	Maintenance
53	Ensure that at least one Facility Management staff member becomes a Certified Pool Operator (CPO).	Middle Term	Maintenance
75	Complete a study to determine if parks and facility maintenance and cleaning responsibilities should be returned to PALS from Facility Management.	Long Term	Maintenance
76	Complete a comprehensive asset inventory of all equipment and furnishings in PALS facilities. This should be completed by Facility Management in concert with PALS.	Long Term	Maintenance
77	Establish a depreciation schedule for all major PALS facility equipment. This should be completed by Facility Management in concert with PALS	Long Term	Maintenance
		<b>Maintenance Count</b>	11

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
24	Develop a basic marketing plan with specific marketing tools to promote the Department and its activities and services that are available to the community.	Short Term	Marketing
25	Update the PALS website to be more interactive with more information and pictures of program/facility users.	Short Term	Marketing
26	Conduct a number of community meetings or focus groups to determine future needs and priorities for parks and recreation programs and services as well as facilities.	Short Term	Marketing
54	Develop a semi-annual printed and electronic program brochure that details PALS programs and services as well as the facilities where they take place.	Middle Term	Marketing
55	Establish on-line registration capabilities for all PALS programs and services.	Middle Term	Marketing
56	Utilize social media (Facebook, Twitter, etc.) to promote PALS programs and facilities.	Middle Term	Marketing
78	Develop a sponsorship and advertising program.	Long Term	Marketing
79	Complete a survey of County residents to determine satisfaction with existing facilities and programs as well as priorities for the future. This type of survey should be conducted every 3-4 years in the future.	Long Term	Marketing
80	Complete a parks and recreation fee survey for like communities in the southeast United States.	Long Term	Marketing
81	Place flat screen monitors in key PALS facilities that can be used to promote parks and recreation services and activities.	Long Term	Marketing
82	Utilize social media (Facebook, Twitter, etc.) to promote parks and recreation programs and facilities.	Long Term	Marketing
		<b>Marketing Count</b>	<b>11</b>

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
16	Update and develop a comprehensive operations manual. This should include clear staff policies and procedures.	Short Term	Policies & Procedures
17	Establish well defined safety and security measures for staff and participants. This plan should include an updated emergency action plan.	Short Term	Policies & Procedures
18	Streamline the policies for purchasing and pick-up of supplies and services within PALS.	Short Term	Policies & Procedures
38	Develop a comprehensive annual report template that is utilized by PALS to summarize department accomplishments, identify operational issues, and document facility program and facility use. This template should also allow for the summary of expenses and revenues association with the Department.	Middle Term	Policies & Procedures
39	Develop long term leases with any contract operators of PALS facilities.	Middle Term	Policies & Procedures
40	Continue to improve the record keeping practices for all aspects of PALS operation. This should be accomplished through the use of the computer software program.	Middle Term	Policies & Procedures
41	Ensure that all outside groups that utilize PALS facilities sign a contract with the County.	Middle Term	Policies & Procedures
42	Develop a code of conduct for all PALS employees as well as users of County facilities or PALS programs.	Middle Term	Policies & Procedures
68	Establish specific priorities of use for each PALS facility to improve the efficiency and operation of each amenity.	Long Term	Policies & Procedures
69	Develop a comprehensive field and facility use policy to cover all PALS facilities.	Long Term	Policies & Procedures
		<b>Policies &amp; Procedures Count</b>	10

Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
27	Develop a comprehensive program and service development plan that increases the level and diversity of program offerings and generates higher revenue numbers.	Short Term	Programs & Services
28	Determine the clear roles of other recreation program providers in offering services to PALS.	Short Term	Programs & Services
29	Establish a clear program participation reporting system (utilizing the new computer software program) to track and summarize quarterly and annual levels of service.	Short Term	Programs & Services
57	Establish PALS as a clearinghouse for all County parks and recreation service providers.	Middle Term	Programs & Services
58	Determine what will be Core, Secondary and Support programs for PALS.	Middle Term	Programs & Services
59	Develop a quarterly calendar system for all programs.	Middle Term	Programs & Services
60	Establish basic program procedures including: o Completing a program projection and reporting form for each program. o Minimum numbers to run programs. o Cancellation rates and program tracking. o Cost recovery ratios.	Middle Term	Programs & Services
61	Improve the youth sports program by: o Developing a comprehensive coach's manual and training program. o Establishing a code of conduct for all participants and spectators. o Continuing background checks for all coaches, officials and volunteers	Middle Term	Programs & Services
83	Complete a lifecycle analysis of all PALS recreation programs to determine the distribution of programs between new, mature and old status.	Long Term	Programs & Services
84	Continue to expand the level of recreation program offerings by developing agreements with other providers in the area.	Long Term	Programs & Services
85	Establish a comprehensive program evaluation process that gathers key information from participants and from staff as well.	Long Term	Programs & Services
86	Plan and fund long range capital improvements and renovations for the County's indoor pools.	Long Term	Programs & Services
		<b>Programs &amp; Services Count</b>	12



Ballard | King Assessment Spreadsheet of Recommendations / Sorted by Category

Index #	Recommendation	Class	Category
6	Establish a definitive staffing philosophy for PALS based on the new mission statement.	Short Term	Staffing
7	PALS staff needs to be reorganized with clear job roles and responsibilities that cover, administration, programming, operations/maintenance, and marketing. This should be followed up with comprehensive staff performance appraisals and individual work plans.	Short Term	Staffing
8	Update all job descriptions to reflect the job responsibilities and requirements of all full-time and part-time staff.	Short Term	Staffing
9	Establish a clear communications protocol for and between all staff.	Short Term	Staffing
10	As part of the reorganization, convert the existing Fiscal Technician to an Assistant Director/Operations Manager and hire for this position.	Short Term	Staffing
11	Focus on establishing a "team" approach to staff management including a number of specific team building exercises.	Short Term	Staffing
12	Insist that weekly staff meetings are held (and documented) at the administrative and supervisory level.	Short Term	Staffing
13	Require all line staff (full and part-time) to wear staff shirts and name tags. They should also have County identification visible at all times.	Short Term	Staffing
14	Develop a comprehensive staff training program for both full-time and part-time staff.	Short Term	Staffing
15	Work with Human Resources to streamline the process and time that is necessary to hire new full-time and part-time staff.	Short Term	Staffing
34	Empower and give full authority to PALS management and supervisory staff to manage their areas of responsibility but hold these same individuals accountable for the performance of their areas.	Middle Term	Staffing
35	Increase the dependence on part-time staff for facility operations and program instruction.	Middle Term	Staffing
36	Develop an automated time card system.	Middle Term	Staffing
37	Hire a Facilities Coordinator and a Marketing Coordinator.	Middle Term	Staffing
66	Establish a strong volunteer program that is directed by a full-time Volunteer Coordinator.	Long Term	Staffing
67	Hire a General Program Leader to manage the increase in PALS recreation programs.	Long Term	Staffing
		<b>Staffing Count</b>	16
		<b>Grand Count</b>	86



# Final Report

## Parks & Leisure Services Performance and Organizational Assessment Study



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March 12, 2013

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## **Section I - Introduction**

The purpose of this study is to critically assess Beaufort County's Parks & Leisure Services Department, identify factors, issues, and concerns within the Department that need to be addressed, changed, altered or improved to increase the operational efficiency, citizen satisfaction, and financial integrity of the organization.

This study is based on information gathered from two site visits to the County in October and December of 2012, and interviews with Department staff, County administrators, and officials.

The intent of the visits were to gain a basic understanding of the PALS Department, how it is organized, staffed, and managed, as well as the facilities that are present and the programs and services that are offered.

### ***PALS Staff Interviews:***

- Joe Penale, Interim Director
- Harold Sanders, Athletic Director
- Kerry White, After School Programs Coordinator
- Shannon Loper, Fiscal Technician/Special Events
- Vicki Hill, Aquatics Supervisor

### ***Other Interviews:***

- PALS Advisory Board
- Gary Kubic, County Administrator
- Bryan Hill, Deputy County Administrator
- Morris Campbell, Community Services Director
- Mark Roseneau, Facility Management Director
- Suzanne Gregory, Human Resources Director
- Alicia Holland, Controller
- Monica Spells, County Compliance Officer

In addition to the staff interviews there was also a review of operational and administrative information, records and material supplied by the County's staff.

### ***Specific Assessment Tasks Included:***

- A. Review Background Information
  1. Location and market impact



- a. Demographic review of the County
  - b. Site/location of key recreation facilities
  2. Programs and services review
    - a. Current service levels
  3. Meetings and interviews (up to 6)
    - a. Department management staff
    - b. PALS Advisory Board
    - c. County administrative staff
- B. Identify Organizational/Management Constraints and Parameters**
1. Goals and objectives
  2. Overall staffing philosophy and approach
  3. General approach to determining staffing roles and responsibilities
  4. Budget impact/implications
- C. Organizational Structure/Staffing Plan Assessment**
1. Assessment by area
    - a. Administration/management
    - b. Parks maintenance
    - c. Recreation programs and services
    - d. Facility operations
  2. Review staff roles and responsibilities
    - a. Job descriptions
    - b. Areas of responsibility
    - c. Tracking of work load and schedules
    - d. Performance evaluation and work plans
- D. Review Department Resources/Policies**
1. Organizational and operations policies and procedures
  2. Fee philosophy/policies (facility and programs)
  3. Operating budget
    - a. Expenditures
    - b. Revenues
  4. Maintenance management plans
  5. Marketing and promotion tools
- E. Recreation Programs and Services Assessment**
1. Categorization of programs
    - a. Current program numbers
    - b. Participation levels
  2. Determination of programming strengths and weaknesses



3. Assessment of future needs and demands for programs and services
  - a. Role of other providers
  - b. Demographic implications
4. Budget impact
  - a. Revenue figures
  - b. Fees and charges

F. Determination of Best Practices

1. Internal
  - a. Staffing
  - b. Programs and services
  - c. Facilities
2. External
  - a. Community relations
  - b. Other organizations/providers

What follows is an analysis of the performance and management of the Beaufort County Parks & Leisure Services Department that has been outlined above with an assessment of what changes or improvements should be made to increase the efficiency and effectiveness of the Department while still supporting the mission of the County in providing parks and recreation services to its residents.

*Any recommendations being made are with the knowledge that it may be difficult to implement all of the findings in this study with the current operational funding level for the Department, the staffing level of PALS, and the necessary time requirements for completion.*



## **Section II – General Demographic Summary**

One of the key pieces of information that is important in the ability of the Parks & Leisure Services Department to meet citizen needs in the future, is to understand the demographics of Beaufort County.

The demographic characteristics of the County as a whole have been examined as well as the two areas that are north and south of the Broad River.



**Table A – Beaufort Area Comparison Chart:**

	<b>Beaufort County</b>	<b>North</b>	<b>South</b>
<b>Population:</b>			
2010 Census	162,233	71,663	90,570
2012 Estimate	167,491	74,279	93,212
2017 Estimate	181,968	81,218	100,760
<b>Households:</b>			
2010 Census	64,945	26,511	38,434
2012 Estimate	66,663	27,404	39,259
2017 Estimate	73,337	30,499	42,838
<b>Families:</b>			
2010 Census	45,322	18,468	26,854
2012 Estimate	46,001	18,861	27,140
2017 Estimate	50,549	20,940	29,609
<b>Average Household Size:</b>			
2010 Census	2.42	2.52	2.34
2012 Estimate	2.43	2.54	2.36
2017 Estimate	2.43	2.51	2.34
<b>Ethnicity:</b>			
Hispanic	11.7%	7.2%	15.3%
White	72.0%	59.9%	81.7%
Black	19.2%	33.1%	8.2%
American Indian	0.3%	0.4%	0.2%
Asian	1.2%	1.3%	1.1%
Pacific Islander	0.1%	0.1%	0.04%
Other	5.1%	2.6%	7.1%
Multiple	2.1%	2.6%	1.7%
<b>Median Age:</b>			
2010 Census	40.6	32.2	47.3
2012 Estimate	41.4	32.8	48.3
2017 Estimate	43.1	34.3	50.7
<b>Median Income:</b>			
2012 Estimate	\$51,819	\$39,669	\$60,233
2017 Estimate	\$55,361	\$43,710	\$64,147
<b>Household Budget Expenditures<sup>1</sup>:</b>			
Housing	109	84	126
Entertainment & Recreation	113	87	131

<sup>1</sup> This information is placed on an index with a reference point being the National average of 100.





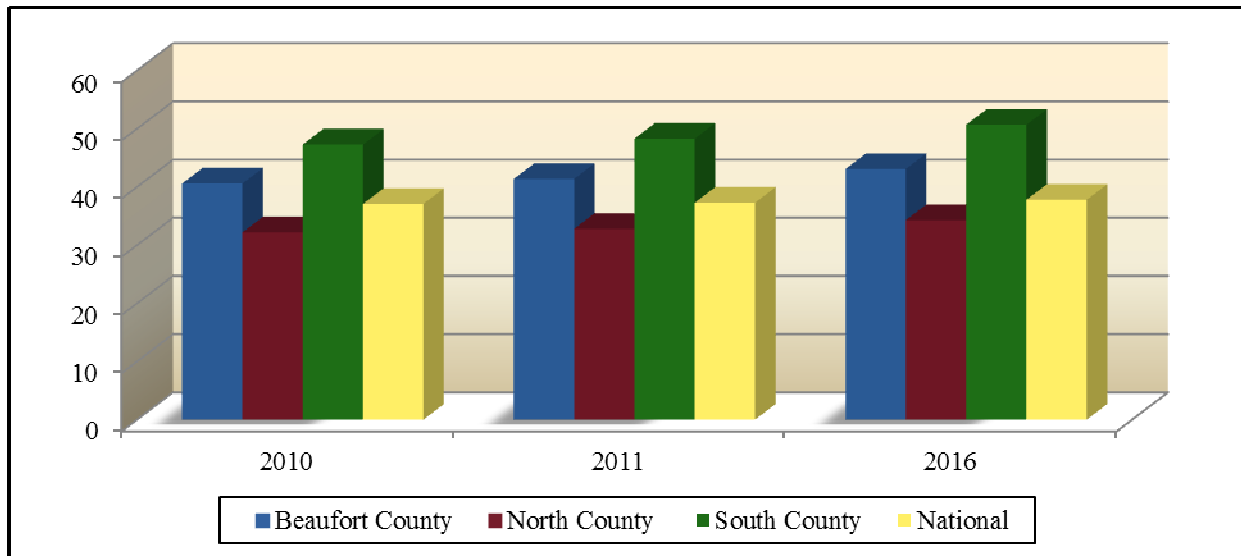
**Median Age and Household Income**

The median age and household income levels are compared with the national number as both of these factors are primary determiners of participation in recreation activities. The lower the median age, the higher the participation rates are for most activities. The level of participation also increases as the median income level goes up.

**Table B – Median Age:**

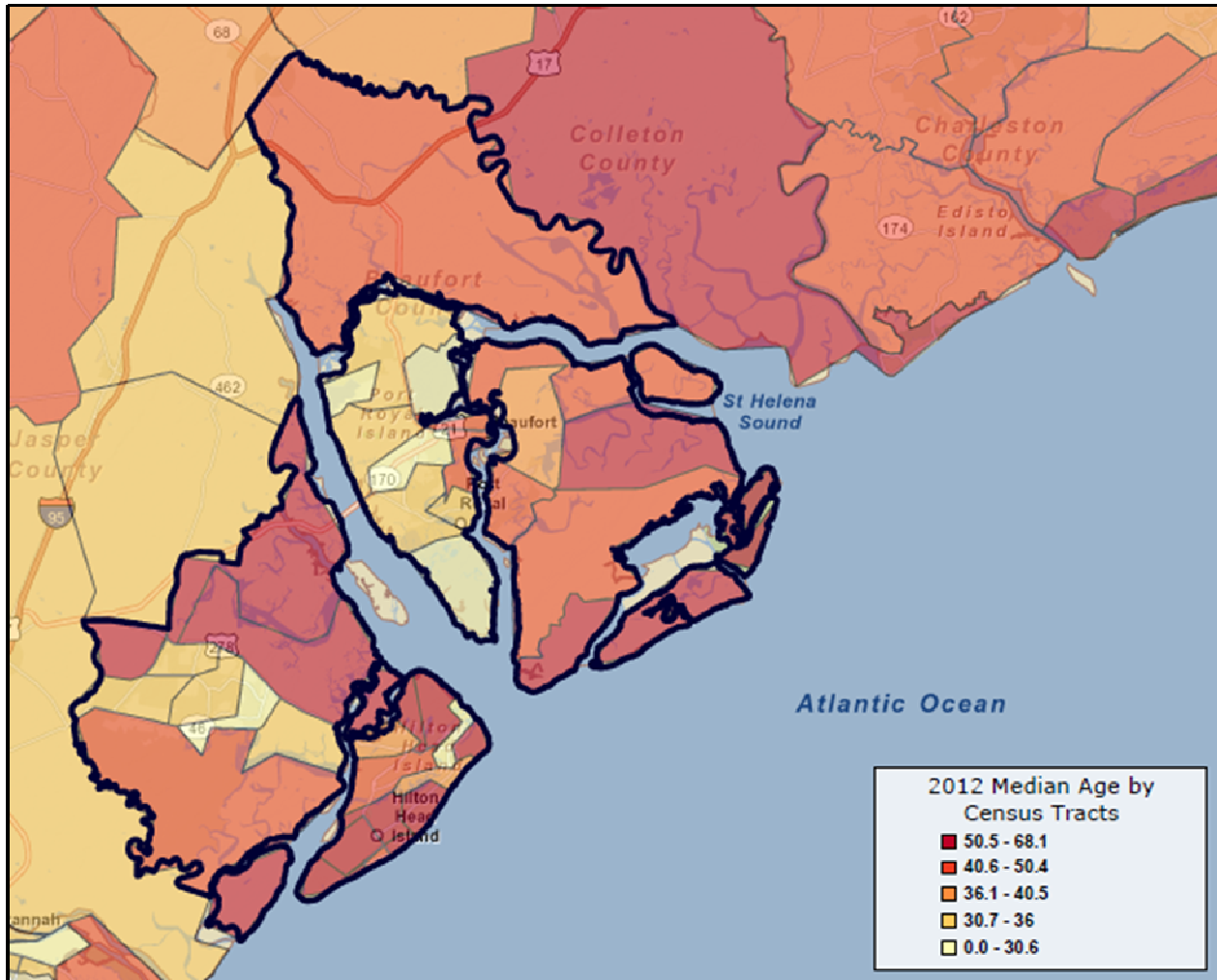
	<b>2010 Census</b>	<b>2012 Projection</b>	<b>2017 Projection</b>
Beaufort County	40.6	41.4	43.1
North County	32.2	32.8	34.3
South County	47.3	48.3	50.7
Nationally	37.1	37.3	37.8

**Chart A – Median Age**





**Map A – 2012 Median Age by Census Tracts**

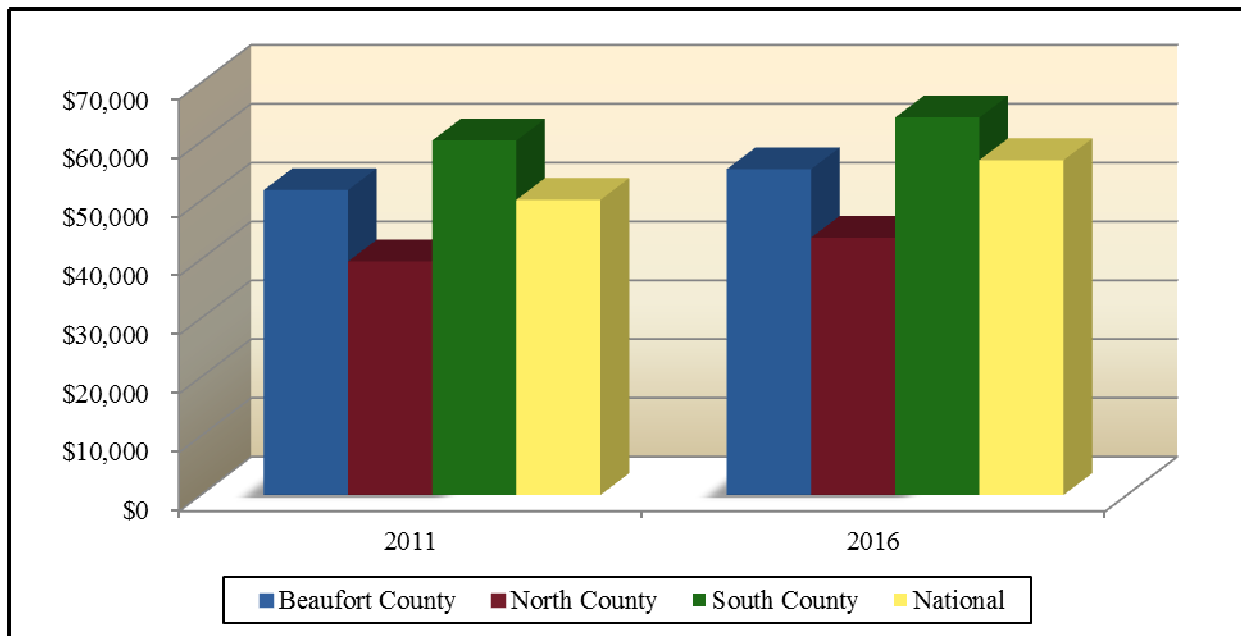




**Table C – Median Household Income:**

	2012 Estimate	2017 Projection
Beaufort County	\$51,819	\$55,361
North County	\$39,669	\$43,710
South County	\$60,223	\$64,147
Nationally	\$50,157	\$56,895

**Chart B – Median Household Income**



Based upon 2012 projections the following narrative can be provided for the service areas:

In Beaufort County the percentage of households with median income over \$50,000 per year is 52.2% compared to 50.1% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 20.9% compared to a level of 24.7% nationally.

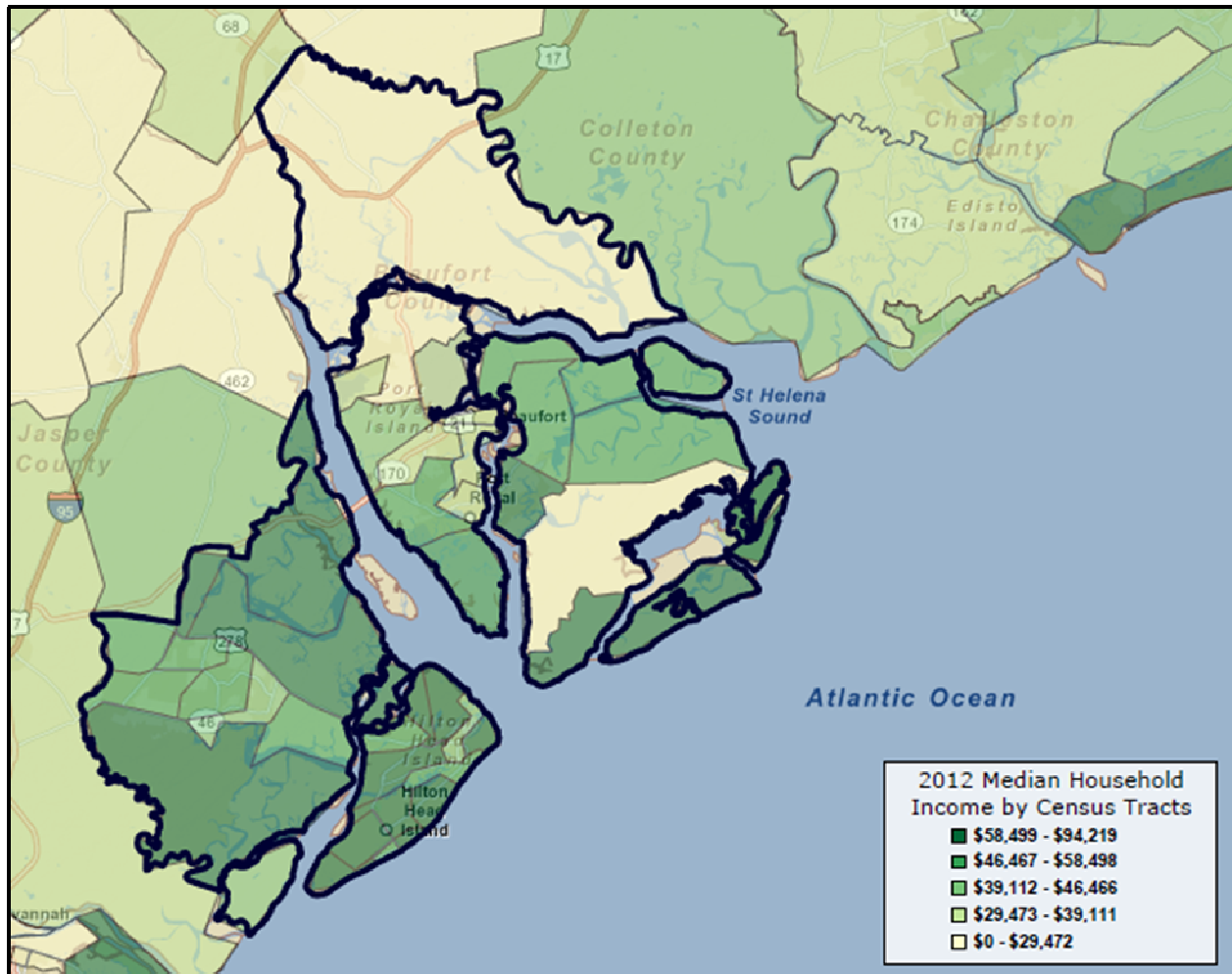
In North County the percentage of households with median income over \$50,000 per year is 39.7% compared to 50.1% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 29.6% compared to a level of 24.7% nationally.



*PALS Performance and Organizational Assessment Study*

In South County the percentage of households with median income over \$50,000 per year is 61.0% compared to 50.1% on a national level. Furthermore, the percentage of the households in the service area with median income less than \$25,000 per year is 14.9% compared to a level of 24.7% nationally.

**Map B – 2012 Median Income by Census Tract**





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In addition to taking a look at Median Age and Median Income, it is important to examine Household Budget Expenditures. In particular looking at housing information; shelter, utilities, fuel and public services along with entertainment & recreation can provide a snap shot into the cost of living and spending patterns in the services areas. The table below looks at that information and compares the service areas.

**Table D – Household Budget Expenditures<sup>2</sup>**

<b>Beaufort County</b>	<b>SPI</b>	<b>Average Amount Spent</b>	<b>Percent</b>
Housing	109	\$21,382.27	30.2%
<i>Shelter</i>	<i>108</i>	<i>\$16,504.28</i>	<i>23.3%</i>
<i>Utilities, Fuel, Public Service</i>	<i>111</i>	<i>\$4,878.00</i>	<i>6.9%</i>
Entertainment & Recreation	113	\$3,519.84	5.0%

<b>North County</b>	<b>SPI</b>	<b>Average Amount Spent</b>	<b>Percent</b>
Housing	84	\$16,461.43	30.1%
<i>Shelter</i>	<i>82</i>	<i>\$12,609.40</i>	<i>23.1%</i>
<i>Utilities, Fuel, Public Service</i>	<i>88</i>	<i>\$3,852.04</i>	<i>7.1%</i>
Entertainment & Recreation	87	\$2,705.52	5.0%

<b>South County</b>	<b>SPI</b>	<b>Average Amount Spent</b>	<b>Percent</b>
Housing	126	\$24,803.03	30.3%
<i>Shelter</i>	<i>126</i>	<i>\$19,245.65</i>	<i>23.5%</i>
<i>Utilities, Fuel, Public Service</i>	<i>127</i>	<i>\$5,557.38</i>	<i>6.8%</i>
Entertainment & Recreation	131	\$4,087.42	5.0%

**SPI:** Spending Potential Index as compared to the National number of 100.

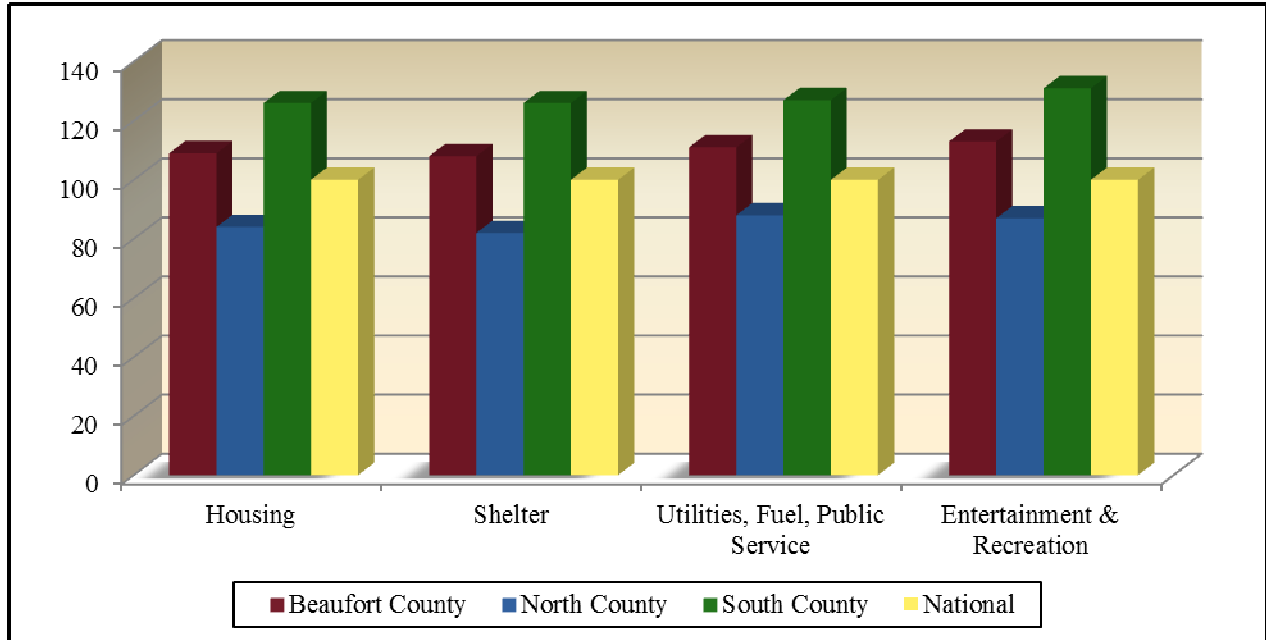
**Average Amount Spent:** The average amount spent per household.

**Percent:** Percent of the total 100% of household expenditures. **Note:** Shelter along with Utilities, Fuel, Public Service are a portion of the Housing percentage.

<sup>2</sup> Consumer Spending data are derived from the 2004 and 2005 Consumer Expenditure Surveys, Bureau of Labor Statistics. ESRI forecasts for 2010 and 2015.



**Chart C – Household Budget Expenditures Spending Potential Index**



It will be important to keep this information in mind when developing fee structures and looking at an appropriate cost recovery philosophy.



**Recreation Expenditures Spending Potential Index:** In addition to participation in recreation activities ESRI also measures recreation expenditures in a number of different areas and then indexes this against national numbers. The following comparisons are possible.

**Table E – Recreation Expenditures Spending Potential Index<sup>3</sup>**

<b>Beaufort County</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	116	\$120.10
Fees for Recreational Lessons	98	\$130.26
Social, Recreation, Club Membership	110	\$175.32
Exercise Equipment/Game Tables	91	\$72.57
Other Sports Equipment	119	\$4.61

<b>North County</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	83	\$86.15
Fees for Recreational Lessons	75	\$99.38
Social, Recreation, Club Membership	80	\$126.27
Exercise Equipment/Game Tables	72	\$57.27
Other Sports Equipment	84	\$7.75

<b>South County</b>	<b>SPI</b>	<b>Average Spent</b>
Fees for Participant Sports	141	\$145.91
Fees for Recreational Lessons	115	\$152.05
Social, Recreation, Club Membership	134	\$212.46
Exercise Equipment/Game Tables	104	\$82.70
Other Sports Equipment	120	\$11.04

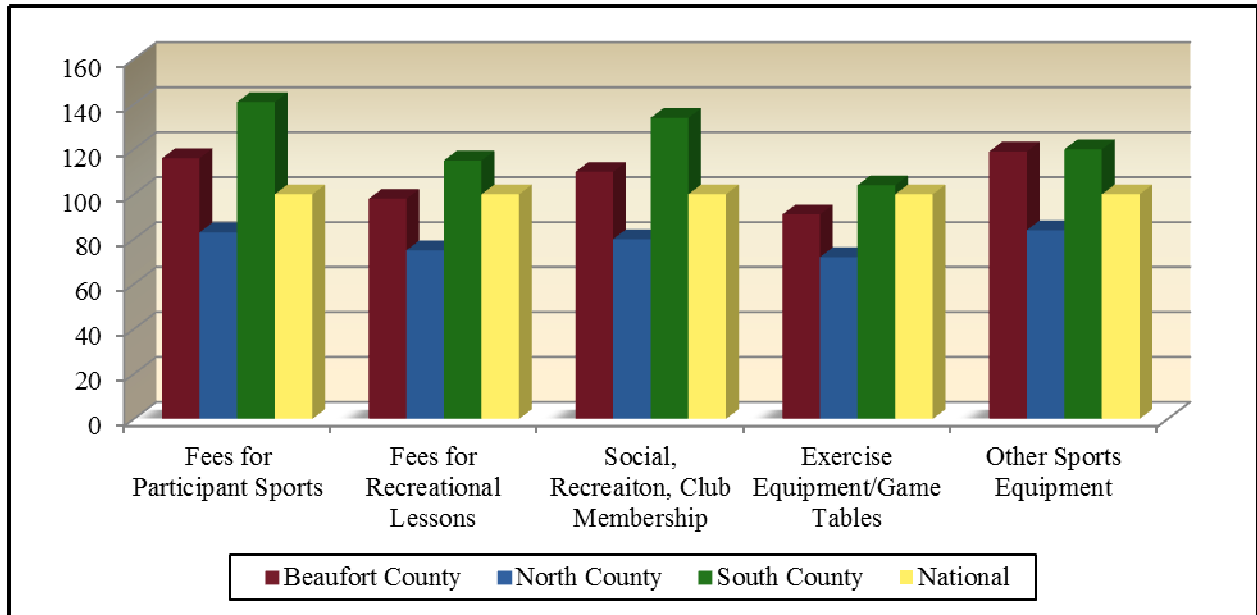
**Average Amount Spent:** The average amount spent for the service or item in a year.

**SPI:** Spending potential index as compared to the national number of 100.

<sup>3</sup> Consumer Spending data is derived from the 2006 and 2007 Consumer Expenditure Surveys, Bureau of Labor Statistics.



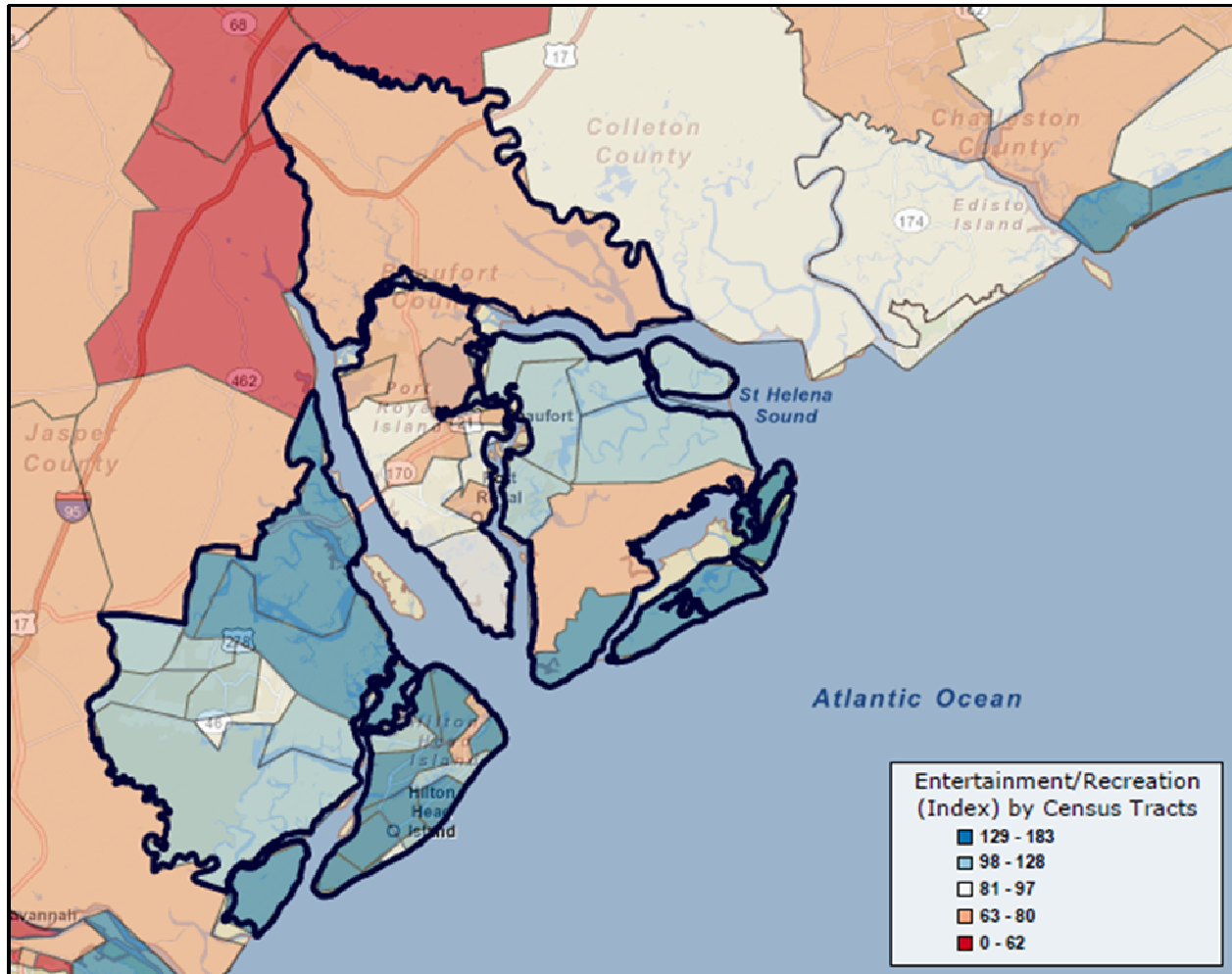
**Chart D – Recreation Spending Potential Index**







**Map C – 2011 Entertainment & Recreation Spending by Census Tract**

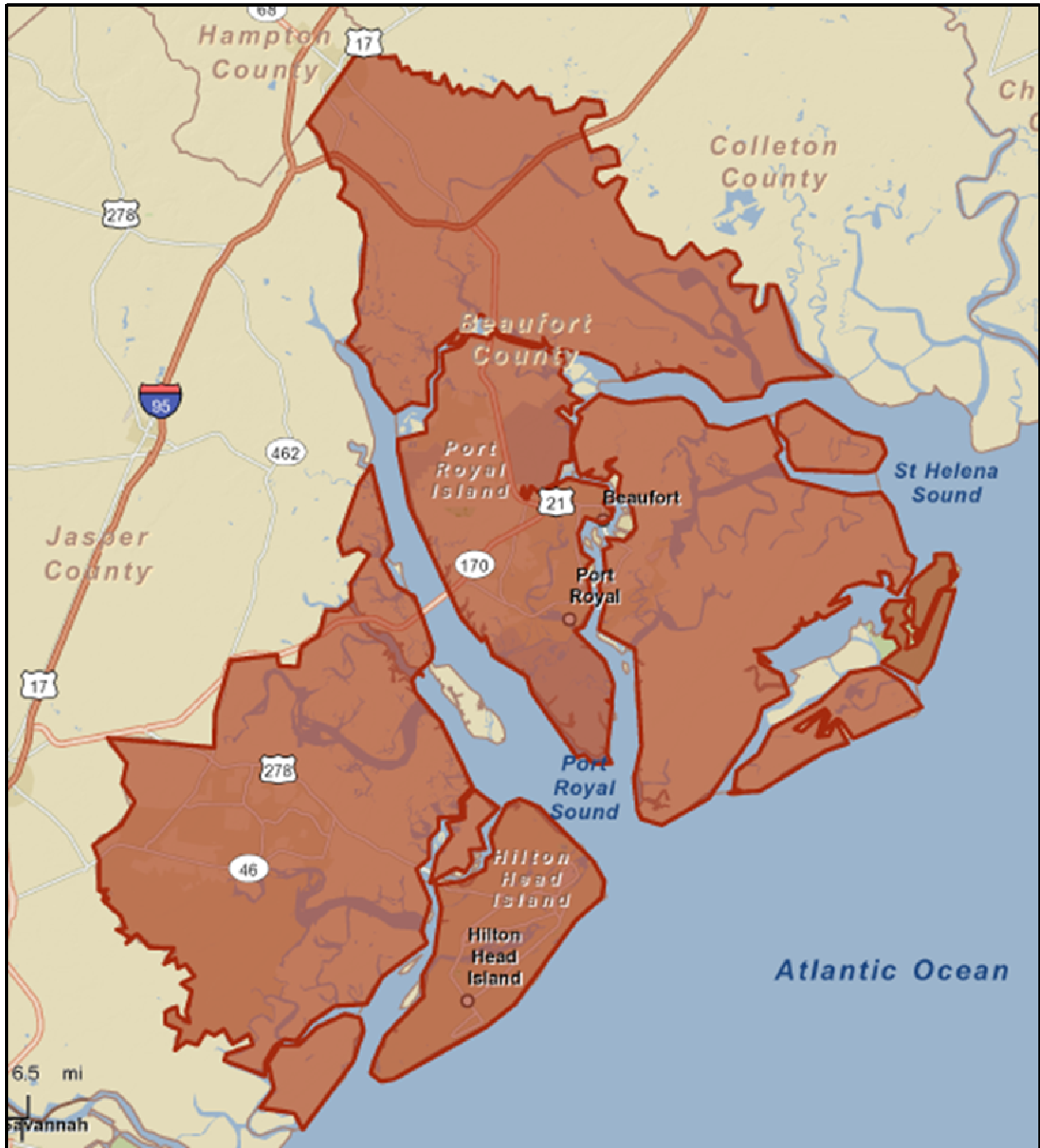


**Area Analysis**

The specific demographic characteristics of the County as a whole, as well as the north and south regions are now analyzed in more detail.



**Map D – Beaufort County Map**





**Population Distribution by Age:** Utilizing census information for the Beaufort County, the following comparisons are possible.

**Table F – 2012 Beaufort County Age Distribution**

(ESRI estimates)

Ages	Population	% of Total	Nat. Population	Difference
-5	11,188	6.7%	6.5%	+0.5%
5-17	23,466	14.1%	17.2%	-3.1%
18-24	16,804	10.1%	9.8%	+0.3%
25-44	38,397	22.9%	26.5%	-3.6%
45-54	18,468	11.1%	14.1%	-3.0%
55-64	23,765	14.2%	12.3%	+1.9%
65-74	22,039	13.1%	7.5%	+5.6%
75+	13,364	8.1%	6.1%	+2.0%

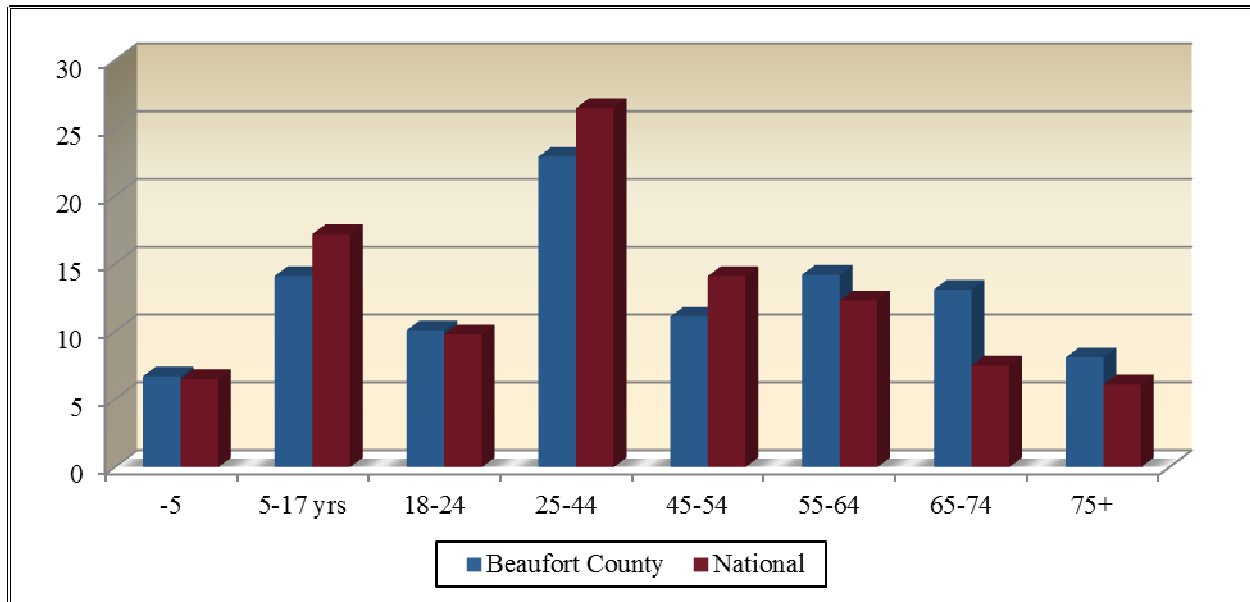
**Population:** 2012 census estimates in the different age groups in Beaufort County.

**% of Total:** Percentage of the Beaufort County population in the age group.

**National Population:** Percentage of the national population in the age group.

**Difference:** Percentage difference between the Beaufort County population and the national population.

**Chart E – 2012 Beaufort County Age Group Distribution**





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**Population Distribution Comparison by Age:** Utilizing census information from Beaufort County, the following comparisons are possible.

**Table G – 2012 Beaufort County Population Estimates**

(U.S. Census Information and ESRI)

Ages	2010 Census	2012 Projection	2017 Projection	Percent Change	Percent Change Nat'l
-5	10,960	11,188	11,932	+8.9%	+4.7%
5-17	23,388	23,466	24,804	+6.1%	+1.8%
18-24	16,443	16,804	16,670	+1.4%	-2.4%
25-44	37,671	38,397	40,685	+8.0%	+10.4%
45-54	18,580	18,468	18,190	-2.1%	-6.2%
55-64	22,159	23,765	26,533	+19.7%	+13.7%
65-74	20,137	22,039	28,157	+39.8%	+32.9%
75+	12,895	13,364	14,997	+16.3%	+9.5%

**Chart F – Beaufort County Population Growth**

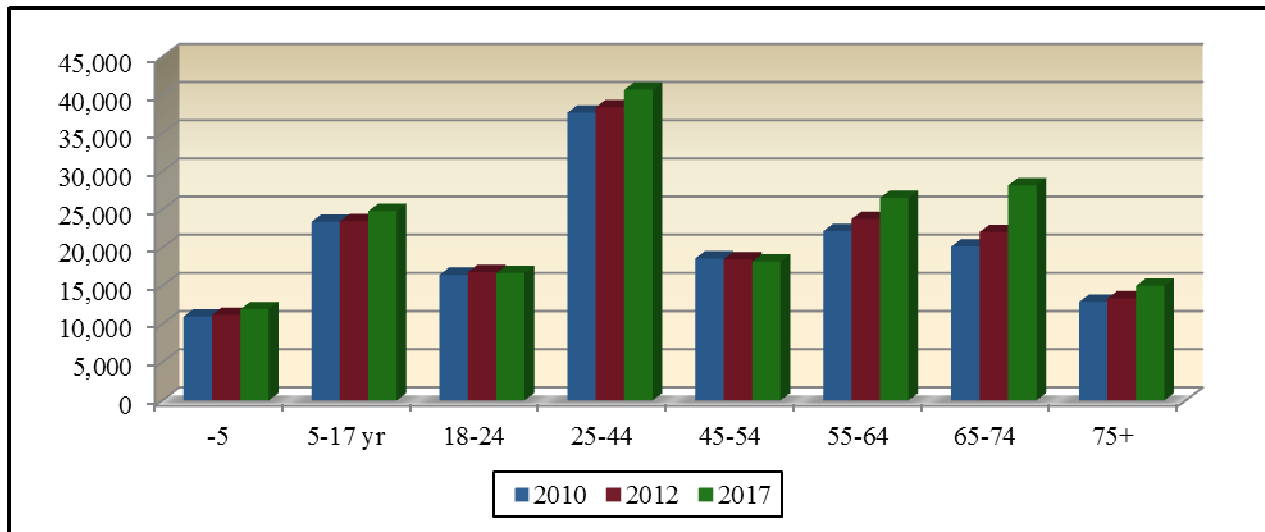


Table-G, illustrates the growth or decline in age group numbers from the 2010 census until the year 2017. It is projected that all of the age categories except 45-54 will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.



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Below is listed the distribution of the population by race and ethnicity for Beaufort County for 2012 population projections. Those numbers were developed from 2010 Census Data.

**Table H – Beaufort County Ethnic Population and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of SC Population
Hispanic	19,605	25.3	11.7%	5.4%

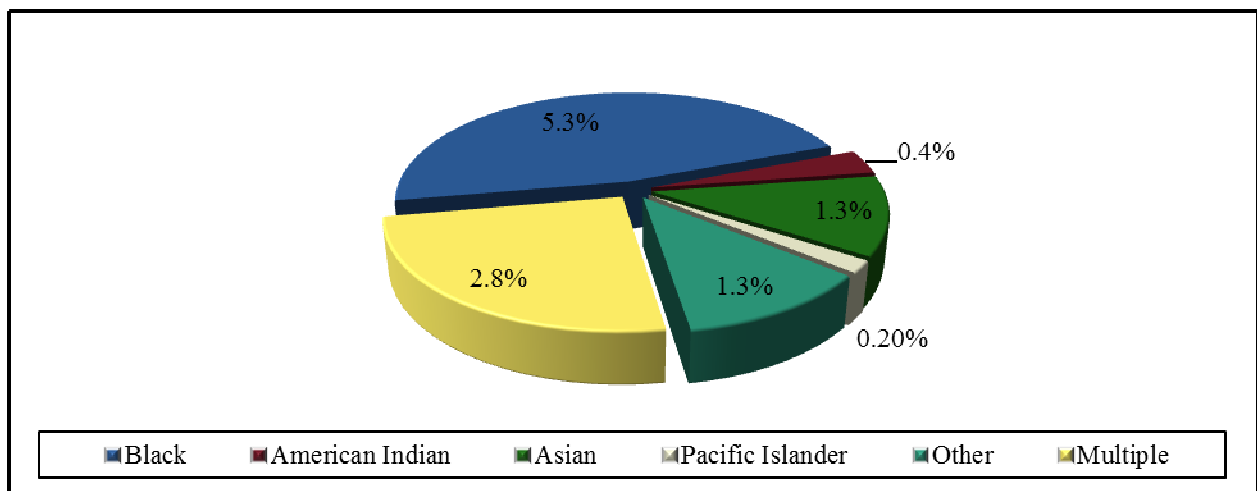
**Table I – Beaufort County Population by Race and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of SC Population
White	120,646	47.9	72.0%	65.9%
Black	32,916	32.4	19.2%	27.9%
American Indian	466	31.0	0.3%	0.4%
Asian	1,986	34.5	1.2%	1.4%
Pacific Islander	140	27.6	0.1%	0.1%
Other	8,535	25.3	5.1%	2.6%
Multiple	3,522	16.1	2.1%	1.8%

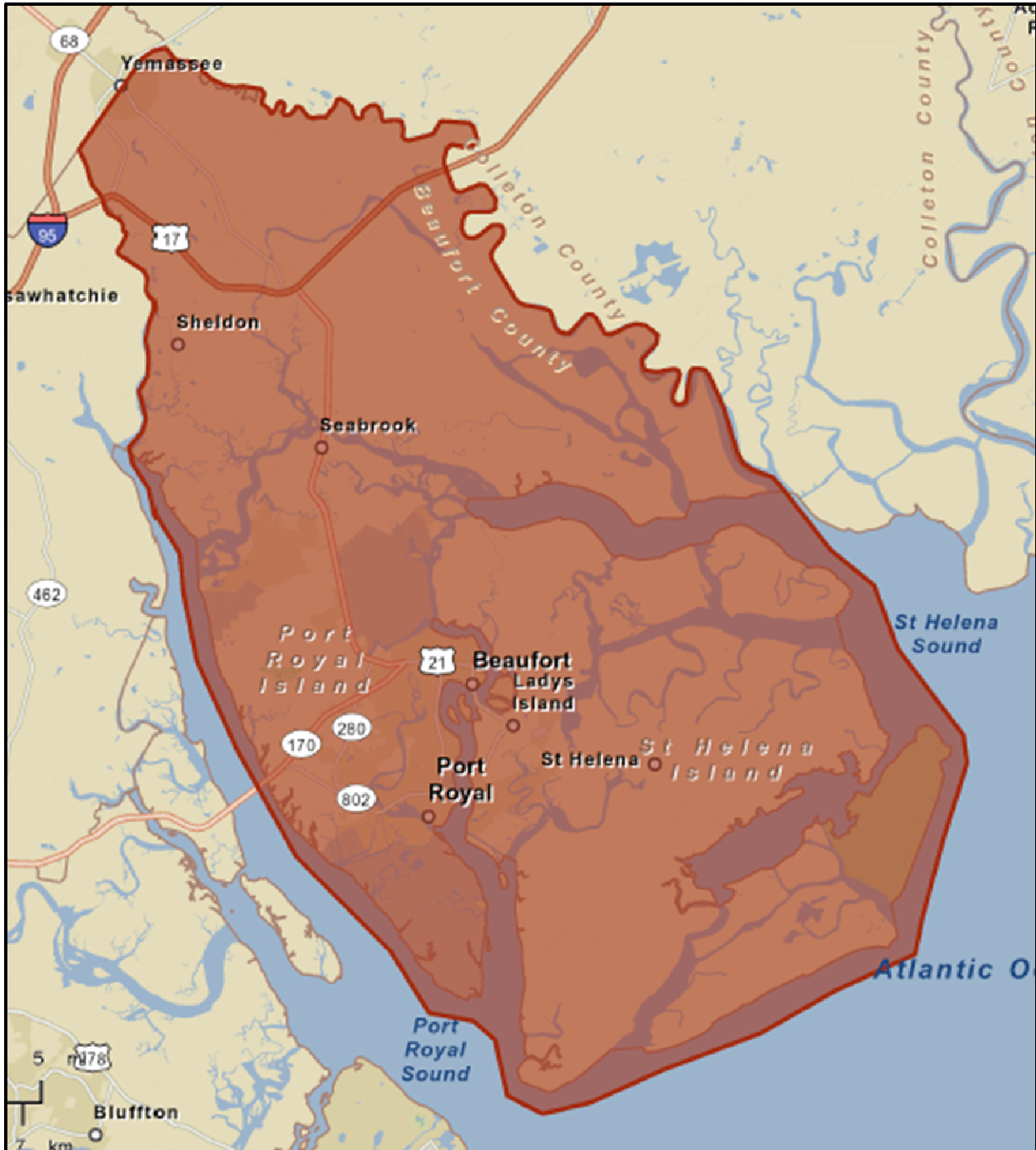
2012 Beaufort County Total Population: 167,491 Residents

**Chart G – Beaufort County Non-White Population by Race**





**Map E – North County Map**





**Population Distribution by Age:** Utilizing census information for North County, the following comparisons are possible.

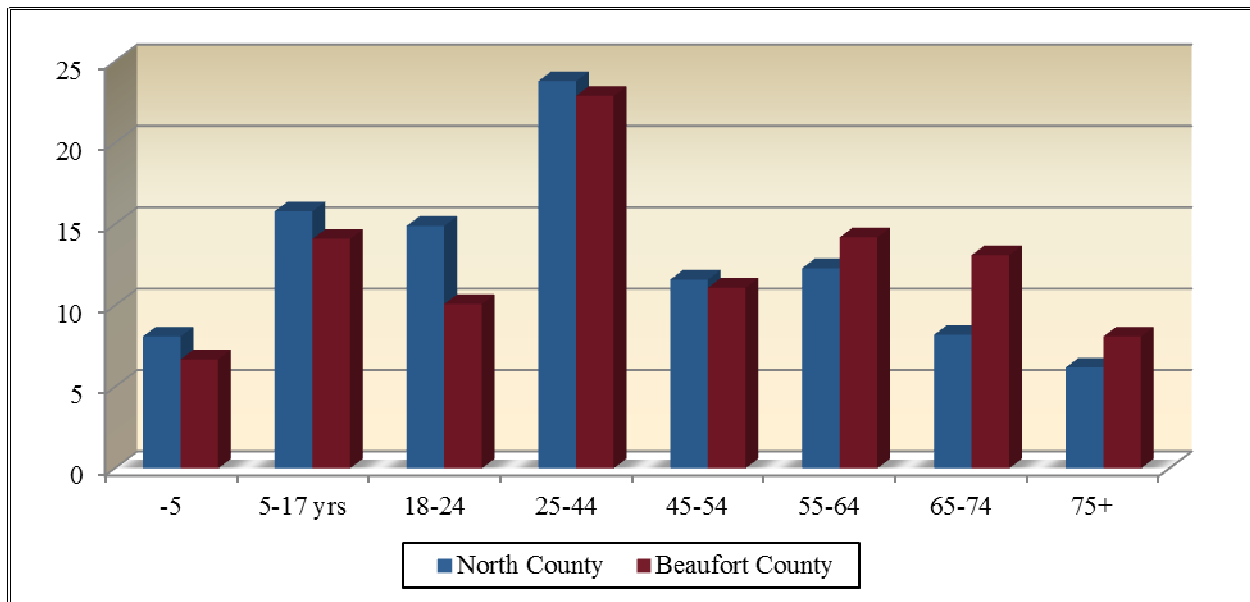
**Table J – 2012 North County Age Distribution**

(ESRI estimates)

Ages	Population	% of Total	County Pop.	Difference
-5	5,997	8.1%	6.7%	+1.4%
5-17	11,802	15.8%	14.1%	+1.7%
18-24	11,063	14.9%	10.1%	+4.8%
25-44	17,618	23.8%	22.9%	+0.9%
45-54	8,674	11.6%	11.1%	+0.5%
55-64	9,157	12.3%	14.2%	-1.9%
65-74	6,093	8.2%	13.1%	-4.9%
75+	3,875	5.2%	8.1%	-2.9%

- Population:** 2012 census estimates in the different age groups in the North County.
- % of Total:** Percentage of the North County population in the age group.
- National Population:** Percentage of the national population in the age group.
- Difference:** Percentage difference between the North County population and the County population.

**Chart H – 2012 North County Age Group Distribution**





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**Population Distribution Comparison by Age:** Utilizing census information from North County, the following comparisons are possible.

**Table K – 2012 North County Population Estimates**

(U.S. Census Information and ESRI)

Ages	2010 Census	2012 Projection	2017 Projection	Percent Change	% Change County
-5	5,844	5,997	6,483	+10.9%	+8.9%
5-17	11,700	11,802	12,609	+7.8%	+6.1%
18-24	10,813	11,063	11,121	+2.8%	+1.4%
25-44	17,175	17,618	18,940	+10.3%	+8.0%
45-54	8,636	8,674	8,715	+0.9%	-2.1%
55-64	8,411	9,157	10,580	+25.8%	+19.7%
65-74	5,437	6,093	8,190	+50.6%	+39.8%
75+	3,647	3,875	4,580	+25.6%	+16.3%

**Chart I – North County Population Growth**

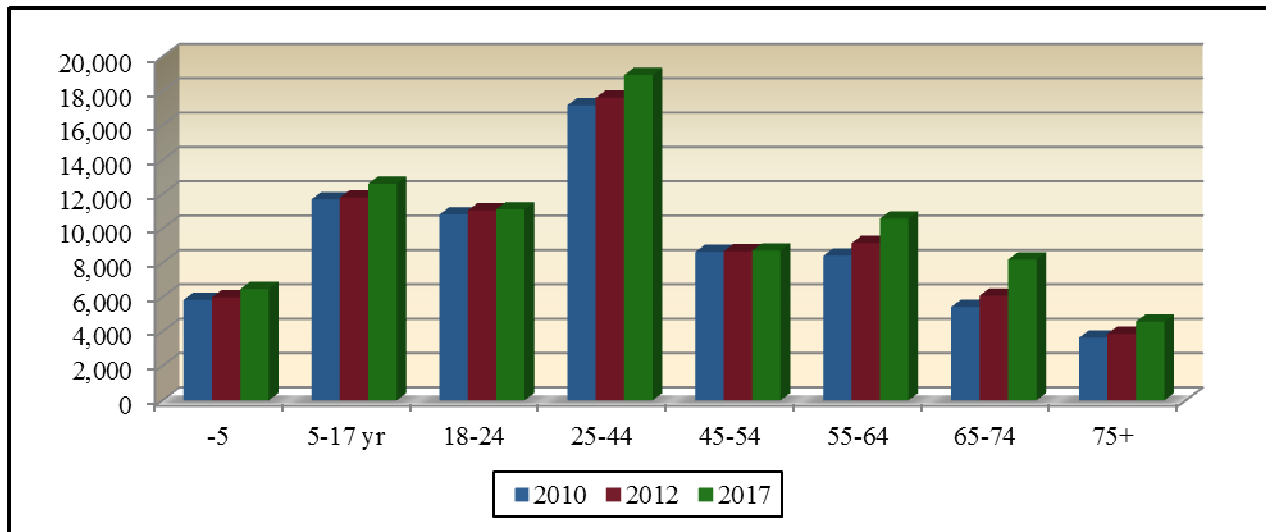


Table-K, illustrates the growth or decline in age group numbers from the 2010 census until the year 2017. It is projected that all of the age categories will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.





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Below is listed the distribution of the population by race and ethnicity for North County for 2012 population projections. Those numbers were developed from 2010 Census Data.

**Table L – North County Ethnic Population and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of County Population
Hispanic	5,379	22.7	7.2%	11.7%

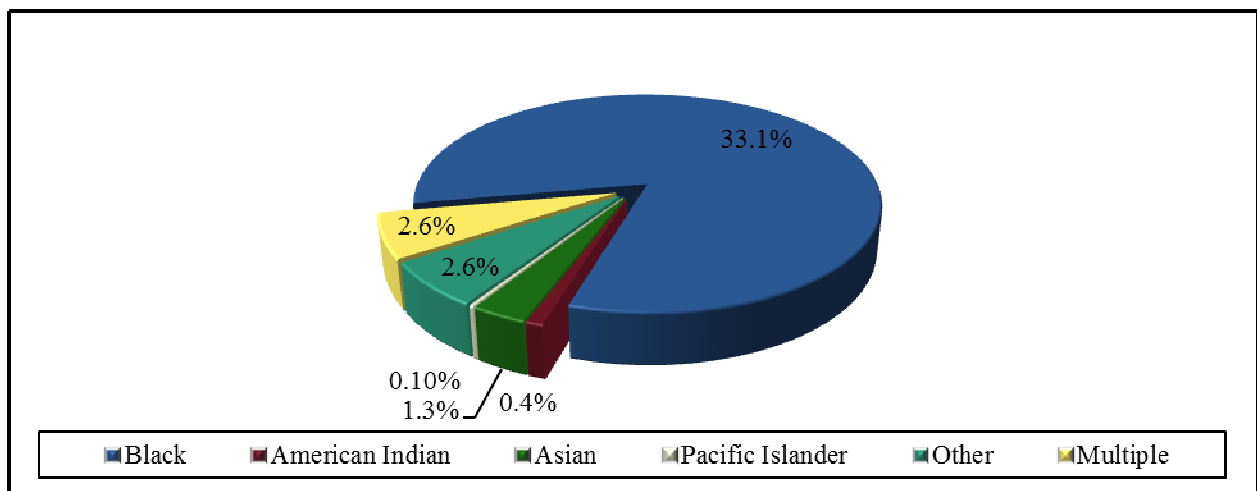
**Table M – North County Population by Race and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of County Population
White	44,498	35.4	59.9%	72.0%
Black	24,565	32.1	33.1%	19.2%
American Indian	282	28.8	0.4%	0.3%
Asian	983	33.3	1.3%	1.2%
Pacific Islander	102	27.5	0.1%	0.1%
Other	1,918	23.3	2.6%	5.1%
Multiple	1,931	16.9	2.6%	2.1%

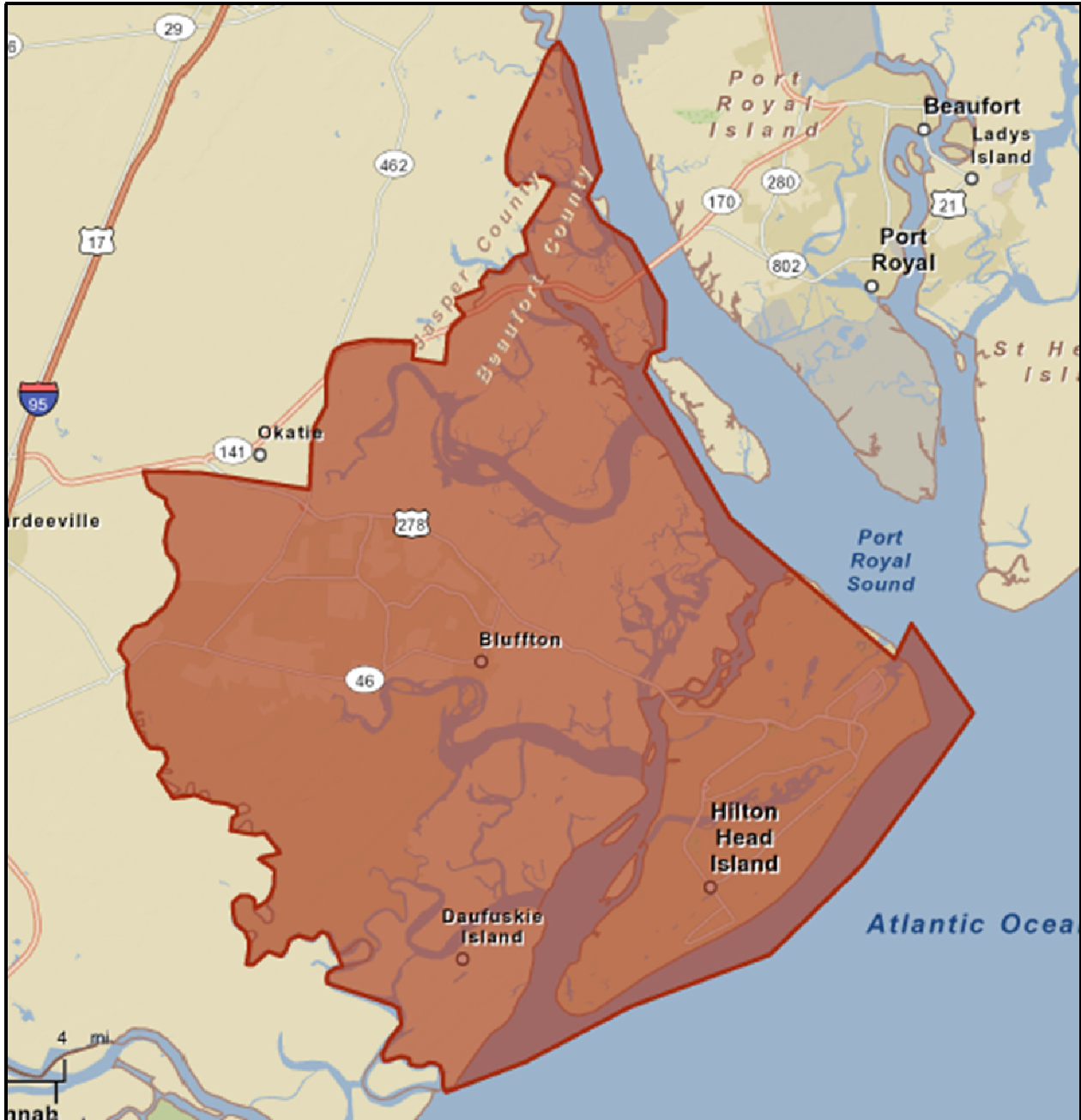
2012 North County Total Population: 74,279 Residents

**Chart J – North County Non-White Population by Race**





**Map F – South County Map**





**Population Distribution by Age:** Utilizing census information for South County, the following comparisons are possible.

**Table N – 2012 South County Age Distribution**

(ESRI estimates)

Ages	Population	% of Total	County Pop.	Difference
-5	5,191	5.6%	6.7%	-1.1%
5-17	11,664	12.5%	14.1%	-1.6%
18-24	5,741	6.1%	10.1%	-4.0%
25-44	20,779	22.2%	22.9%	-0.7%
45-54	9,794	10.5%	11.1%	-0.6%
55-64	14,608	15.7%	14.2%	+1.5%
65-74	15,946	17.1%	13.1%	+4.0%
75+	9,489	10.2%	8.1%	+2.1%

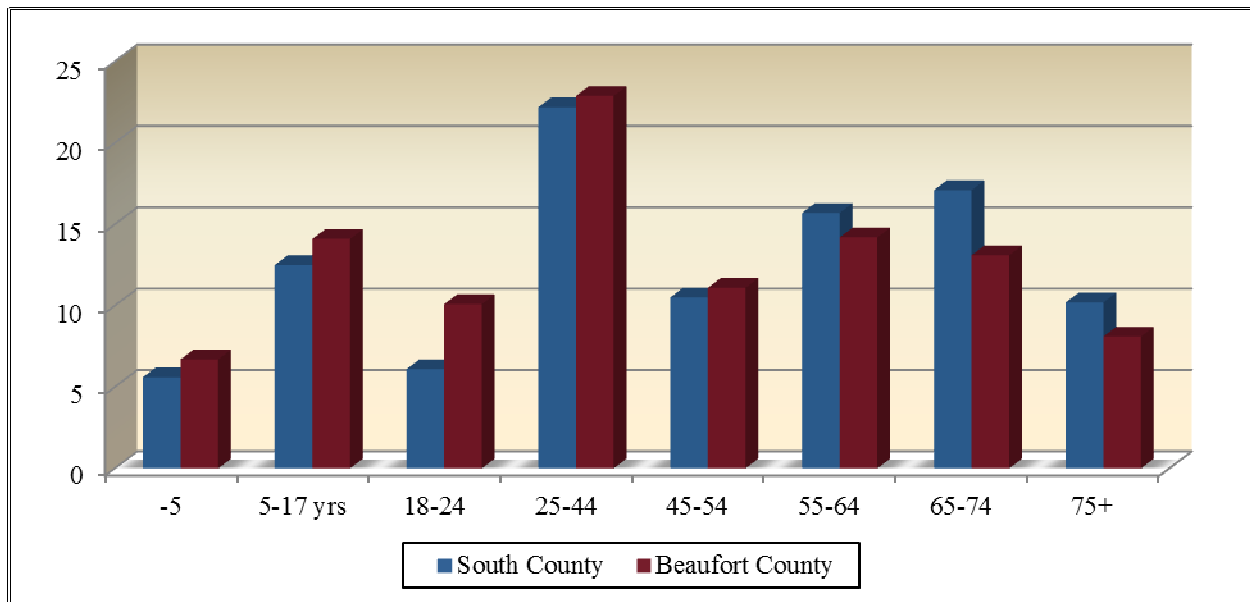
**Population:** 2012 census estimates in the different age groups in the South County.

**% of Total:** Percentage of the South County population in the age group.

**National Population:** Percentage of the national population in the age group.

**Difference:** Percentage difference between the South County population and the County population.

**Chart K – 2012 South County Age Group Distribution**





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**Population Distribution Comparison by Age:** Utilizing census information from South County, the following comparisons are possible.

**Table O – 2012 South County Population Estimates**

(U.S. Census Information and ESRI)

Ages	2010 Census	2012 Projection	2017 Projection	Percent Change	% Change County
-5	5,116	5,191	5,449	+6.5%	+8.9%
5-17	11,688	11,664	12,195	+4.3%	+6.1%
18-24	5,630	5,741	5,549	-1.4%	+1.4%
25-44	20,496	20,779	21,745	+6.1%	+8.0%
45-54	9,944	9,794	9,475	-4.7%	-2.1%
55-64	13,748	14,608	15,953	+16.0%	+19.7%
65-74	14,700	15,946	19,967	+35.8%	+39.8%
75+	9,248	9,489	10,417	+12.6%	+16.3%

**Chart L – South County Population Growth**

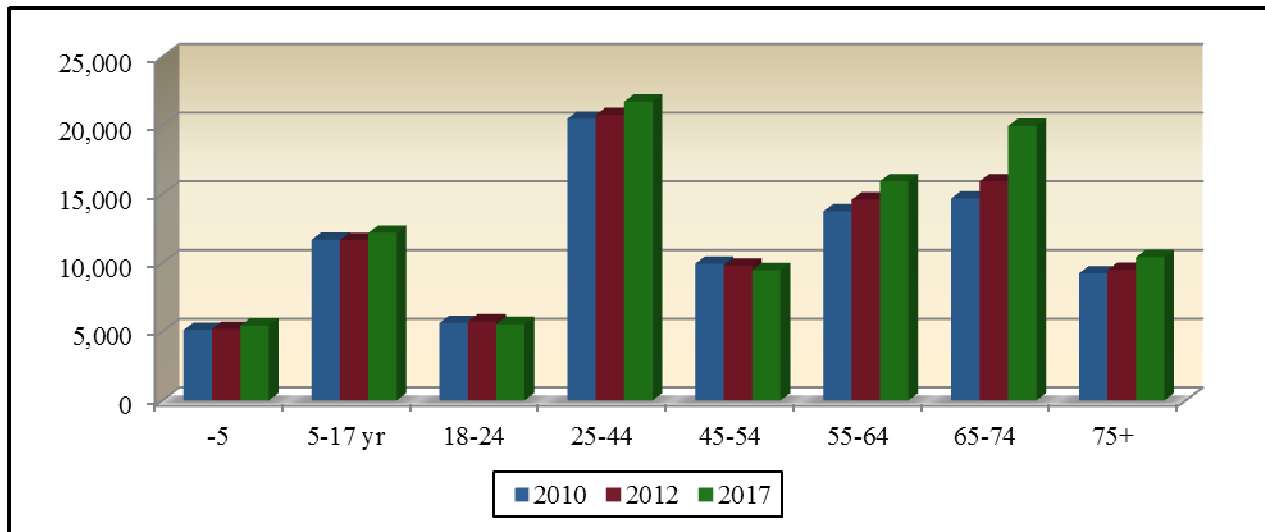


Table-O illustrates the growth or decline in age group numbers from the 2010 census until the year 2017. It is projected that all of the age categories except 18-24 and 45-54 will see an increase in population. It must be remembered that the population of the United States as a whole is aging and it is not unusual to find negative growth numbers in the younger age groups and significant net gains in the 45 plus age groupings in communities which are relatively stable in their population numbers.



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Below is listed the distribution of the population by race and ethnicity for South County for 2012 population projections. Those numbers were developed from 2010 Census Data.

**Table P – South County Ethnic Population and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of County Population
Hispanic	14,226	26.6	15.3%	11.7%

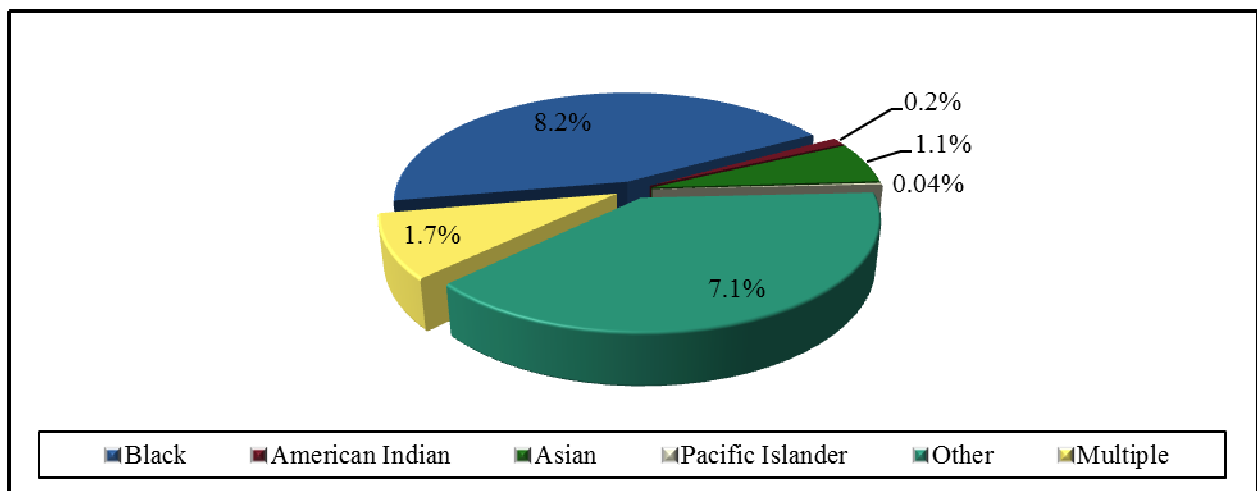
**Table Q – South County Population by Race and Median Age**

(Source – U.S. Census Bureau and ESRI)

Ethnicity	Total Population	Median Age	% of Population	% of County Population
White	76,148	54.7	81.7%	72.0%
Black	7,631	33.3	8.2%	19.2%
American Indian	184	35.9	0.2%	0.3%
Asian	1,003	35.4	1.1%	1.2%
Pacific Islander	38	27.9	0.04%	0.1%
Other	6,617	26.1	7.1%	5.1%
Multiple	1,591	14.9	1.7%	2.1%

2012 South County Total Population: 93,212 Residents

**Chart M – South County Non-White Population by Race**





## **Demographic Summary:**

### *County*

- The population is expected to continue to grow.
- Household size is smaller than the national numbers. This indicates fewer families.
- The youth and adult age groups are smaller in size than the national population numbers.
- There is a higher senior population than the national population.
- The youth and senior age groups are expected to grow over the next 5 years.
- Overall household income levels are similar to the national numbers.

### *North County*

- Has a smaller population than the South.
- The population is expected to continue to grow in all age groups.
- There is a significant African American population.
- The median age is much lower than the rest of the County.
- The median household income is lower than the rest of the County.
- There is a higher youth population and lower senior population than the rest of the County.

### *South County*

- Has a larger population than the North.
- The population is expected to continue to grow in the youth and senior age groups.
- Has the largest White population.
- The median age is much higher than the rest of the County.
- The median household income is higher than the rest of the County.



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- There is a lower youth population and higher senior population than the rest of the County.

It is clear that PALS must be ready to provide services to very different populations in the north and south areas of the County.



### **Section III – General Assessment Summary**

As an introduction to the more in-depth assessment of PALS, a general overview is presented below.

- It must be recognized that parks and recreation facilities, programs and services are a quality of life investment in a county. The value is in the benefits that parks and recreation services bring to residents and their households.
- Beaufort County will need to determine their long term commitment to parks and recreation as part of the services provided by the County. It should be recognized that most counties in the United States have a rather limited role in providing these services with much more of the overall responsibility falling on the individual towns and cities. Counties usually focus on larger regional parks, open space and greenways, and county wide indoor facilities (arenas, event centers and sports complexes). Counties rarely are major program and service providers.

Once the future level of commitment to parks and recreation amenities and services has been determined, the level of service that is going to be provided will need to be established and a commensurate allocation of the necessary resources (funding, staff, and materials) will be required.

If the County opts to reduce its role in parks and recreation facilities and services then a strategic plan will need to be developed that details how this responsibility will be transferred to other governmental units or organizations. It should be realized that this transfer could take three to five years to complete.

- The physical and cultural divide within the County must be overcome if there is ever to be a well organized and managed PALS Department. It is recognized that there are differing needs and expectations for facilities and programs between the north and south areas but these differences need to be effectively managed by a single PALS organizational structure.
- The County currently maintains a number of parks and facilities that are not owned by the County. This situation needs to be reviewed and alternatives developed that either require payment by the organization that owns the facility or a return of operational and maintenance responsibility to that organization.
- The County should have long term leases with any contract operators of facilities that requires specific operational plans, insurance, staffing guidelines and evaluation plans.





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Leases should allow for an annual performance assessment by the County to determine if the best interests of the citizens are being represented.

- An updated formal intergovernmental agreement (IGA) needs to be developed between the County and the school district. There should be greater use of school indoor recreation space as well as outdoor fields by PALS and other community organizations.
- PALS is at a critical juncture in its existence. There are significant management and staffing issues that must be resolved in a quick period of time if there is any hope of dealing effectively with the challenges of providing a diverse set of services to the residents of the County. The staff also seems to be divided into different factions with different priorities and agendas. More than anything else there needs to be strong, consistent leadership, with a clear management style that is able to bring all of the staff together as a cohesive team with one mission and a renewed vigor for the job.
- PALS will need to have a greater emphasis placed on long range planning (rather than the current focus on short term issues) for parks and recreation services and facilities in the future.
- There must be greater financial accountability with cost center accounting for all aspects of PALS operation.
- There will need to be a much stronger emphasis on setting clear staff performance expectations and guidelines in an effort to maximize the staff that is available.
- PALS has a strong reputation for certain programs, especially its athletics, summer camp, aquatics, and after school offerings, but overall there needs to be a wider diversity of programs to serve different ages and interests. If this cannot be accomplished then the County should not be the provider of recreation services.
- PALS has some very basic operating policies and procedures but it lacks strong, comprehensive, directives in these areas and these must be developed to cover all aspects of operations and management including safety and security, maintenance, financial matters, staffing, and even marketing.
- There is a general lack of record keeping regarding program statistics, budget expenditures and revenue history, and quantifiable numbers on people that have been served.
- There will need to be a continuing effort to improve and expand working relationships with other public agencies in the area.



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- PALS desperately needs to have a computer software program for program registrations, point of sale, pass management, facility scheduling and rentals. There are several off the shelf products that are available that would be perfect for this role.
  
- There are four key words that need to guide future PALS management efforts:
  - Leadership
  - Accountability
  - Teamwork
  - Planning



## **Section IV – Organizational/Management Constraints**

This section analyzes PALS basic organizational and management constraints and parameters.

### *Goals and Objectives*

- The County's Comprehensive Plan and the Parks, Recreation and Open Space Master Plan provide a basic framework for providing services to the residents of the County. With the age of the master plan it should be updated in the next three to five years.
- The County has a clear mission statement as well as general goals and objectives. However, while PALS has a list of goals and objectives, these need to be modified and updated to guide their operation and management practices.
- PALS should update and rewrite the Department mission statement as well as general goals and objectives. Then each division within the Department should have their own specific goals and objectives and these should be updated annually.

### *Overall Staffing Philosophy*

- Perhaps the greatest single challenge facing PALS is in the staffing area. The existing staff is reasonably dysfunctional and does not work as a team to further the mission of PALS or the County. Staff must be held more accountable for their areas of responsibility in terms of level of service, budget compliance, work production, and personal conduct. This will require effective, hands on management and leadership from key management staff.
- The Department does not appear to have an overall staffing philosophy and in fact the approach to staffing seems to have varied tremendously in the last 3-5 years. Currently most all of the decision making power and responsibilities for operational and administrative staff are held at the administrative level of the Department. This is not an effective way to manage a diverse operation.
- Despite the geographic and socio-economic split in the County, it is imperative that PALS continue to function effectively as one organization with two regions. This must be an overarching goal of staffing decisions and organizational changes.
- The current staff needs more guidance, nurturing, structure and discipline if their full potential is to be realized. Changing the overall culture of PALS must be a primary consideration in the next six months.



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- There must be stronger communications protocol between staff to ensure that key information and issues are known and addressed in a timely manner. This includes regular staffing meetings (with written minutes as a follow-up) on the management and supervisor level.
- There is an obvious absence of overall planning by staff both on a day to day level for programs and activities and also on more of a long range basis. More attention must be placed on basic organization and planning efforts.
- There is a definite lack of trust between the PALS management staff and the rest of the staff. This has resulted in low staff morale.

### *Approach to Staff Roles and Responsibilities*

- The vast majority of administration, budgeting and other functions are held by only 2 to 3 key managerial staff in the organization. Most of the other employees function as line staff even if they are in supervisory positions. It is recognized that this is due in large part to past problems within the Department. However, this cannot continue in the future if there is to be an effective and efficient department.
- Specific job roles and expectations are not clearly articulated to staff nor are they documented well in writing or visually in the organizational chart.
- Full-time job assignments should be by function and driven by overall organizational needs, not based on personal abilities or likes.
- It is highly recommended that the new PALS Director report directly to the County's Deputy Administrator at least until the Department is firmly reestablished.
- It is difficult to effectively manage PALS facilities and programs when another department is responsible for maintenance.
- It is hard to keep part-time staff employed with the transient nature of the County's population. This has forced a higher reliance on full-time staff than what is normally found.

### *Budget Implications*

- Without a clear road map for the future or specific goals and objectives to get there, PALS is not effectively utilizing the financial resources that it has available to them.



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- On the other side, due to poor overall performance, the Department has had staff positions and operating budgets cut.
- Unless there is greater confidence in PALS to effectively and efficiently provide parks and recreation facilities, programs and services in the future, there is little likelihood of improved funding from the County.



## **Section V – Organizational Structure/Staffing Plan Assessment**

This section examines the organizational structure and staffing roles and responsibilities of PALS.

### *Assessment by Area*

**Management** – Virtually all of the management and operations responsibility for PALS is held by the Interim Director and the Fiscal Technician. This has resulted in a “bunker mentality” and a large separation from the supervisory staff. Stronger leadership and a delegation of responsibilities are needed from this area.

**Administration** – This division primarily provides administrative support at Burton Wells but has limited impact on overall PALS operations, budgeting, or planning. Marketing is also the responsibility of this division but it does not appear to be a high priority. There needs to be a broader role for this area in the future or it should be combined with Management. Current staffing levels just for Burton Wells alone are low.

**Recreation Centers** – This is the largest single division in PALS and covers recreation center operations (12 centers) and programming, including after school, summer camp, rentals and other programs. This area has too wide a span of responsibility and an effort should be made to separate out some program areas from overall facility management. This division should attempt to reduce the number of centers that are managed by contracting this responsibility for the smaller centers to local community groups or other providers.

**Athletics** – Has its focus on providing a variety of youth and adult sports in the County. Staff is assigned by north and south areas of the County and the Fiscal Technician also has job responsibilities in this area. This division also is responsible for the operation of 17 sports fields and 5 gyms. Athletics should have all full-time staff reporting to their supervisor and be responsible for fostering stronger relationships with the other organizations providing services.

**Aquatics** – This division is responsible for the management and operation of the County’s 3 indoor pools and 1 outdoor pool as well as providing the programming for these facilities. The division has a high full-time staffing rate for the size and magnitude of the facilities that are operated. The pools are in relatively poor physical condition and the level of use is very low. This division continues to function at a reasonable rate but needs to be producing a higher rate of programming while more effectively managing costs.

### *Staff Roles and Responsibilities*



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- A long term staffing plan will need to be developed that ensures that PALS, its facilities and programs operate at a consistently high level. Key areas of responsibility that need to be clearly identified as part of this process include:
  - Facilities management
  - General programs coordination
  - Maintenance and coordination with Facility Management
  - Marketing coordination
  - Safety/Security coordination
  - Staff training coordination
  - Contract management

These areas of responsibility do not infer that there needs to be a full-time (or even a part-time) employee dedicated to each function. It may be possible for a couple of areas of responsibility to be shared by a single staff member. However, one individual should be the identified person that is responsible for each of these functions.

- Specific recommendations for staffing changes include:

### Immediate

- *PALS Director* – hiring a dynamic leader for the director position is essential and this individual must have strong organizational and management skills that is able to bring staff together and establish a new culture for the Department. To attract a qualified individual for this position the pay grade will most likely need to be increased and there must be an assurance that they will have full control over the Department. Once hired this individual must be backed by the County’s administrative staff and given the authority to reorganize and manage PALS as required.
- *Assistant Director/Operations Manager* – upgrade the Fiscal Technician position to Assistant Director responsible for operations and finance. Remove the responsibility for athletics from the position.

### Future – As budget allows:

- *Facilities Coordinator* - to manage and supervise operations as well as custodial and maintenance functions (in concert with Facility Management) at all PALS recreation facilities is an important staff addition. This should significantly improve maintenance and operations at all facilities while reducing some direct management responsibilities for the Recreation Centers staff.



## *PALS Performance and Organizational Assessment Study*

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- *Marketing Coordinator* – marketing for the short-term should continue to be the responsibility of the Administrative Division but in the future this position will be necessary to coordinate and manage all Department marketing efforts.
- *General Program Leader* – once the level of programming has increased to approximately 25% higher than the current level then a full-time leader to manage and coordinate general programming efforts should be hired.
- *Volunteer Coordinator* – if the volunteer program becomes large enough then having a full-time person to coordinate these efforts may be necessary.

Note: This suggested reorganization does not necessarily reflect the abilities or short comings of existing staff but rather the needs of the organization and the expectations of the position. The Future category is based on a division of the Recreation Centers Division into two sub areas, one for center operations and the other for programs.

- Once the organizational chart has been reset then all existing job descriptions need to be updated (full-time and part-time) to adequately reflect the actual duties of each position and the performance expectations of the individual in that role. These job descriptions should include specific educational and experience requirements for the position. There also needs to be a consistent format for all job descriptions. The existing job descriptions are the formal position narratives but a more functional depiction is required.
- There should be a comprehensive review of all existing full-time staff to determine if and how they fit in the new organizational structure and if they have the necessary job skills and requirements for their existing position, need to be moved to a different role or not retained. It may be necessary for some existing staff to reapply for their jobs.
- All full-time staff should have an annual performance appraisal completed that clearly outlines not only superior and acceptable performance but also identifies where improvement is necessary. A formal work plan should be instituted as part of this process. The work plan should establish specific measurable goals and areas of focus for the next year. Staff should then be held accountable to meet these goals. This should include on-going monitoring and write-ups for poor performance and/or failure to follow policies.

Full-time staff that are not performing at a satisfactory level on a regular basis based on their evaluations and work plan should have a documented corrective action file established and updated anytime there is an incident. This should be utilized to take further personnel action up to and including dismissal.





All part-time staff should also have a yearly evaluation completed and areas of needed improvement noted.

- It is critical that management staff of the Department commit to developing a stronger team concept. This needs to be a focus for the next six months and requires a systematic plan to accomplish. This includes empowering employees, valuing staff that perform well, encouraging new ideas and ways of doing business, and recognizing top staff. In addition the team approach must work hard to overcome the north/south division of staff.
- There must be a strong staff training and education program instituted to provide opportunities for staff growth and improvement. This staff training program should focus on customer service, program development, budgeting, revenue growth, safety/security, and operations.
- Future staff should be hired based on the required education and experience for the job (as set forth in the new job description) and with a proven track record of job performance in similar settings. Supervisory level positions and up should require a college degree in parks and recreation or a related field. In addition, most positions should require a strong background in facilities operations and/or recreation program service delivery.
- All full-time staff should be cross-trained to handle most operational or supervisory responsibilities in a division or the Department as a whole.
- There will need to be an increased reliance on part-time staff for basic programming and services while key full-time staff provide more supervisory and management control. This will likely require a higher pay rate for key part-time positions.
- Full-time staff should not have any day-to-day direct program responsibilities (teaching or leading classes or programs) and any responsibilities outside of PALS itself should be significantly curtailed or eliminated. This will allow more time to be spent on the management and operations of the Department and will maximize the use of the limited staff.
- Full-time and part-time staff compensation appears to be at the low end of the market and may need to be increased on a gradual basis based on County budget conditions to keep and attract well qualified personnel. Benchmarking pay rates with other public or non-profit recreation providers in the area should be completed at least on an every other year basis.



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- Properly managing both full-time and part-time staff is critical to maximizing PALS resources and controlling operational costs. Full-time staff should be scheduled to provide facility supervision during high use times (often evenings and weekends) as well as when most programs and services are taking place. In addition, full-time staff should have staggered schedules to better utilize manpower and resources while providing the greatest benefit to the organization. For part-time staff, managing work hours and schedules are paramount.
- Staff meetings on the administrative and supervisory level should be held on a weekly basis to review program and service delivery, safety and security issues, facility/program operations, budgets and other issues. The results of each meeting should be documented in writing and passed on to the next level of management. There should be “next steps” identified as part of this process.
- If at all possible PALS should move to an automated time card format for full-time and part-time employees and there should never be an estimation of hours still to be worked in a pay period to meet payroll timing requirements.
- Staff shirts and name tags should be required for all PALS program and facility supervision staff.
- It is critical that background checks continue to be conducted on all full-time, part-time and volunteers that are working for PALS.
- To minimize the impact from a reduced budget, establishing a strong volunteer program should be considered. To effectively make use of volunteers there must be a staff person who is responsible for managing and recruiting volunteers. If the program becomes large enough then a full-time volunteer coordinator position may be necessary.
- The PALS Advisory Board should have their role in the management and operation of the Department clearly defined. Over the last several years it appears that the Board has taken on a more direct and day to day role in operations than what is normally expected from an advisory board. Having an annual board retreat is highly recommended.
- A study should be completed to determine if facility maintenance should be brought back under the direction of the PALS Department. However, PALS will have to show that they can improve overall management practices before this can be seriously considered. If this does not occur, then there must be a significant improvement in the level of coordination for these services with Facility Management.



## **Section VI – Department Resources/Policies Review**

This section reviews the PALS Department resources and policies, including fee policies, operating budget, maintenance plans and marketing program.

### *Policies and Procedures*

- The County must have current, formal written agreements, with any and all organizations for which the maintenance and operation of facilities is provided by County staff.
- PALS needs to have its master plan updated in the next two years as the existing document is now out of date.
- Revise and update the existing operations manual into a comprehensive document for the Department as well as for each major facility that covers all aspects of operation including staff policies, maintenance expectations, emergency procedures, customer service, and even basic marketing.
- PALS should have a comprehensive, well written, code of conduct for people using County facilities.
- PALS needs to have detailed staff policies and procedures that cover all aspects of not only general operations but also staff responsibilities and expectations including everything from disciplinary procedures to an employee's code of conduct. This should be a priority in the next six months.
- An updated emergency action plan for PALS as a whole as well as for each individual facility needs to be in place. This should cover natural disasters, terror attacks, user actions, hold-ups, assaults, blood borne pathogens, lost children, etc.
- PALS should develop a comprehensive field and facility use policy to cover outside group use of County facilities. This should cover fees, priorities of use, and use regulations.
- All organizations that use PALS facilities on an on-going basis should have an active, signed contract or other agreement in place that details the time and season of use, safety and security requirements, user conduct, staff training and program requirements and fees to be paid. Such agreements should not extend beyond a three year cycle without being reviewed and updated.



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- The current hiring process for both part-time and full-time staff can be tedious and very time consuming. PALS management staff should meet with the Human Resources Division to see what steps can be taken to speed up the process.
- Purchasing responsibility is held almost exclusively at the Director and Fiscal Technician level. This slows the purchasing process to unacceptable levels. At least two other individuals need to be authorized for approving purchases and individual staff should be able to pick up required supplies once the purchase has been authorized.
- There are existing money handling procedures in place but these need to be updated and changed at this point and again once a computer software system is in place for all financial transactions.
- While there are some safety and security procedures in place for individual facilities, there needs to be an updated, comprehensive, safety and security plan and policy manual for the Department as a whole.
- Regardless of the facility, all lost and found items above an estimated \$20 in value should be logged into a locked storage area at each location.
- All chemical recording sheets (at the pools), opening and closing checklists, and fitness equipment inspections, should be archived for a minimum of one year.
- PALS should produce an annual report to summarize and document facility use, program numbers, budget figures and marketing efforts.

### *Fee Philosophy/Policies*

- A formal fee policy for facility use, rentals, and programs and services, should be developed that places a stronger emphasis on revenue generation. The tiering of programs and services (that is mentioned in the next section of the report) should be a key aspect of this policy. It is acceptable to have a fee differential between north and south areas of the County. There should be limited to no free facility or program use.
- An annual fee survey should be conducted with the other facilities and organizations in Beaufort County to determine where PALS fees fall in comparison.
- It is critical that there is a policy that encourages an adjustment of fees at least every two years to keep from falling behind on increases in expenditures or increases in fees from other providers. This should keep the Department competitive with other providers in the area.



- Ensure that rental policies and fees are being enforced for every use of PALS facilities. There needs to be a conscious effort to reduce or even eliminate free use of facilities by organizations or individuals that want exclusive use. This would include on-going use of recreation centers, fields or pools.

### *Operating Budget*

- PALS budget for the last four years:

Year	Budget
FY 13	\$3,287,353
FY 12	\$2,909,298
FY 11	\$3,441,626
FY 10	\$4,086,559

- PALS currently has a budget that has a number of sub categories to track expenditures and revenues by some facilities and program areas. However, there must be an even stronger budgeting process that identifies and manages PALS as a series of “cost centers”. Some of the existing budget categories are too broad. Establishing general cost centers by facility and program area is essential. The “cost center” accounting process not only needs to include expenses but also must attach any associated revenues to give a true net cost. Current budget categories include:
  - Central Administration
  - Summer Program
  - Aquatic Program
  - Hilton Head Programs
  - Bluffton Programs
  - Athletic Programs
  - Recreation Centers
- The “cost center” budget process isolates PALS operations expenses and revenues from just a general category. For facilities or parks, large amenities should have their own separate budget and other smaller facilities could be in a single budget but should be tracked by individual amenities if at all possible. Under recreation programs and services separate budget accounts need to be set up for different program areas (youth, sports, cultural, etc.) From this a true cost of service can be determined and matched with the level of service that is being delivered to residents.

For true cost accounting, services provided by Facility Management should be included as a separate line item in each budget.



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- Within PALS, yearly budget priorities should be directed by long term operational and management goals that are updated on an annual basis. There must be realistic and measurable goals established and staff held accountable for reaching these goals.
- There should be stronger budget control at the facility and/or the program supervisor level. Full-time staff should have budget development and monitoring accountability for their areas of responsibility. There also needs to be improved financial practices focusing on good budget monitoring procedures and strong record keeping.
- Many programs and services that take place as part of PALS (especially north of the Broad) are either free or very low priced. However, as has been noted above there should be fees and charges for most programs and services that are provided.
- A depreciation schedule and budget for all furniture, fixtures and equipment in PALS should be developed. This would be completed by Facility Management staff and utilized to develop long range capital funding needs for the Department.
- All financial transactions taking place at PALS (including program registration) must be run through a recreation software system and this will result in better accounting and tracking of facility and program use and attendance.
- The lack of accurate records on center program and service participation and revenue is a major problem in determining a true cost/benefit analysis. Use of a registration software system would solve this problem.
- It appears that PALS is no longer permitted to accept contract program providers with a split of revenue. However, if the process is effectively managed and monitored it can be a very effective method for providing services in the future. This policy should be revisited in the near future. With a comprehensive program registration software in place and a requirement that all registrations be accepted by PALS, the opportunities for misuse can be largely avoided.
- Every effort needs to be made to make on-going budget comparisons with previous years, quarters and months as a way to benchmark current operations.
- PALS has a five year capital improvement budget but it is critical that it is reviewed and updated yearly. This should identify necessary facility improvements in priority order with the anticipated funding requirements.



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- PALS should complete a cost benefit analysis of operating concessions in-house vs. contracting out this service to a qualified vendor on a rental basis. With the other demands on the Department, internal operation is probably not the best use of limited staff resources.
- PALS tends to focus their personnel budgeting (especially for part-time) on the number of positions that are authorized rather than the actual hours and/or the total dollar amount that is available. PALS should work with Human Resources to introduce a system that is based on dollars and hours authorized in an effort to be more efficient and effective in the use of staffing resources.
- A stronger more concerted effort to find alternative funding sources for programs and services will need to be pursued. This includes grants and fundraising as well as corporate sponsorships.
- With a greater emphasis on revenue generation and fee based services, a formal scholarship program will need to be instituted and funded. The scholarship program should be included as an expense for PALS with a revenue source to off-set the amount in the revenue category.
- PALS will need to have at least a basic level of funding for promotions and marketing on an annual basis.
- It is absolutely critical that PALS allocates annual funding for staff training. Particular areas of focus should be customer service, emergency situations, team building, and other factors. Funding levels should support a well thought out training plan that is developed annually.
- All revenues collected by PALS should be processed at one of the center offices and processed through the program registration software system at the time of receipt. Absolutely no fees should be collected by any staff member or providers other than those working at the office area.
- All facilities need to provide accurate and complete tracking information regarding actual usage by the day and hour of use. Quarterly analysis will give a much better picture of the actual use and revenue patterns of the facilities. This information can then be utilized to justify or limit hours of operation. To be done effectively, this will require a computer software program that interfaces with point of sale and program registration.
- Sound financial practices require good budget monitoring procedures and strong record keeping. The operational budgets need to continue to be monitored on at least a monthly



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basis with any possible deviations or modifications noted at that time. This should occur not only on the management level but also at the supervisory level as well.

- The Department should strongly consider forming a foundation (501(c)3) to help as a conduit for donations, grants and other potential revenue sources specifically for parks and recreation.
- PALS may want to consider requiring a percentage of all program and facility use revenue (5% to 10%) to be allocated to a capital improvement fund.
- PALS should identify 3-5 grants a year to pursue for funding specific aspects of recreation programming and/or facility development. This will need to be coordinated at the director level. Grants should focus on energy savings, wellness, teen services and senior activities.
- PALS may want to consider conducting an economic impact study on athletic tournaments and other activities and events that draw outside users to the County.

### *Maintenance Plans*

- There needs to be a clear determination of the roles and responsibilities of PALS and Facility Management in cleaning and maintaining all facilities. This should include the development of an overall maintenance plan for parks and recreation facilities, the responsible party, work order tracking and other similar matters. A key element of this maintenance plan should deal with preventative maintenance and also contract cleaning of facilities. Facility Management should share their equipment with PALS to reduce redundancies.
- A cost benefit analysis should be completed regarding cleaning or maintenance functions that are currently being contracted out or could be in the future. This should include the development of specific criteria for determining when it is appropriate for contracting to be considered. All contract services must have a detailed contract in place (no more than 3 years in length) and should be monitored on a weekly basis for compliance. The existing cleaning contract for PALS should be reviewed and monitored weekly for compliance. There should ultimately be a determination of who actually holds the contract, PALS or Facility Management.
- There is a strong need for a detailed facility maintenance plan for each of the major recreation facilities in the Department. This should include a well developed preventative maintenance plan as well. All maintenance functions should be tracked and





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documented to determine overall cost implications. This should be based on an established level of service philosophy.

- PALS and Facility Management should strongly consider the use of a computer software program to manage the maintenance programs for all parks and recreation facilities. This could be the Pubworks program that is used by Public Works if it is appropriate.
- Facility Management should be tracking time and materials for every facility and charging back PALS for these services. To effectively do this will require the computer software program as outlined above.
- There should be a comprehensive asset inventory completed to identify all equipment, furnishings and other items with a value of over \$1,000 that are present in PALS facilities. This inventory should be developed and updated regularly as part of the responsibility of Facility Management.
- The Facility Management Department does not currently have an on-going documented playground inspection program. Key Department staff needs to be certified for this function (CPSI) and formal inspections need to be implemented and the results documented immediately (completed on a weekly basis).
- All facilities must have their MSDS books prominently displayed.
- Facility Management should have at least one full time staff member that is a Certified Pool Operator (CPO) to back up PALS.
- There are a considerable number of deferred maintenance issues with existing facilities that is documented by Facility Management. Developing both a short term as well as a long term plan to try to reduce and fund this list will be imperative.
- The County should continue to institute an energy management plan for all parks and recreation facilities (as well as other County buildings) with the goal of lowering energy costs for PALS and other departments.
- PALS should investigate the possibility of reducing the electricity and chemical use required by circulating the water on an on-going basis when the Lind Brown pool is closed during the off season. It is possible that the pool would only need to have water circulated for a 4-6 hour time period (one turnover) over the course of the week. This could result in a significant operational cost savings.



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- Facility Management and PALS need to establish a playing field rotation schedule that ensures that grass fields have time to regenerate. Outside user groups should be penalized for over use and unauthorized use of fields.

### *Marketing and Promotion*

- PALS needs to have a basic marketing plan developed that guides promotional efforts of the Department. The first priority must be the establishment of a concise and pointed annual marketing plan as well as a more visionary five year plan. The yearly plan should be a simple document that is built on an overall promotional philosophy and contains bullet points for specific goals. This straight forward document should identify 3 to 4 areas of focus for the year, the specific marketing tasks that will be completed, a timeline for implementation, a cost estimate, the responsible staff, and a way to measure success.
- The marketing plan must take into consideration the market position of the County's facilities and programs. The lower income status and other social service issues that are present in certain areas will have to be considered. The plan must recognize other varied demographic characteristics (age, ethnicity) of the County as well.
- The marketing plan's direction and focus will need to be guided by the key target markets that will be served. This should include different ethnic groups, age groups, interest areas, and socio economic groups.
- While the overall marketing effort should be coordinated and directed by a single staff member, clear areas of responsibility for all staff as it relates to promoting facilities and programs must be developed and endorsed by all staff.
- It is critical that the Department budget some funding for marketing efforts. The level of funding should be tied to implementing the annual marketing plan.
- Current recreation programming is relatively limited and it is critical to gain a better understanding as to what programs would be of interest to County residents. Conducting stakeholder meetings, focus groups or an informal survey are all good tools that can provide a direction for programming. Having a program evaluation form completed at the conclusion of each class by the participants is another tool that can help gain a better understanding of how well a program was received and point out areas for improvement.
- Recreation programming appears to be relatively the same from year to year with no real assessment of its value or direction. The decision on programs should be driven in part by what people desire and will support. It is essential that the staff also determines where



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additional programming can be added through better utilization of existing facilities or having other entities provide the service.

- With the introduction of a computer software program, the ability to register for programs and services on-line needs to be available within the next year to 18 months. This should also include rentals and facility use permits.
- There needs to be continuing efforts to “brand” PALS through all publications, promotional materials, flyers, signs, web site, and other items. All marketing materials need to have the same format, look, logo, etc.
- The annual marketing efforts should have a formal evaluation mechanism to determine the overall effectiveness of the plan as well as specific marketing efforts.
- The areas of focus for marketing in the short term should be:
  - Increasing utilization rates for facilities.
  - Increasing overall participation rates in recreation programs and services.
  - Promoting facility rentals.

### *Promotional Tools*

- A survey of County residents could be conducted on 3-4 year basis. This survey should be conducted in-house and should gather opinions regarding facilities, staff, programs and services, and future needs.
- The use of email as a viable communications medium needs to be encouraged and should include specific demographic groups and program participants. It is recognized that not all individuals in the County may have access to email.
- On a yearly basis a series of focus groups should be held with individuals who are not users of PALS facilities or programs to determine what can be done to attract these individuals or groups.
- The manner in which users find out about PALS facilities, programs and services, needs to be tracked on a regular basis and should guide future marketing resource allocation and areas of focus.
- A twice yearly (to as much as four times a year) recreation program and service brochure should be developed. This would be in addition to the individual program flyers that are already being utilized.



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- The existing PALS website needs to be totally redone with much more information on programs and services, pictures of events and activities, and how parks and facilities can serve the community. All facility schedules, fees, programs and services should be available from the website. The website should be updated at least every six months.
- Strong consideration should be given to utilizing Facebook and Twitter as communication and promotional tools for programs and activities offered by PALS. This should be particularly effective for youth and young adults. Specific policies regarding the use of these social networking sites will have to be developed.
- Video monitors should be placed at key indoor facilities. This could be utilized for promotion of new programs and activities, providing information on current operations and also to pass on other key community information.
- PALS should continue to establish partnerships with other local organizations in an effort to expand markets and services without having to do it all internally.
- Expanding sponsorship opportunities for key programs and services (both existing and new) will not only help to promote the programs themselves but may also provide funding to maintain or add new programs. This should be a simple program with basic levels of sponsorships established based on a yearly basis, the magnitude of the program, and the cost of providing the program. It is recognized that it could take a number of years to totally institute a full sponsorship program.
- PALS needs to establish a strong customer service training program for all of its employees (full-time and part-time). This program should be updated periodically and a yearly schedule for implementation developed. Areas of focus could include, dealing with difficult people, how to handle discipline and behavioral issues, and effectively implementing emergency procedures.



## **Section VII – Recreation Programs & Services Assessment**

PALS offers a number of recreation programs and services. Some issues in this area include:

### *General*

- At present PALS provides a relatively modest level of programming. The primary areas of focus are on youth athletics/sports activities, summer camp and after-school/summer programs. The programming emphasis of the Department must be expanded significantly in the future or the County will need to make a strategic decision to get out of the recreation programming business altogether and allow other providers to take on this role.

Specific existing programs include:

#### Athletics

##### Youth

- Basketball
- Baseball (spring & fall)
- Softball
- Soccer (spring & fall)
- Football (tackle & flag)
- Cheerleading

##### Adult

- Basketball
- Church softball
- Co-ed softball
- Men's softball

#### Recreation Centers

- Summer camp
- After school
- Seniors
- Facility rentals
- Open use

#### Aquatics

- Swim lessons (individual, groups and schools)
- Water aerobics
- Lifeguard certification



First aid  
Open swimming  
Masters swimming  
Rentals

- Programming strengths include:
  - Youth athletics
  - Summer day camp
  - After school programs
  - Aquatics
  - Sports tournaments
  
- Programming weaknesses include:
  - Education programs
  - Senior activities
  - Adult programs
  - Self-improvement
  - Fitness and wellness education
  - Cultural arts
  - Outdoor education
  - Special needs
  - Non-traditional programs
  
- In addition to programs that are offered directly by PALS there are also a number of other entities that provide programs in the County. This includes:
  - Bluffton Youth Sports – baseball and softball
  - Hilton Head Baseball Association – baseball and softball
  - Island Recreation Association – soccer, basketball, swimming, roller hockey, adult soccer, after school program, summer camp and other camps.
  - Circle of Hope – Lind Brown Center
  - Upward Bound Basketball
  - Bluffton Bulldogs, Beaufort Wildcats, Barracudas, Gator - Youth football
  - Upwards, Arsenal, Lower Coastal Soccer Academy, YMCA – Youth soccer
  - YMCA
  - Boys & Girls Club
  - Military bases
  - Churches
  - Day cares
  - Travel league youth sports teams (AAU)



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- For PALS a long term programming plan will need to be developed that outlines program and service priorities for the next five years, the individual responsible for the development of the program, and the required resources (staff, funding, fees, etc.) to implement the activity. From this a milestone schedule is developed that ensures that the programming plan will remain on schedule. This programming plan should be reviewed and updated annually with input from County leaders, participants and other focus groups. It is recognized that the program plan will have extensive differences between the northern and southern portions of the County.
- As part of the long term programming plan, PALS should sort program areas by core, secondary and support categories. The following chart identifies and summarizes potential general program areas by these categories. The placement of programs into these three categories does not indicate the overall importance of these activities in the County but rather the role of PALS in providing these programs.
  - *Core Programs* – are those programs that are a primary responsibility of PALS to provide as County based activities.
  - *Secondary Programs* – are those programs that are a lower priority to be provided directly by PALS but may be offered by other organizations through contract with the County.
  - *Support Programs* – are programs that are not a priority for PALS to be providing directly to the community but where the County may provide support through facilities and promotion of activities for other organizations.

<b>Programs</b>	<b>Core</b>	<b>Secondary</b>	<b>Support</b>
Youth Sports	√		
Adult Sports		√	
Fitness/Wellness		√	
Cultural Arts			√
Education		√	
Aquatics	√		
General Interest	√		
Special Needs			√
Special Events/Tourn.	√		
Outdoor Recreation			√
Seniors		√	
Self Directed	√		



- PALS is the primary provider of youth sports in the north area of the County but it plays a much smaller role in the south area where non-profit youth sports organizations are a major factor.
- PALS conducts a limited number of special events (other than sports tournaments). These vary by time of the year and area of focus. However, 2-3 special events a year can be effective in building community, promoting the County, and celebrating the unique aspects of the physical attributes and cultural customs of the area. On the other side, staff needs to realize that special events take a great deal of time to organize and put on as well as potentially a significant financial commitment. As a result, it is important to evaluate the benefits of the events on an individual basis to determine future commitments.
- Parks and recreation agencies are now making a concerted effort to integrate social services and education curriculum into recreation programming for youth and families. This should be a focus for PALS in future programming efforts.
- Although not considered a true program, drop-in (self directed) activities must also be emphasized and time set aside for these opportunities in County facilities.
- Rentals are not a true program for PALS but they should be an important aspect of the County's services. If the financial benefits are to be gained, then time and resources will need to be allocated for this purpose and a fee for service concept followed to the letter.
- PALS needs to encourage (private and non-profit) outside organizations to provide recreation programs and services at County facilities as long as they do not compete with internal programs, they meet the vision and mandates of the County, and there is no direct liability or financial risk to the County itself. However, there must be clear policies and procedures in place to guide this process including a payment for facility use and/or a percentage of gross revenues collected.
- PALS should serve as a clearinghouse for recreation programs and facilities that are available in the County. This would involve the listing of programs and services provided by these organizations in PALS program brochures, links on the web site, and coordination of other promotional materials.
- PALS staff should continue to communicate regularly with other public and non-profit recreation providers in the area to gain insight into programming trends and demands.
- To significantly grow the number of programs and services that are offered by PALS there will need to be adequate full-time staff dedicated to programming as well as a





sufficient operating budget. This may not be possible with the County's current budget situation.

- PALS should look at all possible partnering opportunities for programs and services. This should include the state, school district, cities and towns, appropriate private providers, and other non-profit organizations in the area. This can be a cost effective method to add more recreation programs and services without adding staff, if it is properly managed.
- Programs should be developed using a quarterly calendar. To accomplish this and allow adequate time for promotion and registration, a detailed schedule of when program information is developed, when it is advertised, and when registration is accepted must be established.
- For the youth sports programs that PALS offers, there needs to be a focus on the following:
  - Develop a comprehensive coach's manual.
  - Develop a referee's training/policies manual.
  - Establish a mandatory coaches training program (through NYSCA). This would require a coach to complete a training program before being allowed to coach and also require on-going training to keep their position.
  - Establish a code of conduct for all coaches, players and spectators.
  - Background checks on all volunteers, coaches and officials.
- Youth sports organizations that utilize County facilities should be required to have all of the items listed above in place to qualify for a field use permit.
- It is recognized that much of the programming associated with seniors is being provided by the state in County facilities. Never the less, in the future PALS should focus its senior programming on the younger and more active senior (Baby-Boomers).

#### *Participation Numbers*

- Currently PALS does not have a comprehensive program reporting system that lists actual program registration numbers and attendance. This needs to be an area of focus in the next six months. A computer software system should be utilized for this purpose and all programs and services (regardless if there is a fee) should require registration and tracking with the system. The method of recording, time frame and format should also be consistent for all program areas.



- Basic program numbers are listed below. This is not a comprehensive list of all such programs but represents what was provided by staff. It should be noted that some numbers are not available and others are probably not as accurate as they should be.

**Youth Athletics**

Athletics North	2011	2012
Football	338	250
Soccer Fall	476	335
Soccer Spring	517	456
Cheerleading	77	64
Basketball	338	335
Baseball Spring	640	593
Baseball Fall	0	59
Total	2,386	2,092

Athletics South	2011	2012
Football	132	225
Soccer Fall	623	693
Soccer Spring	860	945
Cheerleading	45	73
Basketball	558	633
Total	2,218	2,569

**Recreation Centers (2011)**

Kinder Summer Camp North		Pre Teen Summer Camp North		Total
Beaufort Centers	Participants	Beaufort Centers	Participants	
Burton Wells	43	Burton Wells	45	88
Lind Brown	41	Lind Brown	41	82
Broomfield	10	Broomfield	15	25
Dale	17	Dale	5	22
Port Royal	23	Port Royal	21	44
St. Helena	9	St. Helena	15	24
Total	143	Total	142	285

Kinder Summer Camp South	Pre Teen Summer Camp South	



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Bluffton Centers	Participants	Bluffton Centers	Participants	Total
Bluffton Center	59	Bluffton Center	60	119
Buckwalter	41	Buckwalter	41	82
Total	100	Total	101	201

Beaufort After Sch.	Participants
Burton Wells	28
Port Royal	27
<i>After School</i>	
Bluffton Center	58
Total	113

**Aquatics (July 2010-July 2011)**

	Participants
Aerobics	2,252
Camp	5,307
Early Bird	2,341
Family Swim	0
Guard Start	0
Infant/Toddler	0
Intersession	0
Lap/Open	10,021
Learn to Swim	11,001
Lifeguarding Today	168
Masters	428
PALS Afterschool	5
PALS Lessons	1,188
Rec Swim/Wkend	2,146
Rental	5,812
Scuba	71
Special Event	655
Swim Team	10,492
Synchronized Swim	0
Training	179
Water Safety Inst.	1
Bus Drivers	81
Total	52,148



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Note: Aquatics totals include the three indoor pools and the outdoor pools. Not all pools had accurate reports for each month of this time period. These figures also include more than just programs.

- A qualitative analysis should be completed for each program and activity that is offered by PALS. This assessment should primarily be conducted through evaluations by the participants themselves. It is not necessary to evaluate each program every session but every program should be evaluated at least once during the course of a calendar year.
- Each major program area should complete an annual report that succinctly summarizes program numbers and participation rates for the year and compares them with the previous years. Each program area should utilize the same format and the information should be available in a single document for the Department.
- A lifecycle analysis of PALS recreation programs and services needs to be undertaken where program registrations by interest area are tracked and reviewed on a seasonal basis. Programs should be slotted into the following categories:
  - *New* – programs in the start-up phase that are just starting to build in popularity.
  - *Mature* – programs that have consistent high levels of registrations and are still growing in popularity.
  - *Old* – programs that are seeing a decline in popularity.

Programs that are in the old category should be changed, updated or discontinued.

- All in-house programs should have strict minimum numbers of registrants that ensure enrollment and revenues are adequate and there is the best use of space and time at County facilities.
- In general, programs should have an overall cancellation rate of approximately 15%-20%. Numbers that are higher than this level indicates that either too many or not the right types of programs are being offered. Levels below 15% indicate that not enough new program ideas are being explored.

### *Budget Impact*

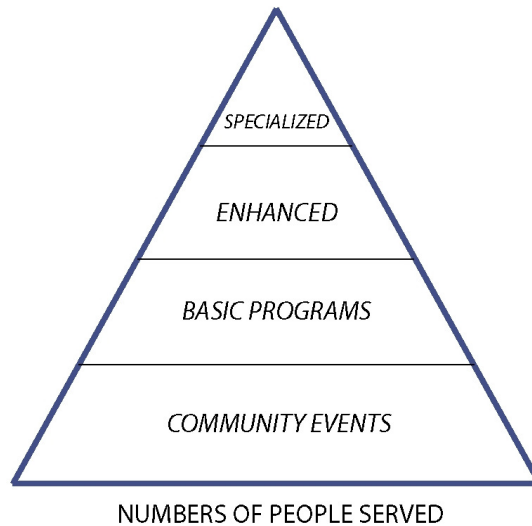
- Each program and service offered by PALS should have a cost and revenue projection completed prior to starting the activity that outlines expected financial performance. At the conclusion of the program a cost/revenue summary should then be completed that indicates the actual financial performance of the program. This effort should be refined to ensure that each program and service meets its financial goals.



- Each program should also have a calculation of the cost per participant to determine the value that is received for the cost.

*Fees and Charges*

- A formal program cost recovery policy must be adopted to guide program and service fee setting. Currently programs do not appear to have any revenue expectations. Despite the fact that income levels are very low in portions of the County, there should still be the expectation that some fee will be collected for most programs. A basic goal should be to recovery at least 25% of the total cost of providing programs through fees associated with these activities. In addition many recreation agencies are now tiering their programs into different categories with differing levels of cost recovery.



**FEE CONTINUUM**

In this particular case programs in the community event category would have the lowest cost recovery level while specialized activities would have the highest. The exact percentage of cost recovery is established for each program category noted and then individual programs are slotted in the appropriate category.

- It is important that some programs are offered in the higher fee categories as well as at the basic level.



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- For any contract classes that are offered in County facilities all program registrations should be collected by the PALS. PALS should also receive a percentage (30% minimum) of any fees collected.

### *Demand for Future Programs and Services*

- The long term program plan that is developed should focus on meeting the demands for future programs and services.
- As the demographic characteristics show, the population of the County varies considerably from north to south. A different program model will be needed for each of these areas. It is not enough to simply continue to offer the same programs because that is what has always been done.
- Hosting several focus groups with community groups should occur every few years to determine the demand for programs and services in specific areas of the County. This information can be utilized to develop or modify the program plan document noted above.
- Specific priorities of use for each facility should be developed to guide programming use, drop-in use, and rentals. The priorities should be set up by time of day, day of week, and season of the year. This will ensure that all parks and recreation amenities are being used to their maximum potential.
- There should be a greater emphasize in the future on the following program areas:
  - Expand aquatic to include:
    - Private swim lessons
    - Additional aqua exercise classes
    - Triathlon training
    - Other aquatic activities such as SCUBA, kayak training, etc.
  - Provide additional ethnically based programming.
  - Attempt to serve the home school and preschool program markets.
  - More family based activities (special events and other programs).
  - Expand the after school and summer day camp program for youth.
  - Add education and self-improvement classes.
  - Provide a low level fitness program and develop a wellness education program that focuses on healthy lifestyles for different age groups. Ideally this should be done through a partnership with other County based wellness organizations.
  - Continue to develop cultural arts programs (dance, music, drama, choir, etc.).



- Planning efforts should include the addition of outdoor education and a special needs programs in future years. This should be accomplished through partnerships with other providers that have experience in these program areas.
- Develop adventure or non-traditional sports activities (skateboarding, climbing, etc.). It is recognized that many of these activities will require specialized facilities that may not be available in the County or the use of facilities that are provided by others in the area.

### *Aquatics*

Special emphasis was placed on assessing the programming and management of the County's three indoor pools and one outdoor facility. Listed below are some specific concerns with this area.

- The aquatic facilities are aging and in need of being renovated. This is particularly true for the three indoor pools where there are issues with air quality, roof leaks, failing windows and severe condensation problems. This has resulted in problems with mold and corrosion. The poor condition of the pools has also contributed to lower use as well.
- The aquatics staff needs to have operational budget responsibility for the pools and should be tracking budget performance for each pool independently as a sub-section of the overall aquatics budget.
- The hours and days of operation at each pool need to be thoroughly evaluated and adjusted based on use and budget performance. As has been noted earlier, the level of full-time staffing for the pools based on their use and the programming that takes place, is high.
- The fees for use of the pools (and for the programs and services taking place in the facilities) are low in relationship to the costs of managing and maintaining these amenities.
- All programming and facility scheduling decisions should be managed by the aquatics staff including any contract service providers.
- Aquatics programming and facility usage is dominated by swim team use and other special interest groups. More balance is needed with a stronger emphasis on community based programming in general.
- It is critical that each pool be able to have fully computerized point of sale and program registration capabilities on-site.



- The Aquatics Supervisor should have their office located at one of the indoor pools or at Burton Wells.

*Other*

- PALS needs to formalize its relationship with Island Recreation that deals not only with program and service delivery but also facility management, operations and use. Island Recreation should be an equity partner in all such instances.
- Providing transportation for youth and senior activities needs to be reviewed and basic policies developed that deal with cost vs. benefits for the number that are served. PALS should seriously investigate contracting for this service rather than owning and operating its own fleet of vehicles.





## **Section VIII – Best Practices**

Utilizing the information that was gathered during the assessment study as well as accepted organizational and management practices in parks and recreation, the following should be considered as best practices that should to be adopted by PALS and the County.

### **Internal**

#### *General*

- Parks and recreation agencies have a clear vision statement regarding their roles and responsibilities in providing services to their constituents.
- The vision statement is backed up by a number of pointed goals.
- Utilizing the vision and goals, a professional and updated master plan is in place to guide future development and operations of parks and recreation facilities and programs.
- There are on-going, long range, planning efforts to position the agency for success in the future.
- There is a realization that an agency cannot effectively be all things to all people in the delivery of parks and recreation services and facilities. As a result specific areas of focus are determined and certain functions are left to others.
- Careful analysis is done to determine which services should be provided in-house and which should be contracted to other providers.
- There is strong record keeping that allows for trends and directional analysis. This is made possible through the full computerization of all management records. This includes program registration, point of sale, rentals, facility scheduling, time card management, maintenance, etc.
- There are well written and comprehensive policies and procedures in place that cover all aspects of an agency's management and operation. These are updated on a regular basis.
- Virtually every aspect of an agency's operation is evaluated and tracked on a regular basis.



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- Facility and field use standards and priorities of use are clearly established and outside user groups must sign well worded use agreements. Outside groups usually are assessed fees for use.
- A 501(c)3 foundation is established to handle non tax funding opportunities and donations.
- There is a well defined code of conduct for staff and participants.

### *Budget*

- There is a comprehensive internal budgeting process that focuses on cost center accounting on a very detailed level.
- A complete fee policy is in place to guide fee setting for all facilities, programs and services.
- Budgets include all expenses, even those services that are provided by other departments or organizations.
- There is thorough, on-going, budget monitoring and tracking where financial performance issues can be quickly identified and dealt with.
- Alternative funding mechanisms are fully explored and implemented where appropriate.
- Five year capital replacement budgets are present and updated each year.
- A scholarship program is funded to cover those individuals and families that cannot afford the established fee schedule.
- Economic impact studies are conducted for events and activities that draw outside users to a community.
- Program and facility supervisors are accountable for their own budgets.

### *Staffing*

- Agencies have a well defined staffing philosophy that clearly defines the role of all staff.
- There is strong leadership at the administrative level that is supported by a team concept.



- Clear expectations are established for all staff with work plans and yearly evaluations to measure job performance. Each staff member is held accountable for their areas of responsibility.
- Job descriptions for all full-time and part-time staff are in place that accurately describe the job requirements and skills that are necessary for the position.
- Staff is empowered and expected to make important management and supervisory decisions but are also held accountable for the performance of their areas.
- There is a mix of full-time and part-time staff.
- There is a formal communications protocol in place. Staff meetings are held on a regular basis and the minutes and actions are documented.
- There are appearance and conduct standards in place for all staff.
- There is an annual staff training program with adequate levels of funding.
- A comprehensive staff manual is updated regularly to guide staffing standards and regulations.
- Background checks are completed on all new hires, especially those that have direct contact with youth.
- There is a strong staff focus on customer service and satisfaction.

#### *Programs and Services*

- Agencies have a well defined program plan in place that guides future programming directions and areas of focus. There is also a realization that an agency cannot provide all of the programs and services that are demanded from their constituents. Agencies clearly identify their core program areas.
- Specific program priorities are established and the role of other providers is recognized.
- Agencies act as a clearinghouse for all major parks and recreation providers in the area.
- Program characteristics are tracked including:



- Rates of fill
  - Participation numbers and comparisons to past years/seasons.
  - Rate of program cancellations
  - Financial performance
  - Evaluations from participants
- There is a youth sports coach's manual and training program in place.
  - A lifecycle analysis is completed for all programs offered by the agency.
  - On-line registration is available for all programs and services including facility rentals.

#### *Facilities*

- An overall maintenance plan is developed and updated for all agency facilities. This is followed-up by specific plans for each major amenity. This includes a strong focus on preventative maintenance tasks.
- Operations manuals are present for all major agency facilities. This includes safety and liability protocols and an emergency action plan.
- Facility and park maintenance are most often provided by parks and recreation departments themselves rather than other departments within an agency.
- Costs for maintaining individual facilities are tracked on a daily, weekly, and monthly basis. Any outside costs are also assigned to a maintenance budget for a facility as well.
- Deferred maintenance items are prioritized and a funding plan to address these concerns is developed.
- An asset inventory is established for all major equipment and a depreciation schedule developed.
- Maintenance tasks, schedules and costs are managed by a maintenance management software system.
- A cost/benefit analysis is completed to determine which maintenance tasks and services should be accomplished in-house and which should be contracted. All contracted services have contracts and are monitored regularly for compliance.



## **External**

### *Community Relations*

- Agencies have a comprehensive community relations protocol as well as a specific marketing plan.
- There is an adequate level of funding for community relations/marketing and staff resources are allocated for this purpose.
- Agencies have interactive web sites that are updated quarterly.
- There is an active effort to engage the public for all planning efforts. This includes the utilization of the following methods:
  - Focus groups
  - Community meetings
  - Surveys
  - Social media
- Specific marketing tools are developed for individual target and niche markets.
- Communications to the public are provided in the languages of the residents that are present in the community.
- Comprehensive sponsorship programs are in place.
- Agencies produce a recreation services magazine or brochure on a twice to three times a year basis that is distributed to the community they serve.

### *Other Organizations and Providers*

- The roles and expectations of other organizations and providers are clearly articulated by an agency in an effort to promote the effective use of overall community resources.
- Equity partnerships are actively pursued for facilities and programs.
- Formal written agreements are in place for any use of agency facilities or partnerships.
- Agreements with school districts are developed to encourage greater community use of school facilities.



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- Coordination efforts with other government agencies are pursued and documented.
- Comparisons and benchmarking with other similar agencies in other geographic areas is completed.



## **Section IX – Action Plan**

Based on the findings of the Performance and Organizational Assessment Study, the following is the recommended action plan for PALS as developed by Ballard\*King & Associates. Ultimately, the action plan will need to be endorsed by the PALS Advisory Board and adopted by Beaufort County's administrative staff and elected officials.

### ***Short Term (1 year)***

It is recognized that there are an extensive number of challenges facing PALS and this list of short term action items may not be able to be accomplished within the next year.

#### *General*

- Beaufort County will need to make a strategic decision regarding its future commitment to parks and recreation amenities and services.
  - If the County is committed long term to providing parks and recreation facilities and programs to residents than a basic level of service will need to be established.
  - If the County determines that their role should be at a reduced level then a plan will need to be developed that outlines how responsibilities will be transferred to other governmental entities and community organizations.
- There must be a new management culture established with the staff of PALS that emphasizes strong leadership and a team approach. This will require the hiring of a strong Director with outstanding organizational and leadership skills.
- Establish a new mission statement for PALS with specific goals and objectives.
- Purchase and begin using a computer software system that supports program registration, pass management, point of sale, facility scheduling and use. From this, develop a comprehensive record system for programs and services that easily documents program and service numbers and demographic characteristics.
- Establish a clear policy and fee directive regarding County maintenance of facilities that are not owned by the County. Also determine the long term position of the County regarding the continued ownership and operation of facilities that are essentially being utilized by other governmental agencies or community organizations.

#### *Staffing*

- Establish a definitive staffing philosophy for PALS based on the new mission statement.



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- PALS staff needs to be reorganized with clear job roles and responsibilities that cover, administration, programming, operations/maintenance, and marketing. This should be followed up with comprehensive staff performance appraisals and individual work plans.
- Update all job descriptions to reflect the job responsibilities and requirements of all full-time and part-time staff.
- Establish a clear communications protocol for and between all staff.
- As part of the reorganization, convert the existing Fiscal Technician to an Assistant Director/Operations Manager and hire for this position.
- Focus on establishing a “team” approach to staff management including a number of specific team building exercises.
- Insist that weekly staff meetings are held (and documented) at the administrative and supervisory level.
- Require all line staff (full and part-time) to wear staff shirts and name tags. They should also have County identification visible at all times.
- Develop a comprehensive staff training program for both full-time and part-time staff.
- Work with Human Resources to streamline the process and time that is necessary to hire new full-time and part-time staff.

### *Policies and Procedures*

- Update and develop a comprehensive operations manual. This should include clear staff policies and procedures.
- Establish well defined safety and security measures for staff and participants. This plan should include an updated emergency action plan.
- Streamline the policies for purchasing and pick-up of supplies and services within PALS.

### *Budget*

- Establish stronger budgeting practices including “cost center” accounting for both expenses and revenues.





- Assign a level of basic funding for staff training and marketing.

#### *Maintenance*

- Determine the specific roles and responsibilities of PALS and Facility Management in the cleaning and maintenance of parks and recreation facilities. This should also include the management of all contract services in this area.
- Develop a basic maintenance management plan for each major facility that ensures that the all amenities are adequately maintained. This should be accomplished by Facility Management.
- Complete an analysis of what specific tasks and services should be contracted and which should be completed in-house. This analysis should be completed by Facility Management.

#### *Marketing*

- Develop a basic marketing plan with specific marketing tools to promote the Department and its activities and services that are available to the community.
- Update the PALS website to be more interactive with more information and pictures of program/facility users.
- Conduct a number of community meetings or focus groups to determine future needs and priorities for parks and recreation programs and services as well as facilities.

#### *Programs and Services*

- Develop a comprehensive program and service development plan that increases the level and diversity of program offerings and generates higher revenue numbers.
- Determine the clear roles of other recreation program providers in offering services to PALS.
- Establish a clear program participation reporting system (utilizing the new computer software program) to track and summarize quarterly and annual levels of service.



### *Middle Term (2-3 years)*

It is likely that a number of action items from the Short Term list will need to be carried over to the Middle Term time frame.

#### *General*

- Establish stronger partnerships with other community organizations to expand the services of the County as it relates to parks and recreation.
- Clearly define the role of the PALS Advisory Board and host an annual board retreat.
- Focus on long range planning tasks for PALS rather than just the day to day operations.
- Update or establish formal written agreements with other governmental units or community organizations including:
  - School District – ensuring greater access to school facilities.
  - Towns and Cities – management and maintenance of County facilities.
  - Island Recreation - management and maintenance of County facilities.

#### *Staffing*

- Empower and give full authority to PALS management and supervisory staff to manage their areas of responsibility but hold these same individuals accountable for the performance of their areas.
- Increase the dependence on part-time staff for facility operations and program instruction.
- Develop an automated time card system.
- Hire a Facilities Coordinator and a Marketing Coordinator.

#### *Policies and Procedures*

- Develop a comprehensive annual report template that is utilized by PALS to summarize department accomplishments, identify operational issues, and document facility program and facility use. This template should also allow for the summary of expenses and revenues association with the Department.
- Develop long term leases with any contract operators of PALS facilities.



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- Continue to improve the record keeping practices for all aspects of PALS operation. This should be accomplished through the use of the computer software program.
- Ensure that all outside groups that utilize PALS facilities sign a contract with the County.
- Develop a code of conduct for all PALS employees as well as users of County facilities or PALS programs.

### *Budget*

- Establish a comprehensive fee policy to guide fee setting for all facilities and programs.
- Develop and document specific budget practices that must be followed by PALS staff. This should start with the establishment of new budget categories to better track financial performance by individual cost centers.
- Review and benchmark rates of compensation for full-time and part-time staff and make any necessary adjustments to individual position rates.
- Rates of use and program participation are tracked by facility and time of day utilizing the new computer software program to determine where possible changes need to be made in staffing, resource allocation, and hours of operation.
- Pursue 3-5 grants a year to fund recreation programs or facility improvements.
- Complete an analysis of the most cost effective method to provide concession services, in-house vs. contract.

### *Maintenance*

- Track all maintenance and cleaning costs by Facility Management by individual facility on a time and material basis. These costs should be shown as a line-item cost for PALS facilities in their budget.
- Institute a comprehensive playground inspection program utilizing a Certified Playground Safety Inspector (CPSI) in Facility Management.
- Establish a sports field rotation policy that ensures that fields are not over used and have time to reestablish turf.
- Purchase and utilize a maintenance management computer software program.



- Ensure that at least one Facility Management staff member becomes a Certified Pool Operator (CPO).

### *Marketing*

- Develop a semi-annual printed and electronic program brochure that details PALS programs and services as well as the facilities where they take place.
- Establish on-line registration capabilities for all PALS programs and services.
- Utilize social media (Facebook, Twitter, etc.) to promote PALS programs and facilities.

### *Programs and Services*

- Establish PALS as a clearinghouse for all County parks and recreation service providers.
- Determine what will be Core, Secondary and Support programs for PALS.
- Develop a quarterly calendar system for all programs.
- Establish basic program procedures including:
  - Completing a program projection and reporting form for each program.
  - Minimum numbers to run programs.
  - Cancellation rates and program tracking.
  - Cost recovery ratios.
- Improve the youth sports program by:
  - Developing a comprehensive coach's manual and training program.
  - Establishing a code of conduct for all participants and spectators.
  - Continuing background checks for all coaches, officials and volunteers

### *Long Term (4- 5 years)*

There will need to be a concerted effort and a specific plan to complete all of the action items that have been listed in the Short, Middle and Long Term categories.

### *General*



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- Update the County's Comprehensive Plan and the Parks, Recreation and Open Space Master Plan.
- Establish a 501(c)3 foundation for PALS.
- Complete a cost/benefit analysis regarding the possibility of transferring operation and even ownership of many of the County's smaller recreation buildings and pools to other governmental units or community organizations.
- Complete a cost/benefit analysis of operating a transportation program in-house vs. contracting for these services.

### *Staffing*

- Establish a strong volunteer program that is directed by a full-time Volunteer Coordinator.
- Hire a General Program Leader to manage the increase in PALS recreation programs.

### *Policies and Procedures*

- Establish specific priorities of use for each PALS facility to improve the efficiency and operation of each amenity.
- Develop a comprehensive field and facility use policy to cover all PALS facilities.

### *Budget*

- Develop a funding plan for the large list of deferred maintenance items in PALS facilities.
- Explore alternate funding sources for parks and recreation services.
- Establish and fund a scholarship program for those who cannot afford the fees that are required to participate in parks and recreation activities.
- Complete an economic impact study for events and activities that attract non-residents to the County.
- Establish equity partnerships with other governmental units and community organizations to renovate or add additional parks and recreation facilities.



### *Maintenance*

- Complete a study to determine if parks and facility maintenance and cleaning responsibilities should be returned to PALS from Facility Management.
- Complete a comprehensive asset inventory of all equipment and furnishings in PALS facilities. This should be completed by Facility Management in concert with PALS.
- Establish a depreciation schedule for all major PALS facility equipment. This should be completed by Facility Management in concert with PALS.

### *Marketing*

- Develop a sponsorship and advertising program.
- Complete a survey of County residents to determine satisfaction with existing facilities and programs as well as priorities for the future. This type of survey should be conducted every 3-4 years in the future.
- Complete a parks and recreation fee survey for like communities in the southeast United States.
- Place flat screen monitors in key PALS facilities that can be used to promote parks and recreation services and activities.
- Utilize social media (Facebook, Twitter, etc.) to promote parks and recreation programs and facilities.

### *Programs and Services*

- Complete a lifecycle analysis of all PALS recreation programs to determine the distribution of programs between new, mature and old status.
- Continue to expand the level of recreation program offerings by developing agreements with other providers in the area.
- Establish a comprehensive program evaluation process that gathers key information from participants and from staff as well.



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- Plan and fund long range capital improvements and renovations for the County's indoor pools.