

## PROGRAM ASSESSMENT

### 1.1 OVERVIEW

#### 1.1.1 INTRODUCTION

A significant component of the Comprehensive Master Plan and the business plans for the Monon Community Center/The Waterpark and the Extended School Enrichment/Summer Camp Series is the recreation program assessment. Recreation programs and services form the essential foundation of park and recreation systems. The goal of the analysis is to understand current recreation program and activity offerings, as well as recommendations for additional programming to meet community needs and priorities identified in the community needs assessment.

The assessment helps identify strengths, challenges, and opportunities regarding programming. The assessment also assists in identifying core programs, program gaps within the community, key system-wide issues, areas of improvement, and future programs and services for residents and visitors.

The program findings and comments are based on a review of information provided by CCPR including program descriptions, financial data, website content, community survey results, and discussions with staff. This report addresses the offerings from a systems perspective for the entire portfolio of programs.

#### 1.1.2 FRAMEWORK

Carmel Clay Parks & Recreation strives to provide exceptional experiences through innovative services. Recreation programming is at the forefront of these agency principles, as outlined in the vision and mission statements below:

**Mission Statement:** *CCPR will be stewards of a healthy community by providing transformative experiences.*

**Vision Statement:** *To be a national leader in parks and recreation, enhancing our community one park, program, and person at a time.*

CCPR provides a broad range of recreation and leisure programming for all ages and abilities. These offerings are supported with dedicated spaces which include the Monon Community Center, Ralph L. Wilfong Pavilion, Jill Perelman Pavilion, and The Waterpark.



### 1.1.3 IMPACTS OF COVID-19 ON PROGRAMMING

CCPR adapted throughout the early days of the pandemic and took swift action by prioritizing staff and community safety through stringent protocols for facilities and programming. Early on, staff recognized this was going to be a time when the community would need their parks and services most to help cope with the continuous change in human interactions. To help prepare for changes that could take place after reopening, CCPR developed the Resumption of Operations Plan to reopen parks, programs, and facilities in a phased manner. The plan is based on best practices from a variety of sources, including the Back on Track Indiana plan, Center for Disease Control and Prevention, Indiana State Department of Health, and National Recreation and Park Association. CCPR also sought advice from local experts, including representatives from the Hamilton County Health Department and Carmel Fire Department, and a panel of medical doctors.

CCPR committed to implementing policies and measures to help mitigate the spread of COVID-19. This required significant changes to operations, especially during the initial phases. CCPR considered revenue generation as it prioritized what services to provide when it was safe to provide such services. This effort to minimize the financial impacts of the pandemic has helped the services rebound much faster. Some specific impacts to services included:

- CCPR's Extended School Enrichment (ESE) program closed March 16, 2020, and resulted in a significant loss of revenue and furlough of most ESE staff. The ESE program resumed operations at all eleven school sites on August 13th, 2020, with several modifications to ensure staff and participant safety. Participants were separated into pods while physical distancing and face coverings were implemented. Curbside services were available for drop-off and pick-up of children. Stringent cleaning protocols were instituted for shared supplies. And staff received continued training on how to monitor themselves and participants for signs of COVID-19 and proper contact tracing procedures.
- CCPR made structural changes to its Summer Camp Series (SCS) when it opened in June to focus on fresh air, active play, and general camper interests. The program operated at reduced capacity offering 9 weeks of camps at 3 CCPR locations starting June 1, 2020. CCPR created dedicated pods that prevented children from intermingling and employees were encouraged to work in teams to help with contact tracing. Diligent communication with parents regarding schedule changes, facility closures, and contact tracing was also implemented by staff.
- The Monon Community Center (MCC) closed March 16, 2020. The facility reopened in two phases with limited access to members, reduced staff, controlled entry to the facility and certain areas, and enhanced cleaning. In June of 2020, CCPR brought back additional part-time staff, opened more locker room access, and offered outdoor group fitness classes. The Waterpark also opened June 14, 2020, for the summer season using many of the same protocols that were established for the MCC. The primary source of revenue for the MCC is recurring monthly memberships, which were suspended until the facility reopened May 24, 2020. These closures caused CCPR to furlough 96% of MCC employees.
- The Resumption of Operations Plan was updated and revised as the COVID-19 pandemic evolved. Various other core programs and volunteer projects resumed at different stages of the plan using the same protocols that were established for ESE, SCS, and the MCC.
- Lastly, CCPR assessed their overall programmatic strategy and developed updated objectives in a 2022 update to their Recreation Program Plan.

While program demand increased post COVID, staffing levels have lagged. This has caused CCPR to make additional programmatic structure changes to ensure the quality service residents and visitors have become accustomed to, continuing the strength of CCPR's long-established brand.

### 1.1.4 PROGRAM ASSESSMENT OVERVIEW

Below are some overall observations that stood out during analysis:

- The **program descriptions and goals** within each core program area effectively communicate the key benefits and desired outcome for the participants.
- **Age segments** are represented among various core program areas. This should be continuously monitored to ensure that programs represent future demographics.
- Of the different **program lifecycle** stages, 60% of CCPR's programs are categorized in the Introduction, Take-Off, or Growth stages.
- **Pricing strategies** are used consistently across all Core Program Areas. CCPR frequently prices programs according to market rate, established cost recovery goals, and the customer's ability to pay. This demonstrates a fair approach to pricing programs as well as ensuring that the Department continues to operate its programming self-sufficiently.
- Nearly all core program areas are operating at or above established **cost recovery goals**. ESE and SCS revenue is distributed across its division to ensure operation at cost recovery.
- CCPR employs a variety of methods to track **program performance** including customer satisfaction levels through surveys, real-time feedback (i.e. "customer feedback technology, program cancellation rates, and participation levels. CCPR staff indicated that they are working toward tracking customer retention rates for all services in the future.
- Methods for marketing and promotions rely heavily on technology including the CCPR website, social media, and blogs or vlogs. Print advertisements are used sparingly with some printed guides offered at the Monon Community Center for those who request them.



## 1.2 RECREATION PROGRAMMING STRUCTURE AND DESIGN

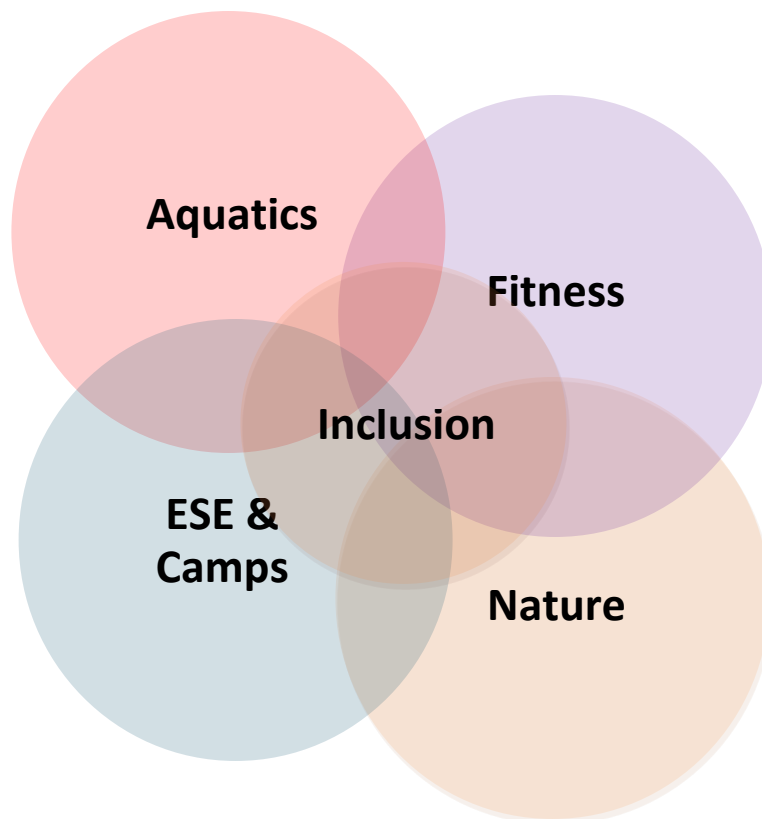
The Department’s Recreation Programming is broken into focused Program Areas and Categories to better support the department’s vision of offering “*engaging programs that contribute to healthy individuals and families, an active and tightly knit community, a thriving economy, and a high quality of life in the City of Carmel and Clay Township.*”

Due to the multitude of program service providers in the City of Carmel and surrounding communities, CCPR’s programmatic focus is divided into one of two buckets. The first bucket entails that program(s) offered must be perceived as *better* than other providers, meaning the department has a rich history of providing or has resources that provide a unique experience for participants. The second bucket allows development of programs that meet an unmet need of the community. This could include programs for unserved or underserved populations.

Additionally, the department analyzes each program area’s ability to positively affect cost recovery goals, level of management and oversight needed, and its flexibility to be **cross-pollinated** with other program categories. This sized down approach allows the most effective use of staff time and resources.

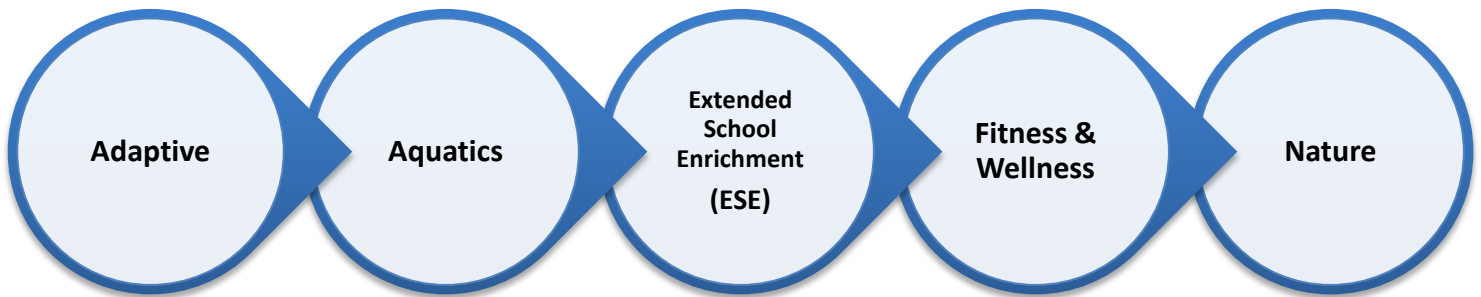
Recreation Program Areas are prioritized as either *Core* or *Supplemental*. Program Areas falling into the Core category are defined as those programs, which over time, will meet departmental goals and objects while adhering to the conceptual foundations of play. These are programs that continue to experience high participation and growth and fall into one of the two priority buckets.

Supplemental Programming helps fill the smaller unmet or underserved needs in the community and can be viewed as somewhat traditional offerings of a park department or community center, most of these programs are led by contractors.

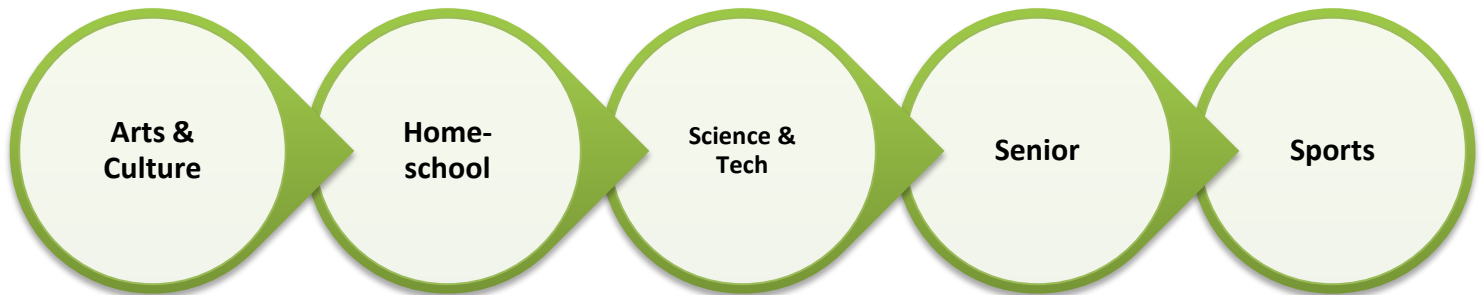


### 1.2.1 CORE PROGRAM AREAS

Recreation Programming is broken down into the following Core Program Areas:



### 1.2.2 SUPPLEMENTAL PROGRAM AREAS



### 1.2.3 PRIORITIZATION OF SERVICES

The provision of facilities, programs and services is fundamental to the vision and mission of Carmel Clay Parks & Recreation. Since the resources available to offer programs and services is limited, the delivery of these services is prioritized based on the following criteria (see **Figure 1** below):

- All Services: All programs and services must support the goals and objectives of the Parks and Recreation Master Plan as approved or amended by the Park Board.
- Priority 1: Programs and services that directly contribute to the cost recovery objective of the department, are high priorities of the public and for which there is a demonstrated demand or expectation for the department to offer or are legally mandated to be provided.
  - Parks: Greenways, Open Space, playgrounds, splash pads, trails
  - Facilities: Monon Community Center, The Waterpark, Central Dog Park, program pavilions
  - Programs: Aquatics, Extended School Enrichment/Summer Camp series, Fitness/Wellness
  - Other Services: Inclusion, Natural, cultural and land resource management
- Priority 2: Programs and services that are value-added or complimentary to Priority 1 Services that build brand loyalty or directly or indirectly contribute to cost recovery expectations.
  - Facilities: Shelter (rentable)
  - Programs: Adaptive, Nature

- Other Services: Concessions, KidZone
- Priority 3: Program and services for which there is an unmet need within the community and the department is well-positioned to provide that do not detract from cost recover objectives.
  - Programs: Arts & Culture, Enrichment, Homeschool, Science & Technology, Senior, Sports

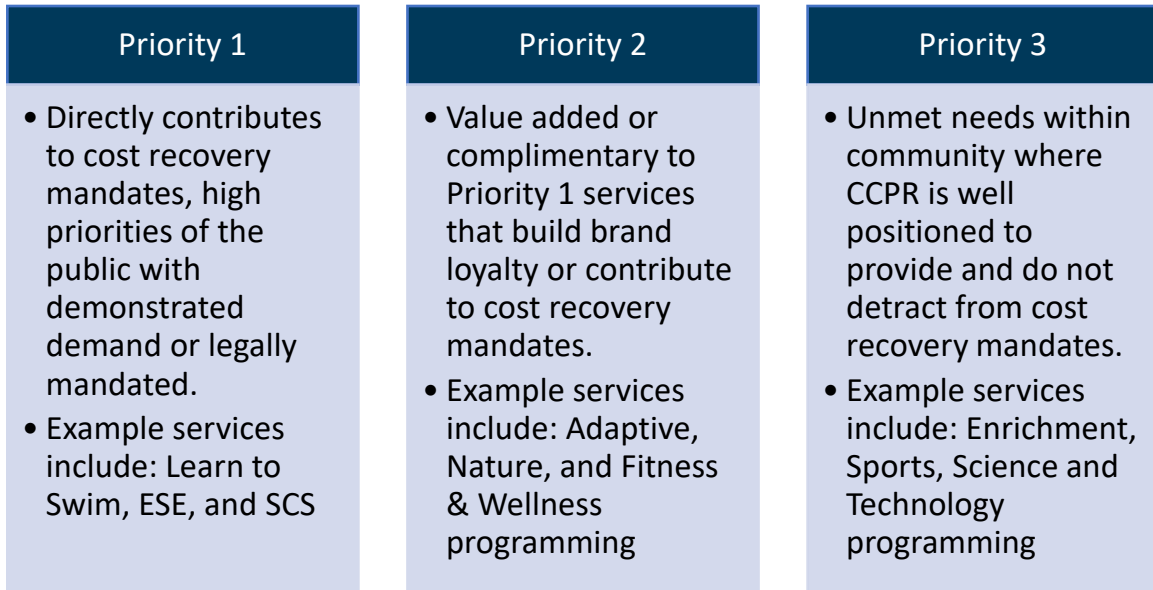


Figure 1: Program Classifications

1.2.4 CORE PROGRAM AREA DESCRIPTIONS, GOALS, & EXAMPLE PROGRAMS

<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Adaptive</p>	<p><b>Description:</b> Adaptive Programs are geared towards individuals with disabilities. CCPR believes that everyone should participate in leisure opportunities that allow for performance at their highest level, and we encourage participation of all ages and abilities.</p> <p><b>Goals:</b> Provide programs for all age segments to have a measurable positive impact on physical and mental health for members with cognitive or developmental disabilities in the community. Provide adaptive programs at low or no cost. Achieve full cost recovery for all adaptive programs.</p>	<ul style="list-style-type: none"> <li>• Adaptive 5k</li> <li>• Adaptive Ballet</li> <li>• Adaptive Creative Art</li> <li>• Barrier-Free Theatre</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Aquatics</p>	<p><b>Description:</b> Promote safety, fitness, and technique to all levels of swimmers. Encourage swim awareness, socializing, and community through aquatics classes and events.</p> <p><b>Goals:</b> Promote safe swimming practices for people of all ages and skill levels. Achieve cost recovery and profit from programs. Offer classes and/or events to the greater community.</p>	<ul style="list-style-type: none"> <li>• Parent/Child Swim Lessons</li> <li>• Learn to Swim</li> <li>• Sea Dragons Swim Team</li> <li>• Flowboarding</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Extended School Enrichment (ESE) /Summer Camp Series</p>	<p><b>Description:</b> Out of school time programs offered for participants ages 5-15.</p> <p><b>Goals:</b> Provide safe and enriching programs, ensuring the development of basic life skills for participants. Promote a culturally, socially, and physically inclusive environment for the success of all participants. Achieve full cost recovery.</p>	<ul style="list-style-type: none"> <li>• Extended School Enrichment</li> <li>• School’s Out Camps</li> <li>• Summer Camp Series</li> <li>• Enrichment Specials</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Fitness &amp; Wellness</p>	<p><b>Description:</b> Exercise, fitness, and wellness activities and education to promote healthy lifestyles for all ages.</p> <p><b>Goals:</b> Provide programs and facilities for all age segments to have a measurable positive impact on physical, emotional, social, and mental health for the community. Provide multi-level programs at low cost. Achieve full cost recovery.</p>	<ul style="list-style-type: none"> <li>• Sunrise Yoga</li> <li>• Fluid Motion</li> <li>• On the Trail to Fitness</li> <li>• Intro to Tai Chi</li> </ul>
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Nature</p>	<p><b>Description:</b> Programs to promote nature education, interaction, and learn more about local parks.</p> <p><b>Goals:</b> Provide programs for all ages the increase nature learning in the community, increase number of Citizen Science volunteers, and meeting cost recovery for paid programming.</p>	<ul style="list-style-type: none"> <li>• Camping Basics</li> <li>• Hoosier Riverwatch</li> <li>• My Park Series</li> <li>• Pollinator Palooza</li> </ul>

### 1.2.5 SUPPLEMENTAL PROGRAM EXAMPLES

#### Arts & Culture

Kids as young as 1 (with a parent) and adults (18 + years ) will learn new ways to express themselves through their creativity.

- Little Artist Series
- Photography Club
- Adult Artist Series: Abstract Art

#### Homeschool

Enrichment programs that create learning opportunities through hands-on experiences and social interaction.

- Homeschool Art
- Homeschool Video Game Creation
- Homeschool Outdoor Sports

#### Science & Tech

Programs designed to create curiosity and develop critical thinking skills through play-based learning.

- Engineers at Play
- Future Coders I
- Apprentice Gamer Bots

#### Senior

A variety of senior programs designed for the 65 and better community including exercise (both low impact or high-intensity), wellness, education, or social programs.

- Bridge Club
- Unlocking Social Security
- Retirement Income Planning

#### Sports

A wide variety of instructional and competitive sports opportunities for all ages and skill levels.

- Skateboarding I
- Beginning Archery
- Beginner Pickleball

### 1.2.6 CUSTOMER LOCATION MAPS

The maps below provide a visual representation of where CCPR program customers are coming from for the SCS program, as well as recreation programs during the Winter/Spring, Summer, and Fall seasons. These maps can be used to determine program demand and underserved areas within the City of Carmel and Clay Township and opportunities for additional targeted outreach and marketing to residents in these areas. CCPR staff should use these maps in unison with other data sources such as more detailed program registration information, socioeconomics, demographics, and community feedback to make informed decisions on programming reach. By identifying areas with lower participation, it provides CCPR with another tool to make data-driven decisions on program offerings, accessibility of services, and outreach.



It is also important to note how the customer distribution changes with each season. Further analysis of where customers are coming from in areas outside city boundaries will provide additional marketing and revenue generating opportunities. For instance, the summer map in **Figure 5** shows more customers coming from the north of city boundaries to participate in recreation programs.

### SCS CUSTOMER LOCATIONS

The map in **Figure 2** provides a visual representation of where SCS program customers are coming from for each program. There is a lack of summer camp registration coming from the southwest part of Carmel. When cross-referencing this information with Carmel-Clay's population distribution this could be because this section has an older population that does not utilize summer camp programming.

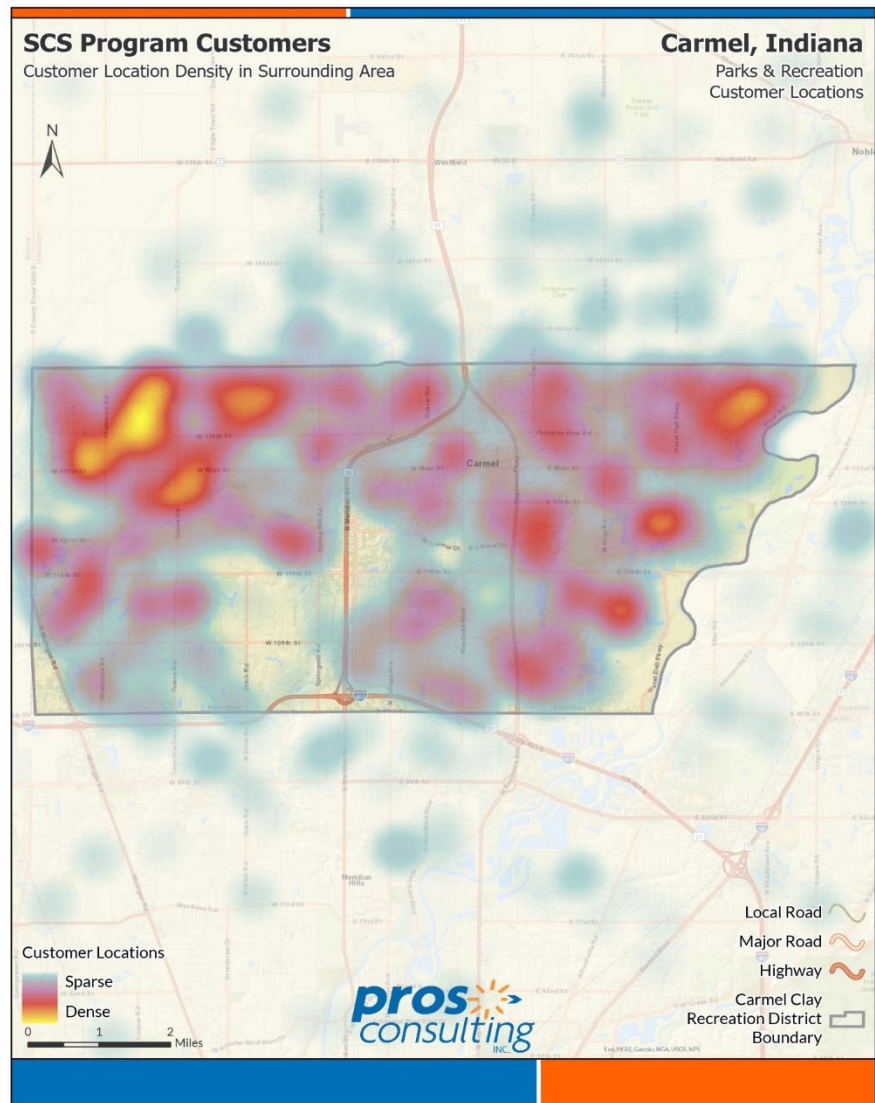


Figure 3: SCS Program Customers

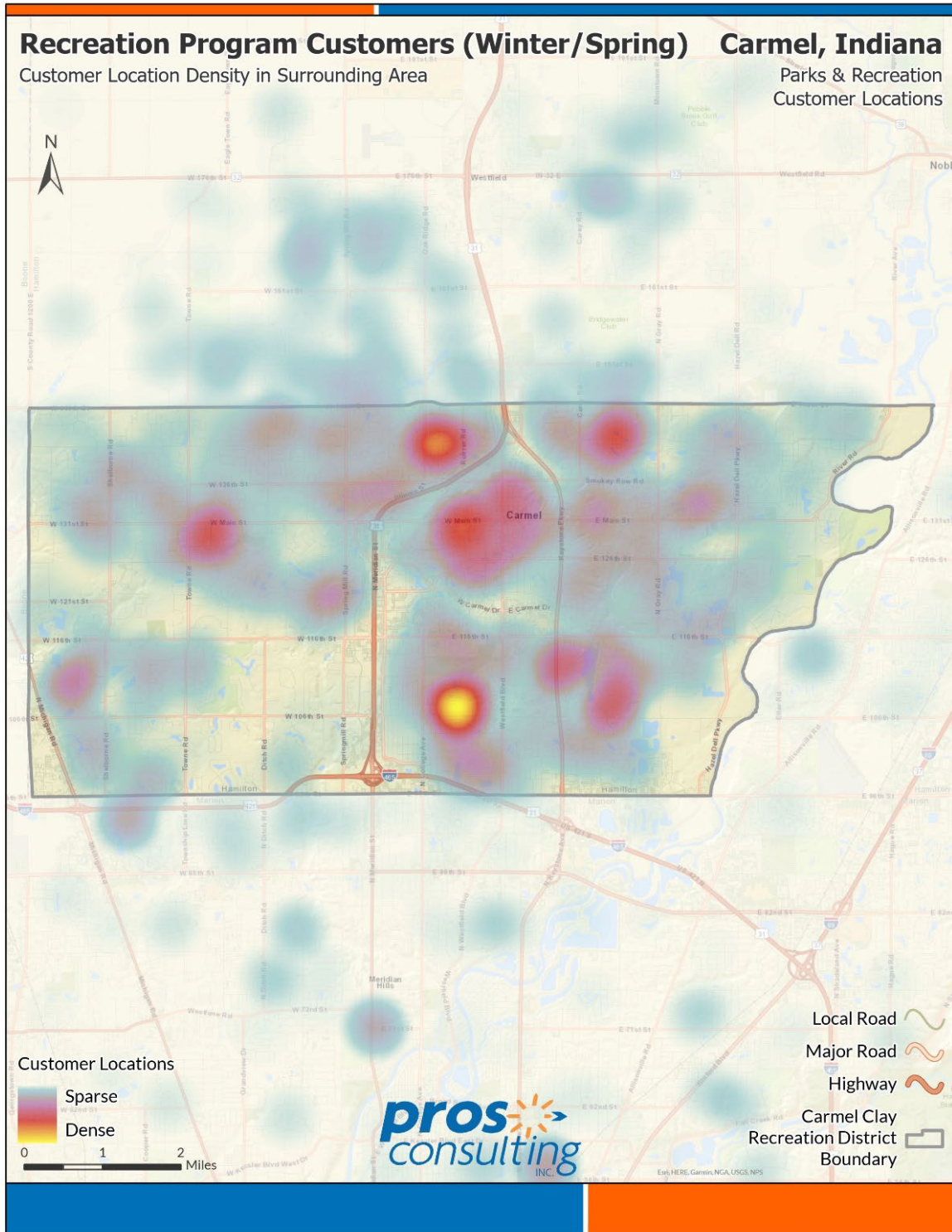


Figure 4: Winter Spring Recreation Program Customer Locations

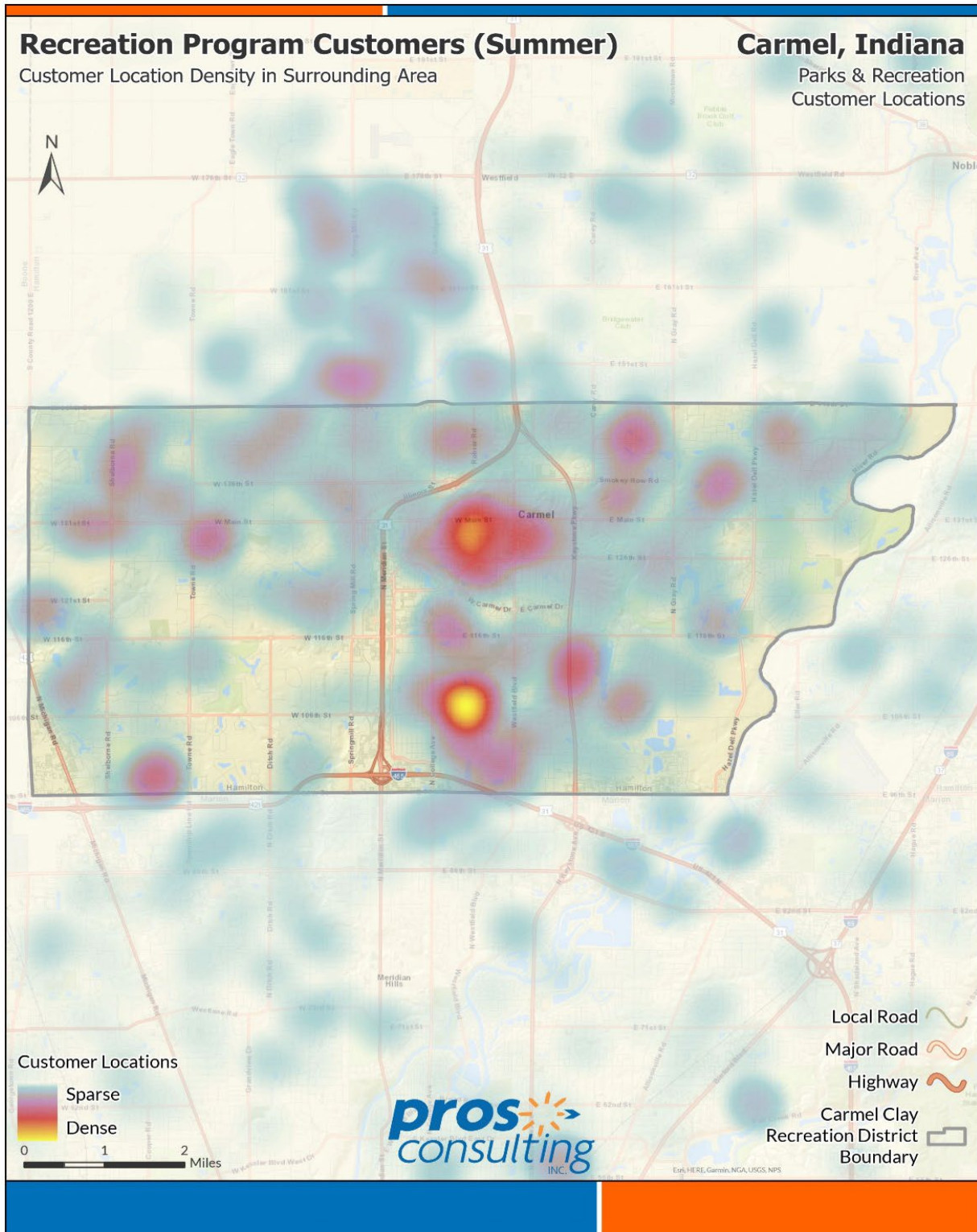


Figure 5: Summer Recreation Program Customer Locations

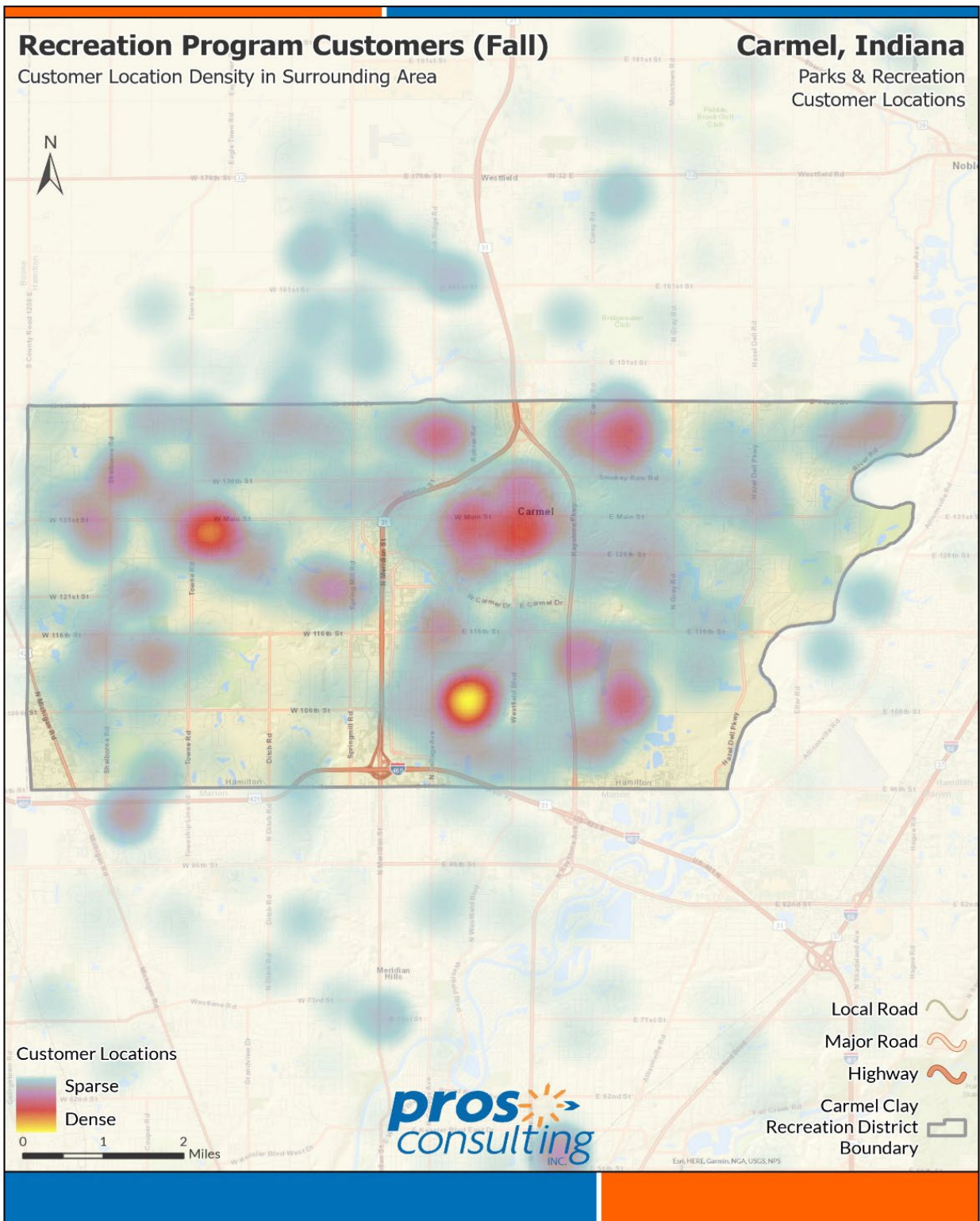


Figure 6: Fall Recreation Program Customer Locations

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### 1.2.7 EXISTING CORE PROGRAM AREA RECOMMENDATIONS

CCPR's existing Core Program Areas provide a well-rounded and diverse array of programs for the community. Based upon the observations of the consulting team as well as demographic and recreation trends information, staff should evaluate Core Program Areas and individual programs, ideally on an annual basis, to ensure offerings are relevant to evolving demographics and trends in the local community. Furthermore, based on key leadership/focus group input, statistically valid survey results, and discussions with CCPR staff, additional programming needs have been identified within the following existing Core Program Areas. CCPR should ensure that programming staff, supplies, and services grow commensurate to additional planned programming. Otherwise, service quality will be negatively impacted. There are no substantial recommendations from data provided by CCPR for current programming in the core areas of Aquatics and Nature.

#### ADAPTIVE

CCPR offers a diverse range of adaptive programming for individuals of all ages with disabilities. According to the statistically valid survey, 75% of respondents stated that they are very satisfied with adaptive-specific programs. In addition, 64% say that their needs for adaptive programming are fully to partly met in the community.

According to data provided by CCPR staff, 43% of the adaptive programs offered fall in the mature to declining stages of the program lifecycle. The agency should closely monitor these programs to ensure that they are either modified or replaced with innovative programs that align with community needs and trends.

#### EXTENDED SCHOOL ENRICHMENT (ESE)

CCPR staff indicated that ESE has recently shown minimal to no participation growth and that there are challenges with adequate staffing and space needed in school facilities. The agency has decided to address these concerns as well as others with a business plan specific to ESE and SCS programming. The consultant team will work with CCPR and recommend solutions to help ensure out-of-school programming continues to meet the needs of the community.

#### FITNESS & WELLNESS

Wellness programming was rated as the third most important (Importance Rating = 79 out of 100) to households in the statistically valid survey with 47% of respondents saying they have a need for this core program area.

The CCPR team has provided data showing more than 50% of fitness and wellness programs were cancelled during the period of 2022 through mid-way 2023. The agency should consider further analyzing the reason for these cancellations and analyzing trends that match community need. For example, Pilates training, trail running, and dance/choreographed exercise are programs that continue to show national participation growth over the last five years in addition to Yoga. Additional senior specific fitness programs would also meet a need according to community input.

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### 1.2.8 POTENTIAL NEW CORE PROGRAM AREAS AND RECOMMENDATIONS

Throughout the community engagement process, several key programming themes emerged including special events, outdoor adventure programs, and more dedicated senior programming. Additionally, all these program areas scored high in terms of community need on the statistically valid survey (e.g., wellness, special events, senior specific programs, and outdoor adventure programs). (See **Figure 7**)

#### PROGRAMMING PRIORITY INVESTMENT RATINGS (PIR)

Below is the programming PIR from the statistically valid survey conducted by ETC Institute. The priority investment ratings are determined by equally weighing the importance that residents place on programs and how many residents have unmet needs for the program. The following program areas ranked "High" in terms of community need.

- Wellness (PIR=179)
- Special Events (PIR=170)
- Senior specific programs (PIR=168)
- Sports (PIR=158)
- Outdoor Adventure (PIR=152)
- Arts & Culture (PIR=143)
- Nature/environmental education (PIR=134)
- Aquatics (PIR=115)

During the stakeholder and staff engagement process, ideas and solutions were discussed for core programming areas of focus. CCPR staff indicated that they were evaluating their appropriate role to develop more dedicated senior services through enhanced collaboration with external organizations.

The community has identified Special Events as an integral part of the overall programming portfolio. Currently the City of Carmel implements special events with little assistance from CCPR. Significant resources would be required for CCPR to begin providing special events to the community, including additional staff. CCPR should continue to assess their partnership with the City and other community agencies to determine if a larger role in providing special events is warranted with the limited resources of CCPR to provide these types of activities to the community.

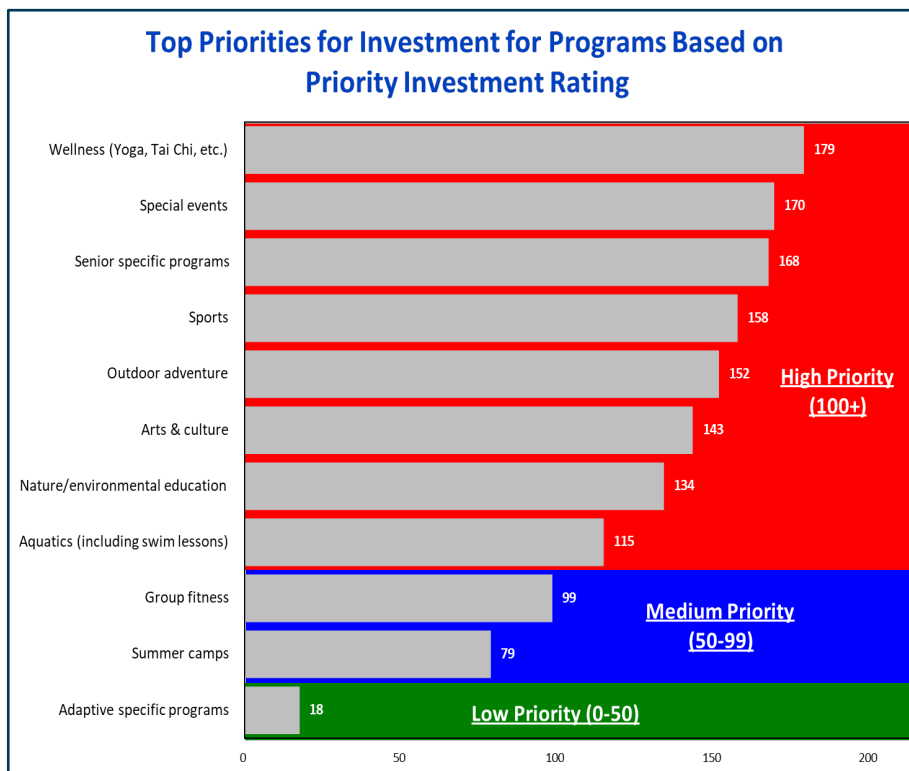


Figure 7: Top Priorities for Investment

Outdoor adventure activities have emerged as a growing need for the community. CCPR has indicated that the activation of the White River with activities such as implementing a canoe/kayak launch and rental services is a priority. Rafting, Kayaking, and Stand-up Paddling are other opportunities to create programming using the White River. Also, Mountain Biking and Skateboarding have seen a steady increase in participation over the past five years according to the Sports and Fitness Industry Association.

Lastly, sports programming that can engage the age segments from youth to active adults include golf and tennis. These sports activities also continue to see increases in participation nationwide.

### 1.3 PROGRAM STRATEGY ANALYSIS

#### 1.3.1 AGE SEGMENT ANALYSIS

The table below depicts each Core Program Area and the most prominent age segments they serve. Recognizing that many Core Program Areas serve multiple age segments, Primary (noted with a 'P') and Secondary (noted with an 'S') markets are identified.

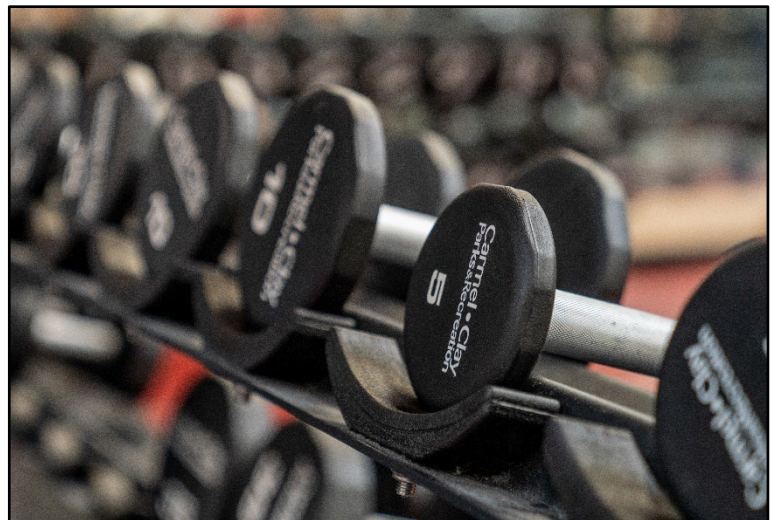
Carmel • Clay Parks & Recreation									
Age Segment Analysis									
Core Program Area	Preschool (5 and Under)	Elementary (6-12)	Teens (13-17)	Adult (18-34)	Adult (35-50)	Adult (51-69)	Adult (70+)	All Ages Programs	
Adaptive	S	P	P	P	P	P	S	P	
Aquatics	P	P	S	S	S	S	S	P	
Extended School Enrichment		P	S						
Fitness & Wellness	S	S	S	P	P	P	P	S	
Nature	S	P	S	P	P	P	S	P	

Figure 9: Program Priority by Age Segment

This analysis exhibits an over-arching view of the age segments served by different program areas and displays any gaps in segments served. It is also useful to perform an Age Segment Analysis by individual programs, to gain a more nuanced view of the data. Based on the age demographics of the city, current programs are well-aligned with the community's age profile. CCPR offers a wide array of opportunities for the age segments between 18-69 years old, which is 59% of the City's total population.

Based on input from stakeholders and aging trends, it is recommended that the agency and/or their partnering organizations continue introducing new programs to the older adult segments to address any potential unmet needs. Particularly, dedicated senior programs seems to be an area of focus for future planning efforts.

Staff should continue to monitor demographic shifts and program offerings to ensure that the needs of each age group are being met. It would be best practice to establish a plan including what age segment to target, establish the message, which marketing method(s) to use, and determine what to measure for success before allocating resources towards a particular effort.



**POPULATION DISTRIBUTION FOR RESIDENTS OVER 65**

As CCPR considers adding more senior specific programs in the future, staff should target activities and marketing strategies and tactics to the areas with the highest density of this age segment. According to **Figure 8** these areas are in the central and east central portions of Carmel Clay.

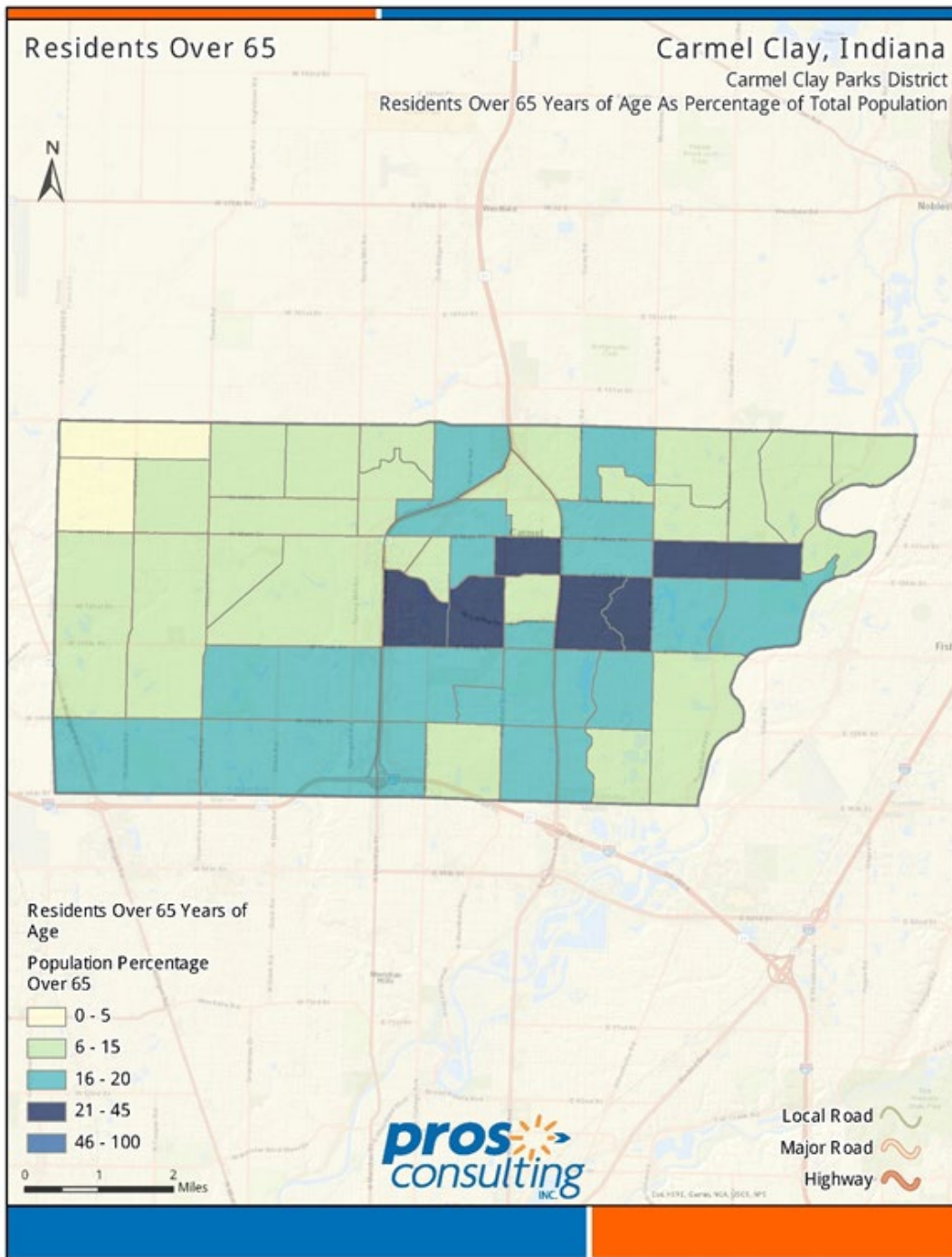


Figure 8: Residents Over 65



### 1.3.2 PROGRAM LIFECYCLE

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

Carmel • Clay Parks & Recreation Lifecycle Analysis				
Stages	Description	Actual Programs Distribution		Recommended Distribution
Introduction	New Programs; modest participation	26%	60%	50%-60% Total
Take-Off	Rapid participation growth	8%		
Growth	Moderate, but consistent participation growth	26%		
Mature	Slow participation growth	30%	30%	40%
Saturated	Minimal to no participation growth; extreme competition	3%	10%	0%-10% Total
Decline	Declining participation	7%		

Figure 10: Program Lifecycle Distribution

The Lifecycle Analysis for CCPR’s program distribution falls closely in line with the recommended distribution. It is recommended to have fifty to sixty percent of all programs within the beginning stages because it provides the agency with an avenue to energize its programmatic offerings. These stages ensure the pipeline for new programs is there prior to programs transitioning into the Mature stage. According to staff, thirty percent of all program offerings fall into the Mature Stage. This stage anchors a program portfolio, and it is recommended to have forty percent of programs within the Mature category to achieve a stable foundation.

Additionally, ten percent of programs are identified as Saturated or Declining. It is a natural progression for programs to eventually evolve into saturation and decline stages. However, if programs reach these stages rapidly, it could be an indication that the quality of the programs does not meet expectations, or there is not as much of a demand for the programs. As programs enter the Decline Stage, they must be closely reviewed and evaluated for repositioning or elimination. When this occurs, the Department should modify these programs to begin a new lifecycle within the Introductory Stage or replace the existing programs with innovative programs based upon community needs and trends.

Staff should complete a Program Lifecycle Analysis on an annual basis and ensure that the percentage distribution closely aligns with desired performance. Furthermore, the agency could include annual performance measures for each Core Program Area to track participation growth, customer retention, and percentage of new programs as an incentive for innovation and alignment with community trends.

### 1.3.3 COST RECOVERY

#### CURRENT COST RECOVERY

CCPR currently sets cost recovery goals at the start of each year and tracks it on a Core Program Area level and in some instances on a program level. This is a great practice and should continue to be calculated and tracked annually to help ensure goals are being met. The agency's current Core Program Area with the greatest average cost recovery is Adaptive Programs (179%). All these programs within this Core Program Area are required to achieve 100+% cost recovery.

Cost recovery targets can vary for specific programs within each core program area. For instance, even though both programs fall into the Fitness and Wellness Core Program Area and have similar costs to operate, an introductory level yoga class may be more appropriately priced at a lower rate than an advanced level or even private yoga class. Several variables can influence the cost recovery target, including lifecycle stage, demographic served, and most important, program classification. It is normal for programs within each Core Program Area to vary in price and subsidy level. The program mix within each Core Program Area will determine the cost recovery capabilities.

Cost recovery is a key performance indicator for CCPR. CCPR should continue to track cost recovery goals at least annually including the actual cost recovery achieved for each Core Program Area. Each Core Program Area can also be benchmarked against itself on an annual basis to measure success. With approved cost recovery goals, annual tracking, and quality assurance, CCPR will continue to achieve financial success with its programming.

#### COST RECOVERY BEST PRACTICES

Cost recovery targets should reflect the degree to which a program provides a public versus individual good. Programs providing public benefits (i.e., Public Services) should be subsidized more by the agency; programs providing individual benefits (i.e., Merit or User Services) should seek to recover costs and/or generate revenue for other services. CCPR has developed the following definitions to help classify specific programs within program areas.

- The Public Services category is critical to achieving the organizational mission and providing community-wide benefits and therefore, receive priority for subsidization.
- Merit or User Services program classifications represent programs that receive lower priority for subsidization.
  - Merit Services contribute to the organizational mission but are not essential to it; therefore, cost recovery for these programs should be high (i.e., 100% of direct costs).
  - User Services directly benefit the individual user(s) and should not draw upon limited public funding, so these programs should be, at a minimum, 100% recovery of direct and indirect costs.

CCPR's cost recovery expectations are outlined in their "Revenue Policy" which was approved via resolution by the Carmel/Clay Board of Parks and Recreation and depicted below in **Figure 12**

Public Services are provided for the benefit of the general public in order to contribute to the high quality of life in the Carmel Clay community. CCPR provides these services through tax revenues, impact fees, donations, endowments, and other available revenue sources. Public Services consist of recreation facilities such as greenways, playgrounds, special use and natural areas, unscheduled sports fields or courts, and some programs including Special Events and Park Stewardship. Also included in this classification are reasonable accommodations for people with disabilities so that they may participate in services provided by the department

Merit Services are funded through a combination of user fees and other sources. Examples of facilities and programs for this category include shelter rentals, pavilions, and adaptive programming.

Lastly, User Services are funded through user fees and are not supported by tax revenues. Examples of User Services include Monon Community Center memberships, Dog Park memberships, and programming (Recreation, Extended School Enrichment, and Summer Camps).

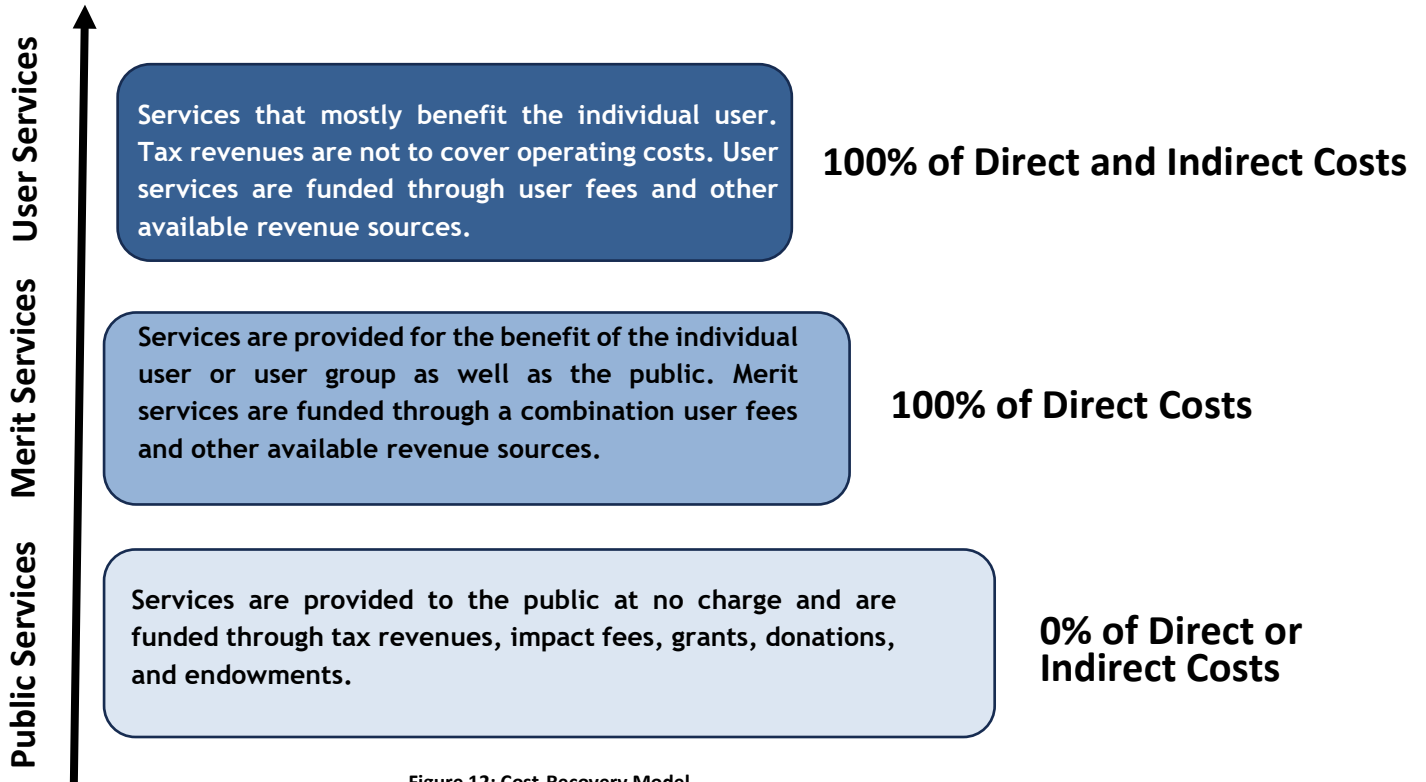


Figure 12: Cost-Recovery Model

### 1.3.4 COST OF SERVICE

Cost recovery targets should at least be identified for each Core Program Area at a minimum, and for specific programs or events when realistic. The previously identified Core Program Areas would serve as an effective breakdown for tracking cost recovery metrics including administrative costs. Theoretically, staff should review how programs are grouped for similar cost recovery and subsidy goals to determine if current practices still meet management outcomes.

Determining cost recovery performance and using it to make informed pricing decisions involves a three-step process:

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

The following section provides more details on steps 2 & 3.

#### UNDERSTANDING THE FULL COST-OF-SERVICE

To develop specific cost recovery targets, full cost of accounting needs to be created for each class or program that accurately calculates direct and indirect costs. Cost recovery goals are established once these numbers are in place, and the Department's program staff should be trained on this process. A Cost-of-Service Analysis should be conducted on each program, or program type, that accurately calculates direct (i.e., program-specific) and indirect (i.e., comprehensive, including administrative overhead) costs. Completing a Cost-of-Service Analysis not only helps determine the true and full cost of offering a program, but it also provides information that can be used to price programs based upon accurate delivery costs. **Figure 13** illustrates the common types of costs that must be accounted for in a Cost-of-Service Analysis.

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

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

Agencies use Cost-of-Service Analysis to determine what financial resources are required to provide specific programs at specific levels of service. Results are used to determine and track cost recovery as well as to benchmark different programs provided by the agency between one another. Cost recovery goals are established once Cost-of-Service totals have been calculated. Program staff should be trained in the process of conducting a Cost-of-Service Analysis and the process should be undertaken on a regular basis.



Figure 13: Full Cost of Service

### 1.3.5 PRICING

Pricing strategies are one mechanism agencies can use to influence cost recovery. Overall, the degree to which CCPR uses various pricing strategies is consistent. Pricing tactics used most consistently by staff include regularly assessing market rate, ensuring rates achieve cost recovery goals, and determining the customer’s ability to pay.

Currently, the Core Program Area that utilizes the largest variety of pricing strategies is Fitness & Wellness, which uses eight of the ten mentioned tactics. Moving forward, the agency should consider researching any untapped pricing strategies and the impact they could have on cost recovery goals.

It is also important to regularly monitor local competitors and other service providers as an increase in competition may alter program pricing. The table below details various pricing methods currently in place as well as additional strategies that could be implemented over time.

Carmel • Clay Parks & Recreation Pricing Strategies	
✓ Age Segment	✓ Group Discounts
✓ Family/Household Status	✓ By Location
Residency	✓ By Competition (Market Rate)
✓ Weekday/ Weekend	✓ By Cost Recovery Goals
✓ Prime / Non-Prime Time	✓ By Customer's Ability to Pay

Figure 14: Pricing Strategies

### 1.3.6 PROGRAM STRATEGY RECOMMENDATIONS

In general, the Department program staff should continue the cycle of evaluating programs on both individual merit as well as the program mix. This can be completed at one time on an annual basis, or in batches at key seasonal points of the year, if each program is checked once per year. The following tool and strategies can help facilitate this evaluation process:

#### PROGRAM DEVELOPMENT & DECISION-MAKING MATRIX

When developing program plans and strategies, it is useful to consider all the Core Program Areas and individual program analysis discussed in this Program Assessment. Lifecycle, Age Segment, Classification, and Cost Recovery Goals should all be tracked, and this information, along with the latest demographic trends and community input, should be factors that lead to program decision-making. Community input can help staff focus on specific program areas to develop new opportunities in what group of citizens to target including the best marketing methods to use.


CCPR uses a program plan template depicted in **Figure 15** that outlines critical program details including projected expenses that are used to establish the program fee. The worksheet also asks for information related to program outcomes, marketing tactics, and whether a similar program is offered elsewhere within the community. As a part of the program development process, CCPR should consider comparing planned programs and prioritizing resources using additional data points, such as potential partnership or sponsorship opportunities, market competition, and the program’s priority investment ranking. This additional analysis will help staff make an informed, objective case to the public when a program in decline, but beloved by a few, is retired. A strong case is made for resources to be allocated to the program/service if it has a high priority ranking, appropriate cost recovery, good age segment appeal, good partnership potential, and strong market conditions.

### CCPR Recreation Program Plan

**Program Title:**  
**Activity #:**  
**Fee:**  
**Program Category:**  
**Age Category:**  
**Determination:**  
**Age Range:**

**Season:**  
**Year:**  
**Min/Max # Part:**

**New Program:** No **Explain:**  
**# Prev. Seasons:**



Approved as is  
 Approved with changes  
 Denied

Section #	Dates	Day	# Classes	Skip Dates	Time	Location	Fee

**Supervisor:** \_\_\_\_\_ **Manager:** \_\_\_\_\_

**Contractor Name:** \_\_\_\_\_ (if applicable)

**Program Guide Description:**

Projected Expenses										
<b>Projected Staff Hourly Rate:</b>		x # of staff		x # of hours	x	\$0.00	0.0765	\$0.00		
<b>Projected Staff Hourly Rate:</b>		x # of staff		x # of hours	x	\$0.00	0.0765	\$0.00		
<b>Prep Time Staff</b>	\$16.75	x # of staff	1	x # of hours	0.5	x	\$8.38	0.0765	\$9.02	
<b>Projected Contract Amount Per Full Time Staff Member Leading Program</b>	No			x # min.	---	---	---	\$0.00	\$0.00	
									<b>Total Projected Personnel Expenses:</b>	<b>\$9.02</b>

Projected Supplies to Purchase:				From:	Price Per:	Qty:	Total:	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							\$0.00	
							<b>Total Projected Supply Expenses:</b>	<b>\$0.00</b>

**Minimum Fee Determiner:**

Total Exp.	Mark Up	Min. Rev.
\$9.02	10%	\$ 9.92
\$9.02	15%	\$ 10.37
\$9.02	20%	\$ 10.83
\$9.02	25%	\$ 11.27
\$9.02	30%	\$ 11.72
\$9.02	35%	\$ 12.17
\$9.02	40%	\$ 12.62
\$9.02	45%	\$ 13.07
\$9.02	50%	\$ 13.52

Min. Rev.	Min. Part	Min. Fee
\$ 12.62	3	\$ 4.21

Do not alter the formulas. Markup should be a straight 40% markup unless otherwise approved by the Recreation Services Manager

**Why do you want to run this program? What makes it awesome? Is anyone else local offering a program like this? How will you market this program? Think all of this through before pitching it.**

Figure 15: Recreation Program Plan



### PROGRAM EVALUATION CYCLE (WITH LIFECYCLE STAGES)

Using the Age Segment and Lifecycle analysis, and other established criteria as outlined in the CCPR Program Matrix (Appendix B), program staff should evaluate programs on an annual basis to determine program mix. This can be incorporated into the Program Operating/Business Plan process. A diagram of the program evaluation cycle and program lifecycle is found in **Figure 16**. During the Introductory Stages, program staff should establish program goals, design program scenarios and components, and develop the program operating/business plan. Regular program evaluations will help determine the future of a program.

If participation levels are still growing, continue to provide the program. When participation growth is slowing (or non-existent) or competition increases, staff should look at modifying the program to re-energize the customers to participate. When program participation is consistently declining, staff should terminate the program and replace it with a new program based on the public’s priority ranking and/or in activity areas that are trending nationally/regionally/locally, while taking into consideration the anticipated local participation percentage.

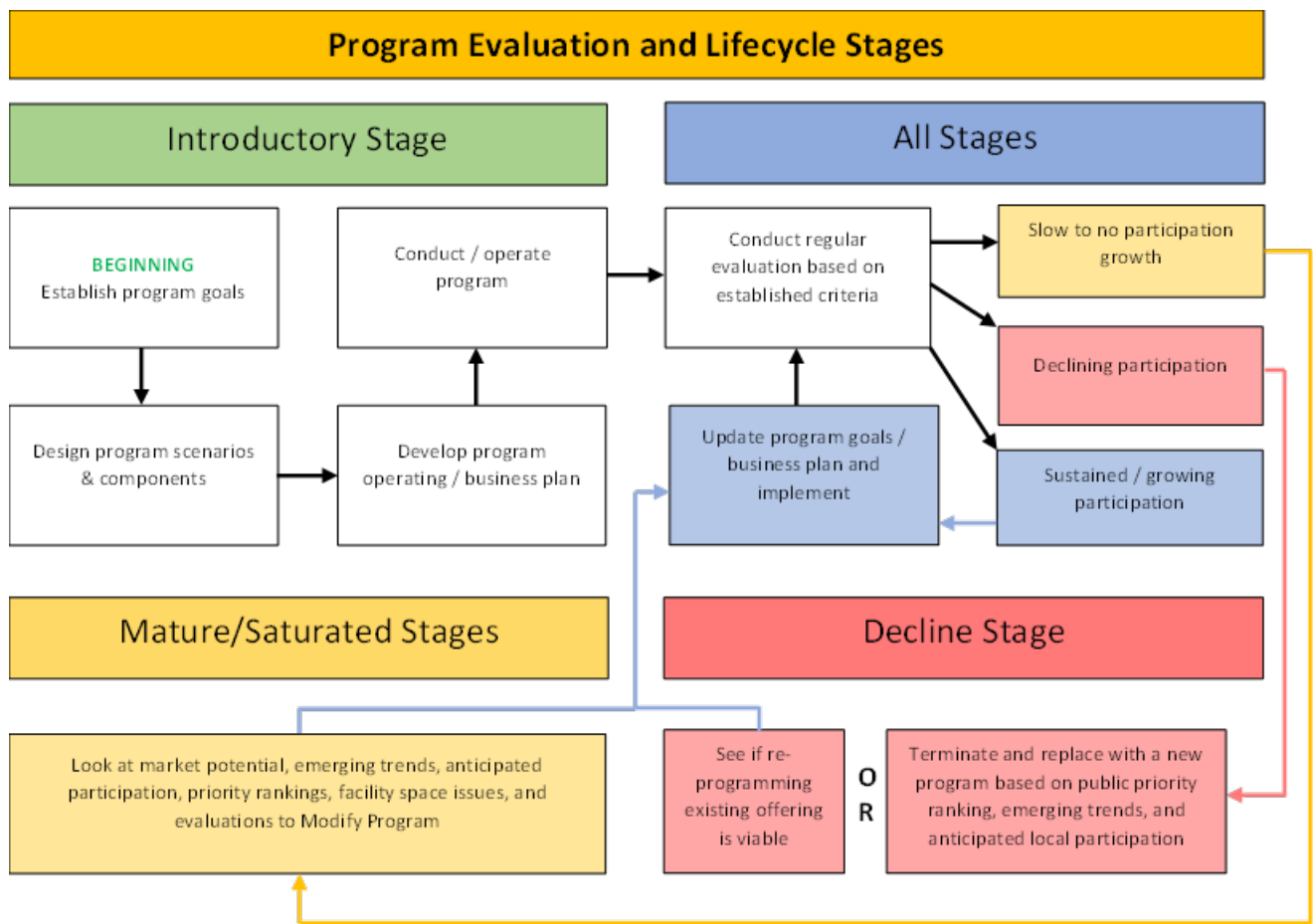


Figure 16: Program Evaluation and Lifecycle Stages

## 1.4 MARKETING, VOLUNTEERS, AND PARTNERSHIPS

### 1.4.1 CURRENT RECREATION MARKETING AND COMMUNICATIONS

The agency's current marketing plan utilizes several communication methods to connect with the community including:

- Printed Program Guides
- Online Program Guides
- CCPR Website (Mobile Friendly)
- Flyers/Brochures
- In-Facility Signage
- Public Service Announcements
- Newsletters (Online)
- QR Codes
- Social Media
- Blogs/Vlogs
- Radio Advertisements (Paid and Free)



Effective communication strategies require striking an appropriate balance between the content with the volume of messaging, while utilizing the “right” methods of delivery. The agency has a broad distribution of delivery methods for promoting programs. It is imperative to continue updating the CCPR marketing strategy annually to provide information for community needs, demographics, and recreation trends.

An effective marketing plan must be built upon and integrated with supporting plans and directly coordinate with organization priorities. The plan should also provide specific guidance as to how the agency's identity and brand is to be consistently portrayed across the multiple methods and deliverables used for communication.





## 1.4.2 SOCIAL MEDIA

CCPR uses Facebook, Twitter (X), Instagram, LinkedIn, YouTube, and TikTok. Here is a quick analysis of each platform. All numbers are as of September 22, 2023.



### FACEBOOK

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- 22,000 followers
- Posts multiple times a week.
- Content developed to promote facilities, programs and activities and share news, member stories, and images within CCPR.

### TWITTER (X)

---

- 1,576 followers
- Posts multiple times a week.
- Posts promote programs, services, and project updates.

### INSTAGRAM

---

- 6,475 followers
- Moderate posts per week
- Most posts align with Facebook content.

### LINKEDIN

---

- 987 Followers
- 151 employees
- Monthly posts highlight employee and volunteer engagement and CCPR public events and agency news.

### YOUTUBE CHANNEL

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- 447 Subscribers
- 319 videos
- Videos highlight CCPR public events, news, and some programming.

### TIKTOK

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- 694,400 Views
- Videos highlight CCPR programming, projects, and employment opportunities.

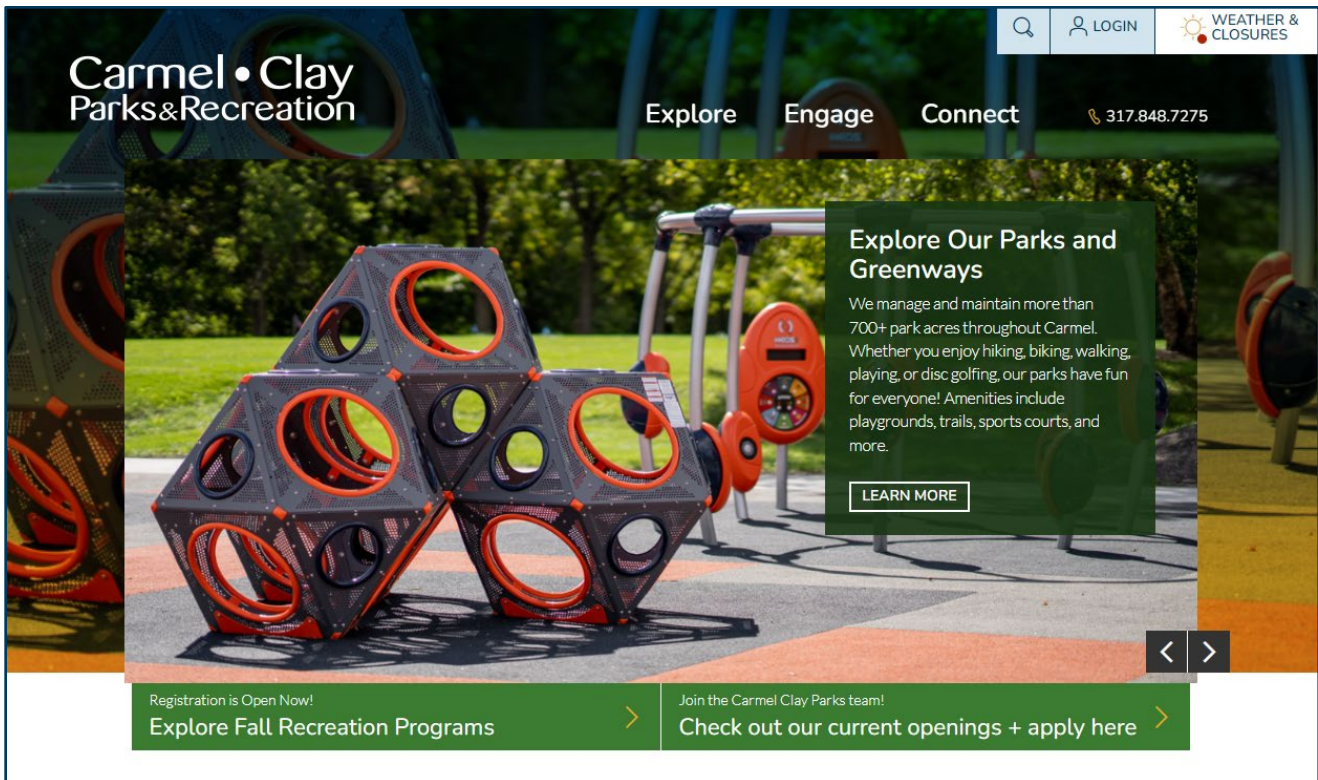
1.4.3 WEBSITE

More than 58% of the statistically valid survey respondents say the CCPR website (<https://www.carmelclayparks.com/>) is the number one way they learn about programs and activities. This implies that the website is critical to the agency’s communications planning. The website has several features making it easy to navigate and user friendly. The top drop-down menu provides clear options for the user to select. The top right corner of the home page provides a link to a pop-up sidebar with important weather and closure information as well as the number to CCPR’s weather hotline. The bottom of the home page has an easy to find email address to guest services as well as links to CCPR’s social media platforms.

When selecting specific program options within the “Explore” menu option, the user is directed to a landing page that provides additional information including an opportunity to sign up for newsletters, critical program information and the online program guide which includes links to the registration software, and drop-down Frequently Asked Questions (FAQ) options further down each page. These are all good tools that can help increase program/event awareness and enhance users experience when utilizing the website.

The “Engage” menu option educates the community on CCPR’s various plans and projects as well as provides opportunities to register for park stewardship programming and volunteer opportunities.

The “Connect” menu option includes CCPR’s blog that highlights the variety of services the agency offers, its team members, and educational pieces that do a respectable job of telling the CCPR story.





#### 1.4.4 VOLUNTEER AND PARTNERSHIP MANAGEMENT

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

##### CURRENT VOLUNTEER MANAGEMENT

When managed with respect and used strategically, volunteers can serve as the primary advocates for CCPR and its offerings. Currently, CCPR has various volunteer opportunities including:

- Park Stewardship programs
- Extended School Enrichment program
- Adaptive programs
- Summer Camp Series programs
- Eagle Scout project opportunities
- Girl Scout Gold Award projects
- Citizen Science
- Adopt-A-Park

This information can be found throughout CCPR’s webpage. Moving forward, it is highly recommended that the agency continue to market various volunteer opportunities on their homepage and via social media platforms to increase awareness and the number of volunteers.

Continuing to track volunteer numbers will help with consistency and ensure volunteers are being utilized to their full potential. Key performance indicators such as number of volunteers, volunteer hours, type of volunteers (E.g., community service, special event, intern, etc.) should all be monitored. Volunteer hours can also be used in budget discussions, showing how well the agency is able to leverage limited resources. A complete list of volunteer recommendations and best practices can be found in **Appendix A**.



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#### 1.4.5 RECREATION PROGRAM PARTNERSHIPS

CCPR currently works with several partnering agencies, organizations, and corporations throughout the community. These partnerships support facilitation of programs and sponsorships of community events.

As with tracking volunteers, tracking partnerships helps show leadership how well staff can leverage resources. In many instances, partnerships are inequitable to the public agency and do not produce reasonable shared benefits between parties. It is not suggested that CCPR's existing partnerships are inequitable; rather, in general many parks and recreation agencies' partnerships tend to be one-sided.

The following recommended policies will promote fairness and equity within existing and future partnerships while helping staff to manage potential internal and external conflicts. Certain partnership principles must be adopted by the agency for existing and future partnerships to work effectively. These partnership principles are as follows:

- All partnerships require a working agreement with measurable outcomes and will be evaluated on a regular basis. This should include reports to the agency on the performance and outcomes of the partnership including an annual review to determine renewal potential.
- All partnerships should track costs associated with the partnership investment to demonstrate the shared level of equity.
- All partnerships should maintain a culture that focuses on collaborative planning on a regular basis, regular communications, and annual reporting on performance and outcomes to determine renewal potential and opportunities to strengthen the partnership.

Additional partnerships can be pursued and developed with other public entities such as neighboring towns/cities, colleges, state or federal agencies, non-for-profit organizations, as well as with private or for-profit organizations. There are recommended standard policies and practices that will apply to any partnership, and those that are unique to relationships with private, for-profit entities.

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#### 1.4.6 MARKETING, VOLUNTEER, AND PARTNERSHIP RECOMMENDATIONS

The consulting team recommends the following regarding marketing, volunteers and partnerships:

##### **UPDATE VOLUNTEER AND PARTNERSHIP POLICIES AND AGREEMENTS**

Following the best practice listed in the previous section as well as in Appendix B, continue to monitor and update established volunteer and partner policies and agreements which are tailored to the distinct types of volunteers and partnerships the agency encounters. Additionally, continue tracking volunteer metrics, including individual volunteers used annually and volunteer hours donated annually. Lastly, begin identifying measurable outcomes for each partnership and track these metrics annually.

##### **MARKETING AND COMMUNICATIONS RECOMMENDATIONS**

- Ensure a marketing plan is regularly updated including the components and strategies identified in this section.
- Regularly train all programming staff on marketing policies, procedures, and best practices.
- Establish priority segments to target in terms of new program/service development and communication tactics (e.g., Teens, Seniors, etc.).
- Establish and regularly review performance measures for marketing. All recreation staff should be involved in tracking performance measures. Data can be tracked through customer surveys as well as some web-based metrics.
- Leverage relationships with partners to enhance marketing efforts through cross-promotion that include defined measurable outcomes.

- Highlight the customer feedback technology to obtain key customer feedback by making it more prevalent on the website.
- Direct mail was number two on the most preferred way to learn about programs in the statistically valid community needs assessment. Continue to invest in targeted marketing through direct mail.

## 1.5 ANCILLARY RECREATION SERVICES

It is important to know that recreation services are more than just programs and events – CCPR responsibilities also include Ancillary Services. These services are necessary to support a primary activity (i.e., Core Programs) or special use facility (i.e., aquatic center, golf course, sports complex, etc.). For example, cabana rentals are a support service to the primary use of the Waterpark and shelter rentals support park use. These services add value and help increase revenues and sustainability, when appropriately planned and managed.

Ancillary services are used by CCPR to maximize capacity and increase revenues. The following facilities and Core Program Areas include ancillary services that help to support recreational pursuits of residents and visitors:



The Waterpark



Monon Community Center



Jill Perelman Pavilion



Ralph L. Wilfong Pavilion



Adaptive Core Program Area



Fitness & Wellness Core Program Area

To assess their impact and effectiveness, the consultant team evaluated program participation, facility utilization and revenues related to ancillary services that are currently managed by CCPR. This assessment was based on actual figures provided by CCPR for the three most recent years data that was available; fiscal year 2020 (FY20) through fiscal year 2022 (FY22), which reveals participation levels based on the Waterpark, Waterpark services, rentals, programming, and volunteer hours. Data was analyzed to determine recent trends in participation and/or revenue generated for these services that supplement CCPR Core Program Areas. Furthermore, due to the COVID-19 pandemic, data was also evaluated that were impacted by closures to provide a more encompassing comparison. Participation in CCPR programs, events, and ancillary services has grown exponentially since the COVID-19 pandemic. This can be attributed to the public’s perception of how important parks and recreation became during the pandemic when access decreased during closures. However, filling vacant employee positions has been a challenge in keeping up with the increased demand causing some programs to limit maximum participation.

1.5.1 THE WATERPARK

As seen below, all services decreased in participation and revenue in FY20 due to COVID-19 pandemic closures, protocols, and customer apprehension. Since FY20, all ancillary services participation and revenue have increased 45% and 97%. Additional findings:

- Concession transactions decreased while total revenue and revenue per transaction increased, likely due to increased overhead.
- The number of cabana rentals include party patio rentals. Cabana rentals consist of 14 units available for the analysis period. The desire for shade and need to incorporate more contributed to the increase in cabana rentals. Customer conflicts have increased over visitors trying to occupy shaded areas. In 2023, CCPR added 10 cabanas bringing the total to 24.
- The number of cabana rentals also includes multiple rentals where visitors reserved two or more. Those are not reflected, as the number is just transactions.
- Party patio rental revenue has increased 97% since FY20.
- Private swim lessons have also increased 83%. These services were impacted by staffing levels in 2020 and 2021 limiting the revenue potential during these two years.

Ancillary Services - Programming				
Services	FY 20	FY 21	FY 22	Difference (%)
<b>Waterpark Admissions</b>				
Total Participation	43,435	100,298	106,917	59%
Revenue	\$ 473,210	\$ 972,333	\$ 1,254,861	62%
Number of Days Open	58	71	67	13%
<b>Concessions</b>				
Number of Transactions	12,048	22,651	21,966	45%
Total Revenue	\$ 80,594	\$ 194,968	\$ 195,444	59%
Revenue per Transaction	\$ 6.69	\$ 8.61	\$ 8.90	25%
<b>Cabana Rentals (14 units available)</b>				
Number of Rentals	480	970	905	47%
Revenue	\$ 37,074	\$ 74,236	\$ 89,113	58%
Cabana Utilization (percentage)	59%	98%	96%	39%
<b>Party Patio Rentals</b>				
Revenue	\$ 600	\$ 15,899	\$ 20,010	97%
<b>Private Swim Lessons</b>				
Total Participation (# Lessons)	45	53	260	83%
Revenue	\$ 1,095	\$ 1,270	\$ 7,650	86%



### 1.5.2 RENTALS

The table below shows the rental revenue from facility rentals (Jill Perelman Pavilion, Monon Community Center, Wilfong Pavilion), shelter rentals in the system and locker rentals. Rental revenue has increased in facilities and shelters while decreasing in locker rental. It should be noted that the rental revenue also includes ESE and SCS payments for their use of the facilities for youth services programming. A couple of potential factors in locker rental decline could be challenges with key codes not working and more people working from home or on a hybrid work schedule. Locker rentals are for indoor rentals. Visitors are not charged for outdoor lockers and patrons can bring their own lock.

Ancillary Services - Rentals				
Services	FY 20	FY 21	FY 22	Difference (%)
<b>Facility Rentals (JPP, Wilfong, MCC)</b>				
Revenue	\$ 97,542	\$ 124,825	\$ 178,275	45%
<b>Shelter Rentals</b>				
Revenue	\$ 65,100	\$ 81,208	\$ 89,853	28%
<b>Locker Rental</b>				
Total Participation (# rentals)	49	42	43	-14%
Revenue	\$ 8,496	\$ 7,308	\$ 7,452	-14%

### 1.5.3 FITNESS

Fitness is comprised of group fitness and personal training. Group fitness classes are an essential ancillary service incorporated into membership benefits not requiring additional fees. Group fitness total participation has increased almost 50% each of the past two years, since the pandemic decline (FY20). This is the same for personal training and revenue from personal training has increased 54%. Additional impacts exist from these increases including:

- Group fitness only has so much physical space within the MCC. Additionally, the MCC East Building is needed for day camps in the summer months displacing group fitness and limiting access. Space utilization analysis is being conducted for the MCC to determine if there are any underutilized spaces or repurpose potential for a greater revenue driving service.
- Personal training adds people in the fitness center. This area can be congested during peak times and when including instructors, making the experience less enjoyable.

Ancillary Services - Fitness				
Services	FY 20	FY 21	FY 22	Difference (%)
<b>Group Fitness (Participation only, part of membership fee)</b>				
Total Participation	49,521	73,135	94,605	48%
<b>Personal Training</b>				
Total Participation (# of sessions)	2,593	3,893	5,318	51%
Revenue	\$ 98,072	\$ 144,709	\$ 210,928	54%

1.5.4 PROGRAMMING

Programming consists of total participation for both internal and contracted programs in Arts & Culture, Seniors, Sports, Private Adaptive Lessons and ESE Enrichment Specials. Participation in these programs has decreased due to CCPR’s post COVID-19 pandemic approach as mentioned in section 1.2.4. This intentional approach is having little to no impact on revenues. In FY21, additional revenues are related to nature half-day programs, which are part of the Nature Core Program Area. Additional findings include:

- Private Adaptive Lessons have begun to increase in the number of lessons and participation. However, have decreased considerably since FY20. The decrease in participation has been caused by a lack of instructors to teach adaptive swim lessons.
- Enrichment Specials (ESE) have been introduced in FY22 and continued in 2023. So, 2022 numbers will be used in a future analysis.

Ancillary Services - Programming				
Services	FY 20	FY 21	FY 22	Difference (%)
<b>Arts &amp; Culture, Senior, Sports programs (internal and contracted)</b>				
Total Participation	4688	1563	775	-505%
Revenue	\$ 123,645	\$ 228,940	\$ 128,999	4%
<b>Private Adaptive Lessons (Swim, Drama Therapy, Leisure)</b>				
Total Participation (# Lessons)	120	16	42	-186%
Revenue	\$ 3,200	\$ 600	\$ 1,300	-146%
<b>Enrichment Specials (ESE)</b>				
Total Participation			72	
Revenue			\$ 9,112	

1.5.5 VOLUNTEERS

Volunteering is a positive way to build community around common interests. CCPR uses volunteers in Core Program Areas, Adopt-a-Park, and Park Stewardship. Tracking the individual volunteers and number of hours helps to identify cost containment measures implemented by CCPR. The national value of a volunteer hour is then utilized to calculate the actual savings in salary expenditures that are being contributed to the park system. Many parks and recreation departments are struggling to reignite the volunteer base to pre-pandemic levels. CCPR has been able to increase the total hours, while not necessarily increasing the number of volunteers. This should be monitored to avoid volunteer fatigue.

Ancillary Services - Volunteers				
Services	FY 20	FY 21	FY 22	Difference (%)
<b>Volunteer (Adaptive, Adopt-a-Park, Park Stewardship, ESE, SCS, Citizen Science, Rec Programs)</b>				
Total Hours	1,315	3,495	3,357	61%
Total Individuals	109	231	157	31%
Value (Based upon \$ of volunteer hour by year)	\$ 35,761	\$ 99,734	\$ 100,556	64%

### 1.5.6 OTHER COMMUNITY ANCILLARY SERVICES - GOLF

It is worth noting that the City of Carmel oversees the operations of the Brookshire Golf Course. Brookshire is an 18-hole course with rolling terrain and stately mature trees. Cool Creek winds its way through a majority of the course layout. Season passes are available as well as individual games. While this ancillary service was not part of the assessment, it is important to recognize that currently CCPR is not involved in operations of golf. Should this change, it will be necessary to assess the golf course compared to current CCPR maintenance standards, level of service, and staffing levels as part of a business plan to ensure sustainability in operations.



## 1.6 APPENDIX A: VOLUNTEER/PARTNERSHIP BEST PRACTICES & RECOMMENDATIONS

### BEST PRACTICES IN VOLUNTEER MANAGEMENT

CCPR currently employs many best practices in volunteer management. Below are some tactics that staff should consider for future volunteer programming:

Involve volunteers in cross-training to expose them to various organizational functions and increase their skill. This can also increase their utility, allowing for more flexibility in making work assignments, and can increase their appreciation and understanding of CCPR.

Ensure a Volunteer Coordinator (a designated program staff member with volunteer management responsibility) and associated staff stay fully informed about the strategic direction of the agency overall, including strategic initiatives for all divisions. Periodically identify, evaluate, or revise specific tactics the volunteer services program should undertake to support the larger organizational mission.

A key part of maintaining the desirability of volunteerism in the agency is developing a good reward and recognition system. The consultant team recommends using tactics like those found in frequent flier programs, wherein volunteers can use their volunteer hours to obtain early registration at programs, or discounted pricing at certain programs, rentals, or events, or any other CCPR function. Identify and summarize volunteer recognition policies in a Volunteer Policy document.

Regularly update volunteer position descriptions. Include an overview of the volunteer position lifecycle in the Volunteer Manual, including the procedure for creating a new position.

Add end-of-lifecycle process steps to the Volunteer Manual to ensure that there is formal documentation of resignation or termination of volunteers. Also include ways to monitor and track reasons for resignation/termination and perform exit interviews with outgoing volunteers when able.

In addition to number of volunteers and volunteer hours, categorization and tracking volunteerism by type and extent of work, is important:

- **Regular volunteers:** Those volunteers whose work is continuous, provided their work performance is satisfactory and there is a continuing need for their services.
- **Special event volunteers:** Volunteers who help with a particular event with no expectation that they will return after the event is complete.
- **Episodic volunteers:** Volunteers who help with a particular project type on a recurring or irregular basis with no expectation that they will return for other duties.
- **Volunteer interns:** Volunteers who have committed to work for the agency to fulfill a specific higher-level educational learning requirement.
- **Community service volunteers:** Volunteers who are volunteering over a specified period to fulfill a community service requirement.

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

### 1.6.1 POLICY RECOMMENDATIONS FOR PUBLIC/PRIVATE PARTNERSHIPS

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

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

As an outcome of the partnership, CCPR must receive a designated fee that may include a percentage of gross revenue dollars less sales tax on a regular basis, as outlined in the contract agreement.

The working agreement of the partnership must establish a set of measurable outcomes to be achieved, as well as the tracking method of how those outcomes will be monitored by the agency. The outcomes will include standards of quality, financial reports, customer satisfaction, payments to the agency, and overall coordination with CCPR for the services rendered.

Depending on the level of investment made by the private contractor, the partnership agreement can be limited to months, a year, or multiple years.

If applicable, the private contractor will provide a working management plan annually that they will follow to ensure the outcomes desired by CCPR. The management plan can and will be negotiated, if necessary. Monitoring the management plan will be the responsibility of both partners. The agency must allow the contractor to operate freely in their best interest, if the outcomes are achieved, and the terms of the partnership agreement are adhered to.

The private contractor cannot lobby agencies advisory or governing boards for renewal of a contract. Any such action will be cause for termination. All negotiations must be with the CCPR Executive Director or their designee.

The agency has the right to advertise for private contracted partnership services or negotiate on an individual basis with a bid process based on the professional level of the service to be provided.

If conflicts arise between both partners, the highest-ranking officers from both sides will try to resolve the issue before going to each partner's legal counsel. If none can be achieved, the partnership shall be dissolved.

## PARTNERSHIP OPPORTUNITIES

CCPR currently has a strong network of recreation program partners. Therefore, the following recommendations are both an overview of existing partnership opportunities available to CCPR, as well as a suggested approach to organizing partnership pursuits. This is not an exhaustive list of all potential partnerships that can be developed, but this list can be used as a reference tool for the agency to develop its own priorities in partnership development. The following five areas of focus are recommended:

**Operational Partners:** Other entities and organizations that can support the efforts of CCPR to maintain facilities and assets, promote amenities and park usage, support site needs, provide programs and events, and/or maintain the integrity of natural/cultural resources through in-kind labor, equipment, or materials.

**Vendor Partners:** Service providers and/or contractors that can gain brand association and notoriety as a preferred vendor or supporter of the City or CCPR in exchange for reduced rates, services, or some other agreed upon benefit.

**Service Partners:** Nonprofit organizations and/or friends' groups that support the efforts of the agency to provide programs and events, and/or serve specific constituents in the community collaboratively.

**Co-Branding Partners:** Private, for-profit organizations that can gain brand association and notoriety as a supporter of CCPR in exchange for sponsorship or co-branded programs, events, marketing, and promotional campaigns, and/or advertising opportunities.

**Resource Development Partners:** A private, nonprofit organization with the primary purpose to leverage private sector resources, grants, other public funding opportunities, and resources from individuals and groups within the community to support the goals and objectives of the agency on mutually agreed strategic initiatives.

## BEST PRACTICE FOR ALL PARTNERSHIPS

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

Each partner will meet with or report to CCPR staff on a regular basis to plan and share activity-based costs and equity invested.

Partners will establish measurable outcomes and work through key issues to focus on for the coming year to meet the desired outcomes.

- Each partner will focus on meeting a balance of equity agreed to and track investment costs accordingly.
- Measurable outcomes will be reviewed quarterly and shared with each partner, with adjustments made as needed.
- A working partnership agreement will be developed and monitored together on a quarterly or as-needed basis.
- Each partner will assign a liaison to serve each partnership agency for communication and planning purposes.