

**SELF~ASSESSMENT WORKBOOK**  
**FOR**  
**PARK AND RECREATION**  
**AGENCIES PREPARING**  
**THE SELF~STUDY DOCUMENT**  
**FOR THEIR**  
**NATIONAL ACCREDITATION APPLICATION**

Lee County Parks and Recreation  
Spring 2006

Sponsored by the  
National Recreation and Park Association  
and the  
American Academy for Park and Recreation Administration

**AGENCY ACCREDITATION PROFILE**  
**For Lee County Parks and Recreation**

(For inclusion at the beginning of the self-assessment and beginning of visitor report)

**I. Community Demographics** (from most recent U.S. census)

- A. Population of tax jurisdiction . . . . 440,542 people (514,000 - 2005 planning data)
- B. Population of metropolitan service area . . . . . 440,542 people
- C. Age profile of tax jurisdiction:
  - Median age – 49
  - 25.2% residents over age 65
  - 13.4 % school age children

Income profile of tax jurisdiction:

- Median household income is \$28,448 (\$41,227 – 2003 planning data)
- 10 % with income below poverty level
- 2.7 % living in public housing

E. Racial diversity of the tax jurisdiction:

- 90.6 % White
- 8.1 % Black or African American
- 6.3 % Latino or Hispanic
- .09 % Asian
- .03 American Indian, Eskimo, Aleut

**II. Agency Characteristics**

- A. Total operating budget (cite year) . . . . . \$27 million (2005-2006)
- B. Total capital budget (cite year) . . . . . \$18 million (2005-2006)
- C. Total full-time employees . . . . . 251 F/T, 18 P/T employees
- D. Parkland acreage . . 14,676 total acres (19 ac neighborhood pks, 665 ac Comm Pks, 2124 ac Regional Pks, 36 ac greenway, 22 ac boat ramps, 11,810 conservation 20/20 preserves)
- E. Describe the predominant form(s) of government in your tax jurisdiction, i.e., manager, mayoral, commission:
  - Five member Board of County Commissioners
  - County Manager, Deputy County Manager, 2 – Assistant County Managers
- F. Significant agency awards and/or recognitions:

Year	Recognition
1. 2002, 2003, 2004	NRPA Gold Medal Finalist
2. 1992,1993,1996,1999, 2000,2001,2005	FL. State League Municipality Grounds Crew Award
3. 2003, 2004	FL. State League Overall Grounds Crew Award
4. 2004, 2005	Gulf Coast League Grounds Crew Award
5. 2004	NRPA Sports Magnet Center

- 6. 2004 NRPA Hearts N Parks Magnet Center
- 7. 2005 National Comm. Service Award (Bob Bueckert) from  
National USTA
- 8. 2002 NRPA/USTA Gold Level Award
- 8. 2003 FRPA Achievement Award (Barbara Manzo)
- 9. 2003 USTA FL Presidents Award (Barbara Manzo)
- 9. 2005 FRPA Fellow Award (Barbara Manzo)

**III. Physical Characteristics**

- A. Geographic size of tax jurisdiction . . . . . 804 square miles
- B. Describe significant rivers, lakes, mountain ranges, etc., which influence your community:

Lee County’s western border is the Gulf of Mexico which makes it a prime beach resort spot for tourists. The coast is fringed by barrier islands which provide 40 miles of beach front. Lee County’s economy is significantly driven by its tourism industry. In addition to its gulf beaches, Lee County is divided by the Caloosahatchee River which is part of the Intercoastal Waterway and receives flow from Lake Okeechobee. All of these factors make Lee County a recreational mecca for boating, fishing, swimming, and all water and beach related sports.

**IV. Cultural Characteristics**

- A. Describe significant social factors and/or cultural institutions, which influence your agency's delivery of service:

Lee County is a world-renowned tourism destination. During the November to April tourist season, the population of Lee County can swell to 1,082,171 people. International tourism is significant resulting in the need for signage in several languages. Additionally, the Hispanic population is projected to increase dramatically in the next decade. With the emergence of Florida Gulf Coast University, as well as, Edison College and International College, what has traditionally been a retirement-aged area for senior citizens is fast evolving into a younger population. Lee County has, in the past, been a bastion of conservatism, both ideologically and politically, but continues to become more liberal due to the influx of tourists and new residents. Program delivery of recreational activities must naturally follow as the changing population begins to demand newer and more diverse activities.



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- ☞ Standards marked are fundamental standards for quality operations and are required of all Agencies seeking accreditation.

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## PREFACE

The purpose of this Workbook is to facilitate the Agency's preparation of its Self-Assessment Report. It must be used in conjunction with the *Self-Assessment Manual* and the *Visitation Procedures*.

There are three formats for presenting evidence:

1. The evidence is incorporated into the body of the Report, following the Standard statement.
2. A summary statement is in the body of the Report with a reference by letter or number to an attachment for more complete information.
3. A summary statement is in the body of the Report with reference to on-site documentation (nature of, systematically organized so visitors can find easily).

For each Standard, it is indicated whether the evidence of compliance should be "attached" (formats 1 and 2) or "on-site" (format 3).

The section "Notations Regarding Compliance" is for the Agency to use as it assembles the documentation who is to prepare/get the documentation, where documentation is located, what's missing, et al. In the final Report, these Notations and Suggested Evidences of Compliance should be deleted, leaving the Report format the actual Standard followed by the actual evidence, or the summary statements with reference to attachments and/or on-site documentation.

If an Agency considers a Standard N/A, not applicable, the rationale should be inserted following the statement of the Standard.

## 1.0 AGENCY AUTHORITY, ROLE AND RESPONSIBILITY

### 1.1 Legal Authority and Jurisdiction

#### ☞ 1.1.1 Source of Authority

X MET NOT MET

***The source of authority of and powers for the public recreation and park managing authority shall be clearly set forth by legal document.***

**Suggested Evidence of Compliance:** (attached)

Provide legal citation and, if appropriate, date of resolution by local governing entity or legal authority, i.e., enabling act, charter, ordinance; if permissive state authority, provide charter.

**Notations by Agency Regarding Compliance:**

A copy of the minutes from the June 17, 1959, Board of County Commissioners meeting giving direction for the Parks Board to hire a park and recreation director are provided in evidence.

**Available on-site evidence:**

- Copy of minutes from the June 17, 1959, Board of County Commissioners meeting

1.1.1.1 Public authority/policy body

X MET NOT MET

*The organizational structure should provide for one public authority responsible for policy-making functions.*

**Suggested Evidence of Compliance:** (attached)

Copy of organizational authority structure chart with narrative description; show relationship to city mayor, council, et al. and departments. Distinguish this chart from a staff organization chart, 3.1.1

**Notations by Agency Regarding Compliance:**

Lee County Department of Parks and Recreation falls under direct authority of the elected Board of County Commissioners (BOCC). The BOCC sets policy and the administration of policy is accomplished via the County Manager, Deputy/Assistant County Managers, Department Directors and department personnel.

**Available on-site evidence:**

- County wide organizational chart showing link to department of Parks and Recreation
- Departmental organization chart

1.1.1.2 Citizen advisory boards/committees X MET NOT MET

*There should be citizen advisory boards/committees.*

**Suggested Evidence of Compliance:** (attached)

Provide list of boards/committees with membership, functions and duties, terms of office, frequency of meetings.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has several Boards and Committees that assist with the operation of the department. The Lee County Board of County Commissioners appoints members of the Parks and Recreation Advisory Board. The Board also appoints five of the ten members of the Bay Oaks Advisory Committee. The Ft. Myers Beach Town Council selects the other five members.

**Available on-site evidence:**

- Resolution adopting the Parks and Recreation Advisory Board
- Public Parks and Recreation Services Advisory Committee list
- Public Parks and Recreation Services Advisory Committee minutes
- Friends of Boca Grande Community Center 2004 Annual Report
- Newsletter for Friends of Six Mile Cypress Slough Preserve

1.1.2 Jurisdiction X MET NOT MET

*The specific geographical boundaries of the Agency's jurisdiction should be set forth by geographical description and map.*

**Suggested Evidence of Compliance:** (on-site)

Provide copy of map with geographical boundaries of jurisdiction and service areas, including location of facilities identified.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a map of the geographical boundaries of Lee County, as well as, maps which show locations of all its' Parks and Recreational facilities. All facilities are maintained in a GIS database and a printed Map Book is available showing all facilities with descriptions.

**Available on-site evidence:**

- Map consisting of geographical boundaries and facilities of Lee County
- Map showing Community Park locations
- Map showing Regional Park locations
- Come Discover Lee County Parks and Recreation Guide Map
- 2005 Parks Mapbook

*There shall be a written mission statement which defines the direction and purpose of the Agency.*

**Suggested Evidence of Compliance:** (attached)

Provide a copy of written statement. (A visitor will check currentness.) Often to qualify for grants the mission must be updated at least every five years.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation's mission statement is included in all our policies and is the basis for our goals and objectives. The department's mission statement can be found in numerous documents such as the Parks and Recreation Operations Manual and the *Cost Benefits Analysis (CBA)*. The mission statement as it currently stands was developed and implemented in September of 2005.

**Available on-site evidence:**

- A copy of the department's mission statement
- A copy of the department's mission statement and Goals and Objectives

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Lee County Parks and Recreation's Strategic Plan (Exhibit B)
- Cost Benefit Analysis (Exhibit C)

### 1.3 Goals and Objectives



#### 1.3.1 Statement of Goals and Objectives

X MET NOT MET

*There shall be written goals and objectives for the Agency and for each organizational component within the Agency. Such goals and objectives shall be directed toward accomplishing the Agency mission, be updated annually, and distributed to all appropriate personnel.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of goals and objectives for **each** organizational component.

**Notations by Agency Regarding Compliance:**

The Board of County Commissioners holds a Goals Workshop annually. Once the goals have been defined, the management team for Parks and Recreation formulates the goals and objectives based upon the Board's goals, as well as, reflecting the objectives of the department's mission statement. Copies of the department's goals and objectives are sent to all staff for inclusion in the Parks and Recreation Operational Manual.

**Available on-site evidence:**

- A copy of the department's goals and objectives
- Parks and Recreation Managerial Meeting Minutes
- Parks and Recreation Senior Supervisor Meeting Minutes

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Lee County Parks and Recreation's Strategic Plan (Exhibit B)

#### 1.3.2 Personnel Input

X MET NOT MET

*There should be input from the various personnel levels within the Agency in the development of Agency goals and objectives.*

**Suggested Evidence of Compliance:** (on-site)

Provide examples of how input obtained, e.g. memo, meetings, et al to communicate to all personnel explaining why their input is important and how to submit such information.

**Notations by Agency Regarding Compliance:**

The process of developing goals and objectives for Lee County Parks and Recreation undergoes many steps. First, the goals and objectives workshop for the Board of County Commissioners and Administration is held. This, as all County Governmental meetings, is held under the "Sunshine Law". There are department heads and members of the Press present. Once these goals and objectives are established, they are sent out to all departments and employees. At



this point, the departments are then responsible to create their individual goals and objectives for submission to Administration.

In Parks and Recreation, we generally hold a management team staff meeting where we review last years' goals and objectives and suggest changes. Very often changes will be the result of discussions and/or reorganization that may have taken place at a Management Retreat. Every staff member receives copies of all meeting minutes and suggestions are received and reviewed before final submission. Once goals and objectives are accepted and distributed they are incorporated into each manager's annual goals and objectives and on down the line to all staff as part of their annual goals and objectives.

**Available on-site evidence:**

- Copies of the managers' staff meeting minutes

1.3.3 Annual Evaluation

X MET NOT MET

*There should be a written annual evaluation stating the progress made toward the attainment of goals and objectives submitted to the Agency's chief administrator by each organizational component.*

**Suggested Evidence of Compliance:** (on-site, unless part of annual report)

Provide a copy of last year's evaluation.

**Notations by Agency Regarding Compliance:**

The departmental goals and objectives are passed down through the programs and incorporated into each employee's personal evaluation. The progress made towards the attainment of each goal and objective is reviewed annually, evaluated, and submitted for review and approval.

**Available on-site evidence:**

- Description of annual evaluation
- Memorandum detailing 2006-07 Board Goals session
- Copies of the managers' staff meeting minutes
- Copies of the administrative staff's retreat minutes

## 1.4 Policy Formulation and Review



### 1.4.1 Process for Formulating Policy

X MET NOT MET

*A specific distinction shall be made among policies, rules and regulations, and operational procedures.*

**Suggested Evidence of Compliance:** (on-site)

Give illustration of how this distinction is facilitated or carried out.

**Notations by Agency Regarding Compliance:**

Policies are set by the Board of County Commissioners and/or State and Federal Regulations. These policies can be found in the Lee County Administrative Code and various State Statutes. Rules and regulations are formulated to assist in the carrying out of policies. These can be found in the Lee County Policies and Procedures Manual and various ordinances such as Lee County Ordinance 02-12. The Parks and Recreation Department then compiles its' Parks and Recreation Operations Manual, which gives staff the procedures for following all policies, rules and regulations.

An example of this process is as follows:

- The Board of County Commissioners has set policy that no alcohol is permitted on County property.
- Lee County Ordinance 02-12 reinforces that policy along with the allowable exceptions.

**Available on-site evidence:**

- Sample copy of Administrative Code

**On Exhibit for on-site review:**

- Lee County Policies and Procedures Manual (Exhibit D)
- Parks and Recreation Operations Manual (Exhibit A)
- Lee County Administrative Code (Exhibit E)

1.4.2 Policy Manual

X MET NOT MET

*There should be a manual setting forth the Agency policies, which is:*

- *kept up-to-date*
- *reviewed systematically, at least every 5 years, by the administration, and*
- *made available to pertinent unit administrative and supervisory personnel.*

**Suggested Evidence of Compliance:**

Provide copy of Agency policy manual with cover letter indicating its distribution and the review by the Board and administrators.

Attach cover letter and table of contents of policy manual, full manual on-site.

**Notations by Agency Regarding Compliance:**

The original Lee County Parks and Recreation Operations Manual was completed in 1997. We consider our manual a living document and as such it is constantly reviewed and updated. There is one staff person who is the custodian of the manual and who is responsible for the distribution of every change. Each facility is required to have a manual on-site and the supervisor is required to update the changes as they occur. The Lee County Parks and Recreation Operations Manual is also available to all employees on the Lee County Parks and Recreation web-site.

**Available on-site evidence:**

- Cover page and table of contents from Parks and Recreation Operations Manual

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

*There shall be understanding the roles of counterpart and complementary agencies in the community.*

**Suggested Evidence of Compliance:** (on-site)

Provide illustrations of cooperative efforts, including MOA's (Memoranda of Agreements) and MOU's (Memoranda of Understanding).

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has numerous cooperative agreements with complementary agencies throughout Lee County.

An Interlocal Agreement between the Lee County School District and Lee County Parks and Recreation allows for reciprocal use of facilities, as well as, identifying cooperative building efforts between the agencies.

Interlocal agreements exist between the cities (Sanibel, Fort Myers Beach, and Bonita Springs) and Lee County Parks and Recreation for the maintenance and use of facilities.

Agreements between Lee County Parks and Recreation and the Cities of Cape Coral and Fort Myers for reciprocal use of facilities for events and tourist related activities to promote the area.

Agreement with the Sanibel Fire and Rescue to the Lee County Sports Complex in the event of emergency for use as a staging area.

Agreements with the Lee County Emergency Management Division to use certain Parks and Recreation facilities as emergency shelters.

**Available on-site evidence:**

*Agreements with the following agencies:*

- U.S. Department of Agriculture
- Town of Fort Myers Beach
- Captiva Island Fire Control District
- City of Sanibel
- School Board of Lee County
- City of Bonita Springs

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)

1.5.1 Administrative-legislative Functions

X MET NOT MET

*There should be written guidelines defining the relationships between the policy-making functions of the Board and the administrative functions of the chief administrator and staff.*

**Suggested Evidence of Compliance:** (on-site)

Provide the written guidelines.

**Notations by Agency Regarding Compliance:**

The Lee County Administrative Code describes the relationship between the Board of County Commissioners and the County Administrator.

**Available on-site evidence:**

- A copy of Administrative Code #AC1-9 and #AC1-10

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)

1.5.2 Operational Coordination and Cooperation

X MET NOT MET

*There should be written established policies on cooperative use and maintenance of facilities and program operation, facility design, land development, finances, etc., with other agencies or organizations or individuals. Agreements on operational cooperation should be in writing by and between the Agency and others involved.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of the policies and any agreements.

**Notations by Agency Regarding Compliance:**

It is common practice for the department to form partnerships with various groups in order to provide a wide variety of services. Lee County Parks and Recreation's success is enhanced by its many cooperative agreements.

**Available on-site evidence:**

*Agreements with the following agencies and groups:*

- School Board of Lee County
- Boston Red Sox
- Minnesota Twins
- Lee County SW Florida Swim Club
- Lehigh Acres Sr. Center
- Boca Grande Historical Society

- Boca Grande Woman’s Club
- Boca Grande Art Alliance
- Pine Island Art

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)

1.5.3 Interagency Relationships with Counterpart Agencies X MET NOT MET

*There should be liaison with other park and recreation agencies in adjoining jurisdictions or jurisdictions having concurrent authority in the Agency's service area.*

**Suggested Evidence of Compliance:** (on-site)

Provide examples of such liaison and provide letters of agreement, if any.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a close working relationship with the existing four City Parks and Recreation Departments. The Directors meet on a regular basis to discuss all issues and several agreements exist between Lee County Parks and Recreation and the departments for various services. A significant example of this cooperation can be seen in the agreement between Lee County Parks and Recreation and Sanibel Parks and Recreation for the operation of several beach parks. Also an agreement exists between Lee County Parks and Recreation and the Town of Fort Myers Beach for the operation of Bay Oaks Recreation Center. Copies of these agreements are on file for review.

**Available on-site evidence:**

- Minutes from the Parks and Recreation Summit
- Agreements with:
  - Town of Ft. Myers Beach
  - City of Sanibel
  - City of Bonita Springs

1.5.4 Relationship with Complementary Agencies X MET NOT MET  
 1.5.4.1 Public and social service agencies

*There should be liaison with appropriate community/civic organizations. The services and resources available through other public and social service agencies should be identified in written form.*

**Suggested Evidence of Compliance:** (on-site)

Identify staff with liaison responsibility and provide a listing or directory of other community public and social service agencies' available services and resources.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has several staff whose responsibility as a liaison with other agencies, is significant. For example, the Therapeutic Recreation position is responsible to coordinate with All agencies serving the disabled and is the ADA/Inclusion Coordinator for Lee County Parks and Recreation.

Forty-three (43) Lee County Parks and Recreation staff members have taken a course of training with the American Red Cross for duty as Emergency Shelter Managers. Many of these, including the liaison, the Lee County Parks and Recreation Manager, have served in this capacity during emergencies.

The Manager of the Lee County Sports Complex is the liaison between the Lee County Sports Complex and the Emergency Operations Center Division in case of emergency needs for staging of equipment and relief.

All area supervisors and coordinators are the designated liaisons between the department and the various civic organizations in their district. This works best since Lee County is so large and every civic organization, such as the Lions Club, is responsible for their area.

**Available on-site evidence:**

- List of departments employee liaisons

1.5.4.2 Local government agencies X MET NOT MET

*There should be public park and recreation Agency liaison with official local governmental agencies such as zoning commissions, city councils, county supervisors, school boards.*

**Suggested Evidence of Compliance:** (on-site)

Identify staff with this liaison responsibility and indicate how the liaison person has been functional, i.e. reports to director, board, or committees.

**Notations by Agency Regarding Compliance:**

The Parks and Recreation Director and Deputy Director act as liaison with all official local agencies. Managers and supervisors will, as needed, act as liaisons with various agencies. For example, the Lee County Parks and Recreation Planning Manager acts as liaison with Lee County Emergency Operations, Bicycle Pedestrian Advisory Committee, and the County’s Landscape Advisory Committee and reports to the Lee County Parks and Recreation Director in this capacity.

**Available on-site evidence:**

- List of Department’s employee liaisons

## 2.0 PLANNING (This entire section documentation on-site)

### 2.1 Trends Analysis

X MET NOT MET

*There shall be a system in place to assess societal and local trends.*

**Suggested evidence of compliance.** Provide a copy of the trends analysis process.

#### **Notations Regarding Compliance:**

Lee County Parks and Recreation assesses the various societal and recreational trends in numerous ways.

Local trends are monitored through needs analysis and facility surveys, managerial retreats, and agency summits, while sociality demographics are assessed thorough the needs analysis and Census and Human Services statistics. Surveying what people want helps identify the current local trends. The County concurrence management document is also used to determine needs and where the Department is lacking in facilities. The Lee County Planning Department evaluates recreational needs through the Comprehensive Plan which is evaluated annually.

The Department has many certified members of Florida Recreation and Parks association which through training and conferences offers staff an insight into the latest recreational trends.

Lee County is on the forefront in investigating and initiating new national trends. The department is an NRPA Hearts 'N Parks Magnet Center, a First Serve life skills through tennis site, has total participation in the National Alliance for Youth Sports by having all certified coaches, and is a NRPA-NFL Magnet Sports Center.

The department circulates several professional journals that focus on national, state, or international recreational trends, legal analysis, and safety trends. Publications such as NRPA Parks and Recreation, World Leisure Recreation, FRPA Journal, Manager's Legal Bulletin, supervisors Safety Bulletin, Customer First for Government are required reading by all managers and supervisors.

#### **Available on-site evidence:**

- Staff memberships list
- NRPA Heart 'N Parks letter
- First Serve partners page
- NAYS resolution
- NFL Magnet Sports Center documents
- Completed "read" signature pages
- User Needs Assessment (Klages study)
- Wa-Ke-Hatchee survey
- Bay Oaks Users Survey
- Managerial Retreat Minutes from 2006
- Agency summit minutes
- Local Demographics
- Lee County Concurrence Report excerpt
- Excerpt from 2006 SCORP Manual

#### **On Exhibit for on-site review:**

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)
- Lee Plan, Comprehensive Plan Evaluation and Appraisal Report (Exhibit H)
- SCORP 2006 Manual (Exhibit FF)





## 2.2 Community Planning

X MET NOT MET

*The park and recreation Agency shall be a part of total community planning.*

### **Suggested Evidences of Compliance:**

Provide documentation, such as letters, minutes, cooperative agreements.

### **Notations Regarding Compliance:**

Lee County Parks and Recreation participates in the total community planning efforts through the following methods.

Total community planning for Lee County is embodied by The Lee Plan. Element V of The Lee Plan, Parks, Recreation and Open Space, details how Lee County Parks and Recreation fits into the total community planning scheme.

A good example of a cooperative agreement is the Lee County School Board Interlocal Agreement. This agreement was updated in 2000 to include new schools and schools that were not part of the original agreement. The agreement allows Lee County Parks and Recreation to build athletic facilities on existing School Board property, as well as, plan for future school sites. The public gains access to these facilities when they are not in use by the schools, in return for Lee County Parks and Recreation maintaining the facility. Examples from among many other agreements are those with the Lehigh Acres Senior Friends, The North Fort Myers Senior Friends, the Community Tennis Association, the City of Sanibel and the Lee County School Board .

Staff participates in planning committees such as the **Bicycle Pedestrian Advisory Committee**, **Smart Growth**, and regional planning committees such as the **BPCC** and the **Regional Planning Council** who assisted us in the development of a **Greenways Master Plan**. Staff also participates in the 22 county planning districts to help develop planning master plans.

### **Available on-site evidence:**

- Lee County School Board Interlocal Agreement
- Lee County School Board Agreements
- Lehigh Acres Senior Friends Center
- City of Sanibel Agreement
- BPAC agenda
- Smart Growth Minutes
- Chapter V of the Lee Plan
- Regional Planning Council Agenda
- Greenways Master Plan
- Copy of BOCC Blue Sheet with Florida Dept of Agriculture Grant

### **On Exhibit for on-site review:**

- Lee Plan, LDC (Exhibit H)

2.2.1 Personnel Part of Community Planning Team

X MET NOT MET

*Professional park and recreation personnel should be a part of the team for total community planning, such as city planning, school planning, and regional planning.*

**Suggested Evidence of Compliance:**

Identify instances and personnel who have been part of a community planning team.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation contains professional personnel who are involved in a team for total community planning. We work with other planning agencies, developers, and the public to develop sound designs and incorporate comprehensive planning principles to enhance the health, safety, and welfare of our residents. Lee County Parks and Recreation also has an ADA Coordinator who is responsible for reviewing plans and attending meetings as part of the department's ADA transition plan.

We presently work with the School Board to develop shared community centers, Bicycle Pedestrian Advisory Committee, Caloosahatchee Watershed Coalition, Lee County Watershed Advisory Committee, Lee county Departments, and have been working with developers through the rezoning process to condition the site plans to add greenway trails. We continuously work with the Lee County Department of Community Development to regulate impact fees and determine the concurrency needs.

The National Park Service worked with us to develop the Greenways Master Plan which has been approved by the Board of County Commissioners to be incorporated into the Land Development Code (Lee Plan) in 2006.

The Lee County Deputy Director and staff met weekly with the School Board on Wa-kehatchee Recreation Center, Oak Hill Recreation Center, and the Veterans Park Recreation Center.

The Planning Staff also meets regularly with the Department of Transportation on Sidewalk, Causeways Development, and Pedestrian issues.

**Available on-site evidence:**

- Agenda of Wa-keHatchee facility
- Bicycle Pedestrian Coordinating Committee Agenda and minutes
- Lee County Waterways Advisory Committee Minutes
- Sloans Gate Development: Community Impact Condition of rezoning
- Estero Park Community Planning Meeting Agendas

2.2.2 Involvement in Community Planning Groups

X MET NOT MET

*The public park and recreation Agency should be regularly involved in and a part of community planning groups for recreation, such as a Recreation Council or Division for the city, and of community planning allied to recreation, such as Council of Social Agencies, social planners.*

**Suggested Evidence of Compliance:**

Identify instances and personnel who have been part of a community planning group.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works with various community groups to plan Parks and Recreation facilities, programs and preserves. Staff is represented on the boards of the various groups either as full members of the board or as liaisons to facilitate the group and provide communication between the parties.

The following evidence is provided that indicates the diverse groups that Lee County Parks and Recreation relies upon to help plan facilities.

**Available on-site evidence:**

- Memo to Planning on population trends
- Conservation Land Acquisition contract
- CTA meeting notes
- Lakes Park Memo of Understanding
- Lakes Park Enrichment Foundation meeting notes
- Friends of Six Mile Slough meeting notes
- North Fort Myers Core Group Meeting Notes
- Wa-KeHatchee facility planning minutes
- Family First Leader Organization notes
- SF water Management Recreational Opportunity meeting notes
- Aquatics Advisory Committee notes
- Bay Oaks Advisory Committee notes
- Friends of Boca Grand Community meeting notes
- Friends of Maztansas Pass Preserve notes
- Lakes Park Railroad Museum meeting notes

*The public park and recreation Agency should have a working relationship with professional recreation state organizations, state legislative committees and state and federal agencies concerned with aspects of community planning and operations.*

**Suggested Evidence of Compliance:**

Identify instances and personnel who have worked with state/federal agencies on community planning issues.

**Notations by Agency Regarding Compliance:**

Many of the Lee County Parks and Recreation staff are involved in State/ Federal agencies on community planning issues. Dave Berra and Fred Johnson have been working with the National Park System on a regional greenways plan. They also review the Office of Greenways and Trail (OGT) Master Plan annually with the state department. The director has been working with the Florida Recreational Department Agency Program (FRDAP) in the development of grants for local parks. Roger Clark has been working on the regional preservation of 91,000 acres of the Babcock Ranch which spans several counties in southern Florida.

David Berra has attended the National Everglades Restoration sessions for recreation component, as well as the Lakes Park project of this program. Fred Johnson sits on the MPO-BPCC

Mike Pavese represents Parks and Recreation on zoning issues which allow special input on proposed developments that are near facilities. Mike is a member of APA.

Many Staff attend the FRPA sessions in 2004-2005 and Bruce Sparks and Colleen Gierut attended the 2005 legislative platform.

David Berra has been working with the FDEP Office of Greenways and Trails.

**Available on-site evidence:**

- Letter from Lori Womack, Florida Recreation and Park Association confirming Attendance.
- Army Corp of Engineers CERP Project Management Plan for Lakes Park. Emails from Project manager.
- Eligibility letter for the Ten Mile Canal Linear Greenway from Cynthia Radford at the FL-DEP.
- Lee County Metropolitan Planning Organization Agenda which list Fred Johnson and Dave Berra as representatives.
- Bicycle Pedestrian Advisory Committee Agenda and minutes.

*An Agency should have a strategic plan approved by the board, stating how the Agency will achieve its mission, goals and objectives.*

**Suggested Evidence of Compliance:**

Provide a copy of the Agency's strategic plan and date of approval by board; indicate progress being made in implementing the plan.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation's Strategic Plan epitomizes the department's determination to provide quality Parks and Recreation services to our community. This plan was designed to identify the most important issues that Lee County must focus on within the next three years.

Lee County is in a constant state of change, and the Parks and Recreation Department must be prepared to adapt to these changes. The demand for Parks and Recreation services continues to increase with an ever-growing population. This population growth has created a more diverse county, which has resulted in a change of community expectations. Although growth brings both challenges and opportunities, Lee County Parks and Recreation must strive to meet the needs of not only the new residents, but existing residents as well. Lee County Parks and Recreation's Strategic Plan is reviewed annually and updated as required.

The Lee County Parks and recreation Managers Retreat is held every two years to review progress and set new planning goals to meet the needs of its customers.

**Available on-site evidence:**

- Lee County Parks and Recreation Strategic Plan cover page
- Park and Recreation Advisory Board meeting minutes, March 28, 2006
- Concurrency Report 04-05
- Section V Parks in Lee Plan
- Lee County Parks and Recreation Inventory from Impact Fee Study
- Lee County Parks and Recreation Managers Retreat minutes

**On Exhibit for on-site review:**

- Strategic Plan (Exhibit B)
- Lee Plan, LDC (Exhibit G)



*There shall be a comprehensive park and recreation system plan, which is basically an inventory of existing conditions and recommendations for future programs and services, acquisition and development of areas and facilities, and administration. The plan shall be officially adopted by the appropriate governing body, updated regularly, and be linked with a capital improvement budget and a phased development.*

**Suggested Evidence of Compliance:**

Provide a copy of the current Plan, with date of official approval; describe linkage to the Agency's capital improvement budget and a phased development.

**Notations by Agency Regarding Compliance:**

The Comprehensive Plan for Lee County Parks and Recreation is developed from various resources. The Lee Plan, which is the Comprehensive Plan for the entire County, is the basis for the Department's plan. The Concurrency Management Plan keeps a watch over how the Comprehensive Plan is managed. Conservation 2020 is funded by a referendum-approved tax which allows Lee County to purchase environmentally sensitive lands for conservation and recreation. Lee County is an area with rapid growth as evidenced by the population change from 2000 to 2005 of 440,000 to 514,000 people. To implement the Comprehensive Plan, Lee County imposes both Regional Park Impact Fees and Community Park Impact Fees. These funds, along with the CIP budget, allow us to add to our facilities and maintain the ones we have. The CIP and budget documents are updated annually and reflect the needs of the Department and how they are handled. The 2005 Impact Fee Study and the 2004/2005 User Needs Assessment provides future needs information throughout the system.

The Comprehensive Plan uses a GIS database of facilities to help with this analysis

**Available On-sit evidence:**

- Parks and Recreation Comprehensive Plan cover page and table of contents
- Impact Fee Study
- Parks and Recreation Advisory Board Minutes

**On Exhibit for on-site review:**

- Parks and Recreation Comprehensive Plan (Exhibit JJ)
- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)
- The Lee Plan (Exhibit G)
- Concurrency Report (Exhibit H)

#### 2.4.1 Recreation Programming Plan

X MET NOT MET

*A long-range recreation program plan (3 to 5 years or more) should be developed and periodically reviewed, as well as a current year plan, which includes implementation procedures and priority listings of recreation programs.*

##### **Suggested Evidence of Compliance:**

A copy of long-range and current-year recreation program plans.

##### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation sets its program goals in accordance with our established Core Level of Service, which is annually reviewed and revised by the Board of County Commissioners. Most program goals remain constant (as per our mission statement “To provide safe, clean and functional Parks and Recreation facilities; to provide programs and services that add to the Quality of Life for all Lee County residents and visitors; and to enhance tourism through Special Events and Attractions.”).

Needs Assessments Studies (such as the Klages Citizen Opinion Study of 1996, and Lee County User Needs studies 2004 and 2005) are used to identify areas where facilities and/or programs are deficient. These needs assessments, therefore, drive the Capital Improvements Program (CIP) for facilities and the Master Program Plan. Various facility and program surveys and demographic statistics further identify programmatic needs. The departments Cost Benefits Analysis (CBA) report identifies facility attendance and assists management in determining under used and over used facilities and programs, further allowing the CBA analysis to guide program planning.

The Master Program Plan and yearly program priorities are reviewed and revised by the program supervisors’ team and approved by the management team.

##### **Available on-site evidence:**

- Master Program Plan
- Annual program priorities
- Departments core level service goals
- User Needs Assessment minutes
- Wa-KeHatchee Recreation Center survey results
- Summer camp survey results 2005
- Lakes Park survey results
- Bay Oaks User Survey Results
- Demographics Characteristics
- Programmer meeting minutes

##### **On Exhibit for on-site review:**

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)
- Cost Benefits Analysis (Exhibit C)

2.4.1.1 Community study

X MET NOT MET

*A comprehensive community study based on population shifts and changing social and economic conditions should be made at least every five years with interim up-dating.*

**Suggested Evidence of Compliance:**

Provide a copy of latest community study and an indication of its use in park and recreation Agency planning.

**Notations by Agency Regarding Compliance:**

An annual document, Concurrency Management, Inventory and Projections, is prepared by the Lee County Department of Community Development. The study contains projections of population demand on Lee County Parks and Recreation facilities due to anticipated growth. It is used as a tool by agency planning to identify, by Park Impact Fee District, areas where population growth will exceed the regulatory level of service, allowing concentration of new facility development to occur in the areas of greatest need.

The latest community study is a 7/6/2005 study, Lee County Parks and Recreation Users Needs Assessment Study, done by the Research Data Services, Inc. Tampa, that focuses on survey results pertaining to new and existing Parks and Recreation facilities. Data was collected via face to face surveys, from five selected community parks. This information has been used by Lee County Parks and Recreation planning staff in formulating new CIP proposals.

Population shifts were also recently compiled for the Park Impact Fee Update which was completed in May of 2005 by Duncan Associates of Austin Texas. This examines the Levels of Service and the shift in housing types from single family to increased multi-family within Lee County.

**Available on-site evidence:**

- Concurrency Report: Inventory and Projections Parks and Recreation Section
- Park impact Fee Update: Lee County Florida
- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey Karl Drews User Profile
- Lee Comprehensive Plan: Evaluation and Appraisal Report Major issue list 2004

**On Exhibit for on-site review:**

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)



2.4.1.2 Community inventory

X MET NOT MET

*There should be an inventory of program elements and services and physical resources in the community to determine overlapping areas, areas of insufficient activity, areas of omission or inadequacy, and potential safety hazards.*

**Suggested Evidence of Compliance:**

Provide a copy of the analysis of the inventory of programs and services and the physical resources of the community.

**Notations by Agency Regarding Compliance:**

An annual document, Concurrency Management, Inventory and Projections, is prepared by the Lee County Department of Community Development. The study includes park facilities throughout the region. This includes all Federal, State, County and incorporated park and recreation facilities.

The latest community study is a 7/6/2005 study, Lee County Parks and Recreation Users Needs Assessment Study, done by the Research Data Services, Inc. Tampa. It provides customer responses to questions about services provided. It also revealed customer trends and needs.

Population shifts were recently compiled for the Park Impact Fee Update which was completed in May of 2005, by Duncan Associates of Austin Texas. This examines the Levels of Service and the shift in housing types from single family to increased multi-family within Lee County based on current building permits. This includes an inventory of facilities.

Another inventory of facilities is available through our GIS database, web based inventory, and a map book in print.

The Florida SCORP analysis and inventory provides additional information on a state-wide basis.

The 2005 CBA report provides an inventory of recreational facilities and programs throughout Lee County

**Available on-site evidence:**

- Concurrency Report: Inventory and Projections Parks and Recreation Section (Exhibit H)
- Lee County Parks and Recreation Impact Fee Update: Park Inventory

**On exhibit for on-site review:**

- Cost Benefit Analysis for 2005 to 2010.

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)
- Lee County Parks and Recreation Map Book (Exhibit GG)
- Florida SCORP analysis (Exhibit FF)

2.4.1.3 Needs index X MET NOT MET

*A "needs index" for determining priorities for development of services within the community should be established within the comprehensive plan.*

**Suggested Evidence of Compliance:**

Provide a copy of the "needs index" within the comprehensive plan.

**Notations by Agency Regarding Compliance:**

Pages V-1 to V-7 of The Lee Plan, "Parks, Recreation and Open Space", outlines priorities for distribution of services and development requirements. Compliance is summarized in the annual document, Concurrency Management, Inventory and Projections, prepared by the Lee County Department of Community Development. The 2004/05 Lee County Parks and Recreation User Needs Assessment Survey was produced by Research Data Services Inc in 2005 and is starting phase two of this study at the Regional Park level. It is ongoing to establish what the current and projected needs are for our customers.

**Available on-site evidence:**

- Concurrency Management copy of Inventory and Projections Section
- Lee County User Research Letter

**On exhibit for on-site review:**

- The Lee Plan (Exhibit G)
- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)

2.4.1.4 Types of programs

X MET NOT MET

*The total community plan should encompass cooperative programming among the public, commercial, and nonprofit entities.*

**Suggested Evidence of Compliance:**

Provide description of cooperative programming with examples of Memoranda of Understanding (MOU), Memoranda of Agreement (MOA), partnering, or outsourcing. .

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation could never provide the entire community with all their programming needs. We are fully aware that private, commercial and non-profit entities must fill in the gaps. It is also important not to duplicate services. Lee County Parks and Recreation is very sensitive to the commercial and private sector. As a governmental agency, we try not to compete with private enterprise. The only way to achieve this is through communication.

The Advisory Committees and Friends Boards are made up of people who have their finger on the pulse of the community. Staff regularly attends meetings with other Parks and Recreation agencies to discuss common goals, objectives and needs. Our regular meeting with the other City Departments and School Board also help keep everyone informed. Every supervisor and manager meets regularly with groups (such as the Friends of the Six Mile Cypress Slough, Friends of Mantnza's Pass among others) in their areas and addresses the specific needs of their individual community.

The interlocal agreements and contracts with non-profit agencies such as Senior Friends, Community Tennis Association and Project Enhance abilities are examples of this cooperation. The concurrency report examines the total area geographically for recreational opportunities and overlapping facilities.

**Available on-site evidence:**

- 2004 Agency summit notes
- Interlocal Agreement with the Lee County School Board
- Hearts N Parks award
- Pilots Club Resolution
- FRPA Certification List

## 2.4.2 Resource Management and Land Use Planning

### 2.4.2.1 Feasibility studies

X MET NOT MET

*Where deemed advisable or required by law, there should be special or feasibility studies prior to construction to determine the appropriateness of certain special facilities (golf courses, swimming pools, zoological parks, etc.).*

#### **Suggested Evidence of Compliance:**

Provide copies of studies.

#### **Notations by Agency Regarding Compliance:**

Feasibility studies would include the Environmental Site Assessments done for Conservation 2020 purchases (conservation lands), or the Archeological Site Assessment performed for the Caloosa Creeks Preserve by Pan American. Resource management plans are prepared for all preserves and resource based parks. These plans include maps of plant communities and inventories of flora and fauna including listed species. This information is used to determine the feasibility of resource based public facilities and to prepare the master site plan, which is contained in the management plan, that recommends the location and type of resource based recreational facilities to be provided for public use. The goal is to provide appropriate public use while protecting the integrity of the environmental quality of the site.

#### **Available on-site evidence:**

- Caloosa Creeks Preserve Archeological Assessment
- Estero Community Park Public Meeting minutes
- Bokeelia Boat Ramp meeting notes

#### **On Exhibit for on-site review:**

- Lakes Park Master Plan (Exhibit AA)

2.4.2.2 Master site plan

X MET NOT MET

*There should be a master site plan for areas and facilities. As with the comprehensive plan, it should be officially adopted by the appropriate governing body.*

**Suggested Evidence of Compliance:**

Provide copies of the various master and site plans with some indication that supporting operational staff have been involved in the planning process and that the plans have been officially adopted.

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation Planning and Contracts department is 95% complete in entering data into a Geographical Information System (GIS) that can be accessed by all Lee County Parks and Recreation staff, other County Departments, as well as, the public. Master plans, including projected development phases, have been prepared for several sites such as Veterans Park, Estero Community Park, Lakes Park, and North Fort Myers Community Park. Additional master plans have been installed for facilities such as Schandler Hall Community Park.

Master site plans for the following resource based parks are within the management plans for those sites: Matanzas Pass Preserve, Imperial River Preserve, Caloosahatchee Regional Park, Six Mile Cypress Slough Preserve, and Hickey's Creek Mitigation Park. All Conservation 20/20 parks have been entered into the GIS Database. All aerial maps based on 2005 Images are available online. All master and site plans are available for review in the map room of the Administration Annex building at Terry Park. Versions of these drawings have been filed as Cad files.

**Available on-site evidence:**

- BOCC agenda implementing Estero Community Park Master Plan
- Estero Community Park Master Site Plan
- BOCC Agenda for Lakes Park Master Plan

**On Exhibit for on-site review:**

- Lakes Park Master Plan, (Exhibit AA)
- Lee County Parks and Recreation Map Book (Exhibit GG)

2.4.2.3 Resource management plan X MET NOT MET

*A resource management plan should accompany the master land use plan of a resource-based park.*

**Suggested Evidence of Compliance:**

Provide copies of both plans with evidence that supporting operational staff have been involved in the planning process and that the plans have been officially adopted.

**Notations by Agency Regarding Compliance:**

Lee County's resource management plans are prepared for all resource based sites prior to use by the public. These are prepared with a team of biologists, ecologists, botanists and Environmental Scientists, as well as, private consultants. The management plans are sent out to a multitude of agencies and staff for review. Public meetings are then held to solicit public input. Once approved the management plan will be the guiding document on the land use of the park, preserve or other facility.

Many of these are developed under the authority of the Conservation 2020 program.

**Available on-site evidence:**

- Management Plan for Pine Lake Preserve
- Master Plan for Pine Lake Preserve
- Public notice of the management plan draft for Popash Creek Preserve.
- Imperial River Preserve Management Plan

2.4.2.4 Competent planning personnel X MET NOT MET

*The foregoing resource management and land use plans and studies should be prepared by a park planner, landscape architect, or other design professional, depending upon the nature of the project.*

**Suggested Evidence of Compliance:**

Provide documentation of competency of planning personnel, staff or contractor.

**Notations by Agency Regarding Compliance:**

Lee County's resource management plans have been or are being prepared by professional staff with experience and training in resource management. This includes wildlife biology, botany, ecology, prescribed burning, exotic pest plant control, and interpretive education. Preparation and implementation of a useful

plan is contingent upon staff that is familiar with all aspects of resource management and land stewardship.

The Agency has two Landscape Architects on staff : Fred Johnson and David Berra, who assist the department as needed. We have cooperated with other agencies which have professional design staff and we are supported by Mike Pavese, an AICP certified Professional Planner who is with the Lee County Construction and Design Department. We are supported by Ayoub Al-Bahou who is a Professional Engineer and Peter Wiesnewski who is a Registered Architect.

Outside consultants are retained in instances requiring highly technical knowledge, such as Engineering, Planning, Water Resource Planning, Public Relations, and the construction design of new facilities.

**Available on-site evidence:**

- Staff Resumes
- A Cultural Assessment of Caloosahatchee Creeks Preserve
- Department Organization Chart

**On Exhibit for on-site review:**

- Lee County Job Description Book (Exhibit N)

2.4.2.5 Citizen involvement

X MET NOT MET

*Planning should include total citizen involvement in the planning process to best meet their needs and gain their support.*

**Suggested Evidence of Compliance:**

Describe how the interest groups representing the cultural diversity of the community were involved.

**Notations by Agency Regarding Compliance:**

Public meetings are held to receive input on draft management plans and master site plans, parks and preserves. Public comment is considered in preparing the final plan, which is approved by the Lee County Board of County Commissioners. The goal of these meetings is to allow all interested parties in the community to have involvement in the planning of their parks. A Charette for citizen input on the planning of Greenways and Pathways was held with all interested agencies and municipalities in 2004 and has been incorporated into that study. Conservation 2020 program requires public meetings on all resource based management plans.

**Available on-site evidence:**

- 2005 Greenways Plan excerpt

- Pop Ash Preserve Public Meeting Notice
- Bunche Beach Public Notice Advertisement
- Prairie Pines Preserve Public Meeting Advertisement
- Deep Lagoon Preserve Public Meeting Advertisement
- Wild Turkey Strand Public Meeting Notice
- Imperial Marsh Preserve Public Advertisement
- 10-Mile Linear Park Advertisement
- Powell Creek Preserve Advertisement
- Pine Lake Preserve Advertisement
- Estero Community Park Public meeting nominated uses

**On Exhibit for on-site review:**

- Greenways Master Plan (Exhibit BB)

2.4.2.6 Phased development X MET NOT MET  
*The overall physical plan should have phased development (prioritization), with a capital improvement budget for each phase. The plan should provide for flexibility due to changing conditions.*

**Suggested Evidence of Compliance:**

Provide a copy of phases of physical plan with a capital improvement budget for each phase. *Management Manual*, chp. 8 @ p.276

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation CIP Plan shows projects and their phased development. Funds within the CIP may be moved forward or back as needs change and growth dictates. A copy of the current and proposed CIP plans are on file for review.

New Parks, or the major renovation of parks are master planned with opinions of cost and phasing plans. The first phase of Estero Community Park is currently under construction with future phases being built depending upon funding sources. A graphic of the plan is included.

Lakes Park is a twenty year old park under revitalization. The master plan indicating phasing is available for inspection.

**Available on-site evidence:**

- Estero Community Park master plan with phasing and estimates
- Capital Improvement Budget
- Administrative Code AC-3-6

**On exhibit for on-site review:**



- Lakes Park Master Plan (Exhibit AA)

### 3.0 ORGANIZATION AND ADMINISTRATION

#### 3.1 Organization

- ☞ 3.1.1 Organization Structure X MET NOT MET

*The Agency shall establish an organizational structure, specifying in detail the interrelationships of the system from the highest authority to all staff positions.*

**Suggested Evidence of Compliance:**

Provide a copy of an organizational structure chart which shows interrelationships. (Distinguish 1.1.1.1)  
 Attach basic chart, with major divisions; in larger agencies, detailed chart on-site.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation is a part of Lee County Government and an integral part of providing for constituents needs. This interrelationship between departments and agency components is clearly demonstrated by organizational charts

**Available on-site Evidence:**

- Parks and Recreation Department organization chart
- County wide Administration organization chart from Deputy County Manager to Department of Parks and Recreation

**On exhibit for on-site review:**

- Lee County Organizational Chart Book (Exhibit O)

- 3.1.2 Delineation of Responsibility X MET NOT MET

*The Agency should have a written purpose for each organizational component and for the duties and responsibilities of each job assignment within each component, which should be available to all personnel.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of the written purpose and indicate how distributed to personnel.

**Notations by Agency Regarding Compliance:**

Department descriptions are provided within the Lee County Annual Budget Book, fiscal year 2005-2006. Each narrative contains information pertaining to the department’s purpose, achievements of the past year and future plans. In addition to this narrative, the budget of the department, which details personnel, operating and

capital expenditures, is included as a part of the document. Job descriptions for Parks and Recreation are on file for review. Job descriptions for all positions in Lee County are located in the Job Description Database in the Human Resources Department and available online for all county staff to access.

**Available on-site evidence:**

- Administration organization chart
- Job descriptions for Parks and Recreation employees

**On exhibit for on-site review:**

- Lee County Annual Budget Book 2005-2006 (Exhibit S)
- Job Descriptions (Exhibit N )

3.1.3 Administrative Manual

X MET NOT MET



*There shall be an administrative manual encompassing policies, rules and regulations, and operational procedures relative to programming, including fiscal forms, permits, uses of areas, charges and fees procedures, rentals, system of requisition, inventories, availability of material and supplies, and safety considerations.*

**Suggested Evidence of Compliance:**

Provide a copy of the administrative manual.

Table of Contents of manual attached; full manual on-site.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation provides a Parks and Recreation Operations Manual on-line and a hard copy to each Senior Supervisor /Supervisor. These are available to every Parks and Recreation employee. Additionally, every employee gets a copy of the Lee County Policies and Procedures Manual.

**Available on-site evidence:**

- Parks and Recreation Operations Manual table of contents
- Lee County Policies and Procedures Manual table of contents

**On exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Human Resources Policy & Procedures Manual (Exhibit D)

## 3.2 Administrative Facilities

### 3.2.1 Administrative Offices

X MET NOT MET

*There should be adequate administrative space and equipment.*

**Suggested Evidence of Compliance:** (on-site)

Provide a check list of the types of space indicated in the community with qualitative annotation of adequacy. The review team will discuss with administrative staff about adequacy of space and equipment in respect to administrative staff and responsibilities.

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation Administration Office is located in Terry Park at 3410 Palm Beach Blvd., Fort Myers, Florida. Our office space is reconfigured as needed to accommodate all staff and provide adequate and convenient work space for everyone. The Administration Office houses 60 employees in two connected buildings. Also located on this property is the Lee County Extension Services, which is a program of Parks and Recreation. There are currently 15 full-time staff persons in that office space. Additional administrative offices are located in various Parks and Recreation facilities throughout Lee County. Recently opened is the Parks and Recreation Support Services Facility at Rutenburg Park. This facility houses the Environmental Education, Park Rangers, and Volunteer Services Coordinators and serves as a training site for County government and associated volunteer and non-profit county support groups.

**Available on-site evidence:**

- Administrative offices space and facilities check list

### 3.2.2 Support Services

X MET NOT MET

*Adequate support staff and services should be provided to enable the professional staff to perform their appropriate functions.*

**Suggested Evidence of Compliance:** (on-site)

Provide a listing of both support staff and services with qualitative annotation of adequacy. The review team will discuss with professional staff the adequacy of support staff and services.

**Notations by Agency Regarding Compliance:**

Support services staff for Parks and Recreation Administration are supervised and directed by the Office Manager. Responsibilities for human resources, payroll, file updates, public reception, and administrative offices custodial services are adequate and

appropriate for the Department of Parks and Recreation Administration.

Support services staff for Extension Services are supervised and directed by the Administrative Support Supervisor. Responsibilities for file updates, public reception and custodial services are adequate and appropriate for Extension Services.

Fiscal support services staff are supervised by the Fiscal Manager. Responsibilities for revenues, accounts receivable, accounts payable, intergovernmental fund transfers, budget tracking and fiscal reporting are adequate and appropriate for the Department of Parks and Recreation.

Environmental Education, Park Rangers, and Volunteer Services support staff are supervised by the Programs Manager(s). Responsibilities for environmental education, park rangers, and volunteer services are adequate and appropriate for the Department of Parks and Recreation.

**Available on-site evidence:**

- List of Parks and Recreation support staff

3.3 Public Information, Community Relations, and Marketing

X MET NOT MET



***There shall be a written statement regarding the role of public information, community relations, and marketing functions in the community.***

**Suggested Evidence of Compliance:** (attach)

Provide the written statement.

**Notations by Agency Regarding Compliance:**

Lee County recognizes the importance of public information, and as such, has a Communications Director on staff in County Administration. Parks and Recreation addresses the public information and marketing and media in Chapter 11 of the Parks and Recreation Operations Manual. Lee County has its own TV station, as well as, agreements with all local cable stations, the School District and the various local print media, television and radio stations. Lee County is committed to providing information by using a variety of methods including brochures, flyers, television, radio and an internet web-site. A copy of the County's guidelines from the Communication Director, Pete Winton, is attached (following 3.3.1).

**Available on-site evidence:**

- County-Wide Parks and Recreation Service Marketing and Media Operations Manual excerpt
- County information efforts and action plan

**On exhibit for on-site review:**

- Parks and Recreation Operation Manual Exhibit (Exhibit A)
- Recreationally Yours Brochures Exhibit (Exhibit DD)
- Brochures and Flyers Exhibit(Exhibit EE)

### 3.3.1 Public Information

X MET NOT MET

*A written statement states that the Agency is committed to informing the community and the news media of events within the public domain that are handled by or involve the Agency and sets forth policies that govern what information should be released, when it should be released, and by whom it should be released.*

**Suggested Evidence of Compliance:** (attach)

Provide the written statement.

**Notations by Agency Regarding Compliance:**

It is the role of Parks and Recreation to provide public information through the marketing and media work group. Chapter 11 of the Parks and Recreation Operations Manual addresses Marketing and Media. The County Information Efforts and Action plan and two examples of public information releases exemplify that Lee County recognizes the importance of public information, and as such, has a Communications Director on staff in County Administration. Lee County has its own TV Station, as well as, agreements with all local cable stations, School District and the various local print media, television and radio stations. Lee County is committed to providing information by using a variety of methods including brochures, flyers, television, radio and an internet web site [www.leeparks.org](http://www.leeparks.org). A copy of the County's guidelines from the Communication Director, Pete Winton, is attached.

**Available on-site evidence:**

- Countywide Parks and Recreation Services Marketing and Media Operation Manual excerpt.
- County Information Efforts and Action Plan
- Example public service announcement
- Example information release

**On exhibit for on-site review:**

- Recreationally Yours Brochures (Exhibit DD)
- Brochures & flyers (Exhibit EE)

3.3.2 Community Relations

X MET NOT MET

*The Agency should be committed to establishing close ties with the community and responding to its needs, and to this end should establish a community relations plan.*

**Suggested Evidence of Compliance:** (on-site)

Provide the community relations plan.

**Notations by Agency Regarding Compliance:**

Various departments throughout the County have staff whose job is “Public Relations”, i.e. Visitor and Convention Bureau, Economic Development, Utilities, etc. Parks and Recreation believes that public relations are the job of every employee. As such, the first page in the Parks and Recreation Operations Manual, 1-1, addresses Customer Service and Public Relations. Community relations include a very successful volunteer work and recognition program. In addition the department works with various advisory groups to better disseminate information and solicit input. The public has on-line access to staff, information, and comment cards at [www.leeparks.org](http://www.leeparks.org)

**Available on-site evidence:**

- Excerpt from Parks and Recreation Operations Manual- Customer Service
- Example Community Advisory Board meeting minutes
- Example public meeting notification for park planning
- Example communication email regarding volunteer honor ceremony
- Example Volunteer Newsletter
- Lee County Parks and Recreation information and registration for organized volunteer groups

3.3.3 Coordinator

X MET NOT MET

*There should be a person in the Agency responsible for the public information and community relations functions.*

**Suggested Evidence of Compliance:** (on-site)

Provide the position description which reflects responsibilities for such functions.

**Notations by Agency Regarding Compliance:**

Lee County has a Communications Director on staff in County Administration. Parks and Recreation has a Program Coordinator of Marketing and Media on staff. Both work in conjunction with public relations and information.

**Available on-site evidence:**

- Job description of County Director of Communications
- Job description of Parks and Recreation Media Coordinator

- Media Coordinator comprehensive position questionnaire

### 3.3.4 Marketing

#### 3.3.4.1 Marketing component functions, plan

X MET NOT MET

*The Agency should have a marketing component with specified functions and a written plan, which includes annual evaluation of the whole marketing component.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of the written plan and latest evaluation.

**Notations by Agency Regarding Compliance:**

An overview of the department's marketing plan has been developed and a copy is on file for review. Examples of information delivery publications and marketing research results are on file. Public opinion is solicited via the Parks and Recreation website [www.leeparks.org](http://www.leeparks.org) in the form of electronic comment and suggestion cards. Program marketing and registration are also available on line. The marketing and media work group annually reviews and evaluates the marketing and media component procedures.

**Available on-site evidence:**

- Marketing and Media FY2006 overview
- Marketing and Media FY2006 job analysis
- County-wide Services Marketing and Media excerpt from Parks and Recreation Operations Manual
- County Speakers Bureau Parks and Recreation component
- Lee County website Public Resources page
- Recreationally Yours Program Guide
- Sample comment cards
- Sample public information flyers and brochures
- Sample program participant registration form
- Example web pages for Parks and Recreation information
- Example web page comment card

**On exhibit for on-site review:**

- Recreationally Yours Brochures (Exhibit DD)
- Brochures and flyers (Exhibit EE)

3.3.4.2 Marketing research

X MET NOT MET

*There should be a marketing research component in the marketing plan.*

**Suggested Evidence of Compliance:** (on-site)

Copies of collected and summarized research as described in the marketing plan.

**Notations by Agency Regarding Compliance:**

Marketing Research is one function of the Visitor and Convention Bureau. They have ongoing research which is performed by Walter Klages of Research Data Services Inc. Monthly data is collected and used for all areas of Lee County. The Lee County Sports Authority collects economic impact data associated with Parks and Recreation tournaments and sports events. Parks and Recreation collects market data from park and program users.

**Available on-site evidence:**

- Lee County Visitors and Convention Bureau 2006 Sales and Marketing Plan
- 2004/2005 Lee County Parks and Recreation User Needs Assessment Survey
- 2004 annual visitor profile
- 2005 annual visitor profile
- Lee County Sports Authority Economic Impact Worksheet Cusic Classic 2004
- 2002-2005 Summer Camp Parent Questionnaire
- Lee County Parks and Recreation website comment card example
- Lee County Parks and Recreation Customer Satisfaction Survey example
- Newspaper article reporting on public meeting

**On exhibit for on-site review:**

- User Needs Assessment (Exhibit F)

3.3.4.3 Position responsibility

X MET NOT MET

*A specific person should be designated to direct the marketing component.*

**Suggested Evidence of Compliance:** (on-site)

Provide the position description which includes responsibility for the marketing component.

**Notations by Agency Regarding Compliance:**



The Parks and Recreation Media/Marketing Coordinator is responsible for the marketing function for the department.

**Available on-site evidence:**

- Parks and Recreation Event/Program Coordinator Job Description
- Marketing and Media Comprehensive Position Questionnaire

3.3.4.4 Quality assurance

X MET NOT MET

*The park and recreation Agency should monitor and evaluate the quality of its facilities, natural resources (areas), programs and services from the user's perspective.*

**Suggested Evidence of Compliance:**

Describe procedures for monitoring and evaluating.

Attach brief summary with details on-site.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation continuously monitors and evaluates all its facilities, programs and services. Various methods are used depending upon the resource and its use. Natural Resource areas that are not generally open to the public are monitored by periodic site inspections which are then used to develop work plans. Facilities are monitored and inspected daily and weekly by staff and many have comment cards available for the public to use. Random surveys are conducted on programs and at facilities on an on-going basis. Surveys are developed for countywide special events. Examples of comment cards and surveys are in the file for review. The Safety and Security Manager oversees and conducts safety audits and reviews of facilities and programs along with his appointed safety committee. A copy of the Manager's job description and minutes from the safety review committee are enclosed.

**Available on-site evidence:**

- Parks and Recreation Operations Manual chapter 14 Department Evaluation Plan
- Needs Assessment Survey
- Summer Camp User Survey results
- Parks and Recreation Safety and Security Class Specifications Bulletin and 2004-2005, 2005-2006 Goals and Objectives for the Safety and Security Manager.
- Training rosters for new employee orientation and audit review training
- Site inspection checklist for County Preserves
- Safety Manager inspection report for Boca Grande.
- Florida Media "Best of Florida 2001 award" for Manatee Park
- Example customer survey

- Example customer comment card
- Example web site comment card
- Conservation 20/20 preserve report on illegal activity in county lands
- Example safety review committee inspection reports
- Example bi-weekly operations update
- Example Lee County Parks and Recreation North Park inspection/safety checklist

**On exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Lee County Policies and Procedures Manual (Exhibit D)
- Needs assessment (Exhibit F)

3.3.5 Periodic Report and Evaluation

X MET NOT MET

*At least quarterly, the person or persons responsible for the public information/community relations functions should submit a report to the Agency's chief administrator; and, the plans (3.3 and 3.3.4.1) should be evaluated annually, at a minimum, for effectiveness.*

**Suggested Evidence of Compliance:** (on-site)

Provide several informal reports and the annual evaluation, which may be a part of the Agency annual report.

**Notations by Agency Regarding Compliance:**

The Parks and Recreation Media/Marketing Coordinator produces semi-annual Program Guides and throughout the year specialty flyers and is responsible to see that each program area is producing the proper informational pieces. Each one of these informational brochures is submitted to the Department Director and reviews are held semi-annually. Examples are on file for review.

There is a marketing committee who routinely reviews/analyses and makes recommendations for changes in the Departments public information efforts.

The Marketing and Media Coordinator conducts an annual job analysis and self evaluation that is reviewed with the Department Director and serves as the regular report to the Department Director.

**Available on-site evidence:**

- Marketing and Media FY 2006 Job Analysis
- Marketing and Media FY 2006 Task Overview
- Example Marketing and Media Production Request
- Recreationally Yours Brochure
- Marketing/Media Report to Director
- Marketing/Media committee minutes

### 3.4 Management Information Systems, including Records Management

#### 3.4.1 Management Information Systems

X MET NOT MET

☞ ***The Agency shall have a management information system, including statistical and data summaries of Agency activities, such as daily, monthly, and annual reports.***

#### **Suggested Evidence of Compliance:** (on-site)

Describe management information system and provide copies of recent statistical and data summaries.

#### **Notations by Agency Regarding Compliance:**

Daily and monthly statistical data are compiled at each facility using a variety of methods. Information is then recorded into an Access database kept on-site. Monthly reports are then produced when all daily reports for that month are recorded. The individual centers use various methods for tracking data based on the type of program or function. For example, actual users in programs are recorded on a daily basis while athletic league participants are estimated using a formula. These numbers along with expense/revenue data are the basis for the Departments' Cost Benefit Analysis (CBA) report. Our current management information systems include a series of in-house created Microsoft Access database applications.

The applications manage information pertaining to:

- Program Registration
- Personnel Management
- Fiscal Management
- Work Orders
- Capital Improvement Project Requisition
- Contract Management
- Sponsorship Management
- Equipment Inventory
- Annual Facility/Park Pass Management
- Special Event Program Cost Analysis Evaluation
- Personnel Uniform Requisitions

#### **Available on-site evidence:**

- Position Control Report (RPA)
- Heavy Equipment Work Order Report
- CIP Summary Report
- Example Injury Incident Report
- Volunteer Reporting
- Revenue Tracking
- Example Fleet Property inventories
- Example Credit Card Activity Reports
- Biweekly Operations Updates

**On exhibit for on-site review:**

- Cost Benefit Analysis (Exhibit C)

3.4.2 Records Management

3.4.2.1 Central records component

X MET NOT MET

*The Agency should have a central records system, including records control, maintenance, and retention.*

**Suggested Evidence of Compliance:** (on-site)

Describe the central records systems with notations regarding the adequacy of the system; the review team will discuss with the staff the adequacy.

**Notations by Agency Regarding Compliance:**

Lee County's Parks and Recreation Department maintains a central filing system within the Terry Park administration building. Our files include historical, fiscal, safety, and personnel records. All managers and supervisors from outlying areas may keep copies of correspondence and reports on-site; however, originals must be kept on file in the Administration Office. These records are updated weekly and are in the process of being document imaged for safekeeping and access by other departments through the document imaging program. A shared computer file server allows records and documents from staff to be accessed electronically. Lee County provides a Records Storage Warehouse to keep records until their deletion date. Records management guidelines are available from the State of Florida, General Records Schedule GS1-L for Local Government Agencies at <http://dlis.dos.state.fl.us/barm>.

**Available on-site evidence:**

- Records Management Liaison Identification note
- State of Florida Basic Records Management Handbook
- Florida Department of State General Records Schedule
- GS1-L General Records Schedule for Local Government Agencies
- GS1-L Cross Reference

**On exhibit for on-site review:**

- One World Manual (Exhibit U)

3.4.2.2 Handling of funds

X MET NOT MET

*There should be written procedures for handling funds by personnel.*

**Suggested Evidence of Compliance:** (on-site)

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

Funds handled by staff are in accordance with the standards of the Parks and Recreation fiscal staff and specific written procedures found in the Parks and Recreation Operations Manual, Chapter 3, Fiscal Operations.

**Available on-site evidence:**

- Fiscal operations chapter of the Parks and Recreation Operations Manual
- Attendance roster for employee audit review training
- Attendance roster for employee fiscal training
- Sample revenue processing and armored car pick-up log

**On exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

3.4.2.3 Accident reports

X MET NOT MET

*There should be written procedures for accident and incident information collection and use of the accident or incident report.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of the procedures.

**Notations by Agency Regarding Compliance:**

Accident and Incident Report procedures are maintained within the Parks and Recreation Operations Manual. All employees have access to the Parks and Recreation Operations Manual. Completed forms that have been filed with Lee County's Risk Management are maintained within the Department.

**Available on-site evidence:**

- Excerpt from Parks and Recreation Operations Manual safety chapter

- Lifeguard emergency situations prompt
- Emergency 9-1-1 call procedures
- Unconscious Victim Rescue Protocol
- Supervisors Accident Investigation Report for Workers Comp. Injury
- Lee County vehicle crash report
- Lee County Risk Management Property Loss Report
- Lee County Claimant Accident/Incident Report
- Ellis & Associates Aquatic Accident Survey for Unconscious Victims

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

3.4.3 Program Service Statistics

X MET NOT MET

*Appropriate service statistics should be maintained to plan, interpret, and evaluate the recreation and park program.*

**Suggested Evidence of Compliance:** (on-site)

Provide the types of service statistics maintained and have available on-site reports issued and how the data were utilized

**Notations by Agency Regarding Compliance:**

Service statistics are included in the Cost Benefit Analysis (CBA) document. The purpose of this document is to evaluate the programs/facilities operated by the Parks and Recreation Department. Units of service are tracked for each time an individual uses a facility or program. If one person uses a facility 10 times in a week, ten units of service are tracked. The total operation and maintenance costs for a program/facility are then divided into the total units of service. This “Cost per Unit of Service” figure is used in evaluating the services provided. This CBA provides the necessary statistics to evaluate how a program/facility is doing, and is one management tool available. CBA data is analyzed and discussed by administration to identify trends, projections and areas in need of improvement. Individual facility units of service are analyzed to account for disparities between facilities. Contracted surveys are used to seek input from park end users. Public meetings are conducted to assess community needs for development of new programs and facilities.

**Available on-site evidence:**

- CBA appendix.
- Administrative staff meeting notes indicating discussion of CBA statistics.
- Example communications and survey from Walter Klages regarding user surveys
- Newspaper article describing public meeting regarding development of a boat ramp site.
- Volunteer Program Hours summary

**On exhibit for on-site review:**

- Cost Benefit Analysis 2006 (Exhibit C)

3.5 Communications

X MET NOT MET



*A communication system shall be established to insure the accurate and timely transfer of information, both internal and external.*

**Suggested Evidence of Compliance:**

Describe communication system.

Attach brief description, details on-site.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has an extensive communication system to accurately disseminate information to the general public, as well as, its employees.

The public has access to all program and facility information, hours, history and amenities via our web site ([www.leeparks.org](http://www.leeparks.org)), Bi-annual Recreationally Yours Program Guide, facility pamphlets, flyers, Parent's Guide, and other various publications.

Staff reports are made regularly at the Parks and Recreation Advisory Board meetings and many public speaking engagements.

Internal two-way communication and information sharing is a priority of the department. Every staff member has an e-mail address and access to computer. All staff is required to regularly check their e-mail. Managers, Sr. Supervisors and Programmers meet bi-monthly to monthly to exchange information and ideas. Minutes from these meetings are e-mailed to every staff member via PARKS-ALL. All County-wide information from Administration, Human Resources Management, Risk, Benefits, or other departments is communicated in a like manner to all County employees.

Supervisors and coordinators submit bi-monthly reports on the status of their facilities/programs.

**Available on-site evidence:**

- Parks and Recreation Operations Manual excerpt on internal communications
- Sample staff reports.
- Bi-monthly staff meeting minutes
- Parks and Recreation Quarterly Supervisors meeting notes
- RecreationaLee Yours Program Guide
- 2006 Summer Camp Guide
- Sample facility pamphlets and flyers
- Parents Guide
- Parks and Recreation Advisory Board minutes
- Example advisory and support boards and organizations communications

- Example speaking engagement agenda
- Example “Parks-All” e-mail

### 3.6 Planning and Research

#### 3.6.1 Function within Agency

X MET NOT MET

*The Agency should have a planning and research functions with established responsibilities and functions.*

**Suggested Evidence of Compliance:** (on-site)

Provide copy of responsibilities and functions of the planning and research function.

**Notations by Agency Regarding Compliance:**

Planning and research is overseen by the Manager of Planning. Additionally, there are many staff involved in the research function of the Department. Research is an integral part of the manager’s job to keep up to date on trends in the profession. To this end, all managers and other staff who have computers and access to the internet, research and keep up with technology and trends.

**Available on-site evidence:**

- Lee County Parks and Recreation Department organizational chart with Planning Function section highlighted
- Parks and Recreation Operations Manual excerpt Chapter 13 (Project Planning/Contracts/GIS)
- Draft Planning and Project Team Strategic Plan 2004-2009
- Pine Lake Preserve Land Stewardship Plan 2005 Table of Contents
- Resumes of Planning Section employees

**On exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

#### 3.6.2 Personnel

X MET NOT MET

*The Agency should employ at least one staff member or consultant who have planning and research capability.*

**Suggested Evidence of Compliance:** (on-site)

Provide job description for persons who have planning and research function and/or consultant agreement.

**Notations by Agency Regarding Compliance:**



Lee County Parks and Recreation employs a full time Manager of Planning. A job description for the Lee County Parks and Recreation Planning Manager is on file. A copy of the proposal our consultants, Wilson-Miller, submitted for their Supplemental Task Authorization Agreement is on file, in addition to example research summaries.

**Available on-site evidence:**

- Department of Parks and Recreation organization chart with planning function highlighted
- Job description for Parks and Recreation Planning and Innovation Manager
- Resume for Parks Planning Manager
- Resume for Parks Planner
- Resume for Parks GIS Technician
- Resume for Parks Planning Contracts Coordinator
- Example of a proposal for contracted landscape services

3.6.3 Analysis of Operations

X MET NOT MET

*There should be a semiannual analysis of operational activities, which includes the following items: type of activity, location, time, date, and is disseminated to affected organizational units.*

**Suggested Evidence of Compliance:** (on-site)

Provide the last two semiannual analyses and indicate to whom they were disseminated.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation conducts regular analysis of operational activities. Analysis is on-going and conducted in many forms. Analyses are conducted annually through the CIP and Budget process. An analysis is also done bi-annually through the CBA.

**Available on-site evidence:**

- CBA appendix
- CIP report
- Example minutes from Parks and Recreation Managerial Staff Meeting
- Minutes from Parks and Recreation Managerial Retreat
- Example Facilities MARS Staff Meeting Notes for Parks
- Example Programmers meeting notes
- Example Senior Supervisors meeting notes
- Example Parks and Recreation Quarterly Supervisors meeting notes
- Example weekly/ biweekly operations update report
- Example Lakes Park Enrichment Foundation monthly board meeting notes
- Project summary reports

- Regional Parks Research Proposal Florida Parks in the 21<sup>st</sup> Century Needs Assessment
- Field use schedule
- Lee County Sporting events update calendar
- Example revenue report
- Example financial budget status reports
- Example Major maintenance programs budget report
- Example Parks and Recreation safety committee notations

**On exhibit for on-site review:**

- Cost Benefit Analysis (Exhibit C)
- Capital Improvement Projects (Exhibit II)

## 4.0 HUMAN RESOURCES

### 4.1 Employees

NOTE: A comprehensive employee manual of the park and recreation or central Agency will encompass many of the subsequent standards of this section and provide the requested evidence of compliance.

#### **Notations Regarding Compliance:**

Lee County Department of Human Services produces and maintains the Lee County Policies and Procedure employee manual for the entire county and the Department of Parks and Recreation maintains its own policy and procedures manual which addresses many employee issues in addition to operational issues.

#### 4.1.1 Chief Administrator

X MET NOT MET



*There shall be a professionally-qualified administrator who is responsible to the managing authority for the management, direction, and control of the operations and administration of the Agency, and who shall have authority to perform such responsibilities.*

#### **Suggested Evidence of Compliance:** (attach)

Provide name and professional qualifications of the current chief administrator; also provide copy of position description. Evidences of "professionally qualified" include: (1) Certified Park and Recreation Professional (CPRP), (2) degree in Parks and Recreation or related field, or (3) four-year college degree and five years professional experience in Parks and Recreation, and involvement in professional park and recreation organizations (see 4.1.4.2.2). All three criteria are highly desirable.

#### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a Department Director and Deputy Director who together have over 55 years of experience in the Parks and Recreation field.

The Director, John Yarbrough, has a BS in Criminology, an MS in Criminal Justice and over 28 years in the Parks and Recreation Department.

The Deputy Director, Barbara Manzo, CPRP, has a BS in Parks and Recreation, an MS in Recreation Administration, an MBA and over 30 years experience in the field.

#### **Available on-site evidence:**

- Resume for Department Director
- Resume for Deputy Director
- Job Description for Department Director
- Job Description for Deputy Director
- Copy of CPRP certification

#### **On Exhibit for on-site review:**

- Job Description Book (Exhibit N)

4.1.2 Staffing

4.1.2.1 Competent staff

X MET NOT MET



***The Agency shall employ professional staff qualified to develop and operate programs and services.***

**Suggested Evidence of Compliance:**

List professional staff with responsibilities and qualification to carry out such responsibilities.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation is fortunate to have highly qualified, long-term staff to carry out its mission. Job descriptions have been developed over the years to ensure the highest standards are met. When filling a position, a panel conducts interviews and ranks candidates. Only the best are hired and must meet all County standards. All personnel files are public record and copies are on file in the Department for review.

**Available on-site evidence:**

- Organizational Charts
- FRPA Certification List
- Certification Incentive Program
- Staff Education History
- CTRS Standards

**On Exhibit for on-site review:**

- Organizational Chart Book, (Exhibit O)

4.1.2.2 Supervision

X MET NOT MET

*There should be constructive and effective supervision of all personnel to help them improve program, grow professionally and interpret program to the community.*

**Suggested Evidence of Compliance:**

Provide the plan for supervising personnel.

**Notations by Agency Regarding Compliance:**

The Parks and Recreation Department Director and Deputy Director meets bi-weekly with managers to review work plans. Senior Supervisors meet at their various sites with their staff bi-weekly; Programmers meet monthly and other on-site work units meet at a minimum, bi-weekly. Under the current organizational structure, supervision takes place at different levels.

Annual performance evaluations are completed by supervisors for each of their employees on a regular basis. At that time, goals and objectives are reviewed for the coming year.

**Available on-site evidence:**

- Employee Supervision Policy #004
- Process for Annual Performance Evaluations
- Employee Performance Evaluation Form
- Sample of Employee Goals and Objectives

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Lee County Policy and Procedure Manual, (Exhibit D)



4.1.2.3 Job analyses

X MET NOT MET

*A written job analysis for all positions shall be maintained on file and shall include, at a minimum: duties, responsibilities, and tasks of each position; and minimum level of proficiency necessary in the job-related skills, knowledge, abilities, and behaviors.*

**Suggested Evidence of Compliance:**

Job analyses on file; visitors review sampling of job analyses.

**Notations by Agency Regarding Compliance:**

Every position has a job description that indicates the Purpose, Essential Duties and Responsibilities, Education, Experience and Licensing, and Knowledge, Skills and Abilities required for the job.

**Available on-site evidence:**

- Copy of all Parks and Recreation Job Descriptions

**On Exhibit for on-site review:**

- Job Description Book, (Exhibit N)

#### 4.1.3 Recruitment and Selection

##### 4.1.3.1 Recruitment process

X MET NOT MET

*There should be a comprehensive and aggressive recruitment and selection program to secure qualified personnel.*

##### **Suggested Evidence of Compliance:**

Provide a copy of written recruitment and selection procedures.

##### **Notations by Agency Regarding Compliance:**

Lee County's policies regarding applicants/applications, position announcements, rejections and examinations are located in the Lee County Policy and Procedure Manual. All managers and supervisors routinely work with local and state universities, high schools, and other educational agencies to recruit staff. Parks and Recreation has an active Internship program coordinated and managed by a staff member. Interns come to us from local and out-of-state colleges. Managers and supervisors work closely with all local service agencies in the recruitment process.

##### **Available on-site evidence:**

- Recruitment & Selection Process
- Hiring Policy #301
- Neogov electronic application review and processing system
- Parks and Recreation Therapeutic Recreation/Inclusion Internship Program

##### **Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)

##### 4.1.3.2 Equal employment opportunity

X MET NOT MET

*There should be a written policy regarding cultural diversity for all employment practices and evidence that it is being implemented.*

##### **Suggested Evidence of Compliance:**

Provide a copy of the managing authority or Agency policy and indicate how it is being implemented by the Agency.

##### **Notations by Agency Regarding Compliance:**

Lee County is an equal opportunity employer and has adopted an Affirmative Action Plan as part of its Administrative Code to ensure equal employment

opportunity to all employees and applicants for employment. The Equal Employment Opportunity Manager, along with the Human Resources Director, implement and monitor this program.

**Available On-Site Evidence:**

- Lee County Affirmative Action Plan, AC-1-4
- Supplement to Affirmative Action Plan
- Affirmative Action/Equal Employment Opportunity Employee Handbook
- Equal Employment Opportunity Policy #201
- EEO Interview Statistics Form
- Lee County Job List
- Sample Job Advertisement in Spanish
- Veterans' Preference Cover Sheet
- Lee County Employee Statistics Report showing employment diversity

**On Exhibit for On-Site Review:**

- Lee County Administrative Code, (Exhibit E)
- Lee County Policies & Procedures Manual, (Exhibit D)

4.1.3.3 Selection process

X MET NOT MET

*There should be a manual that describes all components of the selection process.*

**Suggested Evidence of Compliance:**

Provide a copy of manual.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation follows the policies and guidelines regarding hiring and the selection process as outlined in Policy #301 in the Lee County Policies and Procedures Manual. Positions are advertised to the public and other County departments via Neogov (electronic advertising system), Job List, Job Line, and on the local television station. Select positions are advertised on the FRPA and NRPA web-site job-lines. Applicants complete application which is sent to hiring supervisor via Neogov system. Supervisor reviews applications and determines if qualified and if interview will be granted. Interviews are scheduled and held in front of a panel of 3 – 5 people. Candidate is chosen, offered position, and references, background checks and driver's license (if required) are processed by Human Resources. Candidate is then notified of orientation date and time via letter. Orientation is held with Human Resources and training staff of Parks and Recreation and then candidate is ready to begin work.

**Available On-Site Evidence:**

- Hiring Policy #301
- Drug and Alcohol in the Workplace Policy #205, Section 205:2

- Orientation and Training Policy #303
- Recruitment & Selection Process
- Hiring Procedures and Requirements for Aquatics staff, Chapter 8
- Employee Orientation Checklist, Appendix I
- Job Posting Samples
- Intent to Hire Packet
- Offer Letter and Medical forms packet

**On Exhibit for On-Site Review:**

- Lee County Policies and Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)

4.1.3.4 Background investigations

X MET NOT MET

*Personnel hiring should include procedures for background investigation prior to appointment, including:*

- *the verification of a candidate's qualifying credentials;*
- *a review of a candidate's civil and criminal record, if any;*
- *verification of a least three personal references of the candidate; and*
- *particular attention to drug and child/adult abuse record.*

**Suggested Evidence of Compliance:**

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

As a part of the Human Resources policies, all Parks and Recreation Supervisors make use of a comprehensive hiring process which includes employee application, Intent to Hire Package, personal and employment history reference checks. All candidates that have been offered positions with Lee County must have a criminal background check performed by Human Resources. These checks are run local, state and nation. Driver's License checks are completed on those candidates who are required to drive for the position. Candidates must also pass a pre-employment health assessment and drug test.

**Available On-Site Evidence:**

- Lee County Hiring Policy #301
- Information Disclosure Release Form
- Reference Check Form

**On Exhibit for On-Site Review:**

- Lee County Policies and Procedures Manual (Exhibit D)



#### 4.1.4 Management Policies and Procedures

##### 4.1.4.1 Personnel manual

X MET NOT MET



***There shall be written policies which govern the administration of personnel procedures for both professional and nonprofessional employees and are reviewed annually.***

#### **Suggested Evidence of Compliance:**

Provide copy of policies and manual; describe on-the-job training opportunities; indicate procedures for annual review and date of latest review.

#### **Notations by Agency Regarding Compliance:**

Lee County Human Resources provides a Lee County Policies and Procedures Manual to every employee. Parks and Recreation also issues a Parks and Recreation Operations Manual to each of its employees. Both manuals are considered to be living documents, and as such, are updated on an as-needed basis. Human Resources periodically reviews the Lee County Policies & Procedures Manual by sending a draft email to Department Directors and HR Representatives to review and offer suggestions for changes or improvements. When appropriate changes have been approved, an email goes out to all employees notifying them of updates which are available on-line.

#### **Available on-site evidence:**

- Excerpts from Lee County Policies & Procedures Manual
- Orientation and Training Policy #303
- Staff/Volunteer Education/NAYS Training, Page 11-28
- General Policies, Parks and Recreation Operations Manual, 1-1
- Samples of Proposed Revisions to Lee County Policies and Procedures Manual
- Email of Final Drafts to Lee County Policies and Procedures Manual

#### **On Exhibit for On-Site Review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Lee County Policies & Procedures Manual, (Exhibit D)

4.1.4.2 Professional considerations

4.1.4.2.1 Code of conduct (ethics)

X MET NOT MET



*There shall be a statement of personnel (Agency) responsibility or role in politically sensitive issues as related to the park and recreation system, business dealings with other entities, interrelationships with other organizations and agencies, and interactions with participants.*

**Suggested Evidence of Compliance:**

Provide a copy of the code of conduct.

**Notations by Agency Regarding Compliance:**

A copy of the Lee County Code of Ethics, Policy #206, is found in the Lee County Policies and Procedures Manual. There is also an Employee Code of Ethics found in the Parks and Recreation Operations Manual, which each new Parks and Recreation receives upon employment.

**Available On-Site Evidence:**

- Code of Ethics Policy #206
- Employee Code of Ethics
- Code of Ethics for Lee County Lifeguards
- New Employee Acknowledgement
- Lee County Lobbying Ordinance #89-40, as amended by Ordinance #90-07

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)

4.1.4.2.2 Professional organizations

X MET NOT MET

*Professional park and recreation personnel should be active members of their professional organizations.*

**Suggested Evidence of Compliance:**

Provide a list of professional personnel, and the professional park and recreation organization(s) in which they are a member; indicate nature of participation.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation holds agency memberships with the National Recreation and Park Association, Florida Recreation and Parks Association, World Leisure Recreation Association, United State Tennis Association, Sports Turf Managers Association, as well as many others. Lee County hosts numerous FRPA district meetings, as well as, Florida Turf grass and other organizations. All staff are encouraged through certification and incentive programs to become certified, join and attend conferences and be active members. Lee County Parks and Recreation sends in excess of 20 staff members to the annual FRPA Conference.

**Available On-Site Evidence:**

- FRPA Staff Certification List
- List of Staff Memberships
- List of Professional Organizations

4.1.4.3 Compensation, benefits, conditions of work (this section all on-site)

4.1.4.3.1 Compensation (salaries and wages) X MET NOT MET

*There should be a written compensation program, which is reviewed annually. There should be equity of compensation among units within the local government unit.*

**Suggested Evidence of Compliance:**

Provide copy of the park and recreation agency or managing authority compensation plan.

**Notations by Agency Regarding Compliance:**

Lee County has a very comparable compensation package for its employees. The Human Resources Department is responsible for the maintenance of the Pay Plan with sound compensation practices. The Pay Plan includes a listing of all classifications with a salary range showing pay grades with the minimum and maximum rate of pay for each job title. Each year Human Resources conducts salary surveys throughout the area to ensure employees are receiving fair and equitable compensation. The Board of County Commissioners approves this compensation package annually through the budget process.

**Available On-Site Evidence:**

- Salary Administration, Policy #501
- Pay Procedures, Policy #503
- Pay for Work During Emergencies or Disasters, Policy #504
- Incentive Pay, Policy #505

- Direct Bonus Program, Policy #506
- License/Registration Certification and Fee Renewals, Policy #507
- Moving Expenses, Policy #508
- Lee County Pay Plan & Job Classification
- Direct Deposit Notice
- Salary Survey

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual (Exhibit D)

4.1.4.3.2 Fringe benefits X MET NOT MET

*There should be a written fringe benefits program.*

**Suggested Evidence of Compliance:**

Provide a copy of the park and recreation agency or managing authority fringe benefits program.

**Notations by Agency Regarding Compliance:**

Lee County is proud of its benefit package for employees and offers a comprehensive benefits program that allows employees to select the plans that best fit their individual needs. Some of these include paid medical and dental insurance, family medical and dental options, life insurance, vision insurance, deferred compensation programs, Florida Retirement System, paid vacation and sick leave, bereavement leave, jury duty, and many more. In addition, Parks and Recreation provides a uniform allowance for each employee. Full time staff is allowed \$150.00 and part-time \$75.00 annually to spend on approved uniforms.

**Available On-Site Evidence:**

- Overview of Lee County Employee Benefit Premiums
- Excerpts from Lee County Policies & Procedures Manual related to Benefits
- Smart Benefits 2006 Booklet
- VSP Vision Plan
- Group Life Insurance
- Short Term Disability Insurance
- Long Term Disability Insurance
- FRS information
- Lee Memorial Health Systems programs
- National Association of Counties (NACO) Retirement Workbook
- ICMA Enrollment Kit
- Dental Insurance Packet

- Health Insurance Packet
- Parks and Recreation Uniform Allowance for Employees

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)

4.1.4.3.3 Conditions of work

4.1.4.3.3.1 Physical examination X MET NOT MET

*There should be a written policy governing the provision of physical examinations for employees.*

**Suggested Evidence of Compliance:**

Provide copy of the physical examination written statement.

**Notations by Agency Regarding Compliance:**

Lee County requires all applicants who have been given a conditional offer of employment, to undergo a post-offer, pre-employment health assessment provided by the Lee County Health Nurse. Drug testing is also done at this time. This is done in accordance with Medical Procedures, Policy #302 in the Lee County Policies & Procedures Manual. Employees who are in positions classified as “safety sensitive” are required to undergo “random” drug and alcohol testing throughout the year.

**Available On-Site Evidence:**

- Medical Procedures Policy #302
- Medical Information required for Health Assessment

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual (Exhibit

D)

4.1.4.3.3.2 Health and physical fitness X MET NOT MET

*There should be a program which enhances general health and physical fitness of employees.*

**Suggested Evidence of Compliance:**

Provide copy of program.

**Notations by Agency Regarding Compliance:**

Lee County offers health and physical fitness programs to all employees. Employees receive corporate rates from fitness centers such as Lee Memorial Hospital Wellness Center, Fitness of the Move and The Asylum. There is a wellness nurse on staff who can travel to various facilities to discuss wellness initiatives and issues with staff. Human Resources offers Health Fairs annually to all employees and provides various free health screenings such as blood pressure, glucose screenings, nutrition, body fat, cancer, etc. Periodical emails from the Occupational Health Nurse regarding health items and reminders such as “December is National Hand Washing Month”, diet, wellness checks, as well as, other pertinent information.

**Available On-Site Evidence:**

- Workplace Safety Policy #210
- Coordinator, Wellness Job Description
- Flyers and emails from Health Nurse
- Wellness Center Information
- Health Fair Notices
- Booklets on various health topics such as eating healthy, cholesterol control, prostate health, breast health, depression, stress. etc.
- EAP flyer
- Employee Health & Wellness Newsletter

**On Exhibit for On-Site Review:**

- Lee County Policies and Procedures Manual, (Exhibit D)

4.1.4.4 Training, career development (this section all on-site )

4.1.4.4.1 Orientation program

X MET NOT MET

*There should be an orientation program for all personnel employed by the Agency.*

**Suggested Evidence of Compliance:**

Provide a copy of current orientation program.

**Notations by Agency Regarding Compliance:**

All employees, whether full-time, part-time, temporary, on-call or seasonal must attend Lee County's orientation program, provided by Human Resources, before they can begin work. In addition, all supervisors must orient new employees to their facilities and programs. A checklist for this is provided in the Parks and Recreation Operations Manual.

**Available On-Site Evidence:**

- Lee County Orientation and Training, Policy #303
- Parks and Recreation Employee Orientation Checklist
- In-service Training for Parks and Recreation staff
- Staff/Volunteer Education/NAYS Training for staff
- Lee County Orientation Agenda & forms
- Instructions for accessing Lee County Policies & Procedures via Internet
- Instructions for accessing Employee Training Calendar

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)

4.1.4.4.2 On-the-job training

X MET NOT MET



***There should be an on-the-job training program which is evaluated, updated, and revised annually.***

**Suggested Evidence of Compliance:**

Provide a copy of current job training program. Indicate when it was evaluated and updated. Also, indicate criteria for reimbursement.

**Notations by Agency Regarding Compliance:**

Lee County provides training opportunities for all employees. The Department has a Training Coordinator on-staff whose job is to develop/track/evaluate all mandatory and optional staff training opportunities as outlined in the Operations Manual. Employees are encouraged to take advantage of workshops and seminars provided by the County, as well as, outside agencies, training centers and colleges, FRPA, NRPA and continuing education courses. The Parks and Recreation Operations Manual is a living document which is continually reviewed and revised.

Parks and Recreation has its own hands-on computer training lab for all of its employees and courses are offered monthly. Supervisory training is provided to all managers and supervisors on a quarterly basis both by Lee County Administration and Parks and Recreation. Educational assistance is provided to all County employees to allow them to enhance their ability to serve the public interest of the citizens of Lee County.

**Available On-Site Evidence:**

- Educational Assistance, Policy #212
- Training from Operations Manual
- Policy regarding Certification
- Quarterly Supervisors' Training Notice
- Emails announcing training classes and schedules
- Departmental Course History on Training
- Parks and Recreation Library Inventory on Training Materials

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)
- Parks and Recreation Operations Manual, (Exhibit A)



4.1.4.4.3 Career development

X MET NOT MET

*There should be a program of career development (and self-improvement) based on needs of individual employees, including the responsibilities of employee and employer.*

**Suggested Evidence of Compliance:**

Provide a copy of the opportunities with criteria for participation.

**Notations by Agency Regarding Compliance:**

Parks and Recreation maintains a Library with periodicals, books and other resources available at no charge for all employees. Lee County encourages attendance at workshops, conferences and seminars mentioned in Section 4.1.4.4.2. On-the-Job Training. Parks and Recreation encourages staff to improve their skills in order to become more marketable and promotable. Aggressive career and development programs allow employees to gain necessary skills.

**Available On-Site Evidence:**

- Staff Development Pgs 11-30 & 31
- Educational Assistance Policy #212
- Departmental Course History on Career Development

**On Exhibit for On-Site Review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Lee County Policies and Procedures Manual, (Exhibit D)

4.1.4.5 Performance evaluation

X MET NOT MET

*There should be a sound and systematic procedure for annual appraisal of job performance.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures and representative completed performance evaluations without identifying personnel information, e.g., name, social security number.

**Notations by Agency Regarding Compliance:**

Lee County Human Resources maintains a performance evaluation program which objectively reflects employee performance and attitude. The evaluation is used to measure employee performance through achievement of assigned duties and responsibilities, and agreed upon goals and objectives for the year. It is also used to recognize employee weak points and serves as a tool to determine

whether the County needs to provide additional training or employee needs to exercise self-discipline to improve. Evaluations are completed annually on each employee, with new employees receiving evaluations at 3 months, 6 months (to determine whether they proceed from Probationary to Regular status) and then annually thereafter. Copies of completed employee evaluation are kept in the Personnel Files at Terry Park and in Human Resources.

**Available On-Site Evidence:**

- Performance Evaluation, Policy #502
- Employee Performance Evaluation Form
- Samples of completed Employee Performance Evaluations
- Course History for Employee Evaluation Training
- Positive Performance Evaluation Book

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)

4.1.4.6 Promotion X MET NOT MET

*There should be a written statement defining the promotion process and the Agency's role.*

**Suggested Evidence of Compliance:**

Provide a copy of promotion procedures and processes and indicate how they have been communicated to employees.

**Notations by Agency Regarding Compliance:**

An employee may be promoted to a job classification with a higher range of pay after successfully meeting the requirements for that position and being selected in the interview process. Upon promotion the employee shall have their salary adjusted. Available positions are advertised on the Lee County Job List, Lee County Website and the local television channel. The Parks and Recreation Department encourages staff to apply for promotions from within whenever possible.

**Available On-Site Evidence:**

- Promotion, Policy #306

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)

4.1.4.7 Disciplinary action, appeals and grievances

- 4.1.4.7.1 Disciplinary action X MET NOT MET  
*There should be a disciplinary system related to the code of conduct and performance evaluation.*

**Suggested Evidence of Compliance:**

Provide a written copy of the system, the policies and procedures and how they are made known to all employees.

**Notations by Agency Regarding Compliance:**

It is the policy of Lee County that all employees are expected to comply with the County's standards of behavior and performance and that any noncompliance with these standards must be remedied. The County has a policy of progressive discipline in which it attempts to provide employees with notice of deficiencies and an opportunity to improve. Each employee is made aware of this policy during the orientation process. The Corrective Action Disciplinary Procedure is found in the Lee County Policies & Procedures Manual.

**Available On-Site Evidence:**

- Corrective Action/Disciplinary Procedure, Policy #601
- Notice of Proposed Corrective Action Form
- Notice of Corrective Action Form

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)

- 4.1.4.7.2 Appeals and grievances X MET NOT MET

*A grievance procedure, available to all employees, should be established.*

**Suggested Evidence of Compliance:**

Provide a copy of the grievance procedure and indicate how the procedures have been communicated to the employees.

**Notations by Agency Regarding Compliance:**

The County's grievance procedure is established to provide full opportunity to employees to bring to the attention of management complaints, grievances, or situations which the employee feels need either adjustment or information. It is the intent and desire of the County to adjust complaints or grievances informally. Both supervisors and employees are expected to make every effort to resolve problems as they arise. However, it is recognized that there

will be grievances which will be resolved only after an appeal and review. The submission of a grievance by an employee shall in no way adversely affect the employee or his/her employment with the County. Employees are made aware of this policy during the orientation process.

**Available On-Site Evidence:**

- Grievance Procedures, Policy #602

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)

4.1.4.8 Termination of employment X MET NOT MET

*There should be policies and procedures for termination of employment.*

**Suggested evidence of compliance:** Provide copy of termination policies and procedures, and indicate how they have been made known to employees.

**Notations by Agency Regarding Compliance:**

It is the policy of Lee County to separate employment because of an employee's resignation, termination, retirement, etc. All employment in Florida is considered to be "at-will" for all employees who do not have a formal written employment contract for a specified, fixed term. "At-will" means that employees are free to terminate their employment at any time and for any reason by giving written notice (preferably 2 weeks) to their supervisor. Likewise, employers have the same rights providing the reason for discharge or hire is not discriminatory.

All full-time and part-time regular employees are monitored and evaluated for an initial probationary period of six months. During this time, an employee may be disciplined by Corrective Action, laid off, suspended or terminated and such action is not subject to the grievance procedure.

These procedures are made know to all employees through their initial orientation as part of the Lee County Policies and Procedures Manual.

**Available On-Site Evidence:**

- Separation of Employment, Policy #312
- Employment at Will, Policy #003
- Probationary Period, Policy #304
- Notice of Proposed Corrective Action Form
- Notice of Corrective Action Form

**On Exhibit for On-Site Review:**

- Lee County Policies & Procedures Manual, (Exhibit D)

## 4.2 Volunteers

NOTE: A comprehensive volunteer manual of the park and recreation or central Agency will encompass many of the subsequent standards of this section and provide the requested evidence of compliance.

### 4.2.1 Utilization

X MET NOT MET

*Volunteers should be utilized in the Agency for functions such as program leadership, financial drives and fiscal management, public relations and promotion, clerical services, advisory councils, etc.*

#### **Suggested Evidence of Compliance:**

Provide list of functions in which volunteers are utilization and the extent of such utilization.

#### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a dedicated volunteer/intern coordinator who is responsible for all volunteer activities as outlined in the Operations Manual and the Volunteer Manual/Handbook. The Department utilizes volunteer staff extensively in a variety of positions throughout the department. The job sites and positions are determined with the site supervisor. The job descriptions are then designed and reviewed, along with the wage value for each volunteer hour worked. A copy of the job sites and job descriptions are on file for review. The department compiles quarterly reports and the annual report that shows the number of volunteer staff registered, the number of hours worked and an estimated wage value for the hours worked. Lee County Parks and Recreation currently has 852 volunteers registered recording 40,980.25 hours of service with a wage value of \$521,806.75.

#### **Available On-Site Evidence:**

- Listing of Volunteer Jobs
- Volunteer Program Summary Reports for 2004/05

#### **On Exhibit for On-Site Review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Volunteer Manual, (Exhibit P)

### 4.2.2 Recruitment, Selection, and Orientation

X MET NOT MET

*There should be an on-going recruitment, selection, and orientation program for volunteers.*

**Suggested Evidence of Compliance:**

Provide description of recruitment, selection and orientation procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation through the Department's Volunteer Coordinator and site supervisors, recruit volunteers through schools, career fairs, brochures, flyers, department display boards, civic groups and corporate volunteer programs. The site supervisors handle the interview process; which includes a background investigation, registration process, and selection process of all volunteer staff. Once staff has successfully completed the interview and background screening, as a part of orientation, each volunteer staff member is given a welcome letter and a Volunteer Handbook, which includes: policies and procedures, workers compensation card, a newsletter and the incentive program information.

**Available On-Site Evidence:**

- Volunteer Staff/Interns/Background Check Requirements
- Volunteer Handbook
- Various Recruitment Flyers, Video Request
- Volunteer Welcome Letter
- Various Invitations/Thank you's/Flyers
- Volunteer Incentives brochure
- Newspaper Articles regarding volunteer bird-watchers
- The Volunteer Times Newsletter

**On Exhibit for On-Site Review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Volunteer Manual, (Exhibit P)

*Volunteers should (a) be monitored and given supervisory visits and conferences, as well as in-service training, and (b) be evaluated regarding performance.*

**Suggested Evidence of Compliance:**

Provide written description of the monitoring system, current practices for supervisory visits and conferences, in-service training, and evaluation process.

**Notations by Agency Regarding Compliance:**

Each site supervisor is trained and given a Volunteer Staff Manual which includes timesheets and evaluation forms. Volunteer staff receives in-service training on an as-needed basis depending on the job assignment. The Volunteer Coordinator holds in-service training annually or on an as-needed basis. Each quarter the Volunteer Coordinator sends out *The Volunteer Times* to inform volunteer staff and the *Volunteer Services Informer* to all volunteer staff supervisors of any changes in the Volunteer Program. Lee County Parks and Recreation treats all volunteer staff as if they are a part of the regular staff and must abide by the Policies and Procedures set for all staff in the Operations Manual.

**Available On-Site Evidence:**

- Supervision and Evaluation of Volunteer Staff procedures and forms
- Volunteer Staff Conference Report form
- 2005/06 On-going Training Opportunities & Flyer
- Hard copy of Power Point presentation for new volunteer staff

**On Exhibit for On-Site Review:**

- Parks and Recreation Operations Manual, (Exhibit A)
- Volunteer Manual, (Exhibit P)

4.2.4 Recognition

X MET NOT MET

*There should be a program of recognition for volunteers.*

**Suggested Evidence of Compliance:**

Provide description of the nature of recognitions given, including awards and public recognition.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation recognizes the value of its volunteer staff through various incentive and awards programs. An annual Volunteer Staff Appreciation dinner is given every spring for all volunteer staff, and their families, registered in the department's program. Some site supervisors have also established their own awards programs at individual Parks and Recreation centers.

The Retired and Senior Volunteer Program (RSVP) is a partner with Lee County Parks and Recreation and their organization recognizes our volunteers age 55 and older who have dedicated over 400+ hours a year.

**Available On-Site Evidence:**

- Volunteer Services Responsibilities/Staff Recognition
- Volunteer Incentives Brochure with available items
- Volunteer Times Newsletters/Recognitions
- Incentive Program Information from Volunteer Handbooks
- Recognition Dinner invitations

4.2.5 Liability

X MET NOT MET

*Volunteers should be covered for negligence liability by the Agency.*

**Suggested Evidence of Compliance:**

Provide copy of documentation indicating such coverage.

**Notations by Agency Regarding Compliance:**

Liability Insurance for volunteer staff is covered under the Lee County Board of County Commissioners Worker's Compensation Policies as required by the State of Florida. Lee County is self-insured for worker's compensation. The policies are printed in the Volunteer Staff Handbook.

**Available On-Site Evidence:**

- Volunteer Staff Handbook
- Worker's Compensation for Volunteers

4.3 Consultants and Contract Employees

X MET NOT MET



*Consultants and contract employees may be utilized for special functions.*

**Suggested Evidence of Compliance:** (on-site)

Provide a copy of park and recreation or central Agency policies and procedures regarding use of consultants and contract employees.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation utilizes consultants and contract employees for many of its special programs and projects. For example, a consultant is used for the Users Need Study, contract employees for the 21<sup>st</sup> Century Community Learning Center, and various project designs.

**Available On-Site Evidence:**

- Administrative Code 4-3
- Contract Procedure Manual
- Contract Manual, Administrative Code 4-4

**On Exhibit for On-Site Review:**

- Lee County Administrative Code, (Exhibit E)

## 5.0 FINANCE (FISCAL POLICY AND MANAGEMENT)

Note: Except where designated, all documentation on-site.

### 5.1 Fiscal Policy

X MET NOT MET



*Fiscal policies setting guidelines for management and control of revenues, expenditures, and investment of funds shall be set forth clearly in writing, and the legal authority must be clearly established.*

#### **Suggested Evidence of Compliance:**

Provide copy of fiscal policies and legal authority.

#### **Notations by Agency Regarding Compliance:**

The Lee County Board of County Commissioners has the responsibility of following the guidelines set forth in the Florida State Statutes. Lee County Board of County Commissioners has established the Lee County Administrative Code, which outlines the management of all funds. Upon allocation of funds, it is the Department of Parks and Recreation's responsibility to appropriately track all revenues and expenses while abiding by the Florida Statute in conjunction with the Purchasing and Contracts manual. The Lee County Budget Office is responsible for all investments for the County.

#### **Available on-site evidence:**

- Florida Statute 125.74
- Administrative Code Section 3-6 Financial/Fiscal/Budget
- Parks and Recreation Operations Manual (Chapter 3 Fiscal Operations)

#### **On Exhibit for on-site review:**

- Florida Statute 125 & 287 (Exhibit Q)
- Lee County Administrative Code (Section 3-0 Financial/Fiscal/Budget & Section 4-0 Purchasing/Contracts) (Exhibit E)
- Parks and Recreation Operations Manual (Exhibit A)

5.1.1 Fees and Charges

X MET NOT MET

*There should be an established policy on the type of services for which fees and charges may be instituted and the basis for establishing the amount of such fees and charges.*

**Suggested Evidence of Compliance:**

Provide copy of policy on fees and charges and rationale.

**Notations by Agency Regarding Compliance:**

The Lee County Board of County Commissioners as a part of the Lee County Administrative Code has, established an External Fees and Charges Manual. This manual provides a fee structure for all Parks and Recreation related activities such as programs, parking, rentals, and events to which a fee is associated. These fees are recommended to and approved by the Board of County Commissioners and updated on an as needed basis or at the very least, reviewed by the Department annually. These Board approved minimal fees have been established in an effort to offset costs and provide quality services and programs to the community.

**Available on-site evidence:**

- Lee County Administrative Code (Section 3-10 External Fees and Charges Manual)
- External Fees & Charges Manual (Section 18-0, 19~0 & 20-0 Parks and Recreation Department)

**On Exhibit for on-site review:**

- Lee County Administrative Code (Section 3-0 Financial/Fiscal/Budget & Section) (Exhibit E)
- External Fees & Charges Manual (Exhibit R)

5.1.2 Acceptance of Gifts

X MET NOT MET

*There should be a written policy for the acceptance of gifts and bequests.*

**Suggested Evidence of Compliance:**

Provide a copy of written policy.

**Notations by Agency Regarding Compliance:**

The Lee County Administrative Code outlines the procedure for accepting cash donations and property. Lee County Parks and Recreation further identifies procedures specific to Parks and Recreation in our Operations Manual.

**Available on-site evidence:**

- Lee County Administrative Code (Section 3-12 Cash Donations Policy)
- Parks and Recreation Operations Manual (Chapter 3 pages 3-10 through 3-13)

**On Exhibit for on-site review:**

- Lee County Administrative Code (Section 3-0 Financial/Fiscal/Budget & Section) (Exhibit E)
- Parks and Recreation Operations Manual (Exhibit A)

5.1.3 Financial Assistance (government cost-sharing) X MET NOT MET

*Where feasible and appropriate, matching funding by state and federal governments, voluntary agencies, private groups and individuals may be used.*

**Suggested Evidence of Compliance:**

Provide records for past five years showing source and dates of matching funds for specific projects.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation participates in soliciting grants for partial or entire projects. Occasionally, Lee County Parks and Recreation has engaged in cost-sharing projects.

**Available on-site evidence:**

- Listings of State and Federal Grants
- Single Audit

**On Exhibit for on-site review:**

- Single Audit (Exhibit T)

5.2 Fiscal Management X MET NOT MET



***There shall be written procedures for fiscal management of the Agency.***

**Suggested Evidence of Compliance:**

Provide a copy of the procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation fiscal management is controlled by professional and technical staff who follow the Lee County General Budget/Finance policies. All fiscal

responsibilities including budget, purchasing and tracking revenues and expenses are calculated centrally for the department as outlined in the Parks and Recreation Operations Manual.

**Available on-site evidence:**

- Lee County Parks and Recreation Operations Manual, (Chapter 3 - inclusive)
- Lee County General Budget Policy (Pages C-3 through C-5)

**On Exhibit for on-site review:**

- Lee County Parks and Recreation Operation Manual (Exhibit A)
- Lee County Annual Budget Document 2006 (Exhibit S)

5.2.1 Personnel

X MET NOT MET

*The Agency's chief administrator should be designated as having the authority and responsibility for the fiscal management of the Agency.*

**Suggested Evidence of Compliance:** (attach)

Provide resolution delegation authority and responsibility to the Agency's chief administrator.

**Notations by Agency Regarding Compliance:**

Per the Lee County Board of County Commissioners Administrative Code AC-3-6, the Parks and Recreation Department Director is ultimately responsible for all fiscal matters.

**Available on-site evidence:**

- Lee County Administrative Code Section 3-6 - Financial/Fiscal/Budget
- Job Descriptions:
  - Parks and Recreation Director
  - Parks and Recreation Deputy Director
  - Fiscal Manager
  - Fiscal Officer
  - Sr. Account Clerk.

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)
- Job Description Book (Exhibit N)

5.2.2 Financial Resources (external) X MET NOT MET

*Agencies, organizations, and corporations should be utilized for funding programs and facilities of many different types.*

**Suggested Evidence of Compliance:**

Provide list of agencies, organizations, and corporations which have assisted.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a County-wide Sponsorship Program in which private donations, discounts, organization donations and sponsor events are received. Lee County Parks and Recreation also secures various programs and capital grants annually. These may include a form of match.

**Available on-site evidence:**

- Sponsorship List
- YTD Assessed Donation Value by Facility
- Grant List
- Donation carry-over reports for 2000-2006

**On Exhibit for on-site review:**

- Single Audit (Exhibit T)

5.2.3 Purchasing Procedures

5.2.3.1 Requisition procedure X MET NOT MET

*There should be written procedures for the requisition and purchase of Agency equipment and supplies to include, at a minimum:*

- *specifications for items requiring standardized purchases;*
- *bidding procedures; and*
- *criteria for the selection of vendors and bidders.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures.

**Notations by Agency Regarding Compliance:**

The Lee County Purchasing Manual, which is an appendix of the Lee County Administrative Code 4-1, is a comprehensive guideline outlining all purchasing related procedures.

**Available on-site evidence:**

- Lee County Administrative Code 4-1
- Lee County Purchasing Manual
  - Section 5: Requisition Procedure
  - Section 8: Informal Procedures
  - Section 9: Formal Procedures

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)
- Lee County Purchasing Manual (Exhibit J)

5.2.3.2 Emergency purchase or rental/lease procedures X MET NOT MET

*There should be written procedures for emergency purchasing or rental agreements for equipment.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures.

**Notations by Agency Regarding Compliance:**

Emergency purchases are outlined in the Lee County Purchasing Manual. Typically, Lee County Parks and Recreation purchases equipment outright.

**Available on-site evidence:**

- Lee County Purchasing Manual
  - Section 12: Emergency Purchases
  - Section 13: Disaster Purchase Order Procedures

**On Exhibit for on-site review:**

- Lee County Purchasing Manual (Exhibit J)

5.3 Auditing/Accountability

X MET NOT MET



*The Agency shall have an accounting system.*

**Suggested Evidence of Compliance:**

Provide a description of the accounting system.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation, as well as, all Lee County Departments, use the central accounting system of Lee County. The accounting program, JD Edwards One World System, is inclusive of all aspects of financial applications for the County. In addition, Lee County also utilizes Eagles (a credit card reconciliation/payment program) and OnBase (used to authorize and process invoices). Every year Lee County retains an independent auditor to perform this assessment for the previous fiscal year.

**Available on-site evidence:**

- Description of JD Edwards One World System
- Description of Eagles
- Description of OnBase
- Florida State Statute 215.97 Single Audit Act
- Single Audit

**On Exhibit for on-site review:**

- JD Edwards One World Manual (Exhibit U)
- Single Audit (Exhibit T)

5.3.1 Monthly Status Reports

X MET NOT MET

*The Agency should have an accounting system that includes, at a minimum, provisions for monthly status reports showing:*

- *initial appropriation for each account (or program);*
- *balances at the commencement of the monthly period;*
- *expenditures and encumbrances made during the period; and*
- *unencumbered balances.*

**Suggested Evidence of Compliance:**

Provide a copy of the last three monthly reports.

**Notations by Agency Regarding Compliance:**

The JD Edwards One World System provides monthly status reports. Data in the One World System can be manipulated easily through date and code changes by the user to reach the desired information.



**Available on-site evidence:**

- JD Edwards Financial Budget Status Reports (Jan, Feb & March 2006)
- CIP Project Status Reports (Jan, Feb & March 2006)

**On Exhibit for on-site review:**

- JD Edwards One World Manual (Exhibit U)

5.3.2 Control Personnel and Budget Authorization

X MET NOT MET

*There should be written procedures for maintaining control over personnel in relation to budget authorizations.*

**Suggested Evidence of Compliance:**

Provide copy of procedures and a table of office organizational personnel by budget payroll.

**Notations by Agency Regarding Compliance:**

The Lee County Board of County Commissioners must approve or reject each and every new position request. Changing a position from part-time to full-time status must also be approved by the Lee County Board of County Commissioners. Either of these is done primarily through the budget process. Occasionally, new positions or position class changes are not processed during a budget cycle. Sufficient budget must be available to cover the cost of the position or additional funds are requested at that time. Reclassifications may or may not be processed during budget preparation and do not need Board approval. However, they are processed through the County's Human Resources Department and approved by County Administration providing the department/division requesting the position has sufficient budget.

**Available on-site evidence:**

- Lee County Administrative Code  
Section 3-1 & 3-6 Financial/Fiscal/Budget
- R.P.A. Verification Report

**On Exhibit for on-site review:**

- Lee County Administrative Code  
Section 3: Financial/Fiscal/Budget (Exhibit E)

5.3.3 Procedures Relating to Cash

X MET NOT MET

*There should be written procedures used for collecting, safeguarding, and disbursing cash, to include, at a minimum:*

- *maintenance of an allotment system, if any, or records of appropriations among organizational components;*
- *preparation of financial statements;*
- *conduct of internal audits; and*
- *persons or positions authorized to accept or disburse funds.*

**Suggested Evidence of Compliance:**

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation follows the Lee County Administrative Code, as well as, well refined procedures in our Parks and Recreation Operations Manual pages 3-1 through 3-3. There are several sites that collect and secure cash for the services rendered by Lee County Parks and Recreation specified in the External Fees & Charges Manual. Providing customers with change (\$), during a transaction, is the only form of cash disbursement handled in our outlying areas. Terry Park is the only site that disburses funds via Petty Cash/Change Fund. Parks and Recreation's Petty Cash Procedure is followed and cash payments are recorded and deposited into the main safe in the Parks and Recreation Administrative Building (Terry Park). A couple of times in the Fiscal year the Fiscal Officer performs surprise internal audits to ensure that staff is adhering to fiscal procedures. Through the JD Edwards One World tracking system and the Parks and Recreation Purchase Order Tracking System there are a variety of financial statements/reports that can be provided as needed. Although there are no Parks and Recreation positions that restrict employees from handling cash, there are several that handling cash is specified in their job descriptions.

**Available on-site evidence:**

- Lee County Administrative Code 3-20
- Lee County Parks and Recreation Operations Manual  
Section 3-1 through 3-3
- External Fees & Charges Manual (Section 18-0 & 19-0 Parks and Recreation Department)
- Fiscal Officer Surprise Internal Audits
- Sample of a departmental procedure: Pool Ticket Procedures
- Job Descriptions:
  - Account Clerk, Sr.
  - Fiscal Manager
  - Fiscal Officer
  - Office Assistant, Sr.
  - Park Ranger
  - Program Specialist, Sr
  - Program Specialist

**On Exhibit for on-site review:**

- Lee County Administrative Code Section 3 Financial/Fiscal/Budget (Exhibit E)
- Parks and Recreation Operations Manual (Exhibit A)
- External Fees & Charges Manual (Exhibit R)

5.3.4 Monitoring Fiscal Activity

X MET NOT MET

*There should be written procedures for conducting internal monitoring of the Agency's fiscal activities.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures.

**Notations by Agency Regarding Compliance:**

All revenue/expenditure transactions are monitored in the JD Edwards One World System. In addition, Lee County Parks and Recreation currently uses an internal monitoring system, which enables a break down of revenues and expenses with more detail through a sophisticated LAN database program called POTS (Purchase Order Tracking System).

**Available on-site evidence:**

- Lee County Purchasing Manual Section 23: Monitoring Function
- Parks and Recreation Operations Manual (Chapter 3 – Fiscal Operations)
- JD Edwards One World Selection Key Points

**On Exhibit for on-site review:**

- JD Edwards One World System/Manual (Exhibit U)
- Purchase Order Tracking System (POTS) (Exhibit V)
- Lee County Purchasing Manual (Exhibit J)
- Parks and Recreation Operation Manual (Exhibit A)

5.3.5 Independent Audit

X MET NOT MET

*There should be an independent audit of the Agency's fiscal activities conducted annually.*

**Suggested Evidence of Compliance:**

Provide a copy of recent independent audit and management letter, if provided; indicate response to recommendations.

**Notations by Agency Regarding Compliance:**

Lee County Administration, as well as, Lee County Parks and Recreation utilize the internal and external audits to update and change policies and procedures. The Internal Auditors are a subsection of the Lee County Clerks Office. They are available to schedule audits of each department, but they are also available upon request. The External Auditors complete a comprehensive annual audit.

**Available on-site evidence:**

- Single Audit
- Comprehensive Annual Financial Report 2004
- Internal Audit dated June 2003 with department response

5.4 Budgeting Procedures

5.4.1 Budget Preparation, Presentation and Adoption

X MET NOT MET

☞ *There shall be annual operating and capital improvements budgets, including both revenues and expenditures.*

**Suggested Evidence of Compliance:** (attach)

Provide a copy of the annual operating and capital improvements budgets.

If large agency, attach budget summary, with details on-site.

**Notations by Agency Regarding Compliance:**

The Lee County Administrative Code outlines the budget process. Under the direction of the Lee County Budget Office, annual operating and capital improvement budgets are compiled.

**Available on-site evidence:**

- Lee County Administrative Code 3-6 & 3-9
- JD Edwards Financial Budget Status Reports (Jan, Feb & March 2006)
- CIP Project Status Reports (Jan, Feb & March 2006)

- General Budget Policy
- Lee County BOCC Budget Hearing Minutes of September 22, 2005
- CIP FY06-FY10
- Major Maintenance FY06-FY10

**On Exhibit for on-site review:**

- Lee County Budget Preparation Manual (Exhibit X)
- Lee County Final Budget Document (Exhibit W)
- Lee County Administrative Code (Exhibit E)

5.4.1.1 Participation in budget preparation X MET NOT MET

*The heads of major organizational components within the Agency should participate in the preparation of the Agency's budget.*

**Suggested Evidence of Compliance:**

Provide procedures for such participation.

**Notations by Agency Regarding Compliance:**

Each department/division is responsible for compiling all the necessary budget components for their programs and projects. All revenues and expenses are estimated for the remainder of the current year and projected for the upcoming year. Budgets are compiled with the current core level of service in mind. Budget models are prepared detailing any requested enhancements or reductions in service levels.

**Available on-site evidence:**

- Capital Improvement Program Overall Budget Process
- Capital Improvement Program Department Process
- Operating Budget Overall Process
- Operating Budget Department Process
- TDC Budget Overall/Department Process
- Lee County Administrative Code 3-6
- Lee County General Budget Policy
- Parks and Recreation Core Level of Service

**On Exhibit for on-site review:**

- Lee County Budget Preparation Manual (Exhibit X)
- Lee County Final Budget Document (Exhibit W)
- Lee County Administrative Code (Exhibit E)

5.4.1.2 Agency components' budget recommendations

X MET NOT MET

*Agency components have prepared written recommendations, based on operational and activity analysis, for use in the development of the Agency's budget.*

**Suggested Evidence of Compliance:**

Provide copy of recommendations.

**Notations by Agency Regarding Compliance:**

Each Parks and Recreation Manager has input in the budget process. They prepare enhancement requests that are reviewed and prioritized by the Director and Deputy Director. These may include new positions, reclassification of existing positions, additional operating for specific line items, new and replacement furniture and equipment, as well as, vehicles and rolling stock. This is where the first level of decisions are made. Next, County Administration reviews and prioritizes the individual department budget requests. County Administration may elect to make changes or cuts to the department budgets. Workshops are held during the summer with the Board of County Commissioners and final approvals to the budgets are made during the September budget hearings.

**Available on-site evidence:**

- Samples of: Budget Model
- Budget Workshop Model Summary
- Lee County General Budget Policy
- Parks and Recreation Core Level of Service
- Lee County Budget Workshop
- Lee County Budget Hearings

**On Exhibit for on-site review:**

- Lee County Budget Preparation Manual (Exhibit X)
- Lee County Final Budget Document (Exhibit W)
- Lee County Administrative Code (Exhibit E)

## 5.4.2 Budget Implementation

### 5.4.2.1 Budget control

X MET NOT MET

*There should be procedures for firm budget control within the Agency, including allotment system, accounting system, frequent reporting of revenues and expenditures and continuous management review through staff reports and meetings.*

#### **Suggested Evidence of Compliance:**

Provide copy of procedures and practices for budget control.

#### **Notations by Agency Regarding Compliance:**

There are several versions of reports available in the JD Edwards, One World Financial System. Reports may be generated on an as-needed or requested basis. Additionally, Lee County Parks and Recreation tracks their own revenues and expenditures by facility or programs in a Microsoft Access Database program. Revenue and expenditure reports can be generated on an as needed or requested basis as well. All positions and related activity are also tracked through a Microsoft Access database program.

#### **Available on-site evidence:**

- Parks and Recreation Operations Manual (Chapter 3, Fiscal Operations)
- Lee County Administrative Code 3-6: Financial/Fiscal/Budget
- Lee County General Budget Policy
- Lee County Purchasing Manual Section 23
- Capital Improvement Program Overall Budget Process
- Capital Improvement Program Department Process
- Operating Budget Overall Process
- Operating Budget Department Process
- TDC Budget Overall/Department Process
- JD Edwards One World Selection Key Points

#### **On Exhibit for on-site review:**

- Lee County Budget Preparation Manual (Exhibit X)
- Lee County Final Budget Document (Exhibit W)
- Lee County Administrative Code (Exhibit E)
- Lee County Purchasing Manual (Exhibit J)
- Cost Benefit Analysis (Exhibit C)
- Parks and Recreation Operations Manual (Exhibit A)
- Parks and Recreation Access Database – POTS (Purchase Order Tracking System) (Exhibit V)

5.4.2.2 Supplemental/emergency appropriations X MET NOT MET

*There should be written procedures for requesting supplemental or emergency appropriations and fund transfers.*

**Suggested Evidence of Compliance:**

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

The Lee County Administrative Code 3-4 & 3-6 outlines the budget policy for supplemental to emergency appropriations and fund transfers.

**Available on-site evidence:**

- Lee County Administrative Code 3-4 & 3-6

**On Exhibit for on-site review:**

- Lee County Administrative Code (Exhibit E)

5.4.3 Inventory, Fixed Assets

5.4.3.1 Inventory control X MET NOT MET

*There should be written procedures for inventory control of Agency property, equipment, and other assets.*

**Suggested Evidence of Compliance:**

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

The Florida State Statute Chapter 274 outlines fixed assets inventory control. Additionally, the Clerks Office has their specific written procedures, the annual physical inventory. Internally, Parks and Recreation requires a consumable inventory be taken as part of the year-end procedures.

**On Exhibit for on-site review:**

- Lee County Clerk of Courts Finance Memo
- Lee County Clerk of Courts General Accounting Reference Guide pages 14-15
- Lee County Fixed Asset Property Control Form
- Lee County Administrative Code 3-14
- Lee County Fixed Assets User Manual
- Consumable Inventory Year-End Procedure Memo

**Available on-site evidence:**

- Lee County Administrative Code (Exhibit E)
- Lee County Clerk of Courts Finance Manual (Exhibit CC)



## 6.0 PROGRAM AND SERVICES MANAGEMENT

Note: Attach summary statements with details on-site; descriptive brochures may be utilized.

### 6.1 Program/Services Determinants

X MET NOT MET

☞ *The program and services provided shall be based on:*

- *conceptual foundations of play, recreation, and leisure*
- *constituent needs*
- *community opportunities*
- *Agency philosophy and goals*
- *experiences desirable for clientele*

#### **Suggested Evidence of Compliance:**

Provide written statement that the five determinants have been used in planning for programs and services.

#### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation is proud of the quality of programs and services offered to its constituents. Lee County is unique in that it must serve the needs of its residents, as well as, seasonal residents and tourists. This unique mix requires flexibility in program service delivery.

The Parks and Recreation Operations Manual is a carefully thought-out tool that reflects the high standards of programming and the fundamental principals of recreation and leisure that Lee County Parks and Recreation delivers.

In meeting the five determinants of program/services planning, the following evidence is offered.

- **Conceptual foundations of play, recreation, and leisure -**  
First and foremost, Lee County Parks and Recreation has a wealth of experienced recreation professionals who are schooled in the fundamental foundations of play, recreation and leisure. Many of our programming staff are certified professionals continually increasing their knowledge base. The Lee County Parks and Recreation Operations Manual in chapter 7-1 to 7-3 “The ABC of Programming Recreation” is laid out for all employees to follow when considering program options.
- **Constituent needs -**  
Constituent needs are assessed through a variety of methods including program surveys, needs assessment, on-line comment cards, registration numbers, community meeting reports, Parks and Recreation Advisory Board, managerial retreat, and programmer’s meetings. Program opportunities will vary across the county based upon the resources and individual community needs. The Recreation Lee Yours program guide offers a complete list of all program offerings.

- Community opportunities -  
As evident in the Come Discover Lee County Parks and Recreation facility guide, community opportunities are abundant in Lee County.
- Agency philosophy and goals -  
Lee County's mission is to provide a core level of service throughout the County. Lee County Parks and Recreation follows suit by providing consistent services and programs in all areas of the County. The Mission Statement of the Department revolves around this basic premise.
- Experiences desirable for clientele -  
In addition to a variety of multi-generational program opportunities, Lee County Parks and Recreation has a complete work group assigned to programming for special needs.

**Available on-site evidence:**

- Lee County Parks and Recreation Operations Manual (Pages 7-1 to 7-4, 7-27 to 29)
- Commitment to NCTRC standards
- Wa-KeHatchee survey
- RecreationaLee Yours Program Guide
- RecreationaLee Yours Summer Program Guide
- New facility planning minutes
- Needs assessment analysis minutes
- Summer Camp Parent Survey Report
- Questionnaire samples
- Managerial Retreat and Programmer meeting minutes examples
- Come Discover Lee County Parks and Recreation facility guide
- Example of completed on-line comment card
- Mission Statement
- Vision Statement

**On Exhibit for on-site review:**

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)

6.1.1 Participant Involvement X MET NOT MET

*Development of program should involve the participants.*

**Suggested Evidence of Compliance:**

Describe the process for obtaining and utilizing participants' input. Give examples.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation involves its participants in the program planning

process is a variety of ways. There are many ad hoc groups, non-profit groups/foundations, and advisory committees associated with our department. In many cases, participants make their needs known through the recreation programs assessment questionnaire, via their representative on the Parks and Recreation Advisory Board, on-line comment cards, direct staff interaction, needs assessment, or through one of the various groups. The following is a partial list of some of the groups working closely with Lee County Parks and Recreation.

- Lake Park Enrichment Foundation
- The Friends of Boca Grande
- Friends of Six Mile Cypress Slough
- Lee County Parks and Recreation Advisory Committee
- Special Olympics Management Team
- Spinal Support Group
- Harlem Heights Improvement Association
- Senior Friends
- Bay Oaks Advisory Committee
- Lee County Chapter of the National Association for Mental Illness
- Families 1<sup>st</sup>
- SW FL Council for Environmental Education
- Friends of Matanzas Pass Preserve

**Available on-site evidence:**

- Copies of Program Assessments, comment cards.
- Programmer meeting minutes
- Wa-Ke-Hatchee Recreation Center survey results
- Lee County Parks and Recreation Operations Manual (Pages 14-3)
- Sample Parks and Recreation Advisory Committee minutes
- Friends of Boca Grande Annual Report
- Bay Oaks Advisory Committee sample minutes
- Friends of Six Mile Cypress Slough Annual Report and publications
- Summer camp survey results
- Customer Satisfaction Survey Results
- Lakes Park survey results
- New facility planning minutes
- Needs assessment analysis minutes
- Bay Oaks User Survey Results
- Friends of Matanzas Pass Preserve meeting minutes

**On Exhibit for on-site review:**

- 2004/05 Lee County Parks and Recreation User Needs Assessment Survey (Exhibit F)

☞ *Services programs shall be delivered in a variety of ways, such as: directed and self-directed programs, outreach, user services, rentals.*

**Suggested Evidence of Compliance:**

Provide a list of ways in which services/programs are delivered.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation takes the delivery of its programs and services very seriously. The Department provides diversified recreation programs and delivers them in a variety of ways including general supervision, structured leadership, facilitation, and indirect leadership.

General supervision delivery includes programs such as open recreation, Mommy and Me, Open Basketball, bridge club, playgrounds, athletic fields, picnic areas. Structured leadership delivery includes programs like archery, arts and crafts, ballet, pilates. Structured leadership programs are offered via on staff programmers, contract instructors, or volunteers. Facilitation delivery includes many youth leagues, community tennis, athletic events, radio control flyers, archery club, and shuffleboard group. Indirect leadership is evidenced by recreation opportunities such as swimming, picnic shelter reservations, field rentals, kayak rentals, and train ride.

The Program/Service Outcome and Delivery Matrix groups all the departments programs and notes the delivery method used in providing the program/service.

The current RecreationaLee Yours Program Guide offers descriptions of programs with different delivery methods, the Parks and Recreation Operations Manual describes procedures for various programs, the facilities amenities grid denotes the opportunities available at each facility, and numerous agreements provide evidence of delivery via an outside group.

**Available on-site evidence:**

- Program/Service Outcome and Delivery Matrix
- RecreationaLee Yours Program Guide
- Sample program flyer
- Lee County Parks and Recreation Operations Manual (pages 7-22 to 7-32)
- Sample completed instructor contract
- Facilities amenities grid (excerpt from 2005 CBA report)
- Agreements – Radio Flyers, CTA, Archers, Shuffleboard, youth leagues

6.2.1 General Supervision

X MET NOT MET

*The programs/services should provide for self-directed recreation opportunities under general supervision.*

**Suggested Evidence of Compliance:**

Provide list of opportunities available under general supervision.

**Notations by Agency Regarding Compliance:**

Opportunities under general supervision are available to the public in many forms and are identified in various publications, on-line (www.leeparks.org), and on-site.

**Available on-site evidence:**

- Facilities amenities grid (excerpt from 2005 CBA report)
- Representative sample of facility pamphlets
- Lee County Parks and Recreation Operations Manual (pages 7-22 to 8-7)
- Program/Service Outcome and Delivery Matrix

6.2.2 Directed Leadership Programs

X MET NOT MET

*The program should provide recreation opportunities under direct “face-to-face” leadership.*

**Suggested Evidence of Compliance:**

Provide a copy of brochure, newspaper advertisement or other promotion materials indicating opportunities.

**Notations by Agency Regarding Compliance:**

Programs offered through structured leadership are available at all programming locations and are identified in a variety of ways including on-line (www.leeparks.org), RecreationalLee Yours Program Guide, and on-site flyers. Structured leadership programs are offered by Parks and Recreation programming staff, contract instructors, and volunteers.

**Available on-site evidence:**

- RecreationalLee Yours Program Guide
- Sample of facility pamphlets
- Representative Sample of program flyers
- Sample instructor contract
- Program/Service Outcome and Delivery Matrix

**On Exhibit for on-site review:**

•Educational and Promotional DVDs (Exhibit Z)

6.2.3 Facilitator

X MET NOT MET

*Services/programs should be provided to individuals and small groups of individuals to stimulate and assist them to operate independently of the supervision and control of the recreation Agency.*

**Suggested Evidence of Compliance:**

List groups which your Agency has assisted in this manner.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation facilitates many different groups in providing a variety of programs/services. Following is a list of some of the many different agreements with various organizations.

- Buckingham Radio Flyers
- Community Tennis Association (CTA)
- Lee County Archers
- Fort Myers Rebels (Pop Warner Football)
- Cypress Lake Hornets (Pop Warner Football)
- Lehigh Raiders (Pop Warner Football)
- Fort Myers American Little League
- South Fort Myers Little League
- Greater Ft. Myers Soccer Assoc.
- N. Ft. Myers Soccer Assoc.
- Gateway Soccer League
- Latin American Soccer League
- San Carlos Park Roller Hockey Assoc
- AAU Softball
- Perfect Games
- Babbit Baseball
- Roy Hobbs Baseball
- Pine Island Little League
- Lehigh Little League
- Ultimate Frisbee Club
- Swim Florida Swim Teams (Aquatic Boosters)
- Train Village At Lakes Park
- Edison Sailing Club
- Gateway Bucks (Pop Warner Football)
- Lee County Shuffleboard Club
- Estero/San Carlos Mustangs (Pop Warner)
- N. Ft. Myers Pop Warner Football Club
- Buckingham Wildcats (Pop Warner Football)
- Buckingham Little League
- San Carlos Park Little League
- San Carlos Park Soccer league
- Lehigh Acres Soccer Asso
- San Carlos Park Bridge Club
- Pan American Soccer League
- AAU Baseball
- Union Printers Baseball
- Best Baseball
- Bay Oaks Little League
- North Ft. Myers Little League
- Alva Little League
- YMCA of Lee County
- Florida Mudcutters Mountain Bike Club
- Gulfcoast Swim Team

**Available on-site evidence:**

- Sample Agreements – Radio Flyers, CTA, Archers, Shuffleboard, youth leagues
- Event memo

6.2.4 Programs/Services for a Fee

X MET NOT MET

Programs/Services should be offered for a fee to augment basic recreational opportunities.

**Suggested Evidences of Compliance:**

List programs/services provided for a fee.

**Notations Regarding Compliance:**

While Lee County does not have a goal to generate revenue to cover the cost of services, we do recognize that often fees are important and necessary. We fully understand the perception that certain programs/services are viewed more valuable when a fee is attached and often a fee precipitates greater participation. In certain cases, a fee is necessary to augment a program/service in order to cover a fee for a contracted instructor or other costs. For example, supplies for a ceramics class or for the Certified Aerobics Instructor necessitate charging a fee to participants.

To that end, Lee County Parks and Recreation establishes fees for service in accordance with the Fees and Charges Manual section of the Lee County Administrative Code. The Administrative Code is amended as needed to incorporate new programs and fee structures. It is annually reviewed by all supervisory/management levels in order to adjust fees to accommodate community demands and extraneous costs. New fee categories are established and fee changes occur with review and approval by the Lee County Board of County Commissioners.

Fee are advertised in various publications, and via on-line registration.

**Available on-site evidence:**

- Parks and Recreation's Fees and Charges Manual section of the Lee County Administrative Code
- RecreationalLee Yours Program Guide
- Lee County Parks and Recreation Operations Manual (Pages 3-3)

☞ *There shall be specific objectives established for each program or service.*

**Suggested Evidence of Compliance:**

Provide written objectives for each program or service.

**Notations by Agency Regarding Compliance:**

Objectives for each program/service are established and communicated in a variety of ways including the Program/Service Outcome and Delivery Matrix, RecreationaLee Yours Program Guide (program descriptions), and individual program flyers. The Program/Service Outcome and Delivery Matrix is a compilation of all programs combining like programs with similar objectives into general categories, while keeping large specific programs separate. For example, all swimming lessons are grouped as learn to swim, since all have the same program outcomes, while summer camp is self-standing.

Program objectives reflex the Departments goals and mission statement and are reviewed and subsequently evaluated by the program staff as a component of the regularly scheduled programmers meetings.

**Available on-site evidence:**

- Program/Service Outcome and Delivery Matrix
- RecreationaLee Yours Program Guide
- Sample program flyer
- Programmers meeting minutes
- Copy of Department goals
- Copy of Department mission statement
- Copy of Department vision statement



☞ ***The programs and services shall be available to all cultures and populations resident of and visitors to the community.***

**Suggested Evidence of Compliance:**

Provide maps identifying neighborhoods and showing location of outreach activities, i.e. the distribution of facilities, programs, and services.

**Notations by Agency Regarding Compliance:**

Lee County demographics include:

- \* Lee County had a population of 440,542 (2000 census data)
- \* Growth places the population over 500,000 in 2005
- \* 82% white, 6% black, 9% Hispanic, 3% other (2000 census data).
- \* In 2005 – 2006 school year, there were 71,000 students in Lee County public schools.
- \* Median age is 49 with 24% over age 65 and 16% under age 15 (2000 census data)
- \* Median household income is \$28,448 with 33.6% under \$24,999 (2000 census data)
- \* 90,925 persons with non-institutionalized disabilities (2000 census data).

This data helps drive the distribution of services/programs and facilities. Facilities location map and RecreationaLee program guide pinpoints the distribution of all facilities and programs.

**Available on-site evidence:**

- Lee County Demographics Characteristics graphs
- Come Discover Lee County Parks and Recreation Facility Guide/Map
- RecreationaLee Yours Program Guide
- Lee Island Coast Paddling Trail map
- Work Skills newsletter
- Sample program flyers
- Sample newspaper article

☞ *The Agency's programs shall provide opportunities in all program fields for various levels of proficiency, socio-economic levels, racial and ethnic backgrounds, ages, and gender in accordance with the Agency's statement of mission.*

**Suggested Evidence of Compliance:**

Provide a matrix or listing of program fields, indicating offerings for various levels of proficiency and different ages, and why they are offered.

**Notations by Agency Regarding Compliance:**

In following the lead of our mission statement (...To provide programs and services that add to the quality of life for all Lee County residents and visitors), Lee County Parks and Recreation offers a wide variety of programs for all skill proficiency levels, socio-economic levels, ages, backgrounds and gender.

The Come Discover facility map highlights the distribution of facilities while the RecreationaLee Yours program Guide offers a complete list of current programs noting program ages and required proficiency (where applicable). The Program/Service Outcome and Delivery Matrix delineates all program categories by skill/proficiency level and highlights skills development as part of many program objectives. Programs are established based on customer demand via direct request, needs assessments or participation numbers and there are programs available for all skill levels and ages.

**Available on-site evidence:**

- Department mission statement
- Department vision statement
- Come Discover Lee County Parks and Recreation Facility Guide
- RecreationaLee Yours Program Guide
- Program/Service Outcome and Delivery Matrix

☞ ***The selection of program content, specific activities, and opportunities shall be based upon an understanding of individual differences and the culture of the community.***

**Suggested Evidence of Compliance:**

Provide list of program activities and describe how individual and cultural interests were considered.

**Notations by Agency Regarding Compliance:**

As detailed in Section 6.4 Outreach, the 2000 Census and other data reflects the culture of Lee County's Communities and helps drive the types of programs and services offered. Community demand often generated through Human Services or other organizations help to identify program desires in the more needy areas of Lee County. For example, the summer camp and year-round programs established in 2004 at the Charleston Park facility were in response to community demands generated by the neighborhood association and further advocated by the department of Human Services.

It is also important to note that during the January – April tourist season, Lee County's population can increase by an additional 200,000 people. Lee County Parks and Recreation must serve this diverse population by providing programs to all areas of the County and be particularly responsive to the needs of the large tourism based population.

The "Come Discover" Facility Map notes the distribution of facilities on all socio-economic areas of Lee County and the RecreationLee program guide illustrates all program offerings to tourists and residents, while individual program/center flyers highlight specific programs.

Of special note is the cooperative effort between Lee County Parks and Recreation, the Lee County Sports Authority, and Lee County Visitor and Convention Bureau to promote and provide activities that bring tourism to Lee County. The largest of these events is the Gene Cusic Colligate Baseball/Softball Classic which in 2004 brought 256 teams from northern colleges and universities to Lee County Parks and Recreation facilities for their spring training games. These teams played over 750 games in a 6-week period which generated close to \$6 million in tourist economic impact.

The Department has an Certified Therapeutic Recreation professional serving as the Sr. Supervisor of our special needs team. The special needs team coordinate all Special Olympics, as well as, special needs and adaptive programming. The special needs team will be moving to its new home at the Karl Drews Center in the summer of 2006. The team has a very aggressive program schedule for the special needs community.

**Available on-site evidence:**

- Demographic Characteristics
- Come Discover Lee County Parks and Recreation Facility Guide
- RecreationLee Yours Program Guide
- Sample program flyers/newsletters
- Sports Authority Economic Impact Report

- Special Needs Program schedule.

6.7 Types of Participation

X MET NOT MET

*The program shall provide structurally for a wide range of types of participation.*

**Suggested Evidence of Compliance:**

Provide listing of programs and illustration of activities indicating the range and nature of involvement opportunities.

**Notations by Agency Regarding Compliance:**

As evidenced in the Program/Service Outcome and Delivery Matrix and the RecreationaLee Yours program guide, Lee County offers a host of programs with a wide variety of participation levels and degrees of involvement.

**Available on-site evidence:**

- Program/Service Outcome and Delivery Matrix
- RecreationaLee Yours Program Guide

6.8 Education for Leisure

X MET NOT MET

*The agency should educate for leisure.*

**Suggested Evidence of Compliance:**

Provide examples of programs of various ways in the agency educates for leisure.

**Notations by Agency Regarding Compliance:**

Lee County has a multitude of programs ranging from very passive to extremely active. Most programs by the very nature of their outcomes indirectly educate the participants on one or more aspects of leisure education. For example, a fitness class has program objectives including: to increase/maintain fitness, socialization, and increase sense of wellbeing, which are all parts of providing the participants the benefits of recreation. Some programs such as the Club Rec program include leisure education as part of the specific program standards.

Lee County has adopted the NRPA Hearts N Parks program and philosophy. Since 2000, the Department has actively incorporated the program in the summer camps and all recreation centers teaching children/adults the healthy outcomes of participating in recreation activities and maintaining a healthy lifestyle. Lee County is recognized nationally as a place for sports and healthy lifestyles and is a NRPA Hearts N Parks Magnet Center. April 14, 2005, Lee County Parks and Recreation hosted an NRPA Step Up to Health...It Starts In Parks Summit, with 10 Lee County employees in attendance. This national program is the next generation of the Hearts N Parks program which continues to educate on all the health benefits of recreation and park facilities and programs.

The Department has two First Serve tennis sites. First Serve is a national program that teaches children life skills and healthy choices through tennis.

In addition to individual programs providing leisure education, an aspect of the marketing groups function is to include promoting and educating the public on the benefits of participating in recreation activities and visiting park facilities. This is accomplished through face to face public participation via the RecMobile and mass media via various video segments.

**Available on-site evidence:**

- Lee County Parks and Recreation Operations Manual  
(pages 7-23, 11-1 to 11-5, 11-28 to 11-29)
- Program/Service Outcome and Delivery Matrix
- Minutes of outcomes development and evaluation
- RecreationalLee Yours Program Guide
- Select programmers meeting minutes
- NRPA Step Up to Health...It Starts In Parks Summit information and Employee Sign in.
- Hearts N Parks Committee minutes
- Sample program flyers
- First Serve Flyer

**On Exhibit for on-site review:**

- Educational and Promotional Videos – (Exhibit Z)

## 6.9 Program evaluation

*Program evaluations, based on stated program objectives, shall be conducted systematically and regularly.*

**Suggested evidence of compliance:** Provide completed copies of various program evaluations with analyses.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation program evaluation and analysis comes in many forms. Procedures are set forth in the Operations Manual for the evaluation of individual programs.

The Department's Cost Benefits Analysis (CBA) is a comprehensive report that evaluates all the department's facilities and programs in terms of cost effectiveness and comparison. This document is used to further analyze programs for expansion, deletion, or modification.

Large programs, such as summer camp, are evaluated as a whole through parent questionnaires and administrative/site personal evaluation and analysis through on-site post camp meeting. Staff evaluates the summer camp staff training and the results are analyzed by the program supervisors.

Program objectives are reviewed annually to assure programs are meeting established outcomes.

**Available on-site evidence:**

- Lee County Parks and Recreation Operations Manual (page 7-33).
- Summer camp parent questionnaire report
- Sample summer camp parent questionnaire
- Camp Training evaluation report
- Sample camp meeting analysis/evaluation (Post Camp Meetings)
- Aquatic class evaluations/analysis
- Sample Customer Satisfaction Survey
- Customer Satisfaction Report
- Programmer meeting minutes
- Teen Camp Committee minutes
- Manager meeting minutes (CBA analysis)

**On Exhibit for on-site review:**

- Cost Benefit Analysis (CBA) – (Exhibit C)

## 7.0 FACILITY AND LAND USE MANAGEMENT

Note: Details of documentation on-site.

### 7.1 Acquisition of Park and Recreation Lands X MET NOT MET

*There should be written policies and procedures for the Agency to acquire lands for park, recreation, conservation, and historical-cultural purposes.*

**Suggested Evidence of Compliance:**

Provide citation of legal authority to acquire lands and copy of policies and procedures.

**Notations by Agency Regarding Compliance:**

The purchase or condemnation of land for the public good is the responsibility of the Lee County Lands Department. Administrative Code AC-5-8 governs the Department's acquisition procedures. Lee County's Conservation 2020 program identifies, nominates and ranks parcels to be obtained for conservation and passive recreation. The County Lands Department coordinates this program. Florida Statute 125.33 governs acquisition of land. Lee County Parks and Recreation assists the County Lands Department by identifying suitable parcels to have them transferred or purchased for Department use.

The following evidence is provided to describe Lee County's acquisition procedures.

**Available on-site evidence:**

- Comprehensive Plan: Parks, Recreation and Open Space.
- Administrative Code AC-5-8
- Conservation 2020 Program highlights
- Conservation 2020 Acquisition & Stewardship Program brochure
- Lee County Ordinance #96-12
- Lee County Ordinance #97-08

### 7.2 Development of Lands X MET NOT MET

*There should be a written land development policy and procedures for development of park and recreation lands and facilities within the financial framework of the Agency.*

**Suggested Evidence of Compliance:**

Provide a copy of policy and procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation uses the Lee County Comprehensive Plan, Chapter 5 of the Lee Plan and the Parks and Recreation Operations Manual as guides in the development of lands. These documents provide the framework for the procedures to develop a site into a park or conservation area. Lee County Parks and Recreation works with various user groups, public

agencies and professional services to develop facilities appropriately that meet the needs of the community.

**Available on-site evidence:**

- Chapter 5 of the Lee Plan
- Land Development section of the Operations Manual
- PinEstero Marsh Preserve 2020 Management Plan

**On Exhibit for on-site review:**

- Lee County Comprehensive Plan (Exhibit G)

7.3 Defense Against Encroachment

X MET     NOT MET

*There should be procedures for protecting park and recreation lands and facilities from encroachment.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works with the support of the Lee County Division of Lands, Lee County Code Enforcement and the County Attorney's office to resolve any encroachment issues as soon as identified. The Parks and Recreation Operation Manual provides general procedures staff should use when discovering encroachment. Lee County Ordinance 02-12 provides the legal authority to enforce. Viscott property site plan amendment and Gladiolus RPD conditions are examples of review for adjacent land development.

**Available on-site evidence:**

- Lee County Operations Manual Encroachment section
- Vicott Property Site Plan amendment
- Gladiolus RPD conditions developed by parks staff

**On Exhibit for on-site review:**

- Lee County Ordinance 02-12 (Exhibit KK)



7.4 Disposal of Lands

X MET  NOT MET

*There should be written procedures providing safeguards for the public interest when it becomes necessary to dispose of park and recreation lands.*

**Suggested Evidence of Compliance:**

Provide a copy of procedures.

**Notations by Agency Regarding Compliance:**

The Division of County Lands, within the Public Works Department, has a procedure for disposal of County-owned lands. A copy of this procedure is on file for review. The Administrative Code (AC-8.5) outlines the legalities of property disposal. The disposal must not conflict with adopted policies in the Lee Plan (section 5 & 6) and Land Development Code relating to impact fees buffering etc. The State of Florida has requirements to return funds awarded for grants and other state support of Recreational Facilities. FRDAP, Florida Community Trust, Land and Water Conservation Fund, and all grants guided by Florida Statutes and Administrative Code are subject to refund in the event of disposal of park lands or facilities.

**Available on-site evidence:**

- Lee Plan Section 5 and 6 policy
- Administrative Code AC-8.5
- FRDAP grant requirements

**On Exhibit for on-site review:**

- Lee Plan (Exhibit G)

7.5 Operations and Maintenance

X MET  NOT MET

*There shall be a written maintenance and operations plan for management of the Agency's park and recreation areas, facilities, and equipment.*

**Suggested Evidence of Compliance:**

Provide a copy of the current management plan.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation strives to provide well-maintained facilities, equipment, conservation areas, park and recreation areas. A comprehensive Parks and Recreation Operations Manual and Land Stewardship Manual have been produced to assist staff with this mission. These two manuals are well thought out tools that reflect the high standards Lee County has in regards to its park, recreation and conservation areas.

The Lee County Parks and Recreation Operations Manual chapters 4, 5, 6, 7, 8 and 13 provides guidance to staff in regard to maintenance and operations of Lee County Parks and

Recreation facilities. In addition, the Parks and Recreation's Land Stewardship section has a manual specific to maintaining and restoring resource-based areas.

The Safety Manager is tasked with making sure all monthly inspections are submitted and then filing documents. The Land Stewardship section maintains their own files for resource based facilities.

The following evidence is provided to describe the commitment Lee County Parks and Recreation has to providing quality facilities:

**Available on-site evidence:**

- Copies of pertinent chapters of Lee County Parks and Recreation Operations Manual.
- Copy of Land Stewardship Operations Manual.
- Conservation 2020 management priorities ranking.
- Sample of completed monthly park maintenance/safety checklist.
- Sample of completed Land Stewardship site inspection.

**On Exhibit for on-site review:**

- Parks and Recreation Operation Manual (Exhibit A)

## 7.6 Facilities Management

7.6.1 Legal Requirements X MET    NOT MET

*There should be a regular review of legal requirements related to facilities, such as licenses, sanitary regulations, fire laws, safety measures, and inspections of adherence thereto.*

**Suggested Evidence of Compliance:**

Provide date of last review and inspections.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works in conjunction with the local Health Dept., Fire Depts, and Lee County Risk Management office to insure compliance with all applicable laws, rules and standards. The Parks and Recreation Safety Manager is tasked with collecting and filing all reports in regard to any legal requirement/guidelines the Division is obligated to perform. In addition, the Parks and Recreation Department has its own internal review with staff background checks, staff motor vehicle license checks, facility inspections, playground audits, pesticide/herbicide applications licensing and pool quality checks.

The following evidence is provided to demonstrate the Department's efforts to insure facilities meet all applicable laws, rules or standards.

**Available on-site evidence:**

- Copies of annual purchase orders to service all fire extinguishers

- Copies State elevator inspection certificate
- Copies of State boiler inspection certificate
- Copies State Operating Permit for pool facilities
- Copies monthly Health Dept. Swimming Pool report
- Copies of Lifeguard Training course completion
- Copy of Safety Committee Facility Inspection (Boca Grande, Rutenberg) as samples
- Copy of e-mail sent to review motor vehicle licenses
- Copy of staff DMV license list with expiration dates.
- Copy of staff Pesticide License (samples)

7.6.2 Building Security Plans

X MET     NOT MET

*A security plan should be developed for each building and facility. Annual review and inspection should reflect all changes.*

**Suggested Evidence of Compliance:**

Provide copy of last annual review of plan and inspection of facilities.

**Notations by Agency Regarding Compliance:**

The Parks and Recreation Safety Manager works with field staff to develop and file security plans for all facilities that have buildings or controlled access. These plans are checked annually to update information. This requirement is specified in the Lee County Parks and Recreation Safety and Security Manual.

The following security plans are provided to verify plans in place and a copy of the e-mail sent annually to remind staff to review plans for updates:

**Available on-site evidence:**

- Index of Safety and Security Manual applicable section noted.
- Copy of annual update reminder sent from the office of the safety manager.
- Alva Community Center
- Bay Oaks Recreation Center
- Bonita Beach Park
- Boca Grande Community Center
- Boston Red Sox Player Development Complex
- Bowditch Point Regional Park
- Buckingham Community Center
- Caloosahatchee Regional Park
- City of Palms Park
- Concession stands (Lehigh Park, Lehigh Middle, Alva Park, Buckingham Park, Three Oaks Comm. Park, Estero Park, San Carlos Elem., Hancock Park, Kelly Road Soccer Complex, N. Ft. Myers Comm. Park, Bayshore Soccer , Rutenberg)
- Extension Service building
- Hancock Park Maint. building

- Harlem Height Comm. Center
- Karl Drews Comm. Center
- Three Oaks Comm. Center
- Lakes Park
- Lynn Hall Regional Park
- Bayshore Soccer Complex Maint. Building
- Lehigh Park Maint. Building
- Buckingham Park Maint. building
- Rutenberg Park Maint. building
- Harlem Heights Maint. building
- Manatee Park
- Matlacha Park & Center
- N. Ft. Myers Comm Park Maint. building
- N. Ft. Myers Comm. Park Recreation building
- Olga Comm. Center
- Phillips Park Maint. building
- Rutenberg Rec. Room
- Schandler Hall Comm. Center
- Six Mile Cypress Slough
- Lee County Sports Complex
- Terry Park
- Public Swimming pools
- Three Oaks Park Maint. building
- Veterans Park Recreation Center
- Veterans Park Maint. Building
- Wa-KeHatchee Recreation Center

**Available on-site evidence:**

- Parks and Recreation Safety and Security Manual (Exhibit I)

7.6.3 Preventive Maintenance

X MET     NOT MET

*There should be a preventive maintenance program, including regularly scheduled systematic inspections and careful safety checks, for each facility.*

**Suggested Evidences of Compliance:**

Provide a copy of the programs, including inspection schedules.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation along with Lee County Maintenance and Repair Services, work together to insure well-maintained facilities through a comprehensive preventative maintenance program. Both agencies have in place preventative maintenance standards to protect the investment in infrastructure and provide a safe environment for our customers.

The Parks and Recreation Operations Manual, chapters 5, 6, 8 and 15, lay the framework for staff responsibilities and inspections of facilities. Maintenance and Repair Services has in place a preventative maintenance schedule for all aspects of buildings, lighting systems, irrigations systems, ice machines, automated gates, plumbing, H.V.A.C. systems and various park amenities. The Safety Manager's office is the repository for all files related to inspections of Parks and Recreation facilities.

**Available on-site evidence:**

- Pertinent sections of chapters 5, 6, 8, & 15 with preventative maintenance sections highlighted.
- Aquatics Lead Guard training maintenance duties.
- Monthly swimming pool reports.
- Handbook for public playground safety.
- The Dirty Dozen playground hazards list.
- Daily playground inspection form.
- Weekly playground inspection form.
- Monthly Supervisor playground inspection form.
- Playground safety inspection audits performed by certified playground safety inspectors.
- Monthly Park Maintenance/safety checklist.
- Lee County Parks and Recreation Center inspections.
- Summer Camp Quality Assurance checklist.
- Water systems reports for drinking water standards at facilities that have water treatment plants.
- Maintenance and Repair Services preventative maintenance completed list and maintenance request completed work orders.

7.7 Fleet Management

X MET     NOT MET

*There should be a fleet management plan, including an inventory and maintenance schedule, for all vehicles and other major equipment.*

**Suggested Evidences of Compliance:**

Provide copy of plan.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works in conjunction with Lee County Fleet Management to insure a maintained fleet of vehicles, rolling stock and equipment. Lee County Fleet Management has in place a preventative maintenance service plan for all vehicles, equipment and rolling stock. In addition, a point system is used to determine when a unit has reached the end of its service life and must be replaced.

The Parks and Recreation Operations Manual, Chapter 15, covers policy in regard to Parks and Recreation's responsibilities to the vehicles, rolling stock and equipment used to achieve the mission. Fleet Maintenance sends overdue notices via the County's e mail system to "Parks-All" to inform Parks and Recreation staff.

**Available on-site evidence:**

- Lee County Fleet Management’s service plans.
- Sample overdue notice from Fleet.
- Lee County Parks and Recreation Operations Manual copies of section that pertains to operator responsibility.
- Lee County Fleet Maintenance replacement plan.
- Lee County Fleet inventories of vehicles, rolling stock and equipment.
- Forms used to perform monthly safety check for all units.

7.8 Agency-owned Equipment and Property X MET  NOT MET

*There should be a policy and procedures for the management of and accountability for Agency-owned property, including purchase and distribution to authorized persons, proper training of appropriate personnel in use of equipment, safe and secure storage of equipment, and maintenance of all equipment in operational readiness and working order.*

**Suggested Evidences of Compliance:**

Provide copy of policy and procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works under the policy and procedures of the Board of County Commissioners’ Administrative Codes and Purchasing Manual to obtain the equipment and services needed.

Parks and Recreation’s supervisory staff is assigned the responsibility of insuring the safe and secure storing of all equipment. Additionally, the supervisory staff works with facility staff to keep equipment in a state of operational readiness and working order. Contracted repair services are retained for all equipment not maintained by Lee County Fleet Management.

The following evidence is offered to describe the policies and procedures that provide guidance in regard to management and accountability of agency owned property:

**Available on-site evidence:**

- Lee County Administrative Code: Policy on Tangible Personal Property owned by Local Governments AC-3-14 revised 08/09/05
- Lee County Administrative Code: Policy of County Fleet assignment and vehicle usage criteria AC-5-1 revised 8/03/92.
- Fixed Asset Report sample
- Parks and Recreation Operations Manual Chapter 15

**Available on-site evidence:**

- Lee County Purchasing manual.(Exhibit J)

7.9 Natural Resource Management

X MET  NOT MET



*There shall be written environmentally sound standards and procedures for development and maintenance of the Agency's natural resources, with particular attention to protection and preservation of especially-sensitive land and water areas.*

**Suggested Evidences of Compliance:**

Provide copy of standards and procedures.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation is sensitive to our environment and has taken action to do its part to protect and preserve resources. The Land Stewardship section of the Parks and Recreation Department is responsible for the Natural Resource management of all resource-based parklands. Land Stewardship's role is described in section 9-1 to 9-2 of the Lee County Parks and Recreation Operations Manual.

The Department's Land Stewardship workgroup is responsible for developing all standards and procedures for the County's natural resources and Conservation 20/20 sites. Conservation 20/20 is the County's initiative to preserve 20% of the County by the year 2020.

Recycling, hazardous waste handling/disposal, protection of resources and the use of appropriate trees and plants are described in section 11-20 to 11-27 of the Lee County Parks and Recreation Operations Manual. All Parks and Recreation facilities are directed to recycle materials designated as recyclables by the Lee County Solid Waste Division. All waste is to be disposed of in an appropriate manner.

**Available on-site evidence:**

- Copy of pages 9-1 and 9-2 of the Parks and Recreation Operations Manual, Land Stewardship
- Table of Contents to Land Stewardship Operations Manual
- Copy of pages 11-20 through 11-27 of the Park and Recreation Operations Manual, Environmental Programs
- Management Status reports copies from January 2005 to November 2005 for various preserves.
- Various Conservation 2020 program land acquisition status reports.

**Available on-site evidence:**

Land Stewardship Operations Manual (Exhibit K)

7.10 Maintenance Personnel Assignment

X MET  NOT MET

*There should be competent personnel assigned to clearly defined duties for routine maintenance, repairs and minor improvements, general cleanliness and overall attractiveness of areas, facilities, and equipment.*

**Suggested Evidences of Compliance:**

Provide procedures for assignment of personnel.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation works with the assistance of Lee County Human Resources to obtain the best-qualified maintenance staff possible. Writing clear concise job descriptions and offering competitive pay and benefits accomplish this by attracting a large pool of applicants. Parks and Recreation identifies the need for maintenance staff, writes justifications and submits the personnel request annually in the budget process. County Administration and the Board of County Commissioners approve or deny these requests.

The addition of personnel is governed by Administrative Code AC-3-6 and the budget process approval is done annually in September. The requesting Department, beginning in March of each year, produces request and justifications. Human Resources do job classification surveys periodically to ensure Lee County is competitive with wages and benefits.

**Available on-site evidence:**

- Samples of two position request forms FY 05/06
- Sample job descriptions for maintenance positions and maintenance supervisors.
- Administrative Code AC-3-6

7.11 Depreciation and Replacement

X MET  NOT MET



*There should be an established replacement schedule for all park and recreation properties and facilities, and equipment.*

**Suggested Evidences of Compliance:**

Provide copy of replacement schedule.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a replacement schedule for all capital maintenance type items such as playgrounds (replaced on 10 year cycle), fencing, signage, resurfacing, athletic court resurfacing and lighting through the County's Capital Vehicles and Improvement Program (CIP) budget process. CIP process is also the mechanism by which facilities are renovated. Chapter 6 of the Lee Plan outlines Capital policy for larger facilities and recommended levels of service. Our operating budget has available line items for replacement of minor equipment, under \$750. Additionally, a budget for replacement vehicles and equipment over 1 ton is made available and funded by Lee County Fleet Management, and the County's ITG Department has regular schedule replacement for computers. For all the above mentioned, there is specific criteria established by Fleet/ITG for all replacements. Database schedules are on file. The CIP schedule is budgeted each year and presented to the Board of County Commissioners for approval. Depreciation is calculated by the Risk Management Department for insurance purposes.

**Available on-site evidence:**

- Capital Improvements Chapter VI Goals and Objectives
- CIP Replacement Schedule for paving
- County Computer Refresh/Replacement Program

## 8.0 SAFETY AND SECURITY

Note: Details of documentation on-site.

### 8.1 Authority

X MET     NOT MET

*The authority of all park and recreation personnel as related to law enforcement (including whether deputized or not), traffic control, and general security functions shall be clearly set forth by policy statement and communicated to appropriate persons. A person shall be designated as liaison to the jurisdictional police department.*

#### **Suggested Evidences of Compliance:**

Provide copy of policy and method of distribution, and name of liaison.

#### **Notations by Agency Regarding Compliance:**

The Department has a highly trained Ranger Unit. The Sr. Supervisor of the Park Ranger unit is the department's designated liaison to local law enforcement. Also each area field supervisor acts as a liaison with the Sheriff's District Offices within their geographic area, as outlined in the Lee County Parks and Recreation Operations Manual, Chapter 11, and the Lee County Ordinance 02-12, Section 2.2. Park ranger staff and the park ranger supervisors issue citations and serve as informational officers as related to communicating park rules and regulations to visitors. All Rangers undergo continued education and training.

All Parks and Recreation staff upon employment reviews a copy of the Parks and Recreation Operations Manual. A current version of the Parks and Recreation Operations Manual is available to all staff on-line at the Parks and Recreation website. A "hard" copy of the manual is kept at each work site and is available for all employees to review. Parks and Recreation employees are encouraged to enforce all safety rules and regulations as it pertains to all park patrons and their safety.

Each member of the Park Ranger Unit is given a copy of a "field guide booklet" of the Lee County Ordinance 02-12.

#### **Available on-site evidence:**

- Parks and Recreation Operations Manual pertinent sections
- Field Guide booklet of the Lee County Ordinance 02-12
- Minutes of Manager's Meeting
- Copy of Blue sheet 20020194 & 20050892 (2020 Rangers)
- Letters to Lee County Sheriff's Office designating department liaison

#### **On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

## 8.2 Traffic Control

### 8.2.1 Plan

X MET     NOT MET

*There should be a plan for traffic control, worked out in conjunction with the jurisdictional police for:*

- *each activity/facility site, including significant transfer points from highway to park road, parking, and foot travel;*
- *each major event where there are large number of people and vehicles;*
- *crowd control (nonvehicular);*
- *traffic patterns; and*
- *emergency disasters, such as fires, tornadoes, riots.*

#### **Suggested Evidences of Compliance:**

Provide copy of plan.

#### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation Department has adopted the State DOT guidelines for traffic control and crowd control within our park boundaries and work in conjunction with local law enforcement outside of park property.

Safety equipment, temporary signage, electronic message boards and traffic control devices are used to direct, slow down and control the flow of traffic for each activity/facility site, which includes significant transfer points from highway to park road, parking, and foot travel.

For major events where there are large numbers of people and vehicles, a Special Events Permit is required for specific events attracting greater than 1,000 visitors. This permit requires approval by law enforcement, Parks and Recreation and other agencies responsible for traffic and crowd control. Specific requirements for the groups to follow are detailed and compliance must be insured before the permit is approved.

In addition, traffic and crowd control for events at the Lee County Sports Complex are under the jurisdiction, direction and operation of the Lee County Sheriff's Office. Off duty Sheriff's deputies are hired by Parks and Recreation in the number recommended by the Sheriff's Department for each specific event.

Emergency disasters may necessitate closing of Park and Recreation areas by the Director as provided for in Lee County Ordinance 02-12, Section 16.6. and 19. Person and property protection during emergencies is addressed in Chapter 15 of the Parks and Recreation Operations Manual.

#### **Available on-site evidence:**

- Parks and Recreation Operations Manual chapter 15
- Lee County Ordinance 02-12
- Special Event Permit

8.2.2 Personnel

X MET  NOT MET

*There should be special in-service training for the safety of personnel handling traffic at events and in parking areas.*

**Suggested Evidences of Compliance:**

Provide copy of training schedule.

**Notations by Agency Regarding Compliance:**

The Lee County Sheriff's Department deputies direct and control traffic on the public roadways at Parks and Recreation events. Parks and Recreation staff is responsible for traffic control within the park boundaries as authorized in Lee County Ordinance 02-12, section 18. Staff conducts "pre-event" and "post-event" meetings to discuss the traffic control plan. The Special Services personnel are certified by the International Municipal Signal Association as safety specialists in work zone traffic control.

**Available on-site evidence:**

- Parks and Recreation Operations Manual (chapter 15)
- Lee County Ordinance 02-12
- Pre – event meeting notes and site maps
- Certifications

8.2.3 Recording Procedures

X MET  NOT MET

*There should be clearly identified procedures for recording and documenting accidents and disturbances.*

**Suggested Evidences of Compliance:**

Provide copy of procedures (for traffic accidents only).

**Notations by Agency Regarding Compliance:**

Standardized forms provided by Risk Management are used to document and report losses, accidents and incidents. Procedures are outlined in the Parks and Recreation Operations Manual.

**Available on-site evidence:**

- Parks and Recreation Operations Manual (chapter 15)
- Accident Reporting Kit and forms

8.2.4 Roadblocks and Street Closures X MET  NOT MET

*There should be a policy for use of road-blocks and street closures.*

**Suggested Evidences of Compliance:**

Provide copy of policy.

**Notations by Agency Regarding Compliance:**

The department's traffic control policy is listed in the Parks and Recreation Operations Manual, chapter 15. The Lee County Ordinance 02-12, Sections 19.3, gives authority to the Parks and Recreation director to regulate traffic and close park areas for special events. However, the Special Events Permit application requires authorization from the Lee County Sheriff's Office and the Department of Transportation, in addition to, Parks and Recreation, Emergency Management Services, Public Safety and Risk Management, for street closures. Any roadblocks and street closures must be authorized and overseen by the Lee County Sheriff's Office.

**Available on-site evidence:**

- Lee County Parks and Recreation Operations Manual (chapter 15)
- Lee County Ordinance 02-12
- Special Events Permit Application

8.3 Law Enforcement

8.3.1 Training Program X  NOT MET

*There shall be a law enforcement in-service training program conducted either by the Agency or in conjunction with the jurisdictional police or other agency.*

**Suggested Evidences of Compliance:**

Provide copy of program outline and training schedule.

**Notations by Agency Regarding Compliance:**

The Lee County Sheriff's deputies are certified law enforcement officers with arrest powers from an accredited agency and are the law enforcement agency with jurisdiction over Lee County Park and Recreation areas. The park ranger staff, selected managers, senior supervisors and supervisors also have been certified by the County Sheriff's Department as Parking Enforcement Specialists. The Department's Park Ranger Unit has the main responsibility for enforcing park rules/ordinance in all Parks and Recreation Facilities. The Park Rangers are additionally certified through the County's Code Enforcement program. The Park Rangers periodically attend code enforcement training programs. In addition, fire safety training is conducted as a part of employee orientation as indicated in the Land Stewardship Operations Manual, Section 2.1.3.

**Available on-site evidence:**

- Parks and Recreation Operations Manual (Chapter 15)
- Staff Certifications and training logs
- Land Stewardship Operations Manual (Section 2.1.3)

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Land Stewardship Operations Manual (Exhibit K)

8.3.2 Handling of Evidentiary Items X MET  NOT MET

*There should be procedures for all personnel regarding handling of drugs and narcotics, weapons, and other evidentiary materials.*

**Suggested Evidences of Compliance:**

Provide copy of procedures. *Management Manual*, chp, 17 @ pp.761-762

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation Operations Manual contains guidelines for handling of evidentiary items.

**Available on-site evidence:**

- Parks and Recreation Operations Manual (chapter 15)

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)

8.3.3 Handling of Disruptive Behaviors X MET  NOT MET

*There should be procedures regarding assaults and batteries, crowd disturbances and other types of incidents/offenses.*

**Suggested Evidences of Compliance:**

Provide copy of procedures.

**Notations by Agency Regarding Compliance:**

Guidelines set forth in the Parks and Recreation Operations Manual applies to park patrons in general, and participants enrolled in structured and non-structured recreation

programs. Procedures for minors and adults vary based on circumstances. Specific expectations of appropriate behavior in Parks and Recreation areas are outlined in Lee County Ordinance #02-12. Rangers offer training to park staff in how to handle park patrons.

**Available on-site evidence:**

- Parks and Recreation Operations Manual, Section 7-11
- Use of Force Policy
- Lee County Ordinance (02-12, Sections 16.0)
- Copy of Ranger Training Session (Addressing Park Patrons with Ease)

8.4 General Security

8.4.1 Plan

X MET  NOT MET

☞ *There shall be a general security plan both for general use of outdoor areas and facilities and buildings, and for specific group program/activity functions.*

**Suggested Evidences of Compliance:**

Provide copy of plans.

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation Operations Manual contains general security plans for the use of outdoor areas, facilities and buildings, and for specific group program/activity functions. These guidelines apply to park patrons in general and participants enrolled in structured and non-structured recreation programs. The department has established safety guidelines for staff that which are outlined in Chapter 15 of the Lee County Parks and Recreation Operations Manual.

In addition, through regularly scheduled facility inspections and maintenance, areas in need of attention are identified and addressed. An aggressive approach funded by dedicated Capital Improvement budgets for Countywide playground, athletic field, boardwalk, fencing, etc. allows scheduled systematic replacement and upgrades to existing facilities. Facilities and grounds in need of repair are addressed and repaired on a timely basis.

All contracted special events are required to have uniformed deputies with such numbers as are determined by the Lee County Sheriff's Office as part of the Special Events permitting process administered through Lee Cares. Additional security upgrades such as lighting of playgrounds to discourage night vandals, automating park gates and restroom doors to close and lock at predetermined times, installation of security cameras, and hiring security services when necessary are other ways Lee County Parks and Recreation addresses general security concerns.

Structured programs are targeted at populations in an effort to reduce vandalism that

occurs when select groups are faced with inordinate amounts of free or idle time and whom have historically abused facilities. Evening and weekend teen programs have proven quite successful in providing a healthy outlet for the community youth.

**Available on-site evidence:**

- Parks and Recreation Operations Manual (chapter 15)
- Security Plans for facilities
- 21<sup>st</sup> Century Community Learning Center Juvenile Program
- Emergency Response List

**On Exhibit for on-site review:**

- Risk Management Plan (Exhibit L)
- Parks and Recreation Operations Manual (Exhibit A)

8.4.2 In-Service Training X MET    NOT MET  
*There should be an in-service training program, which includes the role of each employee and volunteer in the general security plan.*

**Suggested Evidences of Compliance:**

Provide copy of program outline and training schedule.

**Notations by Agency Regarding Compliance:**

In-service training is provided by Parks and Recreation management and/or supervisory staff during initial employee orientation and when updating is needed. Whenever an employee is newly hired or transfers into another position assignment, their immediate supervisor conducts site-based in-service training, including completion of a New Employee Orientation Checklist. In addition to new staff in-service training, site supervisory staff conducts in-service training with volunteer staff. Pre-event training is held prior to all special events that are planned at specific sites, this training would include but not limited too: crowd control, traffic control, emergency action plans, etc. Regular safety meetings held with staff reviews the general security plans.

Lee County Parks and Recreation Aquatics staff is required to incorporate in-service training into their daily routine. Documented in-service training is required at least 4 hours a month by the Aquatic Risk Management firm the department uses.

**Available on-site evidence:**

- Parks and Recreation Operations Manual
- New Employee Training Program
- Staff In-Service Training logs

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)



## 9.0 RISK MANAGEMENT

Note: Detailed documentation on-site.

9.1 Statement of Policy X MET    NOT MET

*There should be a policy for risk management, which is approved by the Agency policy entity.*

**Suggested Evidences of Compliance:**

Provide copy of policy and board minutes adopting policy.

**Notations by Agency Regarding Compliance:**

The Board of County Commissioners, Lee County, Florida and the Lee County Parks and Recreation Department insist that all possible measures be taken to ensure the safety of County employees, the public, and all County property. Lee County has prepared and established safety and health requirements and policies aimed to assist County employees toward the goal of safe performance of duties and constant vigilance against injury.

**Available on-site evidence:**

- Selected excerpts from Parks and Recreation Operations Manual – Risk Policy Statement.
- Risk Policy statement from Parks and Recreation Risk Management Plan.

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Parks and Recreation Risk Management Plan (Exhibit L)
- Lee County Risk Management Plan- (Exhibit LL)  
(Revised 1/06, adopted by Board of County Commissioners)

9.2 Risk Manager X MET    NOT MET

*There should be an employee with risk management responsibility and authority to carry out the policies established for risk management.*

**Suggested Evidences of Compliance:**

Provide copy of job description evidencing responsibility for risk management.

**Notations by Agency Regarding Compliance:**

Lee County is committed to safety and managing risk. As such, the County has a Risk Manager on staff. The Parks and Recreation department enhances the risk management program with a safety and security manager.

The Lee County Risk Manager is directed by the Lee County Budget Services Director while the Lee County Parks and Recreation Safety and Security Manager is responsible to the Lee County Parks and Recreation Director through the Deputy Director. Both positions work together for the benefit of the Lee County Parks and Recreation Department by holding monthly county-wide Risk Management Safety Coordinators meetings.

The Lee County Risk Manager is responsible for the fiscal auditing of the County, insurance brokerage services actuarial services claims administration, etc. as detailed in the job description. The Lee County Parks and Recreation Manager of Safety and Security is responsible for inspecting of facilities and parks for compliance with standards for maintenance, safety, security, etc. as detailed in the job description.

**Available on-site evidence:**

- Job descriptions of both the Lee County Risk Program Manager and the Lee County Parks and Recreation Manager of Safety and Security.

9.3 Plan

X MET  NOT MET

☞ ***There shall be a risk management plan reviewed annually and updated to reflect new information, operational techniques, and programs/services.***

**Suggested Evidences of Compliance:**

Provide copy of the plan with dated revision.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has developed a Risk Management Plan. This plan complements the Lee County BOCC Plan and strategically lays out the mission of Risk Management within the Parks and Recreation Department.

Lee County Parks and Recreation has a comprehensive operational manual, which includes a large safety section with risk management issues covered throughout. As noted in the available evidence, the operations manual covers topics such as automatic insurance, security plans, playground safety, guidelines on child abuse, participant safety, aquatics standards, and risk policy statements. The Operations Manual is available at every staff location as well as available on-line. In addition, Lee County Parks and Recreation also has compiled a large Safety Manual relating to everyday operations and equipment use. The Lee County Parks and Recreation Safety and Security Manual is given to all supervisors on computer disc and is available to all staff at their reporting locations. It is also available on-line under the Lee County Parks and Recreation web page.

**Available on-site evidence:**

- Cover page from Parks and Recreation Risk Management Plan

- Cover page from Lee County Risk Management Plan

**On Exhibit for on-site review:**

- Parks and Recreation Risk Management Plan (Exhibit L)
- Lee County Risk Management Plan- (Exhibit LL)  
(Revised 1/06, adopted by Board of County Commissioners)

9.4 Risk Analysis and Control Approaches

X MET     NOT MET

*There should be a risk analysis systematically performed annually and with approaches to control of risks clearly identified.*

**Suggested Evidences of Compliance:**

Provide copy of analysis.

**Notations by Agency Regarding Compliance:**

The Lee County Parks and Recreation Manager of Safety and Security maintains several databases for continual analysis of operations in the system and monitoring of staff to ensure proper licensing and training is current. Vehicle inspections, playground inspections, facility inspections and losses are tracked and evaluated. A copy of the current report summary is included in on-site evidence. The previous years' summaries can be viewed in the Manager of Safety and Security's office or accessed via computer on the S- drive at Excel/Ed/Safety Reports 2003-05. Samples of the individual reports and inspections are available on-site. The complete reports can be viewed in the Safety and Security Manager's office. Currently, these are hard copies but are in the process of being archived electronically.

Risk Analysis Reports from Gallagher and Bassett are sent through the County Risk Manager for his review and forwarded to the Parks and Recreation Safety and Security Manager for any needed action.

**Available on-site evidence:**

- Gallagher/Bassett Claims and Losses Report for 10/1/2001-10/1/05
- Copy of 2004-2005 database tracking Facility Safety Inspections, Playground Inspections, Recreational Center Inspections, Worker Compensation Claims, Vandalism/Theft, Property Damage, Public Injuries, Vehicle Inspections, and Weekly Safety Meetings
- Samples of Playground Inspection Reports, Facility Inspection Reports, Recreation Center Inspection Reports, Liability Accident/Incident Reports, Property Loss Reports, Workers Compensation Reports, Vehicle Crash Reports, Vehicle Inspections, and Weekly Safety Meetings

9.5 Employee Involvement

X MET     NOT MET

*The risk management plan should involve active interaction between employees at all levels and administrators/supervisors.*

**Suggested Evidences of Compliance:**

Provide description of interaction.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation employees are an integral part of the risk management plan. All levels of employees are offered the opportunity to serve on any of the four various safety committees chaired by the Lee County Parks and Recreation Manager of Safety and Security. These committees are as follow:

- Ballfield Safety Committee
- Facility Inspection Tour Committee
- Emergency Planning Committee
- Incident Review Committee

Each of these committees meet monthly. Members of each of these committees are comprised of all job classes and the committees are always open to anyone wishing to become a member.

The **Ballfield Safety Committee** focuses on playing conditions on and surrounding all ballfields to assure that fields are being properly maintained; securing the safety of patrons using the facilities. Recommendations for modifications in maintenance, field design, turf and renovations are forwarded to the immediate supervisor, manager, deputy director and director for review. Planning for large fiscal impacts can then be prioritized and scheduled.

The **Facility Inspection Tour Committee** centers its attention on the safety requirements of all facilities other than ballfields. This includes open areas, preserves, playgrounds, recreation centers, beaches and equipment. Both the safety of park patrons and staff are equally important. It is necessary to encourage staff at the various facilities to interact with the safety committee to root out safety problems they may have.

The **Incident Review Committee** must review all accidents, both public and staff without finding personal blame. In reviewing accidents and incidents, the committee makes finding a root cause their priority instead of affixing culpability. All incidents for the prior month are reviewed and recommendations are made to all supervisors, staff, and administration to avoid future accidents without attaching blame to individuals.

The **Emergency Planning Committee** focuses on evacuation routes in our facilities, hurricane and storm preparations and recovery, and fire prevention. Emergency plans for hurricanes are reviewed annually and revised according to needs. Fire drills are scheduled and monitored in a different facility each month.

The minutes of all four of these committees are sent to the Department Director, the Deputy Director, Managers, and all supervisors to post for their staff.

Lee County Parks and Recreation also interacts with its staff by offering training sessions for all staff including orientation training before an employee begins their job duties.

**Available on-site evidence:**

- Membership lists of Tour, Review, Ballfield Safety and Emergency Planning Committees
- Committee notes for Tour, Review, Ballfield Safety and Emergency Planning Committees
- Copy of sessions conducted for safety training of staff

9.6 Operational Procedures

X MET     NOT MET

*There should be a manual of operating procedures for carrying out the risk management plan. All administrative and supervisory personnel shall have a copy of the manual and other employees' procedures pertinent to their responsibilities.*

**Suggested Evidences of Compliance:**

Provide copy of manual and distribution procedure.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation has a comprehensive operational manual which includes a large safety section, as well as, risk management issues covered throughout. As noted in the available evidence, the operations manual covers topics such as automatic insurance, security plans, playground safety, guidelines on child abuse, participant safety, aquatics standards, and risk policy statements. In addition to the operation manual, the Department has an extensive safety and security manual. The operational manual is available at every staff location, as well as, available on-line. Every employee has signed a statement noting they have read the manual and understand how to access it on-line. All employees have computer access. Each Manager, Senior Supervisor and Supervisor has been given a copy of the Safety and Security manual on disc. All staff in the field may access the manual on computers at their work stations via the Parks and Recreation website or by disc. Being a living document, the manuals are reviewed and revised annually or at any time as it needs revision.

**Available on-site evidence:**

- Selected excerpts from Parks and Recreation Operations Manual
- Table of contents of Lee County Parks and Recreation Safety and Security Manual
- CD disc of entire Safety and Security Manual

**On Exhibit for on-site review:**

- Parks and Recreation Operations Manual (Exhibit A)
- Lee County Parks and Recreation Risk Management Plan and Safety and Security Manual (Exhibit I)

9.7 Risk Accounting

X MET    NOT MET

*The risk management plan should be monitored in terms of the dollar costs.*

**Suggested Evidences of Compliance:**

Provide copy of monitoring procedure.

**Notations by Agency Regarding Compliance:**

The Lee County Risk Manager monitors expenditures and claims of all County Departments with the services of Gallagher Bassett Services, Inc. Annually, Gallagher Bassett provides statistics and data to the Risk Manager using comparative data of representative counties. Gallagher Bassett also provides recommendations to the Risk Manager for reduction and mitigation of claims and current trends for focus as part of their services. Gallagher Bassett provides updates to reports as requested.

The Lee County Parks and Recreation Manager of Safety and Security monitors specific costs associated with safety and training expenses within the Department.

**Available on-site evidence:**

- Gallagher Bassett Stewardship Report, October 1, 2005
- Self-Insured Employer Management View Report, 10/1/1998-2003
- Gallagher Bassett Services, Inc. Claim Profile, October 2003
- Lee County Parks and Recreation 2005 Safety Expenses

## 10.0 EVALUATION AND RESEARCH (EVALUATIVE RESEARCH)

Note: Detailed documentation on-site.

### 10.1 Systematic Evaluation Program

X MET     NOT MET

☞ *There shall be a systematic evaluation plan to assess outcomes and the operational efficiency and effectiveness of the Agency.*

#### **Suggested Evidences of Compliance:**

Provide copy of plan and most recent evaluation.

#### **Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation strives to meet the needs of our customers both internal and external. In an effort to better understand those needs, the department continually requests feedback in the form of evaluations through user surveys, program evaluations, bi-annual Cost Benefit Analysis reports, bi-annual department “Retreats”, and monthly staff meetings at various supervisory levels. Lee County Parks and Recreation employs several “Advisory” and “Friends” groups as partners in our planning and evaluation of future needs and resource management. The department routinely holds public meetings to discuss areas of impact or future impact to help assess public opinions and perceptions of proposed projects.

#### **Available on-site evidence:**

- Department Evaluation Plan (Chapter 14 – Parks and Recreation Operations Manual)
- Description of Annual evaluation
- Memorandum detailing 2006-07 Board Goals session
- Cover page and table of contents from Parks and Recreation Operations Manual
- Various staff meetings (Managers Meetings, Senior Supervisor Meetings, Program Supervisor’s Meetings) to discuss:
  - Evaluation of Goals and Objectives
  - Program Evaluations
  - Risk Management
- Advisory Board minutes
- Walter Klages Needs Assessment Meeting Minutes
- Walter Klages Needs Assessment Presentation
- Park Impact Fee Update Report
- Concurrency Report: Inventory and Projections Parks and Recreation Section
- County Demographics
- Swim Lesson Delivery Changes Evaluation
- Parks and Recreation “Retreat” minutes
- Parks and Recreation Program Delivery Matrix
- Quarterly Supervisor’s meeting minutes
- Agency Summit meeting minutes
- Extension Services Annual Report
- Volunteer Program Summary Report
- News Press article on boat ramps

**On Exhibit for on-site review:**

- Concurrency Management – Inventory and Projections 2004/2005 – 2005/2006 (Exhibit H)
- Cost Benefit Analysis 2005 (Exhibit C)
- Lee County Parks and Recreation Operations Manual (Exhibit A)

10.2 Demonstration Projects and Action Research X MET  NOT MET

*There should be at least one experimental or demonstration project or involvement in some aspect of research, as related to any part of park and recreation operations, each year.*

**Suggested Evidences of Compliance:**

Provide copy of report on project for the last year and list projects for the preceding two years.

**Notations by Agency Regarding Compliance:**

Lee County Parks and Recreation is committed to providing cutting edge services whether those services are in the programmatic arena, Aquatic risk management, turf management technology, or technology in general. The department seeks to try new approaches or products and is always willing to test the newest innovation.

**Available on-site evidence:**

- A copy of the memo detailing the conversion of a baseball field from Bermuda grass to paspalum grass.
- A copy of the memo detailing the implementation of the center computer labs.
- A copy of the rational for switching our Aquatic Risk Management firm

10.3 Evaluation Personnel X MET  NOT MET

*There should be personnel either on staff or a consultant with expertise to direct the technical evaluation/research process.*

**Suggested Evidences of Compliance:**

Provide copy of job description for staff person or contract or evidence of informal agreement for external technical assistance.

**Notations by Agency Regarding Compliance:**

Lee County Parks & Recreation relies on internal and external expertise in developing criteria and implementing effective evaluation and research. Research Data Services, Inc., a research firm that has completed thousands of tourism, hospitality, economic impact, and location feasibility studies, is continuing to provide objective and thorough public surveys



throughout the park system. Once analyzed, detailed reports are presented to staff for discussion and review.

**Available on-site evidence:**

- Florida Institute of Government purchase order and brochure.
- Klages Group: Research Data Services, Inc. purchase order
- Resume of Celia Hill, Extension Services Director
- Transcripts of staff members David W. Harner II and Deborah E. Derums
- Certification of “Certified Playground Safety Inspector” for Deborah E. Derums

10.4 Employee Education

X MET     NOT MET

*There should be an in-service education program for professional employees to enable them to carry out quality evaluations.*

**Suggested Evidences of Compliance:**

Provide description of program.

**Notations by Agency Regarding Compliance:**

The Lee County Department of Human Resources (HR) is committed to providing our employees with the tools and training to complete accurate and meaningful staff evaluations. Annual training is provided by HR to all personnel in the area of employee evaluations.

Employees are also trained by staff members that have specific areas of expertise. A good example would be workplace and playground safety training. Through the development of specific workplace safety and playground safety committees we have trained our employees in the proper techniques of evaluation, analysis, and implementation. Employees have also attended evaluation training sessions through professional organizations like American Trails, University of Florida’s “**The Natural Areas Training Academy**”, Florida Division of Forestry, etc.

**Available on-site evidence:**

- Copy of the Employee Evaluation Training Handbook
- Copy of rosters of Training classes
- Transcripts for Harner and Derums – noting research training
- Certificate and TOC for Lynne Boyd – Conservation Site Assessment and Planning
- Certificate and TOC – Jim Green – Interagency Basic Prescribed Fire Training
- Certificate – Roger Clark – Certified Burn Manager
- Scientific Evaluation and Simulation of the Six Mile Cypress Watershed Final Report Contributors, Roger Clark, Dan Calvert, Mike Knight
- Brochure and Receipt for Fred Johnson – 17<sup>th</sup> National Trails Symposium
- Transcripts for Dan Calvert for following classes:
  - Interpreting the Environment
  - Simulation and Modeling
- Certificates for Dan Calvert for
  - “Introduction to ArcGis Survey Analyst”
  - “Turning Data into Information”