

COMMISSION FOR ACCREDITATION OF PARK AND RECREATION AGENCIES

SELF-ASSESSMENT REPORT AND VISITATION REPORT 2014 CAPRA STANDARDS, 5TH EDITION

LEE COUNTY PARKS & RECREATION
MR. DANA KASLER, DIRECTOR
LEE COUNTY, FL



MAY 10-13, 2016

VISITATION TEAM:

DIANNE HOOVER, CHAIR

ROBERT ARMISTEAD

LINDA FOWLER

AGENCY INTRODUCTION

Welcome to beautiful Lee County Florida, home of gorgeous beaches, exciting trails/preserves, extensive parks system, multigenerational recreation centers, and spring training location for the Boston Red Sox and the Minnesota Twins.

We anticipate you will find this Self-Assessment document a useful guide to the processes and procedures of Lee County Parks & Recreation. We feel this document is an excellent snapshot of the Department as well as a map of where we have been and where we are headed.

As you review this document, you will gain a comprehensive understanding of who we are and how we operate. Each standard provides our description of how we accomplish or meet the standard, followed by supporting digital evidence. All evidence is linked within the self-assessment document and you simply “click” to open that file. If for some reason the file doesn’t open, double check what “drive” your computer is reading and assure it is reading the document drive. In most cases, this is the E: drive. If this still doesn’t work, you can access all documents directly from the flash drive in the corresponding folder.

We are proud of our department’s accreditation status that has been held since 2001. We have worked diligently over the last 15 years to strengthen our process and have utilized accreditation to make our department stronger and a national leader for the profession. In addition to the Department-wide efforts, we have a team of more than 30 staff working together to maintain accreditation and assure we are using the tools to continually challenge how we conduct business. Our accreditation team never stops reviewing, maintaining and updating standards so that we are well prepared at the end of the five-year cycle to complete the comprehensive self-assessment.

We look forward to your visit and feedback on our Department. It is our goal that you find this self-assessment document user friendly, informative and complete.

Thank you for your time and efforts in helping us to continue our high level of excellence.

Visitation Report Introduction

The visitation team will include a brief introduction about the overall context in which the team members approached their task. This might include the types of data gathering processes undertaken, the types of individuals interviewed, and materials reviewed.

AGENCY OVERVIEW

Lee County Parks & Recreation
3410 Palm Beach Blvd
Fort Myers, FL 33916

I. Community Demographics

- A. Predominant form(s) of government in the tax jurisdiction (i.e., manager, mayoral, commission):
Lee County Unincorporated - Board of County Commissioners with County Manager
Lee County Incorporated - Cities have a Mayor and City/Town Councils
- B. Population of tax jurisdiction:
679,513 (2014)
- C. Population of metropolitan service area:
Not applicable due to being a County
- D. Age profile of tax jurisdiction:
Under 18 – 24%
Ages 18-64 – 50%
Over 65 – 26%
- E. Income profile of tax jurisdiction:
Median household income - \$47,439 (2013)
- F. Racial diversity of the tax jurisdiction:
69% White, 20% Hispanic, 9% Black, and Other 2% (2013)

II. Agency Characteristics

- A. Operating budget:
\$33,810,992
- B. Capital budget:
\$11,427,329
- C. Full-time employees:
231
- D. Part-time/seasonal employees:
4 Part-time
73 Temp/Seasonal
- E. Parkland acreage:
29,400 acres

Lee County Parks & Recreation

F. Significant agency awards and/or recognitions:

October 2015 - Best Ballpark Renovation Award (CenturyLink-Hammond Stadium renovations) - Ballpark Digest

August 2015 - Florida Sports Group Series Champion Award (Most participants for local area senior games) - Florida Sports Foundation

April 2015 - Chrysalis Sports Award - Lee County Visitor Convention Bureau

August 2014 - FRPA Excellence in Sport Tourism Award - Florida Recreation and Park Association

October 2013 - Florida State League Sports Turf Crew Municipality Award (The Fort Myers Miracle Diamond Cutters) - Florida State League

III. Physical Characteristics

A. Geographic size of tax jurisdiction (square miles):

811 square miles

B. Describe significant rivers, lakes, mountain ranges, which influence the community:

Lee County is bordered to the west by the Gulf of Mexico and is fringed by barrier islands that provide 40 miles of beach front. In addition to its Gulf beaches, Lee County is divided by the Caloosahatchee River, which is part of the Inter-coastal Waterway and receives flow from Lake Okeechobee.

IV. Cultural Characteristics

A. Significant social and/or cultural factors that influence the agency's delivery of service:

Lee County is a large jurisdiction made up of various communities that serve diverse populations with social and cultural areas. Difference can range from highly populated tourist areas like beaches, to agricultural farm areas, to middle income families. There is a strong migrant workforce that depends on growing farms. In other areas seasonal residents and tourist drive the economy.

Lee County Parks & Recreation 2016 CAPRA Accreditation Team

CAPRA LEADERSHIP - OVERALL

Kathy Cahill Steve Cox Kathy Loomis
Jessie Lavender *Debbie Derums – consultant*
Kristie Valone

Chapter One – Agency Authority, Role and Responsibility

Jessie Lavender – lead
Cathy Olson Keith Blasingim
Pablo Adorno

Chapter Two - Planning

Jason Lamey – lead
Brittney Kelley Renee Mee
Laurie Goshen Libby Olive

Chapter Three – Organization and Administration

Christine Bailey– lead *Gary Porter - consultant*
Austin Morris Andy Miller
Kristie Valone Joe Debacker
Dawn Lyons

Chapter Four – Human Resources

Alise Flanjack - lead Liz Owens
Kristie Valone

Chapter Five – Financial Management

Cindy Mitar - lead Barb Marlow
Daisy Cardona Zoran Viskovic

Chapter Six – Programs and Services Management

Kathy Loomis – lead *Debbie Derums - consultant*
Colleen Via Kathy Ball

Chapter Seven - Facility and Land Use Management

Steve Cox – lead *Tim Eckert – consultant*
Mike Hammond Terry Farrell
Laura Carr Lee Coffee

Chapter Eight – Public Safety, Law Enforcement and Security

Cindy Carter - lead Shane Bergmark
Troy Trudo

Chapter Nine – Risk Management

Vicki Little – lead
Kathy Cahill Cindy Carter

Chapter Ten – Evaluation and Research

Joy Hazel – Lead Kristie Valone
Annisa Karim Nancy Apperson

STANDARD TASK FORCES

2.4 Master Plan – Jason Lamey -Lead

2.5 Strategic Planning – Kathy Cahill- Lead, Colleen Via, Zoran Viskovic

4.1 Policy and Procedure – Vicki –Lead, Alise Flanjack

4.4.1 Leadership/Succession Planning – Dana Kasler, Alise Flanjack

7.5 Maintenance and Operations Standards –Lee Coffee- Lead, Terry Cain, Laura Carr, Jodi Goettemoeller, Kyle Katzenmeyer, Dan Lott, Bob Tice, Christie Tvardek

10.4 Needs Assessment – Jason Lamey

10.5.1 Recreation Trends Analysis – Christine Bailey- Lead, Irma Reyes, Heather Gienapp,

Leaders are responsible for organizing periodic meetings, compiling information, presenting reviews at managers meetings and completing the self assessment with narratives and links.

Consultants are previous chapter leaders who are mentors to the new chapter leaders. Each accreditation review (ever 5 years), we encourage the chapter leader to find and mentor their replacement and become a consultant role on the team.

Teams are created from individual staff and volunteers that have expressed interest in professional development, additional challenges and leadership opportunities.

The **CAPRA Leadership team** oversees the entire accreditation process through the year. They meet regularly and attend meetings where documents are scheduled for reviews. They assist and mentor the chapter and task force leaders and attend their meetings. Most are CAPRA reviewers and sign up to do annual reviews across the nation. During the year of the visit, the leadership team plans the visit, submits paperwork, finalize the self assessment and anything else needed.

1.0 - Agency Authority, Role, and Responsibility

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Delineation of jurisdiction and authority are the foundation upon which the park and recreation agency is organized. Policy and rule-making functions and the development of procedures to implement policy create the organizational framework. The mission establishes the organizational purpose, and goals and objectives establish the strategic direction. Organization values affect how the agency through its leadership and staff relate to other governing bodies, agencies, organizations and how it incorporates input from citizens and staff.

1.1 - Source of Authority ★

Standard: The source of agency authority or legal basis of operation and the extent of powers shall be identified in a legal document such as the state statute, local charter, city ordinance, or park district code.

Suggested Evidence of Compliance: Provide legal citation and, if appropriate, date of resolution by local governing entity or legal authority (i.e., enabling act, support documentation, ordinance; if permissive state authority, provide charter).

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 3 - Legal Authority and Jurisdiction, pp. 41-42.

Agency Evidence of Compliance:

There is a Lee County Charter Review Commission that meets over a period of about 18 months in order to produce any proposed amendments to the Charter.

The Lee County Parks & Recreation Department was created in 1959. Minutes from the June 17, 1959, Board of County Commissioners (BOCC) meeting giving direction for the Parks Board to hire a Parks and Recreation Director is evidence of authority as allowed by Florida State Statute. Florida State Statute 418.03 gives supervision to allow municipalities and counties to establish a system of supervised recreation.

Digital Evidence:

- Lee County Charter (website) - <https://www.leegov.com/charter>
- [Source of Authority June 17, 1959 minutes](#)
- [Florida State 2011 Statute 418.03](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.1.1 - Approving Authority/Policy Body

Standard: The agency organizational structure shall provide for one public entity responsible for policy-making functions. This entity usually has taxing power and must approve the budget; it holds title to property. It also serves an important function in providing input to improve and expand park and recreation programs, services, and facilities.

Suggested Evidence of Compliance: Provide a chart or diagram and narrative description of the organizational structure, interrelationship of organizational components and powers of authority over policy-making; show the relationship of the agency to its approving authority and provide the approving authority bylaws or charter.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 3 - Legal Authority and Jurisdiction, pp. 38-52.

Agency Evidence of Compliance:

The Department of Lee County Parks & 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, Assistant County Managers, Department Directors and department personnel. The Lee County charter shows the relationship between the Department and the BOCC.

Digital Evidence:

- [High Level Organizational Chart](#)
- Lee County Charter (website) - <https://www.leegov.com/charter>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.1.2 - Citizen Advisory Boards/Committees

Standard: There shall be citizen boards/committees that are advisory to the agency and the approving authority that appoints them. Advisory boards engage the community and serve as advocates for the advancement of programs, facilities, and services.

Suggested Evidence of Compliance: Provide list of boards/committees with membership, authority, responsibilities and duties, terms of office, meeting minutes.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 3 - Legal Authority and Jurisdiction, pp. 53-54.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a 15-member Parks and Recreation Advisory Committee. All members are appointed by the Board of County Commissioners for two-year terms (unlimited re-appointments). In addition, there are several friends groups throughout the County that assist with fundraising, enhancements and operations of specific facilities.

Digital Evidence:

- [Parks and Recreation Advisory Committee Meeting Minutes from Jan 23, 2014](#)
- Parks and Recreation Advisory Committee (website) - <http://www.leegov.com/parks/about/advisory>
- Partnership and Friends Groups (website) - <http://www.leegov.com/parks/about/partnerships>
- [Annual Report Friends of Six Mile Slough](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.2 - Periodic Timetable for Review of Documents

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

Standards with a review requirement are:

- 1.4.1 Agency Goals and Objectives
- 1.6.1 Administrative Policies and Procedures
- 2.4 Park and Recreation System Master Plan
- 2.5 Strategic Plan
- 3.4.2 Community Relations Plan
- 3.4.3 Marketing Plan
- 3.6 Records Management Policy and Procedures
- 3.6.1 Records Disaster Mitigation and Recovery Plan and Procedures
- 4.1 Personnel Policies and Procedures Manual
- 4.1.2 Recruitment Process
- 4.1.8 Compensation Plan
- 4.3 Job Analyses for Job Descriptions
- 4.5 Workforce Health and Wellness Program
- 4.6.1 Employee Training and Development Program
- 5.1.1 Comprehensive Revenue Policy
- 6.1 Recreation Programming Plan
- 6.2 Program Objectives
- 6.4 Community Education for Leisure Process
- 7.1 Parkland Acquisition Procedures
- 7.2 Area and Facilities Development Policies and Procedures
- 7.5 Maintenance and Operations Management Standards
- 7.5.1 Facility Legal Requirements
- 7.9.1 Recycling and/or Zero Waste Plan
- 8.5 General Security Plan
- 8.6.2 Emergency Risk Communications Plan
- 9.1 Risk Management Policy
- 10.4 Needs Assessment
- 10.5.1 Recreation and Leisure Trends Analysis

Suggested evidence of compliance: Provide the agency review schedule for the document, program, policy or procedure referenced in the enumerated standards.

Agency Evidence of Compliance:

Prior to the adoption of the 2014 standards, all documents were reviewed by the management team on an unscheduled basis. In January of 2015, Lee County Parks & Recreation developed a timetable for review of documents.

Digital Evidence:

- [Manager Document Review Timetable 2015](#)
- [Example meeting minutes approving documents](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.2.1 - Document Approval Authority

Standard: All documents designated for approval by the appropriate approving authority shall be approved or adopted in a manner consistent with the agency process and procedure for adoption of policies, rules, regulations, and operational procedures, except that the agency budget and park and recreation system master plan must be adopted or approved by the entity responsible for policy-making.

Standards with an adoption or approval requirement are:

- 1.5 Vision
- 2.3.1 Community Comprehensive Plan with Park and Recreation Component
- 2.4 Park and Recreation System Master Plan
- 2.5 Strategic Plan
- 2.10 ADA Transition Plan
- 3.4 Public Information Policy and Procedure
- 4.4.1 Leadership Succession Procedure
- 5.4 Annual or Biennial Budget
- 8.1 Codes, Laws, and Ordinances
- 9.1 Risk Management Policy
- 9.1.1 Risk Management Plan and Procedures

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

Agency Evidence of Compliance:

When creating a review standard, the above approved documents were recognized along with the approval of the latest Lee County budget and Strategic Policy Initiative by the Board of County Commissioners. The Department's master plan went before the Parks and Recreation Advisory Committees for comments and approval. The plan was approved by Parks and Recreation approving authority which is the management team on 2-18-2016.

Digital Evidence:

- [Strategic Policy Initiatives approved 12-2-14](#)
- [Final Budget Hearing Script approved 09-15-15](#)
- [Lee County Parks & Recreation Master Plan approval Minutes 02-08-16](#)
- [Lee County Parks & Recreation Master Plan](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.3 - Jurisdiction

Standard: The specific geographical boundaries of the agency's jurisdiction shall be set forth by geographical description and map.

Suggested Evidence of Compliance: Provide a map with geographical boundaries of jurisdiction and service areas, including location of facilities identified.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 604-606.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a map of the geographical boundaries of Lee County as well as maps that show locations of all its facilities. All facilities are maintained in a GIS database and a printed Mapbook is available showing all facilities with descriptions. Supplemental materials are available on the website that outline, identify and catalog the geographical sites.

Digital Evidence:

- [Sample page for 2015 LCPR Mapbook](#)
- Lee County Mapbook (website) - <http://www.leegov.com/parks/Documents/CompleteLeeCoParksMapbook2013.pdf>
- Supplemental materials (website) - <http://www.leegov.com/parks/brochures>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.4 - Mission 

Standard: There shall be an established mission statement that defines the direction and purpose of the agency. The agency mission is the purpose or reason for the existence of the agency and establishes the long-term direction for the agency services and

activities.

Suggested Evidence of Compliance: Provide the established mission statement

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, pp. 71-72.

Agency Evidence of Compliance:

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. To enhance tourism through special events and attractions. We are committed to fulfilling this mission through visionary leadership, individual dedication and the trustworthy use of available resources.

Lee County Parks & Recreation’s mission statement is included in all policies and is the basis for its goals and objectives. The Department’s mission statement can be found in numerous documents such as the Operations Manual and the Cost Benefits Analysis.

Digital Evidence:

- [Mission statement](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.4.1 - Agency Goals and Objectives ★

Standard: There shall be established, measurable 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 reviewed periodically, and distributed to all appropriate personnel.

Suggested Evidence of Compliance: Provide the measurable goals and objectives for each organizational component, with evidence of periodic review and distribution.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, pp. 72-73; Chapter 11 – Physical Resource Planning, pp. 220-224; Chapter 15 – Public Relations, Marketing, Customer Service, p. 360.

Agency Evidence of Compliance:

Every January, the management team meets and reviews the Department's goals and objectives as outlined in the Strategic Plan 2013-2016.

Starting in 2014, the County Manager began the year long process of creating a county-wide master strategic plan by soliciting input from every department, every level and hiring consultants.

The results created nine Strategic Policy Initiatives:

1. Managing Growth
2. Economic Development
3. Redevelopment
4. Transportation
5. Tourism/Sports
6. Conservation 20/20
7. Funding Sources
 - a. Impact Fees
 - b. Roads and Transit
8. Water Quality
9. Mid-year funding requests/grants

In 2015, the Lee County Parks & Recreation management team met and reviewed the current goals and objectives and voted to continue using them. In 2016 the Lee County management team plans to meet to continue to evolve the nine initiatives. Lee County Parks & Recreation plans to re-evaluate the goals and objectives to include the initiatives with the next Strategic Plan in October 2016.

Digital Evidence:

- [Strategic Initiatives Plan 12-2-2014 \(County-wide\)](#)
- [Strategic Plan 2013-2016 \(Departments Goals and Objectives\)](#)
- [Meeting minutes accepting the Department's goals and objectives 01-16-15](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.4.2 - Personnel Involvement

Standard: The agency shall have an established process for acquiring and considering input from personnel at various levels of the organization in the development of goals and objectives.

Suggested Evidence of Compliance: Provide examples of the methods utilized to obtain input from

personnel at various levels of the organization (e.g., surveys, focus groups, etc.) and how the organization's goals and objectives are communicated to all personnel.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, p. 72.

Agency Evidence of Compliance:

Input was garnered from parks and recreation staff via several avenues, including Quarterly Supervisors Training (QST), staff meetings, Manager retreats, bi-weekly Manager staff meetings and Supervisor/Coordinator bi-monthly meetings. Often, improvements result from discussions, follow-up e-mails, staff meetings and comments.

The goals and objectives were created using input from all avenues. Every staff member receives copies of all meeting minutes. Staff suggestions are received and reviewed before being incorporated into the final submission of goals and objectives.

Digital Evidence:

- [QST Meeting Minutes 9-12-2014](#)
- [Manager meeting minutes 1-16-2015](#)
- [Supervisor/Coordinator Minutes asking for input](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.5 - Vision 

Standard: The agency shall provide an adopted Vision Statement that is aspirational, far reaching, and states where the agency is going. It should be available to the approving authority, staff, and participants.

Suggested Evidence of Compliance: Provide evidence of adopted Vision statement that is available to the approving authority, staff, and participants.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 4 – Politics and Advocacy, p. 58; Chapter 5 – Organization Structure and Administrative Operations, pp. 72-73; Chapter 7 – Planning for Strategic Management, pp. 115-116.

Agency Evidence of Compliance:

Lee County adopted the vision statement “A Natural Place to Play” in September 2005.

The Vision Statement was revised to “A Natural Place to Learn and Play” to better depict the educational opportunities offered by the Department. This was updated on February 10, 2014. The Vision Statement is reviewed annually in January.

Digital Evidence:

- [Managers Meeting adopting updated Vision Statement 02-10-2014](#)
- [Managers Meeting Reviewing Vision 01-16-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.6 - Policies, Rules, Regulations, and Operational Procedures

Standard: There shall be delegation of responsibilities for the policy-making functions of the approving authority and the administrative functions of the chief administrator and staff.

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

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 2 – Management and the Law, p. 20; Chapter 5 – Organization Structure and Administrative Operations, p. 87.

Agency Evidence of 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. The Department then compiles its Parks and Recreation Operations Manual, which gives staff the procedures for following all policies, rules and regulations.

Digital Evidence:

- [Page from Board of County Commissioners \(BOCC\) web page](#)
- Link to BOCC Administrative Codes (website) - <http://www.leegov.com/bocc/codes>
- [Lee County Parks & Recreation Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.6.1 - Administrative Policies and Procedures ★

Standard: There shall be policies and procedures, encompassing administrative aspects of the organization that are kept up-to date, reviewed periodically, and made available to pertinent administrative and supervisory personnel.

Suggested Evidence of Compliance: Provide access to the agency policies and procedures, demonstrate how they are made available to personnel, and provide evidence of periodic review by the approving authority and administrators.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 3 – Legal Authority and Jurisdiction, pp. 43-44; Chapter 5 – Organization Structure and Administrative Operations, pp. 87-88.

Agency Evidence of Compliance:

Policies are set forth by the Lee County Board of County Commissioners. Departments and Human Resources regularly submit updates for Board approval. Each department incorporates these updated policies into the various operations and procedures manuals.

The original Lee County Parks & Recreation Operations Manual, which was completed in 1997, and the Lee County Policies and Procedures Manual are the Department’s main manuals that provide operational and policy direction. Both manuals are updated routinely with updates posted online.

The Lee County Parks & Recreation Operations Manual is available to all employees on the Department’s extranet. The countywide Policy Manual is available online.

Digital Evidence:

- [Lee County Parks & Recreation Operations Manual](#)
- [Manager Meeting of reviewing Operation Manual - 11-16-2015](#)
- Lee County Policy and Procedure Manual online link (website) - <http://www.leegov.com/hr/policies>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.7 - Agency Relationships

Standard: There shall be ongoing liaison roles with complementary organizations, such as nearby park and recreation agencies, social service organizations, and other governmental units and regulatory bodies.

Suggested Evidence of Compliance: Provide evidence of cooperative efforts, including a list of staff with liaison responsibility. This information may be evidenced through Memoranda of Agreement, Memoranda of Understanding, Cooperative Agreements, etc.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 2 – Management and the Law, p. 28; Chapter 4 – Politics and Advocacy, p. 66; Chapter 6 – Partnerships, pp. 95-110; Chapter 7 – Planning for Strategic Management, pp. 110-122.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a close working relationship with existing nearby parks and recreation departments and universities. Leadership meets on a regular basis to discuss issues and agreements that exist between Lee County Parks & Recreation and other agencies for various services.

A significant example of this cooperation can be seen in the agreement between Lee County Parks & Recreation and Lee County School District for the joint use of facilities and resources. There are also agreements between Lee County Parks & Recreation and the State of Florida, City of Sanibel, Lee Memorial Health System and University of Florida.

Digital Evidence:

- [Agreements Worksheet with Staff Contacts \(liaisons\) 2015](#)
- [2015 executed Lee County School District Agreement](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

1.7.1 - Operational Coordination and Cooperation Agreements

Standard: There shall be established agreements with other agencies, organizations, or individuals that entail cooperative use and maintenance of facilities, programming, facility design, land development, finances, etc.

Suggested Evidence of Compliance: Provide examples of cooperative agreements.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 6 – Partnerships, pp. 109-107.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation follows Florida State Statute 163.01 Florida Interlocal Cooperation Act of 1969 in its pursuit of cooperation agreements. It is common practice for the Department to form partnerships with various groups in order to provide a wide variety of services.

The Lee Comprehensive Plan (Objective 87.2) states that the Department must work with other public/private agencies to meet the recreational demand. All cooperative agreements are managed through a spreadsheet.

The success of Lee County Parks & Recreation is enhanced by its many cooperative agreements.

Digital Evidence:

- [Florida State Statute 163.01](#)
- [Lee Comprehensive Plan \(Objective 87.2\)](#)
- [Agreement worksheet with staff contacts 2016](#)
- [2015 executed Lee County School District Agreement](#)
- [LCCTA Agreement 2015](#)
- [Lee Co License of Use of City of Palms by Edison State College \(executed copy\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 1.0 - AGENCY AUTHORITY, ROLE, AND RESPONSIBILITY**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

2.0 - Planning

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Planning activities are essential to effective agency management. Frequently, they are the responsibility of a permanent component of the agency; however, they may be performed by staff from various units or contracted to an outside professional consultant. Complex demands for services and limited public resources require that the park and recreation agency carefully research operational alternatives and plan future programs. Precise guidelines should establish the parameters of planning tasks and responsibilities.

The strength of the planning unit's leadership is a major ingredient in a productive and effective planning effort. This competence may be reflected both in academic training and in prior professional experience. The chief administrator should be closely involved in the planning process. A direct relationship between planning personnel and the chief administrator enhances the ability for the planning personnel to collect data and make recommendations, and the chief administrator's ability to make informed decisions.

Strategic planning is vital to high performing organizations and involves organizational and community input to identify and come to agreement on vision, mission, and values that support and guide the systems, structures, and strategies as a framework for organizational progress to achieve results.

These standards examine the types of planning necessary for administrators to efficiently and effectively manage both day-to-day and long-term operations of a park and recreation agency.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 7 – Planning for Strategic Management, pp. 111-125.

2.1 - Overall Planning Function within Agency

Standard: The agency shall have planning functions with established responsibilities, including at least one staff member or consultant with planning capability.

Suggested Evidence of Compliance: Provide the responsibilities and functions of the planning entity. Provide resumes of training and experience for staff and/or consultants who have planning capabilities.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 7 – Planning for Strategic Management, pp. 120-121.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a dedicated full-time position with assigned planning

related duties. With a background in landscape architecture, Jason Lamey currently occupies this position as a Senior Planner and has been with the Department for over nine years. His planning related duties are geared toward helping Lee County Parks & Recreation to achieve its mission and are outlined in Planning and Design/Contracts of the Department's Operations Manual.

In order for this to occur, Jason works in tandem with a number of people both internally and externally. Internally, Jason communicates with the Department Director, Deputy Director and other senior staff during bi-monthly administrative meetings. He also communicates regularly with other Department staff. Externally, Jason works closely with staff from other County departments, including an architect, engineers, several planners and other professionals from within Community Development and Facilities Construction and Management. He also employs various consultants for planning related matters on an as needed basis.

Digital Evidence:

- [Resume for Jason Lamey](#)
- [Planning and Design/Contracts - Operations Manual](#)
- [Managers Meeting Minutes with Senior Planner](#)
- [County Approved Consultant List for Miscellaneous Planning Services](#) (screenshot)
- Miscellaneous Planning Services (website) - https://www.lee.gov.com/procurement/awarded-annual-contracts/downloads?fid=4543&fn=Project2014-04-04T14_20_01.xml

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.2 - Involvement in Local Planning 

Standard: The agency shall be involved in local planning, e.g. comprehensive planning, strategic planning, and capital improvement planning by reviewing development proposals, monitoring the decisions of planning and zoning boards or commissions and participating on task forces and committees that will impact parks and recreation services within the jurisdiction.

Suggested Evidence of Compliance: Demonstrate the role of the agency in local planning through personnel assignments and documentation of involvement, e.g. minutes, agendas, and cooperative agreements.

Informational reference in the Management of Park and Recreation Agencies, (2010), 3rd

Agency Evidence of Compliance:

When it comes to local planning matters that have the potential to affect countywide parks and recreation services, Department staff are actively involved in various processes. For example, in 2013 and 2014, staff worked closely alongside the Lee County Department of Community Development in updating the “Parks, Recreation and Open Space” and “Conservation and Coastal Management” chapters of the *Lee Plan*. This is a state mandated comprehensive planning document that lays out a framework for growth and development within Lee County through the year 2030. Staff also immerses themselves in local planning issues by regularly attending public meetings held by the local planning agency. This citizen advisory board makes recommendations to the Board of County Commissioners (BOCC), Lee County’s governing body, on local planning related matters. Additionally, staff participates in various public hearings run by the BOCC as well as the Lee County Hearing Examiner’s Office. The latter entity is an independent reviewer of Lee County’s regulation of land development and land use. Lastly, staff stays abreast of local planning matters through their involvement on various committees. Two examples include the Bicycle/Pedestrian Advisory Committee and Complete Streets Team.

Digital Evidence:

- [Meeting Appointments Regarding Updates to Lee Plan](#)
- [Agenda for Local Planning Agency Meeting](#)
- [Agenda for Board of County Commissioners Public Hearing](#)
- [Meeting Minutes from Lee County Hearing Examiners Office Public Hearing](#)
- [Agenda for Bicycle/Pedestrian Advisory Committee Meeting](#)
- [Meeting Appointment for Complete Streets Team](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.3 - Planning with Regional, State, and Federal Agencies

Standard: The agency shall have a working relationship with the regional, state, and federal agencies to ensure the coordination of planning efforts that affect the delivery of parks and recreation services within the jurisdiction.

Suggested Evidence of Compliance: Define the role of agency personnel and documentation of involvement (minutes, agendas, cooperative agreements) in regional, state, and federal agencies planning.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 7 – Planning for Strategic Management, p. 120.

Agency Evidence of Compliance:

Since its inception, Lee County Parks & Recreation has developed strong working relationships with various state, federal and regional agencies. These partnerships have been valuable in regard to the planning of facilities, programs and services, with any overlap being minimized.

The Department has developed numerous partnerships with state agencies over the years including; the Florida Department of Environmental Protection (FDEP), the Florida Department of Transportation and the Florida Fish and Wildlife Conservation Commission. A good example of one can be found in association with Lehigh Acres Trailhead Park. In particular, on April 20, 2012, Lee County entered into a Recreational Trails Program (RTP) Project Agreement with the FDEP. This agreement helped in establishing a park containing a multi-use trail, restrooms, picnic pavilions, parking and other amenities. Department Senior Planner Jason Lamey worked alongside the FDEP as the Department's Grant Manager for the project.

In addition to working alongside various state agencies, the Department works closely with a number of federal agencies, including the U.S. Army Corps of Engineers (Army Corps), the U.S. Fish and Wildlife Service, the U.S. Environmental Protection Agency and the U.S. Department of Transportation. More recently, Lee County Facilities Construction and Management Project Manager Randall Harris has been working on behalf of the Department and in tandem with the Army Corps on a project involving Pine Island Commercial Marina, a Lee County facility. Pursuant to Section 10 of the Rivers and Harbors Act of 1899 (33 U.S.C. 403) and/or Section 404 of the Clean Water Act (33 U.S.C. 1344), Lee County is authorized under a Letter of Permission and associated permit to renovate parts of this marina provided that certain conditions are met.

In terms of partnerships with regional agencies, the Department has a longstanding one with the Florida Governmental Utility Authority (FGUA), which is illustrated at Lehigh Acres Trailhead Park. Specifically, Lee County and FGUA entered into the Utility Infrastructure Conveyance and Service Agreement on October 11, 2011. This agreement allowed for the construction and subsequent operation and maintenance of various potable and wastewater facilities at this park. The Department also works closely with the Metropolitan Planning Organization (MPO), an entity responsible for the coordination of regional transportation planning between the City of Bonita Springs, the City of Cape Coral, the City of Fort Myers, the Town of Fort Myers Beach, the City of Sanibel, the Village of Estero and unincorporated areas of Lee County. Specifically, Senior Planner Jason Lamey is a voting member of their Bicycle Pedestrian Coordinating Committee. This group reviews regional transportation projects and advises the MPO on its transportation plan as it pertains to bicycle and pedestrian matters.

Digital Evidence:

- [RTP Project Agreement for Lehigh Acres Trailhead Park](#)
- [U.S. Army Corps of Engineers Permit for Pine Island Commercial Marina](#)

- [Service Agreement for Lehigh Acres Trailhead Park](#)
- [Bicycle Pedestrian Coordinating Committee Meeting Minutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.3.1 - Community Comprehensive Plan with Park and Recreation Component

Standard: The jurisdiction with land use authority within which the agency operates shall have a comprehensive plan adopted by the governing authority that dictates public policy in terms of transportation, utilities, public facilities, land use, recreation, and housing. In some jurisdictions the comprehensive plan is called the general plan or the land use plan. Zoning for the jurisdiction is based upon the comprehensive plan. To meet this standard, the comprehensive plan shall have a park and/or recreation component that discusses how the jurisdiction intends to meet the needs for parkland and public recreation facilities in concert with other land use priorities.

Suggested Evidence of Compliance: Provide the current plan, with date of official approval.

Agency Evidence of Compliance:

Lee County’s comprehensive planning document is known as the *Lee Plan*. Managed by the Lee County Department of Community Development, it lays out a framework for growth and development within the County through the year 2030. This living document is a compilation of thirteen chapters or “elements” and contains various goals, objectives and policies on matters such as future land use, transportation, schools, libraries, capital improvements, conservation, coastal management, historic preservation and housing. Element V, “Parks, Recreation and Open Space”, is devoted entirely to parks and recreation and contains twelve goals along with numerous objectives and policies.

Digital Evidence:

- [Parks, Recreation and Open Space Section of Lee Plan](#)
- Lee Plan website with updates (website) - <https://www.leegov.com/dcd/planning/leeplan>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.4 - Park and Recreation System Master Plan

Standard: The agency shall have a comprehensive park and recreation system plan that provides recommendations for provision of facilities, programs and services; parkland acquisition and development; maintenance and operations; and administration and management. The plan shall be officially adopted by the policy-making body, updated periodically and linked with a capital improvement budget and a phased development program. The system master plan shall implement policies adopted in the comprehensive plan for the jurisdiction. Interested and affected agencies, organizations, and groups shall be engaged in the planning process.

Suggested Evidence of Compliance: Provide the current plan with documentation of official approval; describe update process; and describe a phased implementation program with linkage to the agency's capital improvement budget. The system master plan shall include:

- a. Agency mission (1.4);
- b. Agency objectives (1.4.1);
- c. Recreation and leisure trends analysis (10.5.1);
- d. Needs assessment (10.4);
- e. Community inventory (10.5.2); and
- f. Level of service standards (10.3.1).

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 7 – Planning for Strategic Management, p. 120.

Agency Evidence of Compliance:

The *Lee County Parks & Recreation Master Plan* is a living document that serves as a guiding tool for the Department over a five-year period. Composed of various interconnected elements, its more notable end products include tables outlining phased capital improvement and major maintenance projects. The Departmental planner updates this master plan on an as-needed basis by reviewing and integrating any new information provided by various sources, including staff, other County departments, the Board of County Commissioners, outside agencies, various committees and partners and the general public. A more comprehensive update takes place every five years in conjunction with Department administrative staff. The Parks and Recreation Advisory Board has the final say and votes on whether or not to adopt this master plan, also every five years. The most current edition was reviewed and adopted by this advisory board on January 28, 2016. The newest approved version was most recently reviewed by the management team February 8, 2013.

Digital Evidence:

- [Lee County Parks & Recreation Master Plan](#)
- [Minutes of approval from Management Team 2-8-2016](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.5 - Strategic Plan

Standard: An agency shall have a strategic plan, approved by the approving authority, stating how the agency will achieve its mission, goals, and objectives over an extended period of time, typically three to five years. The strategic plan shall be reviewed annually. The goals and objectives of the plan shall be measurable to demonstrate progress and results. The strategic plan shall support the priorities and initiatives of the whole organization. The strategic plan is a tool to implement the Parks and Recreation System Master Plan.

Suggested Evidence of Compliance: Provide the agency's strategic plan, date of approval by approving authority, evidence of last review, and indicate progress being made in implementing the plan.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 7 – Planning for Strategic Management, pp. 114-120.

Agency Evidence of Compliance:

In October 2009, a consulting firm was hired to lead Lee County Department Directors through a process of goal setting, which resulted in several workshops with the Board of County Commissioners as these goals were refined.

The final product is a standardized format of goals, strategies and performance measures for every department. The Lee County Parks & Recreation Strategic Plan establishes the measure and schedule to achieve the goal and strategies. Implementation has already occurred with the plan, as evidenced from the performance indicators.

This was the guiding document until late 2012 when the department director retired and the County manager was replaced by an Interim County manager. In July 2013, Lee County hired a new County Manager who brought with him new philosophies of how to involve employees in making decisions and creating a functioning top level management team. The Department followed the lead and created department goals and objectives with input from all levels of staff through various meetings. This process produced the strategic plan for 2013-2016.

Starting in 2014, the County manager began the year long process of creating a county-wide master strategic plan by soliciting input from every department, every level and hiring

consultants. In January 2015, County manager called upon the Department director to step up as an Assistant County Manager who then appointed the Deputy Director as Director.

The results created nine Strategic Policy Initiatives:

1. Managing Growth
2. Economic Development
3. Redevelopment
4. Transportation
5. Tourism/Sports
6. Conservation 20/20
7. Funding Sources
 - a. Impact Fees
 - b. Roads and Transit
8. Water Quality
9. Mid-year funding requests/grants

In 2016, the Lee County management team plans to continue to evolve the nine initiatives. Lee County Parks & Recreation has decided to continue with the current strategic plan in place but reevaluate to include the initiatives with the next Strategic Plan in October 2016. Last review was February 8, 2016 at a scheduled managers meeting.

Digital Evidence:

- [Strategic Plan 2013-2016](#)
- [Strategic Initiatives approved 12-02-2014](#)
- [Performance Measurement Progress for Strategic Plan](#)
- [Managers Meeting reviewing plan 2-8-16](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.6 - Feasibility Studies

Standard: Studies shall be conducted to determine the feasibility of proposed facilities.

Suggested Evidence of Compliance: Provide examples of recent feasibility studies such as market, cost benefit, site, transportation, environmental and economic analyses.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 215-215.

Agency Evidence of Compliance:

A feasibility study was completed in 2013 and concluded that portions of a greenway rail corridor could be developed for a linear park. The Department worked closely with the Lee County Metropolitan Planning Organization in assuring this study.

The rail corridor runs north-south through Lee County and establishes connections with two neighboring counties. Sections of this greenway follow existing canal and railway corridors as well as road right of ways. While portions of the canal corridor and road right of ways have yet to be studied to determine whether or not they can accommodate linear parks, the opposite is true of the railway corridor.

When the situation warrants, Lee County Parks & Recreation commissions a comprehensive study to determine the feasibility of a proposed facility. Such is often the case with the Department's proposed linear parks or "greenways", which have the potential to impact many people. One such example is the Able Canal Greenway, a portion of which the Department is looking to build. As a first step, the Department is preparing to conduct a Project Development and Environment (PD&E) Study of a 5.5 mile section in tandem with the Florida Department of Transportation. This feasibility study is scheduled to commence in 2016.

Digital Evidence:

- [Lee County Rail Corridor Feasibility Study](#)
- [Schedule for PD&E Study for Able Canal Greenway \(Harns Marsh to Joel Boulevard\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.7 - Site Plans

Standard: There shall be site plans to guide the use of existing and the development of future areas and facilities. A site plan is a depiction of a park site of that is drawn to scale and delineates features such as building and facility locations, roads and trails, use areas and utility easements.

Suggested Evidence of Compliance: Provide a representative sampling of the agency's area and facility site plans.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 230-232.

Agency Evidence of Compliance:

Lee County Parks & Recreation maintains an extensive inventory of plans, both digital and physical, that staff uses regularly for planning events and developing future areas and facilities. Some recent additions to this collection include site plans of Bat House Park, Lehigh Acres Trailhead Park and Pinewood Trails Park, as well as an as-built topographic survey of the North Fort Myers Recreation Center.

The Department maintains a Mapbook detailing all properties.

Digital Evidence:

- [Bat House Park Site Plan](#)
- [Lehigh Acres Trailhead Park Site Plan](#)
- [Pinewood Trails Park Site Plan](#)
- [North Fort Myers Recreation Center As-built Topographic Survey](#)
- [2015 Mapbook condensed](#)
- Mapbook Online (website) - <http://www.leegov.com/parks/Documents/CompleteLeeCoParksMapbook2013.pdf>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.8 - Historical and Cultural Resource Management Plans

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

Suggested Evidence of Compliance: Provide the historical and cultural plan(s).

Agency Evidence of Compliance:

Lee County values its cultural and historical resources, a number of which are intertwined with its parks and preserves. Notable examples include the community center buildings at; Boca Grande Community Park, Buckingham Community Center Park, Olga Community Park, farmhouse and schoolhouse structures at Estero Community Park and military remnants at Wild Turkey Strand Preserve. When it comes to managing these resources, the *Lee Plan* plays a vital role. Specifically, Element IX of this comprehensive planning document contains various goals, objectives and policies aimed at identifying and preserving these cultural and historical resources.

Digital Evidence:

- [List of Lee County Parks and Preserves with Historic Significance](#)
- [Element IX of the Lee Plan \(Historic Preservation\)](#)
- [Wild Turkey Management Plan](#)
- [Caloosahatchee Regional Park \(CRP\) Management Plan](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.9 - Community Involvement 

Standard: The agency shall include community involvement in the planning process that includes ongoing and systematic outreach to include the entire community. It is critical that the diversity of individuals (i.e., all cultures, ages, and abilities) and local, regional, and national non-governmental community organizations, agencies, businesses, and service providers such as the Red Cross, Sierra Club, Trust for Public Land, YMCA/YWCA, Boys and Girls Club, and local foundations and employers are afforded opportunities for input.

Suggested Evidence of Compliance: Describe how the diverse interests (community organizations, businesses and individuals) of the community were involved in the planning process.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, p. 220

Agency Evidence of Compliance:

When planning facilities, programs and services, Lee County Parks & Recreation provides equal opportunities for the entire community to be involved. Specifically, when doing so, the Department is mindful of and embraces the eclectic nature of all community organizations, businesses and individuals, regardless of their race, sex, gender, religious beliefs, color, national origin, disability or other legally protected group/class.

One way in which this all-inclusive outreach is accomplished is via the Parks and Recreation Advisory Board. This BOCC appointed committee consists of 15 members, each of whom represents the interests of a different area of the County (i.e., Cape Coral, Pine Island, San Carlos, etc.). During their monthly meetings with Department staff, each member passes along citizen input that they have received from their respective area.

Another way in which the entire community is involved in the planning of facilities, programs and services is through participation in public meetings. These events are advertised well in advance on Lee County's website as well as through local media outlets. As an example, on October 21, 2014, the Department hosted a public meeting at the North Fort Myers Recreation Center to garner input on revisions to the management plan for Prairie Pines Preserve. During this meeting, citizens were given the opportunity to look at and comment on this plan.

The community also has the ability to provide feedback through surveys administered by the Department, which is available online. Recent surveys conducted include those pertaining to summer camp and the Department's website.

An additional way in which the community is involved in the planning process is through direct interaction with staff. For the most part, these interactions occur during regularly scheduled meetings between staff and various groups representing a diverse cross-section of the community. During these meetings, information on a broad range of topics is exchanged, some of which is used for planning purposes. The following are some community groups that the Department works with on a regular basis:

- Center for Independent Living of Southwest Florida
- Florida Mudcutters
- Friends of Boca Grande Community Center
- Friends of Six Mile Cypress Slough Preserve
- Gulf Coast Swim Team
- Heights Foundation
- Lakes Park Enrichment Foundation
- Lee County Community Tennis Association
- Lee County YMCA
- Nations Association Charities
- San Carlos Park Scorpion Soccer Club
- Friendship Centers of Lee County
- South Fort Myers Little League
- United Way of Lee, Hendry, Glades and Okeechobee Counties
- Lee County 4-H (please refer to accompanying meeting minutes)

Digital Evidence:

- [Parks and Recreation Advisory Board Meeting Minutes](#)
- Parks and Recreation Advisory Members (website) - <https://www.leegov.com/parks/about/advisory>
- [Press Release for Public Meeting \(Prairie Pines Preserve\)](#)
- [Results from 2015 Summer Camp Survey](#)
- [Results from 2014 Website Survey](#)
- [Lee County 4-H Meeting Minutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

2.10 - ADA Transition Plan

Standard: The agency shall develop and adopt a phased plan for the removal of barriers at existing recreation facilities, parks, and amenities owned or operated by the agency, pursuant to the requirements of the US Department of Justice Title II regulation issued September 14, 2010 and effective March 15, 2011.

Suggested Evidence of Compliance: Submit minutes of the approving authority meeting approving the transition plan, or a copy of the plan noting the dates and times when plan tasks were completed.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, p. 188; Chapter 11 – Physical Resource Planning, p. 236; Chapter 12 – Physical Resource Management, p. 253; Chapter 13 – Management Operations, pp. 288 and 400.

Agency Evidence of Compliance:

In 2001, a transition plan was created for Lee County Parks & Recreation (LCPR) after completion of a preliminary ADA assessment taken from self evaluations of all Department facilities, programs, activities and services. The transition plan included 70 facilities to determine compliance with the *1991 ADA Standards for Accessible Design*. All barriers were identified in the self evaluation, and listed in the transition plan. Work orders were submitted, resolutions were tracked and barrier removal dates were recorded. The *LCPR ADA Transition Plan* was created as a living document, and has been updated periodically.

In 2013, the Department began an internal assessment to reevaluate its policies, programs, activities, events and facilities to determine current levels of accessibility under the Department of Justice's (DOJ) *2010 ADA Standards for Accessible Design* (compliance date for new facilities and alterations - March 15, 2012). The Department joined efforts with Lee County as a whole and has continued accessibility compliance inspections with contracted consultants from ADA Consulting of Southwest Florida. New construction and new alterations will meet the DOJ's 2010 standards and those of the *2012 Florida Accessibility Code for Building Construction* when more stringent. Existing facilities that met the 1991 standards will be brought up to these codes as improvements and alterations are made. When the new site evaluations are completed and barriers are identified, the *LCPR ADA Transition Plan* will be updated with recommendations for barrier removal, priority rating, schedule for barrier removal and completion date.

Digital Evidence:

- [LCPR ADA Transition Plan](#)

- [Sample Accessibility Compliance Inspection Report \(North Fort Myers Community Park\)](#)
- [Sample Accessibility Compliance Recommendations Report \(North Fort Myers Community Park\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 2.0 - PLANNING**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

3.0 – Organization and Administration

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

The organizational structure provides alignment of responsibility and delegation of authority to enable the agency to carry out its mission. The roles, responsibilities and structure should be clearly understood by staff and the public.

Administrative reporting systems provide management information on the activities of the agency. Properly designed administrative reports will reflect comparative data and trends on activities. An effective administrative reporting system ensures communications throughout the chain of command.

Public information, community relations, and marketing are complementary functions within the agency. The functions overlap because they all deal with an organization's relationships and employ similar communication tools. While they have the same ultimate purpose of helping assure an organization's success, the purpose of each differs and each approaches the task from a different perspective.

To operate effectively, a park and recreation agency must have the support of its community. An agency can obtain such support by informing the public and news media of events that affect the lives of citizens in the community. By providing the news media and the community with information on agency administration and operations, a relationship of mutual trust, cooperation, and respect can be maintained.

An agency should make use of the many community organizations that exist in its jurisdiction and establish relationships with them. The park and recreation agency should play an active role in organizing community groups where they do not exist. By establishing such links with the community, the park and recreation agency learns of issues, needs, and opportunities and responds to them before they become problems. A well-organized community relations effort can act as an effective means of eliciting public support and can serve to identify problems in the making.

Effective market research, planning, product and program development, strategies, and objectives for delivering demand-driven, high quality programs and services contribute to successful park and recreation operations. Marketing is a process for accomplishing agency mission and objectives by developing, pricing, making accessible, and providing accurate and timely information about recreational opportunities that satisfy the wants/desires of target markets.

All park and recreation agencies perform certain marketing functions; the scope of their work however, depends on their size and mandate. Among the functions are user inquiry, development of an agency marketing philosophy and marketing plan, and development of operational procedures and policy guidelines to implement that philosophy. The complexities of marketing and related research functions require that all agency staff be appropriately educated

about marketing and its application across functions.

3.1 - Organizational Structure

Standard: The agency shall establish a staff organizational structure that reflects its methods of operation, its relationship to the community, and the relationships among the different organization components.

Suggested Evidence of Compliance: Provide a chart showing the agency’s organizational structure, interrelationships among organizational components, and the function of each component. Organizational components are the major subdivisions of the organization, e.g. departments and divisions. Indicate how this information is made available to staff and the public.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, pp. 73-87.

Agency Evidence of Compliance:

Lee County Parks & Recreation is a part of Lee County Government Board of County Commissioners (BOCC) and is an integral part of providing for constituents’ needs. This interrelationship between departments and components is clearly demonstrated by the organizational charts. These charts are available to all staff and the public on the website.

The Department is broken down into districts and a manager oversees assigned areas.

Digital Evidence:

- [County Admin level organizational chart](#)
- [Lee County Parks & Recreation organization chart](#)
- Parks and Recreation administrative staff contacts (website) - <https://www.leegov.com/parks/about/admin>
- [Lee County Parks & Recreation district map](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.2 - Administrative Offices

Standard: The agency administrative offices shall be accessible to the public and staff. There shall be administrative, meeting and storage space, and equipment adequate to perform the agency's functions and responsibilities.

Suggested Evidence of Compliance: Provide documentation that describes the types of office space and administrative equipment used by the agency and how access is provided to the staff and the public.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, p. 90.](#)

Agency Evidence of Compliance:

The main administrative office is located at Terry Park (3410 Palm Beach Blvd., Fort Myers, FL 33916). Other administrative offices are located in various parks throughout Lee County. The main office is open to the public Monday through Friday from 8 a.m. until 5 p.m. Field administrative offices are open to the public at additional times and days.

Meeting rooms:

There are two meeting/training rooms available at Terry Park to all staff and volunteers' use. There are four major recreation centers and several smaller community centers that provide adequate meeting/training rooms for staff, volunteers and public use.

Adequate work space:

Office, desk, filing, storage space, telephone, printing and network computer access is provided for each staff member assigned to administrative duties. Every office has overhead energy efficient lighting and HVAC installed. The main Administrative Office at Terry Park is monitored by local closed-circuit television. Door access is by electronic pass card. Outside parking areas are camera monitored and well lighted. Adequate additional storage and warehouse space is provided in free-standing buildings, fenced open areas and inside rooms/closets throughout Terry Park.

Library and reference area:

Terry Park has a reference room for staff and volunteers. Staff and volunteers assist with public inquiries and a distribution rack for educational material is displayed. The Lee County internet site and intranet site that are accessible by all employees provide a large reference source for staff. Parks and Recreation Administration oversee the Environmental Education and sustainability reference library at Olga Community Center as a part of the volunteer and public training facility.

Digital Evidence:

- [Administration office layout](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.2.1 - Support Services

Standard: Sufficient and appropriate equipment, technology, clerical and administrative staff shall be provided to enable the professional staff to perform their appropriate functions.

Suggested Evidence of Compliance: Describe the equipment, technology, and services used to support professional staff.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, pp. 90-91.](#)

Agency Evidence of Compliance:

Support services and staff for Parks and Recreation are spread throughout the county. The primary administrative staff and services are located at the main Administrative Office at Terry Park.

Administrative support staff is responsible for human resources, payroll, file updates, registration, public reception and a variety of other office duties. Fiscal support staff is responsible for revenues, accounts receivable, accounts payable, intergovernmental fund transfer, budget tracking and fiscal reporting.

Additional support staff includes Park Rangers, Volunteer Services, Marketing and Media, and Technology.

All staff has access to services and current technology, resources, material and equipment. Resource libraries are available at two locations, with all major facilities connected to the countywide computer server. ID card scanning access is available at most facilities and many locations have video monitoring.

Depending on job assignment, support staff has access to several technologies and programs to efficiently conduct their jobs, such as RecTrac (registration), Kronos (payroll), OneWorld (budgeting) and Sharepoint (website). All general office equipment is available such as computers, networked printers, fax machines and scanning capabilities. Additional printing and production equipment and materials are available at the main Administrative Office.

Digital Evidence:

- [Lee County Parks & Recreation Support Staff list](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.3 - Internal Communication

Standard: A communication system shall be established to ensure the accurate and timely transfer of internal information among staff.

Suggested Evidence of Compliance: Provide a communication matrix illustrating how internal communications are managed by the agency.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 5 – Organization Structure and Administrative Operations, pp. 86-87.

Agency Evidence of Compliance:

The Department has various ways of communicating information from email, meetings and a well developed and maintained Extranet via the internet. An example would be that meeting minutes are emailed through a “Parks-All” distribution group email.

The link listed below illustrates the communication matrix.

Digital Evidence:

- [Internal Communication Matrix](#)
- [Example of Parks All email](#)
- [example of internal email communication](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.4 - Public Information Policy and Procedure

Standard: The agency shall have approved policies that govern what information shall be released, when it should be released, and by whom it should be released and that demonstrate the agency’s commitment to inform the community and news media of events involving the agency.

Suggested Evidence of Compliance: Provide the written statement of policy and procedure, indicating approval by the proper authority.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 375-377.

Agency Evidence of Compliance:

There is a countywide Director of Communication. The Department has a Marketing Coordinator. Together, they manage all communication for the County and the Department.

Lee County Parks & Recreation, through the Marketing Coordinator and marketing team, provides the public with information on the Department's programs and facilities. There is a commitment to inform the community and the news media of events and agency administrations operations. The Department interacts with the public through a variety of community relations and multimedia methods. The goal is to heighten public awareness of County policy, projects, services, accomplishments and the value of tax dollars.

The Department's Operations Manual highlights policy and procedures relating to public information. The Operations Manual is reviewed and approved on an annual basis.

In the event of a pending disaster, there is a standard operating guide for Media Relations.

Digital Evidence:

- [Lee County Parks & Recreation Operations Manual Chapter 11](#)
- [Manager Meeting approving operations manual chapter 11 on 09-21-15](#)
- [Standard Operating Guide for Media Relations during activation updated 7-9-15](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.4.1 - Public Information and Community Relations Responsibility

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

Suggested Evidence of Compliance: Provide the position description that reflects responsibilities for public information and community relations functions.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 375-377.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a Marketing Coordinator on staff who works closely with staff to enhance public relations and disseminate information. 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, addresses Customer Service and Public Relations.

Digital Evidence:

- [Lee County Parks & Recreation Coordinator job description](#)
- [Lee County Parks & Recreation Operations Manual Chapter 11-A](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.4.2 - Community Relations Plan

Standard: The agency shall have an established community relations plan that identifies and addresses community needs for all segments of its service population, which is evaluated periodically for effectiveness.

Suggested Evidence of Compliance: Provide the community relations plan and latest evaluation.

The community relations plan shall address the following:

- a. Community relations policies for the agency;
- b. Process and procedure for establishing contact with community organizations and other community groups;
- c. Training needs for staff and community.

The community relations plan and marketing plan is often included in a single document.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 375-377.

Agency Evidence of Compliance:

The Department's Community Relations Plan resides in the Operations Manual. Lee County Parks & Recreation makes use of the many community organizations that exist within Lee County by establishing relationships with numerous groups. This helps identify and address the community needs of all segments of the population. The Department actively organizes support groups to establish links with the community so the Department can be responsive and maintain a pro-active approach to issues before they become problems.

Digital Evidence:

- [Community Relations Plan - Operations Manual](#)
- [Minutes approving the Operation Manuals Chapter 11 - Community Relations Plan](#)
- [Minutes from Managers review 2-8-2016](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.4.3 - Marketing Plan

Standard:

The agency shall have an established marketing plan, based on market research that is evaluated periodically for effectiveness. The fundamental principle of marketing is to gain an understanding of customer needs, wants, concerns and behaviors. The marketing plan addresses the appropriate mix of communications tools to promote agency programs, facilities, events and services and to provide accurate, timely and useful information to the various segments of the target audience.

Suggested Evidence of Compliance: Provide the plan and latest evaluation. The plan shall include:

- a. Marketing objectives;
- b. Situation assessment, to include:
 1. Examination of demographic trends
 2. Economic climate
- c. Market coverage by alternative providers;
- d. Segmentation, targeting, and positioning;
- e. Marketing mix;
- f. Marketing methods
- g. Evaluation criteria and methods.

Research is important to support segmentation, targeting, and positioning. Common evaluation methods include surveys, focus groups, customer comment cards, and mystery shopping.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 359-377.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation has an established marketing plan that resides in the Operations Manual regularly assessed by the Marketing & Media Coordinator. The plan

provides the Department with a mission statement, the products and services the Department provides and other items to be used in the Parks and Recreation marketing efforts. This marketing plan is evaluated periodically.

A Marketing Analysis Report is created periodically and distributed to the management team for review. The most recent review was February 8, 2016.

Digital Evidence:

- [Lee County Parks & Recreation Marketing Plan – Operations Manual](#)
- [Minutes from Manager’s meeting approving Marketing Plan](#)
- [Lee County Marketing Analysis Report](#)
- [Minutes from Manager’s Meeting reviewing Marketing Analysis Report](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.4.3.1 - Marketing Responsibility

Standard: A specific position shall be designated to direct the marketing function.

Marketing functions shall be the responsibility of a permanent position of the agency that works closely with all agency units in developing, coordinating, and implementing the agency marketing plan.

Suggested Evidence of Compliance: Provide the position description that includes responsibility for marketing.

Agency Evidence of Compliance:

The Marketing & Media Coordinator is Kristie Valone. She is designated to direct the marketing functions of Lee County Parks & Recreation. Her duties are included in her job description and are outlined in the Lee County Parks & Recreation Operations Manual.

Digital Evidence:

- [Lee County Parks & Recreation Coordinator job description](#)
- [Kristie Valone Resume](#)
- [Marketing Coordinator’s Duties outlines in Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.5 - Utilization of Technology

Standard: Technology shall be used to enable the agency to operate more efficiently and effectively. The agency should research and apply such resources progressively.

Suggested Evidence of Compliance: Provide examples of progressive adoption, upgrade, installation, and/or use of technology. Examples could include but are not limited to communications and security systems, energy and records management systems, data management and sharing systems, lighting and irrigation systems, work orders and work assignment applications, financial systems, and class registration systems.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 14 – Information Technology Management, pp 305-345.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation has been employing the use of leading edge technology for many years, from computer based automated irrigation, lighting systems and weather tracking alert systems to the use of simple digital timers for restroom doors and motion sensor-activated lighting. In recent years with the development of internet technologies, many of these systems have migrated to the internet and the Parks and Recreation intranet.

Many database applications using Microsoft Access have been developed to help administer the multitude of data generated and managed by all levels of departmental staff. In recent years, due to the amount of data involved, the Department has begun migrating several of these systems to Microsoft SQL (Structured Query Language) servers designed to handle this huge amount of data. SQL also helps facilitate the ability to web-enable many of the applications.

The Department also utilizes many “Off the Shelf” systems designed specifically to manage the many Department and Countywide functions. An example of this type of software is OneWorld financial software used by The Lee County Clerk’s office.

Examples of these systems are as follows:

Volunteer Services - The Department Volunteer Program uses Volgistics, which is a web based volunteer management software with the latest technology and mobile app features. Volunteer Staff log on from any device to log hours, check volunteer opportunities, view schedule, check messages and communicate with Volunteer Services. Parks and Recreation Staff have all the tools to manage a large volunteer program from any device and internet connection.

AiM work order system by AssetWorks LLC – This is an enterprise-wide work order system designed and implemented by the Lee County’s Facilities and Construction Management department. This network-based system enables employees to enter and track work orders

needed for items such as plumbing and electrical services provided by County service personnel.

Heavy Equipment Work Order System – This Microsoft Access database is used to enter and track the work order requests that require specialized heavy equipment such as graders and boom trucks. This system, like several others, has been web-enabled so staff can enter work orders into the system anywhere they have an internet connection by logging in to the Parks and Recreation extranet.

Parks and Recreation Extranet – The password protected section of the website provides staff with a multitude of features. Various links provide employees with budget tracking, purchase order downloads, event calendar login, Heavy Equipment work orders, Unit of Service entry, SDS database, website updates for their facility, MS Word templates for the Department, a variety of internal surveys, Defensive Driving Course access and others.

Purchase Order Tracking System (POTS) – This system began as a Microsoft Access Database and is one of the systems that have been migrated to a SQL based system. It is an internally used application for tracking departmental expenditures to a specific project number that may be an actual facility or a recreational program. With this system, the Department can pinpoint what the associated costs are for a particular recreation center, swimming pool, community park, etc.

Equipment Inventory – This Microsoft Access database enables us to track the costs associated with the varied fleet charges for items such as vehicles, mowers, trailers, etc. Once tracked, this information can be entered into the Purchase Order Tracking System (POTS) program to allocate these charges to the facilities which the equipment is assigned.

Position Control – This is a database system that enables the Department to track individual employees to specific project numbers. Used in conjunction with the POTS system, the Department is able to generate reports such as the Cost Benefit Analysis (CBA), which details both personnel and operational expenditures to all of the facilities and programs.

Ranger Parking Violation System – This is a web-enabled database that allows the Park Rangers to enter parking violations and retrieve them in the field using wireless laptop systems. This permits the Rangers to monitor violation trends and habitual offenders on the go.

RecTrac and WebTrac Program Registration and Facility Reservation Systems – This is “Off-the-Shelf” software by Vermont Systems designed for the specialized task of recreation program registration and facility reservations. Registrations and reservations can be entered by staff, as well as a web-based interface for the public to register from the convenience of personal computers.

WeatherBug Lightning Alert System - Lee County Parks & Recreation has installed lightning alert systems at several park locations. The lightning alert systems are used as a weather monitoring tool that will provide additional protection to employees, recreational program participants and other park patrons. Employees use the WeatherBug app on their

smart phones to monitor the weather throughout the day.

The Department is continuously looking and researching new software and technology to improve its systems and processes. Many of the above were extensively researched and tested to ensure it would meet the Departments needs.

Digital Evidence:

- **Digital Screen shots of Software Applications 2015:**
 - Work order request; AiM
 - Heavy Equipment work order request
 - Lee County Parks & Recreation Extranet
 - Purchase Order Tracking System (POTS) 2016
 - RecTrac
 - WeatherBug

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.5.1 - Management Information Systems ★

Standard: The Agency shall have management information systems that can produce reliable statistical and data summaries of agency activities, such as daily, monthly, and annual reports for use in management decision-making. The reports shall provide comparative data and statistics.

Suggested Evidence of Compliance: Provide examples of recent statistical and data summaries and describe their use in management decision-making.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 14 – Information Technology Management, pp 310-313.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation management information systems provide a combination of daily, monthly, annual and biennial reports to evaluate the effectiveness of facilities, personnel, policies, procedures and programs. These reports are reviewed and analyzed to see if agency goals are being met, what trends are occurring, program and facility needs and to help in the decision-making process for upcoming objectives and measures. Information is stored, entered, tracked and analyzed by use of systems such as Microsoft Access, Microsoft Excel spreadsheets, as well as geographic and proprietary database systems.

The distribution and dissemination of the information is successfully accomplished through a

range of formats, such as posting to the website, distribution via email and hardcopy publications.

The management information systems accumulate data from numerous sites and data sources which are then developed into publications such as the Cost Benefit Analysis Report (CBA), Concurrency Report and other reports related to equipment, inventory and maintenance tracking. The CBA is the Department's principal biennial report for identifying attendance, revenue and costs associated with individual programs, staff and facilities. These reports are vital to management decision making for internal controls, strategic planning, administration staff and the elected board. All information and data accumulated may be viewed or requested at any time.

Managed information includes, but is not limited to:

- Facility/Program Attendance – RecTrac Enrollment participation Report
- Personnel Management – Allocation Report
- Work Orders – Fleet Billing
- Capital Improvement Projects (CIP) – CIP Summary report
- Equipment Inventory/Maintenance – Fleet Billing
- Units of Service Report – YTD Vehicle Units of Service

Digital Evidence:

- [Lee County Cost Benefit Analysis](#)
- [Lee County Concurrency Report](#)
- [Lee County Parks & Recreation Allocation report](#)
- [Lee County Parks & Recreation Rec Trac Enrollment participation Report](#)
- [Lee County Fleet Billing report](#)
- [Lee County Parks & Recreation CIP summary report](#)
- [Lee County Parks & Recreation YTD Vehicle Units of service](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.6 - Records Management Policy and Procedures

Standard: The agency shall have established policy and procedures for control, maintenance, and retention of records that are periodically reviewed. Records management policies and procedures address retention, disposal, access, disclosure and distribution of documents, including freedom of information requests, and they must be consistent with legal requirements.

Suggested Evidence of Compliance: Provide records management policy and procedures and a copy of the most recent review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 14 – Information Technology Management, pp 312-313.

Agency Evidence of Compliance:

Lee County Parks & Recreation follows the State of Florida general records schedule for state and local government agencies last reviewed February 19, 2015.

The Department maintains a central filing system within the Terry Park administration building. Department 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. Electronic files are automatically archived daily by the County IT department through the County computer network. Paper records are processed by office clerical staff through document imaging for safekeeping and access by other departments through the County's computer network. Shared computer file servers allow 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. Lee County maintains an established consistent procedure for the efficient processing of Public Records Requests.

Digital Evidence:

- [GS1-SL General Records Schedule for State and Local Government Agencies](#)
- [Records Management Liaison Identification email](#)
- [Public Records Request Policy](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

3.6.1 - Records Disaster Mitigation and Recovery Plan and Procedures

Standard: There shall be an established records disaster mitigation and recovery plan and procedures that are periodically reviewed for protecting records, storing them and recovering critical information after a disaster.

Suggested Evidence of Compliance: Provide the records disaster mitigation and recovery plan and procedures and a copy of the most recent review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd

Agency Evidence of Compliance:

The Department follows the Florida Department of State Disaster Recovery procedures for Public Records Custodians, Archives and Libraries and General Records Schedule per the State of Florida dated February 19, 2015.

Historical records found in the central filing system within the Terry Park administration building have been scanned and archived off site. 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 for scanning. Electronic files are automatically archived by the County’s IT department daily through the County’s computer network and electronic copies are kept in a contracted data recovery site located out of the area. Paper records are processed by office clerical staff through document imaging for safekeeping and access by other departments through the County’s computer network. Shared computer file servers allow records and documents from staff to be accessed electronically. Lee County provides a secure records storage warehouse to keep records as required by law until their deletion date. Field staff in remote locations are required to back up computer hard drives that are off network and secure files from potential disaster impact as outlined in the hurricane preparation policy.

Digital Evidence:

- [Florida Department Of State Disaster Recovery procedures for Public Records Custodians, Archives and Libraries](#)
- [General-Records-Schedule per State of Florida - Disaster Recovery](#)
- [Excerpt from Hurricane Preparation Checklist for computers](#)
- [Screenshot of Disaster Recovery from IT website](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 3.0 – ORGANIZATION AND ADMINISTRATION**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

4.0 - Human Resources

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

To produce the level of quality that customers have come to expect, organizations must employ qualified employees. Qualified personnel bring to the organization the knowledge, skills, and abilities in specialized areas that are needed to design and deliver the benefits that customers seek from recreation and park experiences. Organizations that employ quality individuals who are capable of packaging and delivering experiences can attract and retain a strong and satisfied customer base; organizations that compromise on hiring quality may face difficulties in remaining competitive.

Employing qualified individuals is not only one of the most important functions of recreation, park, and leisure services organizations; it is also one of the most expensive. Generally, more than half of the operational expenditures of recreation and park organizations are allocated to personnel salaries and benefits. Considering the vital importance of hiring quality employees and the associated expense, it is essential for management to have a working knowledge of the principles, practices, and procedures for employing personnel in the recreation, park, and leisure services field. A well-prepared personnel policies and procedures manual provide a consistent road map for human resources decision making as well as standardized procedures. The development of a personnel policies and procedures manual may include a systematic and comprehensive outline of how the organization administers the policies and procedures for both the professional and non-professional employees, fair employment practices, and how it communicates to all employees the specific expectations of employment and finally, how the organization deals with complaints, grievances, and morale problems.

4.1 - Personnel Policies and Procedures Manual ★

Standard: There shall be established policies that are reviewed periodically and govern the administration of personnel procedures for both professional and nonprofessional employees. The personnel policies and procedures manual shall be available to each employee, as appropriate to the position.

Suggested Evidence of Compliance: Provide the personnel policies and procedures manual and the date of latest review. The personnel practices shall include procedures for

- a. Selection, hiring, and dismissal;
- b. Benefits including retirement, insurance, leaves, and other benefits;
- c. Salary schedule;
- d. Incentive system; and
- e. Staff development program.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp 443-444; Compendium Section 17-7.

Agency Evidence of Compliance:

Lee County Human Resources Department provides a Policies and Procedures Manual on the Human Resources Department website. The manual is designed and intended to be used as a working outline document of the basic personnel policies, practices and procedures for the county. Human Resources periodically reviews the Lee County Policies and Procedures Manual by sending a draft email to Department Directors and HR Representatives to review

and offer suggestions for changes or improvements. Once revisions are determined by the Human Resources department, they are presented to the Board of County Commissioners (BOCC) for approval. The last revision approved by the BOCC was April 7, 2015.

The Department also has a Parks and Recreation Operations Manual available to each of its employees. The process to review the Department's Operations Manual is that each Chapter is assigned for review by designated staff each month. Both manuals are considered to be living documents, and as such, are updated on an as-needed basis.

Digital Evidence

- Lee County Human Resources website for Policy and Procedures - <https://www.leegov.com/hr/policies>
- [Blue Sheet for Revisions on April 7, 2015 of Policies and Procedures Manual](#)
- [Parks and Recreation Operations Manual](#)
- [Manager Review Schedule - Operations Manual review](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.1 - Code of Ethics 

Standard: There must be an established statement of ethical principles for agency personnel that provide a clear understanding of ethical responsibility involving 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 the code of ethics.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp 422-423.

Agency Evidence of 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 is available online to each Parks and Recreation employee.

Digital Evidence:

- [Code of Ethics Policy, #206 Lee County Policies and Procedures Manual](#)
- [Employee Code of Ethics- Parks and Recreation Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.1.1 - Staff Acceptance of Gifts and Gratuities

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

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

Agency Evidence of Compliance:

A copy of the Lee County Code of Ethics Policy as it relates to acceptance of gifts and gratuities by staff members is located in the Lee County Policy and Procedures Manual.

Digital Evidence of Compliance:

- [Code of Ethics Policy, #206:2 Lee County Policies and Procedures Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.2 - Recruitment Process

Standard: There shall be a comprehensive recruitment process to attract qualified personnel that is based upon established recruitment procedures with specific recruitment objectives that are reviewed periodically. It is understood that in certain cases an agency is required to handle its personnel through a state or local civil service merit system, and is, therefore, linked to that system in the recruitment of its park and recreation personnel. Agencies are obligated to comply with all applicable statutes and policy statements.

Suggested Evidence of Compliance: Provide recruitment procedures, recruitment objectives, and last review.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 16 – Human Resource Employment, pp 404-406.](#)

Agency Evidence of Compliance:

Lee County's policies regarding recruiting announcements, applications and the advertising process is located in the Lee County Policy and Procedure Manual. Lee County Parks & Recreation has designated administrative staff members that work closely with the Lee County Human Resources department in all hiring procedures. This policy was last reviewed November 9, 2010.

Digital Evidence:

- [Hiring Policy #301, Lee County Policies and Procedures Manual](#)
- [Copy of application process](#)
- [Recruitment and Selection Process Parks and Recreation Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.3 - Equal Opportunity Employment and Workforce Diversity 

Standard: There shall be an established policy regarding diversity with evidence of implementation that assures equal opportunities for employment, promotion, and equity in employment working conditions and that complies with the American Disabilities Act.

Suggested Evidence of Compliance: Provide the equal opportunity and workforce diversity policy and show evidence of implementation.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 437-438.

Agency Evidence of 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 Human Resources Director or designee, is responsible to implement, coordinate and monitor this program.

The Lee County Policies and Procedure manual has an Equal Employment Opportunity Policy #201 that all staff follow.

The employee statistic report shows the diversity of Lee County employment in 2014.

Digital Evidence:

- [Lee County Affirmative Action Plan, Admin Code-1-4](#)
- [Equal Employment Opportunity Policy 201 Lee County Policies and Procedures Manual](#)
- [Lee County employee statistic report 2014](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.4 - Selection Process

Standard: There shall be comprehensive procedures for hiring personnel. The agency shall also have a role in determination of skills and the personal attributes required for positions.

Suggested Evidence of Compliance: Provide selection process procedures and evidence that procedures are being followed. The procedures shall include information about the purpose, development, validity, utility, fairness, adverse impact, administration, scoring, and interpretation of all elements used in the selection process.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 408-414.

Agency Evidence of Compliance:

Lee County Parks & 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 designated publications. Applicants complete an application online or a printed version which is sent to the hiring supervisor via Neogov system. The hiring supervisor follows the recruitment and selection process from the Departments Operations Manual.

An example of policy and procedures being followed would be the Department's Intent to Hire packet which shows the steps taken to hire applicants for employment.

Digital Evidence:

- [Hiring Policy #301, Lee County Policies and Procedures Manual](#)
- [Job Posting Samples](#)
- [Recruitment and Selection Process Parks and Recreation Operations Manual](#)
- [Intent to Hire Packet](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.5 - Background Investigation

Standard: The agency process for hiring personnel shall include procedures for a national background investigation prior to appointment, including verification of a candidate's qualifying credentials, review of a candidate's civil and criminal record, particular attention to drug and child/adult-abuse records, and driving record for employees assigned to operate motor vehicles. Part of the process shall include criteria for disqualification which at a minimum is consistent with the “Criteria for Exclusion” guidelines adopted by the National Recreation and Parks Association.

Suggested Evidence of Compliance: Provide the background investigation procedures and examples of background checks completed.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 412-413.

Agency Evidence of Compliance:

Human Resources policy #301 from the Lee County Policies and Procedures manual states that all candidates who have been offered a position with Lee County must have a criminal background check performed by the Human Resources department. These background checks are considered Level 1 and conducted through local, state and national agencies by a third-party vendor set up through the Human Resources department. Candidates working for the Summer Camp Programs must clear a Level 2 background check. A check of the applicant’s driver’s license is completed on candidates who are required to drive for the position to verify a safe driving history.

As per the Department’s Operations Manual, the applicants complete the information disclosure release form after receiving offer letter for a position giving approval to conduct background screening.

Digital Evidence:

- Lee County Hiring Policy #301, Lee County Policies and Procedures Manual
- [Information Disclosure Release Form](#)
- [Livescan Submission Form Level 2 Screening](#)
- [Copy of a Candidates Background screening](#)
- [Copy of Employee Driver’s License check](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.6 - Employee Benefits

Standard: There shall be an established employee benefits plan. Each of the benefits provided to employees shall be described in terms of what is provided, under what conditions, and the extent of the benefit. Types of benefits often include administrative leave, holiday leave, sick leave, vacation leave, retirement program, health insurance program, disability and death benefits program, liability protection program, provision of clothing and equipment used by employees in performing park and recreation functions, employee education benefits, if any, and personnel support services to employees.

Suggested Evidence of Compliance: Provide the employee benefits plan.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 416-422.

Agency Evidence of Compliance:

Lee County is proud of its benefit package for employees and offers a comprehensive benefits program that allows employees to select a medical plan, dental plan and a vision plan that best fit their individual or family needs. The employee benefits plans 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.

Digital Evidence:

- [Lee County Benefit Package](#)
- [VSP Vision Plan](#)
- [FRS information](#)
- [Nationwide Retirement Planning To-Do List](#)
- [ICMA 457 Plan and Trust Document](#)
- [Employee Sick Leave Lee County Policy and Procedures Manual 401](#)
- [Employee Vacation Leave Lee County Policy and Procedures Manual 402](#)
- [Employee Holidays Lee County Policy and Procedures Manual 403](#)
- Lee County Employee Benefits online - <https://www.leegov.com/hr/employees/benefitplans>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.7 - Supervision

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

Suggested Evidence of Compliance: Provide examples of processes, procedures, or tools used to assure constructive and effective employee supervision.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 18 – Supervision of Personnel, pp 461-484.

Agency Evidence of Compliance:

The Department Director and Deputy Director meet bi-monthly with managers to review work plans. Managers meet with all Senior Supervisors, Supervisors and Coordinators regularly. Supervisors meet with their staff to review schedules, expectations and safety issues.

Annual performance evaluations are completed by supervisors for each of their employees on or before the employee's employment yearly anniversary date. At that time, performance work traits, goals and objectives are reviewed for the coming year.

The Human Resources department offers various training sessions for supervisory staff that cover Harassment Avoidance, Diversity in the Workplace, Performance Evaluation training for Supervisors, Workers Comp 101 and Managers and Supervisor Training.

Digital Evidence:

- [Employee Supervision Policy 004 Lee County Policies and Procedures Manual](#)
- [Process for Annual Performance Evaluations - Operations Manual](#)
- [Employee Performance Evaluation Form](#)
- [Sample of Employee Goals and Objectives](#)
- [Example of Human Resources Training](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.8 - Compensation Plan

Standard: There shall be an established compensation plan and that establishes equity of compensation among units within the agency that is reviewed periodically. The compensation plan for an agency shall take into account agency employment standards, agency skill needs, and compensation levels offered by other local employers.

Suggested Evidence of Compliance: Provide the compensation plan and a copy of its most recent review or update.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 414-422.

Agency Evidence of Compliance:

The Human Resources department is responsible for the maintenance of the Pay Plan with sound compensation practices that is reviewed annually. The Pay Plan includes a listing of all job classifications with a salary range showing pay grades with the minimum and maximum rate of pay for each job title. The last review was October 15, 2015.

The Human Resources Department conducts salary surveys on various positions annually to ensure employees are receiving fair and equitable compensation.

Digital Evidence:

- [Lee County Pay Plan and Job Classification](#)
- [Salary Survey](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.9 - Performance Evaluation

Standard: There shall be a fair and systematic procedure for annual or periodic appraisal of job performance. Personnel evaluation shall be utilized for the development and improved quality of the individual's performance on the job, as well as a basis for promotion, monetary increments, and dismissal. Although evaluation is a day-by-day process, there shall be periodic specific reviews with the employee. An employee's personnel file shall include a written annual evaluation.

Suggested Evidence of Compliance: Provide the procedures and a sample of completed performance evaluations without identifying personal information.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed.,

Agency Evidence of Compliance:

Lee County Policies and Procedure Manual gives guidance on how conduct staff performance evaluations. The Department’s Operations Manual provides the process for performance evaluations.

Lee County Human Resources maintains a performance evaluation program that objectively reflects employee performance. Positive Performance Evaluation training is offered to all staff who oversees employees.

The evaluation is used to measure employee performance through achievement of assigned duties, responsibilities and agreed upon goals and objectives for the year. It is also used to recognize areas that an employee needs to improve and serves as a tool to determine whether the County needs to provide additional training. New employees receive an evaluation after three months and then after six months to determine whether they completed their probationary period. Evaluations are then completed by the Supervisor annually and reviewed with the employee.

Digital Evidence:

- [Performance Evaluation, Policy #502, Lee County Policies and Procedures Manual](#)
- [Performance Evaluations – Operations Manual](#)
- [Positive Performance Evaluation Booklet](#)
- [Samples of completed Employee Performance Evaluations](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.10 - Promotion

Standard: There shall be an established policy and procedures available to all employees defining the promotion process and the agency's role. The park and recreation agency may rely upon a state or local civil service commission, or other public or private external organization to administer one or more elements of the process in accordance with legal, professional, and administrative requirements.

Suggested Evidence of Compliance: Provide the policy and procedures, and indicate how they have been communicated to employees.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp 445-448.

Agency Evidence of Compliance:

Lee County Policies and Procedures manual provides a promotion policy that provides training and development opportunities for employees as a way to promote when appropriate.

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 or appointed by Senior Management. Upon promotion, the employee shall have their salary adjusted. Most available positions are advertised on the Lee County Job List, Lee County Website and on a broadcast email. The Department encourages staff to apply for promotions whenever possible.

Digital Evidence:

- [Promotion, Policy #306, Lee County Policies and Procedures Manual](#)
- [Internal Manager job posting](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.11 - Disciplinary System

Standard: There shall be an established disciplinary system based on the code of conduct and performance. The system shall specify the conduct expected of employees. Prohibitions should be specific, whereas approved behavior may be stated in general terms (e.g., courtesy, punctuality).

Suggested Evidence of Compliance: Provide the code of conduct and performance and the policies and procedures that guide the disciplinary system and how this information is communicated and made accessible to employees. Include copies of disciplinary action steps included in collective bargaining agreements, if applicable. This system shall address the following topics:

- a. Compliance with agency statements;
- b. Unbecoming conduct;
- c. Appropriate appearance;
- d. Use of alcohol and drugs;
- e. Acceptance of gratuities, bribes, or rewards;
- f. Abuse of authority; and
- g. Proper care and maintenance of equipment.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 423-427.

Agency Evidence of Compliance:

The Corrective Action Disciplinary Procedure and Code of Ethics is found in the Lee County Policies and Procedures Manual. 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 Departments New Employee orientation process.

Digital Evidence:

- [Behavior of Employees, Policy #101 Lee County Policies/Procedures Manual](#)
- [Code of Ethics – Lee County Policies and Procedures](#)
- [Corrective Action/Disciplinary Procedure Policy 601 Lee County Policies/Procedures Manual](#)
- [Notice of Proposed Corrective Action Form](#)
- [Notice of Corrective Action Form](#)
- [New Employee Orientation Booklet](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.12 - Grievance Procedures

Standard: There shall be an established grievance procedure, available to all employees. The procedure shall identify matters that are grievable; establish time limitations for filing or presenting the grievance; establish steps and time limitations at each step in the grievance procedure; and establish criteria for employee representation. Formal grievance procedures shall be written in clear, concise terms.

Suggested Evidence of Compliance: Provide the grievance procedures and indicate how the procedures have been communicated to the employees. Include grievance procedures included in collective bargaining agreements, if applicable.

Informational reference in the Management of Park and Recreation Agencies, (2010), 3rd Ed., Chapter 16 – Human Resource Employment, pp 427-430.

Agency Evidence of Compliance:

A grievance procedure has been established to provide full opportunity for all Lee County employees to bring to the attention of management complaints, grievances or situations in

which the employee feels they need further information. It is the intent and desire of the County to handle complaints or grievances informally. Both the supervisor and employee are expected to make every effort to resolve problems as they arise. However, it is recognized that there will be grievances that can only be resolved 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 and online access.

Lee County does not have collective bargain agreements and is not unionized.

Digital Evidence:

- [Grievance Procedures, Policy #602 Lee County Policies and Procedures Manual](#)
- Lee County Policies and Procedures – Grievance Procedure (website)
<https://www.leegov.com/hr/Policy%20Manual/602.pdf>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.1.13 - Termination and End of Employment

Standard: There shall be established policies and procedures for termination and end of employment.

Suggested Evidence of Compliance: Provide the termination and end of employment policies and procedures, and indicate how they have been communicated to employees.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 16 – Human Resource Employment, p. 426.

Agency Evidence of 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 two 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, suspended or terminated and such action is not subject to the grievance procedure.

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

Digital Evidence:

- [Separation of Employment, Policy #311 Lee County Policies and Procedures Manual](#)
- [Employment at Will, Policy #003 Lee County Policies and Procedures Manual](#)
- [Reduction of Workforce, Policy # 310 Lee County Policies and Procedures Manual](#)
- [Probationary Period, Policy #304 Lee County Policies and Procedures Manual](#)
- [Employee orientation and handbook acknowledgment](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.2 - Staff Qualifications 

Standard: The agency shall employ staff qualified to develop and operate programs and services in furtherance of goals and objectives. Staff shall be qualified for the positions as provided in the job descriptions and possess specified licenses and certificates. Park and recreation personnel shall have certification and/or educational training appropriate to the position.

Suggested Evidence of Compliance: Provide job descriptions for a representative sample of key positions and resumes for the current incumbents.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, p. 451.

Agency Evidence of Compliance:

Lee County Parks & 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, unless Senior Management appoints an employee directly. Only the best suited applicant is hired and must meet all County standards. All personnel files are public record and copies are on file in the Department for review.

Digital Evidence:

- [Director Job Description](#)
- [Dana Kasler, Director, Resume](#)
- [Deputy Director Job Description](#)

- [Alise Flanjack, Deputy Director, Resume](#)
- [Select Staff Résumés and Job Descriptions](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.3 - Job Analyses for Job Descriptions

Standard: Established job descriptions for all positions shall be based on the job analysis and reviewed periodically.

Suggested Evidence of Compliance: Provide a job description for a full-time, part-time, temporary and internship position, and, if applicable, an example of a job analysis with last review. The job descriptions shall include, at a minimum:

- a. Duties of each position;
- b. Responsibilities of each position;
- c. Tasks of each position; and
- d. Minimum level of proficiency necessary in the job-related skills, knowledge, abilities, and behaviors.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp.439-441.

Agency Evidence of 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.

New positions require a Comprehensive Position Questionnaire be completed by the Department in order to analyze the job duties and requirements of the proposed position.

An example of a periodic review is completed by Human Resources Department was recently done for our Fiscal Manager.

Digital Evidence:

- [Copy of all Parks and Recreation Job Descriptions](#)
- [Comprehensive Position Questionnaire](#)
- [Memo to regrade and retitle Maintenance Specialist](#)
- [Copy of Position Dr. form to update position descriptions](#)
- [Memo notification of Fiscal Manager Classification Review](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.4 - Chief Administrator

Standard: The agency shall have a chief administrator responsible to the approving authority for the management, direction, and control of the operations and administration of the agency and with authority to perform such responsibilities. The chief administrator shall be employed full-time, year-round, and be qualified by experience, education, certification, and/or training in park, recreation, leisure services, tourism, or related disciplines. These qualifications shall be verified and demonstrated specifically as to how it is related to park and/or recreation management.

Suggested Evidence of Compliance: Provide the chief administrator position description and the resume of the current incumbent. If she/he is from a related discipline, provide a summary of how the person's qualifications relate to park and/or recreation management.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 17 – Human Resource Management, pp. 433-438.](#)

Agency Evidence of Compliance:

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

The Director, Dana Kasler, has a BS in Parks and Recreation, an MS in Recreation Administration, an MBA and more than 25 years experience in the field.

The Deputy Director, Alise Flanjack, has more than 31 years of experience in the field.

Digital Evidence:

- [Job Description for Department Director](#)
- [Job Description for Deputy Director](#)
- [Resume for Department Director](#)
- [Resume for Deputy Director](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.4.1 - Leadership Succession Procedure

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

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

Agency Evidence of Compliance:

The Department's procedure to transfer the authority of leadership from the Director to he/she designee when appropriate was established with the approval of the County Manager's office. The Director will announce at the Manager's bi-monthly meeting that a transfer of authority is needed and he names the designee along with an estimated timeframe.

Digital Evidence:

- [Leadership Succession Procedures – Operations Manual](#)
- [Agenda and Minutes to Manager's Meeting updating Policy of Delegated Authority](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.5 - Workforce Health and Wellness Program

Standard: The agency shall have an employee health and wellness program showing periodic evaluation of the program status.

Suggested Evidence of Compliance: Provide evidence of the agency's employee health and wellness program, level of participation and most recent evaluation.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 441-442.

Agency Evidence of Compliance:

Lee County offers health and physical fitness programs to all employees. The Human Resources department provides an informational website and organizes an annual Health and Wellness fair that offers various free health screenings such as blood pressure, glucose screenings, nutrition, body fat, cancer screenings and free flu shots. Lee County offers an

employee assistance program (EAP), which provides various online resources for employees and families.

The Lee County Wellness Program was last reviewed September 14, 2010 and has been evolving every since.

Digital Evidence:

- [Lee County Wellness Program Summary](#)
- [Employee Level Participation](#)
- [Employee Fitness Membership Benefit](#)
- [Webpage from Lee County Employee Health & Wellness site](#)
- [Employee Health Assessment Incentive Program](#)
- [Tobacco Free Lee Program](#)
- [Lee County Employee Assistance Program](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.6 - Orientation Program

Standard: There shall be an orientation program for all personnel employed by the agency.

Suggested Evidence of Compliance: Provide outline of the orientation program and a representative example of materials distributed at an orientation. The orientation program should include:

- a. Philosophy, goals, and objectives;
- b. The history and development of the agency;
- c. Pertinent sociological and environmental factors of the community and specific neighborhoods in which the individual is to serve (environmental scan); and
- d. Review of program/parks policies and procedures manuals, job duties, staff procedures, first aid and safety concerns and guidelines and forms review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 442-443.

Agency Evidence of Compliance:

All employees, whether full-time, part-time, temporary, on-call or seasonal, must attend Lee County’s new employee orientation program, conducted by Human Resources their first day of work. Once the employee completes the Human Resources department’s orientation program they attend a Parks and Recreation orientation training program either that same afternoon or the next morning. At the Parks and Recreation orientation, the employee will get a more in-depth overview of how the Department functions within Lee County

government. The employees get their photo taken for an ID badge, they get an email established and take some online safety training courses.

Digital Evidence:

- [Lee County Orientation/Training, Policy #303 Lee Co Manual](#)
- [Lee County Orientation Agenda](#)
- [Lee County Parks & Recreation New Employee Orientation Booklet](#)
- [Lee County Parks & Recreation New Employee Training Checklist](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.6.1 - Employee Training and Development Program

Standard: There shall be a program of employee development which is available to employees throughout the agency. It should be based on needs of individual employees, future organizational needs, and is evaluated and updated periodically. The program must notify personnel of available and/or required training, maintain training records, and assure that required training programs are attended. The program should incorporate in-service training and succession planning to ensure the continued effective performance of the organization after the departure of key staff.

Suggested Evidence of Compliance: Describe the scope and components of the employee development and training program, provide an outline of training offered (mandatory and discretionary), and provide lists of participants for the prior calendar year, and last review.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 17 – Human Resource Management, pp. 448-451.](#)

Agency Evidence of Compliance:

Lee County Government has an Education Assistance policy that provides educational assistance to its employees to allow them to enhance their ability to serve the public interest of the citizens of Lee County that was last revised April 7, 2015.

The Department’s Operation Manual provides employees with the policy and focus on staff development and was last reviewed on January 28, 2016.

Lee County provides training opportunities for all employees accessible via the Intranet called WebConnect. The Department offers mandatory monthly safety meetings at their site. Employees are encouraged to take advantage of workshops and seminars provided by the County, as well as outside agencies, training centers, colleges, FRPA, NRPA and continuing education courses.

Digital Evidence:

- [Educational Assistance, Policy #212 Lee County Policies and Procedures Manual](#)
- [Staff Development - Operations Manual](#)
- [Staff Training History](#)
- [Lee County Training and Development website](#)
- [Lee County Parks & Recreation Monthly Safety Topics](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.6.2 - Professional Certification and Organization Membership

Standard: Professional staff shall be active members of their professional organization(s) and pursue professional certifications within their respective disciplines. "Active" means more than holding membership, including attendance at meetings, making presentations, participating in committee work, holding elected and appointed positions, and participation in educational opportunities.

Suggested Evidence of Compliance: Provide a list of staff with professional certifications and also provide a list of staff that have actively participated in a professional organization during the prior calendar year, indicating the nature of participation. The following are examples for park and recreation professionals e.g. Certified Park and Recreation Professional (CPRP), Certified Park and Recreation Executive (CPRE), Certified Therapeutic Recreation Specialist (CTRS) for park and recreation professionals.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 17 – Human Resource Management, p. 451.

Agency Evidence of Compliance:

Lee County Parks & Recreation holds a premiere agency membership with the National Recreation and Park Association, a gold agency Florida Recreation and Parks Association (FRPA), Sports Turf Managers Association, as well as many others. Agency staff is encouraged to become certified, join and attend conferences and be active members in professional organizations. Lee County Parks & Recreation send several staff members to the annual FRPA Conference. The Department has four active CAPRA visitors, as well as several more staff who recently completed visitor training. Many staff represent a variety of professional organizations as well as board members.

The following are examples for park and recreation professionals e.g. Certified Park and

Recreation Professional (CPRP), Certified Park and Recreation Associate (CPRA), Certified Therapeutic Recreation Specialist (CTRS) for park and recreation professionals, Certified Playground Safety Inspectors.

Digital Evidence:

- [FRPA Staff Certification List](#)
- [List of Staff Memberships and Professional Organizations](#)
- [Example of active member teaching session at state conference](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7 - Volunteer Management

Standard: There shall be a volunteer management function within the agency, including a comprehensive volunteer management manual that includes policies and procedures related to the management of volunteers.

Suggested Evidence of Compliance: Provide the volunteer management manual.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 454-458.

Agency Evidence of Compliance:

The agency has a comprehensive Volunteer Services program that is coordinated and monitored by a full-time Parks and Recreation staff member. The Volunteer Services Coordinator has developed a comprehensive Volunteer Services manual with policies and procedures for staff to follow as they interview, train, schedule and evaluate the volunteer staff. The role of the Volunteer Services Coordinator is to be the gate keeper for the Department’s needs, to advertise, recruit and record the many hours and projects the volunteer staff provides for the Department.

The Volunteer Program has an extensive website that has all the information that the public would need to know to be a part of the volunteer program.

Digital Evidence

- [Volunteer Staff Policy - Operations Manual](#)
- [Job Description for Volunteer Services Coordinator](#)
- [Volunteer Staff Manual](#)
- Volunteer Services (website) - <https://www.leegov.com/parks/volunteers>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7.1 - Use of Volunteers

Standard: Volunteers shall be used by the agency in a variety of positions.

Suggested Evidence of Compliance: Provide list of functions in which agency volunteers are used, the extent of use, and examples of volunteer position descriptions.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 455-456.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a dedicated Volunteer Services Coordinator who is responsible for all volunteer activities as outlined in the Operations Manual and the Volunteer Manual.

The Department utilizes volunteer staff extensively in a variety of positions throughout the Department. The list of volunteer opportunities is available on our website. The locations and tasks are determined with the site supervisor. The volunteer opportunities are then designed and reviewed, along with the wage value for each volunteer hour donated. 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 & Recreation currently has 1,357 volunteers registered recording 51,945 hours of service with a wage value of \$797,004.95.

Digital Evidence:

- Lee County Parks & Recreation Volunteer Opportunities (website) <https://www.volgistics.com/ex/portal.dll/od?from=159456>
- [Listing of types Volunteer Opportunities](#)
- [Sample Volunteer Report](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7.2 - Volunteer Recruitment, Selection, Orientation, Training, and Retention

Standard: There shall be an on-going function within the agency for the recruitment, selection, orientation, training and retention of volunteers, including procedures on background screening. Background investigations shall be made for all volunteers who work routinely with vulnerable populations, especially youth, senior adults, and persons with disabilities.

Suggested Evidence of Compliance: Provide the agency's recruitment, selection, orientation, training, and retention procedures. Provide the agency's background investigation procedures for volunteers and evidence of implementation.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 456-457.

Agency Evidence of Compliance:

Lee County Parks & Recreation, through the Department's Volunteer Coordinator and site supervisors, recruit volunteers through schools, career fairs, brochures, social media, civic groups and corporate volunteer programs. The site supervisors identify individuals to become volunteers through email and personal interviews. The individual is connected to the Volunteer Services Coordinator who accepts the volunteer application and processes the background screening. Once staff has successfully completed the interview and background screening, as a part of orientation, each volunteer staff member is given a welcome email and a Volunteer Manual/Handbook, which includes policies and procedures, workers compensation information and the incentive program information.

The Volunteer Services Coordinator hosts two annual volunteer events and encourages each site supervisor to have regular meetings with all their volunteer staff to aid with retention.

Digital Evidence:

- [Volunteer Services Policies and Procedures](#)
- [Volunteer Staff Handbook/Manual \(Orientation/Training\)](#)
- [Volunteer Application \(Recruitment\)](#)
- [Samples of Background Screenings](#)
- [Brunch Invite \(Retention\)](#)
- [Volunteer Incentives Brochure \(Retention\)](#)
- Volunteer Services Facebook Page - <https://www.facebook.com/LCPRVolServices>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7.3 - Supervision and Evaluation of Volunteers

Standard: Agency volunteers shall be monitored, shall receive supervisory visits, and be evaluated regarding performance. Supervision and evaluation of volunteers is important to ensure adequate training is provided and to verify satisfactory conduct and performance. The degree to which the agency supervises and evaluates volunteers may vary depending on the role of the volunteers.

Suggested Evidence of Compliance: Provide written description of the monitoring system including current practices for supervisory visits, and examples of evaluations.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, p. 457.

Agency Evidence of Compliance:

Volunteer Staff Supervisor and evaluation is outlined in the Volunteer Program Matrix.

Volunteer Staff are supervised by Volunteer Staff Supervisors. Several of the Supervisors are volunteers and report directly to the Volunteer Services Coordinator. Volunteer Staff Supervisors attend trainings offered by the Volunteer Services Coordinator and other agencies. Volunteer Staff receives in-service training on an as-needed basis depending upon the assignment. The Volunteer Services Coordinator meets (checks in) with each volunteer staff supervisor at least annually to discuss and evaluate how their site is doing.

The Volunteer Services Coordinator emails *Volunteer Services Update* to all volunteer staff supervisors on any updates to the Volunteer Program throughout the year.

In the event a volunteer needs a corrective action, the Volunteer Services Coordinator will meet with the Volunteer Staff Supervisor and the volunteer to discuss the situation and plan a course of action. This conference is documented on the Volunteer Staff Conference Report and maintained at Volunteer Services.

Lee County Parks & Recreation volunteer staff and regular staff abide by the policies and procedures set for all staff in the Operations Manual.

Digital Evidence:

- [Volunteer Program Matrix](#)
- [Example of email to volunteer to \(Check In\)](#)
- [Volunteer Staff Conference Report Form](#)
- [Volunteer Staff Supervisors duties – Operations Manual](#)
- [Evaluation – Volunteer Handbook](#)
- [Example of Volunteer Evaluation](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7.4 - Recognition of Volunteers

Standard: There agency shall recognize volunteers for their contributions. Recognition may take many forms, depending on the nature of volunteer roles.

Suggested Evidence of Compliance: Provide a description of the recognition program and recognitions given over the past calendar year.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 457-458.

Agency Evidence of Compliance:

Lee County Parks & Recreation recognizes the value of its volunteer staff through various incentive and awards programs. An annual Volunteer Staff Appreciation event is hosted every spring for all the volunteer staff registered in the Department's program. Also, some site supervisors have established their own recognition events and programs at individual facilities.

The Retired and Senior Volunteer Program (RSVP) is a partner with Lee County Parks & Recreation and their organization recognizes the Department's volunteers age 55 and older who have dedicated more than 25 hours a year.

Digital Evidence:

- [Volunteer Incentives Brochure with available items](#)
- [Incentive Program Information from Volunteer Handbooks](#)
- [Recognition Invitations](#)
- RSVP Program (website) - <http://www.friendshipcenters.org/Volunteers/LeeRSVP.aspx>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.7.5 - Liability Coverage for Volunteers

Standard: Agency volunteers shall be covered for negligence liability.

Suggested Evidence of Compliance: Provide documentation indicating coverage of volunteers for negligence liability.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, p. 458.

Agency Evidence of 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.

Digital Evidence:

- [Volunteer Staff Handbook](#)
- [Worker's Compensation for Volunteers](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

4.8 - Consultants and Contract Employees

Standard: The agency shall have policies and procedures regarding the use of consultants and contract employees.

Suggested Evidence of Compliance: Provide the agency's policies and procedures regarding the use of consultants and contract employees.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 17 – Human Resource Management, pp. 458-459.

Agency Evidence of Compliance:

Lee County Parks & Recreation utilizes consultants and contract employees for many of its recreational programs, special programs and projects. All Independent Contractors go through a background screening process before they start providing services for the Department. Consultants are used for various project designs and Independent Contractors are used to provide specific services such as Zumba, Jazzercise, Martial Arts, Backyard BBQ

classes and more.

The Department's Operations Manual provides the procedures for handling independent contractors.

Digital Evidence:

- [Procedures for independent contractor - Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 4.0 – HUMAN RESOURCES**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

5.0 - Financial Management

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Financial management is the process of planning for, acquiring, and using funds to achieve predetermined organizational goals and objectives. The increasing demand for more and better services, continuing upward spiral of costs, increasing emphasis on fiscal responsibility and accountability, and the unwillingness of taxpayers support higher taxes, are all forcing park and recreation organizations to become more effective and efficient in all aspects of their financial operations. Parks and recreation managers must possess the ability to secure, organize, and control the financial resources of the organization to assure the success and survival of their organizations.

Formal fiscal control and monitoring procedures enable an agency to establish accountability, to comply with funding authorizations and restrictions, to ensure that disbursements are for designated and approved purposes and to alert agency management to possible problems.

5.1 - Fiscal Policy ★

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

Suggested Evidence of Compliance: Provide fiscal policies and legal authority.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 487-494.

Agency Evidence of Compliance:

The Lee County Board of County Commissioners (BOCC) has the responsibility of following the guidelines set forth in the Florida State Statutes. BOCC has established the Lee County Administrative Code, which outlines the management of all funds. Upon allocation of funds, the Department's responsibility to appropriately track all revenues and expenses while abiding by the Florida Statute in conjunction with the Procurement Management manuals.

The Lee County Clerk of Courts is responsible for all investments for the County while the Lee County Budget Office monitors revenues and provides debt analysis. The Fiscal section of the Department's Operations Manual sets forth the fiscal policies and procedures for all parks and recreation staff regarding fiscal policy.

Digital Evidence

- [Florida Statute 125.74](#)
- [Lee County Administrative Code AC 3-6 Budget Amendment, Revenue and Expenditure Authority](#)
- [Operations Manual - Fiscal Operations](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.1.1 - Comprehensive Revenue Policy 

Standard: There shall be an established revenue policy that is periodically updated regarding fees and charges for services and the strategies and methodologies for determining fees and charges and levels of cost recovery.

Suggested Evidence of Compliance: Provide the policy on fees and charges, the current fee schedules or cost-recovery procedures, and the most recent review or update.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 500-515.

Agency Evidence of Compliance:

The Lee County Board of County Commissioners (BOCC), 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 Department related activities such as programs, parking, rentals and is approved by the BOCC and updated on an as-needed basis or, at the very least, reviewed by the Department annually.

An attempt is made to incrementally increase fees as the market will bear. Minimal fees have been approved by the BOCC and have been established in an effort to offset costs and provide quality services and programs to the community. Programs are offered as a service for the residents and visitors.

The National Recreation and Park Association (NRPA) database Parks and Recreation Operating Ratio and Geographic Information System (PRORAGIS), is a national database that has the ability to run comparative reports to help agencies effectively manage and plan. Lee County is currently at a 20% cost recovery as it pertains to revenues.

Digital Evidence:

- [Lee County Administrative Code AC 3-10 External Fees and Charges Manual](#)
- [External Fees and Charges Manual](#)
- [PRORAGIS Report](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.1.2 - Agency Acceptance of Gifts and Donations

Standard: The agency shall have an established policy for the acceptance of gifts and donations.

Suggested Evidence of Compliance: Provide the policy on acceptance of gifts and donations.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 511-514.

Agency Evidence of Compliance:

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

Digital Evidence:

- [Lee County Administrative Code AC 3-12 Cash Donations Policy](#)
- [Operations Manual - Fiscal Operations](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.1.3 - Grants Procedures

Standard: Where feasible and appropriate, the agency shall procure regional, state, federal and/or other applicable agency grants to supplement funding through an established procedure to research, coordinate and implement grant opportunities. Prior to grant procurement, agencies shall evaluate how application, approval, implementation and management processes will be coordinated.

Suggested Evidence of Compliance: Provide the procedure to procure grants along with a summary of grants received by the agency for the past five years, including identification of the following: project descriptions, grantor, date awarded, grant amount and agency match.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed.,

Agency Evidence of Compliance:

Lee County Parks & Recreation participates in soliciting grants for partial or entire projects and follows procedures set forth in the Administrative Code and the Department’s Operations Manual.

The Department has engaged in cost-sharing projects and has secured various program grants. Typically, staff will research grant opportunities to determine the feasibility based on the type of grant, potential dollar amount, the required match, the length of the grant, the time that will be required to oversee the grant/project along with program and financial reporting requirements. The application process in most cases can be very extensive and labor intensive. Staff evaluates whether or not the grant will be a practical undertaking.

Digital Evidence:

- [Lee County Administrative Code AC 3-17 Grant Program Administration Procedures](#)
- [Operations Manual - Fiscal Operations](#)
- [Grants Summary \(Conservation 20/20\) 1999 through 2015](#)
- [Grant Summary \(Parks and Recreation\) FY 13 through FY 15](#)
- [Grant Status – Operating and Capital FY 12 through FY 15](#)
- [Gulf of Mexico-NPAA Galt Preserve grant](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.1.4 - Private, Corporate, and Non-Profit Support Procedures

Standard: Where feasible and appropriate, the agency shall solicit private, corporate, and non-profit support to supplement agency funding through an established procedure to research, coordinate and implement alternative funding options. Prior to acceptance of support the agency shall evaluate the terms of acceptance and how the implementation and management process will be coordinated.

Suggested Evidence of Compliance: Provide the procedure to solicit private, corporate and non-profit support along with a summary of such support received by the agency for the past five years including identification of the following: project descriptions, grantor/sponsor, date awarded, and value of the contribution and method of recognition.

Agency Evidence of Compliance:

Lee County Parks & Recreation has procedures in which private donations, discounts and organizational donations are received for County events as well as follows County Administrative Code. There are several groups that have partnered with Lee County Parks & Recreation to assist with financial support and/or advocate for the Department. Donations and discounts are reviewed and evaluated for feasibility of acceptance to ensure the donations and discounts complement and/or enhance existing programs. Once a clear purpose has been determined, the donation is applied and managed by the appropriate staff. If requested, a detailed expense report can be provided to an agency or group at any given time.

Over the years, facilities have been named for community leaders who had the foresight for a project and were instrumental in pursuing its completion. Typically these individuals are recognized at a BOCC meeting and/or at grand opening ceremonies.

Examples of nonprofit groups the Department partners with are the [Lakes Park Enrichment Foundation](#) and the [Friends of Six Mile Cypress Slough](#).

Digital Evidence:

- [Operations Manual - Donations](#)
- [Lee County Administrative Code AC 3-12 Cash and Capital Donations Policy](#)
- [Sponsorship List for FY 2011 - FY2015](#)
- Donation Carryover reports for FY 12 through FY 16
- Blue Sheets/Resolutions (naming rights)
 - [Barbara Manzo Tennis Center](#)
 - [JetBlue Park](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.2 - Fiscal Management Procedures 

Standard: There shall be established procedures for the fiscal management of the agency.

Suggested Evidence of Compliance: Provide the procedures for the fiscal management of the agency.

Agency Evidence of Compliance:

Lee County Parks & Recreation fiscal management is controlled by professional and technical staff that follows the Lee County General Budget/Finance policies and procedures. All fiscal responsibilities including budget, purchasing, tracking revenues and expenses are managed centrally for the Department as outlined in the Department's Operations Manual.

Digital Evidence:

- [2014 – 2015 Annual Operating Budget Document - Lee County General Budget Policy \(Section C – Financial Policy\)](#)
- [Operations Manual- Fiscal Operations](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.2.1 - Authority and Responsibility for Fiscal Management

Standard: The agency's chief administrator shall be designated as having the authority and responsibility for the fiscal management of the agency. Although an agency's chief administrator is ultimately responsible for all agency fiscal matters, the size and complexity of the agency may dictate the need to delegate responsibility for fiscal management functions to an identifiable person or component within the agency.

Suggested Evidence of Compliance: Provide documentation demonstrating clear delegation of fiscal authority for the agency.

Agency Evidence of Compliance:

Per the BOCC Administrative Code, the Department Director is ultimately responsible for all fiscal matters. With approximately 250 employees, 78 facilities and over 26,924 acres of environmental lands, a fiscal staff of five assume all daily fiscal management for the Department.

Digital Evidence:

- [Lee County Administrative Code AC 3-6 Budget Amendment, Revenue and Expenditure Authority](#)
- [Job Descriptions:](#)
 - Parks and Recreation Director
 - Parks and Recreation Deputy Director
 - Fiscal Manager
 - Fiscal Officer
 - Sr. Account Clerk

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.2.2 - Purchasing Procedures 

Standard: Agencies shall have established procedures for the requisition and purchase of agency equipment, supplies, and services.

Suggested Evidence of Compliance: Provide the procedures for the requisition and purchase of agency equipment, supplies, and services, including:

- a. Bidding procedures;
- b. Criteria for the selection of vendors and bidders; and
- c. Procedures for disbursement of petty cash and issuance; and
- d. Use of procurement cards, if applicable.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 515-517.

Agency Evidence of Compliance:

Lee County Procurement Management provides a Purchasing and Contracts Manual, which are appendices of the Lee County Administrative Code.

A comprehensive guideline outlining all purchasing related procedures is made available online.

The Fiscal chapter of the Department’s Operations Manual outlines all purchasing procedures.

Digital Evidence:

- Lee County Purchasing Manual (website)-
<https://www.leegov.com/procurement/manuals/purchasing-manual>
 - Section 4: Purchasing Methods
 - Section 5: Requisition Procedure
 - Section 6: New Vendor Set-up
 - Section 7: Purchase Orders
 - Section 8: Informal Procedures
 - Section 9: Formal Procedures
 - Section 18: Contract Procedure
 - Section 27: Procurement Card Policies and Procedures
- [Lee County Administrative Code AC 4-1 Lee County Purchasing & Payment Procedures Manual](#)
- Lee County Contracts Manual (website) -
<https://www.leegov.com/procurement/manuals/contracts-manual>

- [Lee County Administrative Code AC 4-4 Contracts Manual](#)
- [Operations Manual - Fiscal](#)
- [Lee County Administrative Code AC 3-20 Change Funds/Petty Cash/Imprest Accounts](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.2.2.1 - Emergency Purchase Procedures

Standard: There shall be established procedures for emergency purchases within the agency to secure equipment or services in a swift and efficient manner.

Suggested Evidence of Compliance: Provide the procedures for emergency purchases.

Agency Evidence of Compliance:

Emergency purchases are outlined in the Lee County Purchasing Manual as mandated by Administrative Code. Typically, Lee County Parks & Recreation purchases equipment outright. There are many established vendors that the County uses on a regular basis who would be available quickly in an emergency situation.

Digital Evidence:

- Lee County Purchasing Manual (website)
<https://www.leegov.com/procurement/manuals/purchasing-manual>
 - Section 12: Emergency Purchases
 - Section 13: Disaster Purchase Order
- [Administrative Code AC 4-1 Lee County Purchasing & Payment Procedures Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.3 - Accounting System

Standard: The agency shall have a comprehensive accounting system to ensure an orderly, accurate, and complete documentation of the flow of funds. The accounting system shall facilitate rapid retrieval of information on the status of appropriations, expenditures and revenue any time the information is required.

Suggested Evidence of Compliance: Provide a description of the accounting system.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 517-519.

Agency Evidence of Compliance:

Lee County Departments use a central accounting system. The accounting program, JD Edwards-Enterprise One Financial System, is inclusive of all aspects of financial applications for the County. In addition, Lee County utilizes the computer based program WORKS (a credit card reconciliation/payment program) and OnBase Unity (used to authorize and process invoices). All of these software based programs were updated to web-based applications within the last few years. Financial information can be easily located and retrieved from any of these programs depending on what might be requested.

Digital Evidence:

- JD Edwards-Enterprise One Financial System (website) <http://www.oracle.com/us/products/applications/jd-edwards-enterpriseone/overview/index.html>
- [WORKS User Guide](#)
- OnBase Unity Database (website) - <https://www.onbase.com/en/product/core-platform-strengths/integrations/enterprise-applications/e-business-suite#.VqE15vkrLhk>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.3.1 - Financial Status Reports

Standard: The agency shall periodically, monthly at a minimum, provide financial status reports. Each appropriation and expenditure shall be classified according to function, organizational component, activity, object, and program.

Suggested Evidence of Compliance: Provide financial status reports for the previous three months.

Financial status reports shall include, at a minimum:

- a. Initial appropriation for each account (or program);
- b. Balances at the commencement of the regularly defined period;
- c. Expenditures and encumbrances made during the period;
- d. Unencumbered balances; and

- e. Revenue status.

Agency Evidence of Compliance:

The JD Edwards-Enterprise One Financial System can create monthly status reports. Data in the Enterprise One Financial System can be manipulated easily through date and code changes by the user to reach the desired information. The Enterprise One Financial Budget Reports are very comprehensive and detail revenue and expenditure information including but not limited to, original and current budget, monthly amounts, year to date amounts, encumbrances and balance remaining by individual object codes.

Digital Evidence:

- [JD Edwards-Enterprise One Financial Budget Status Reports \(July, Aug and Sept 2015\)](#)
- [JD Edwards-Enterprise One CIP and Major Maintenance Project Status Reports \(July, Aug and Sept 2015\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.3.2 - Position Authorization Procedures

Standard: The agency shall have established procedures for maintaining control over the number and type of authorized filled and vacant positions to ensure that persons on the payroll are legally employed and that positions are in accordance with budget authorizations.

Suggested Evidence of Compliance: Provide the position authorization procedures and budgeted positions.

Agency Evidence of Compliance:

The Administrative Code allows the Department to hire and compensate staff. The BOCC must approve all new position requests including changing a position from part-time to full-time status. Either of these is done primarily through the budget process or a separate Board action is required. 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.

Digital Evidence:

- [Lee County Administrative Code AC 3-6 Budget Amendment, Revenue and Expenditure Authority](#)

- [Lee County Salary/Fringe Total Budget Prep Permanent Position by Home Division/Department for FY 15 Proposed Budget](#)
- [R.P.A Verification Report \(11/18/15\) – All Budget Positions](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.3.3 - Fiscal Control and Monitoring Procedures

Standard: The agency shall have established procedures used for collecting, safeguarding, and disbursing funds. The procedures shall enhance security and accountability of all monies received by the agency.

Suggested Evidence of Compliance: Provide the fiscal control and monitoring procedures. The fiscal control and monitoring procedures shall include:

- a. Maintenance of an allotment system, if any, or records of appropriations among organizational components;
- b. Preparation of financial statements;
- c. Conduct of internal audits; and
- d. Persons or positions authorized to accept or disburse funds.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 20 – Budgeting, pp. 572-576.

Agency Evidence of Compliance:

Lee County Parks & Recreation complies with the Lee County Administrative Code, as well as refined procedures in the Department's Operations Manual. There are several facilities that collect and secure cash for the fees and programs.

Change funds are maintained throughout the Department providing customers with change only during a transaction. This is the only form of cash disbursement handled in the outlying areas. The Fiscal Officer performs random surprise internal audits to ensure that staff is adhering to fiscal procedures. In addition, revenues are monitored and tracked through the RecTrac System, cash registers and the revenue side of Purchase Order Tracking System (POTS), a sophisticated LAN database program.

Terry Park is the only facility that disburses funds via Petty Cash, and the procedure is followed per the Lee County Administrative Code and the Department's Operations Manual.

There are no Department positions that restrict employees from handling cash, but there are several positions that handle cash as specified in their job descriptions.

All revenue/expenditure transactions are monitored in the JD Edwards-Enterprise One Financial System. In addition, the Department currently uses an internal monitoring system, which enables a breakdown of revenues and expenses with more detail through POTS. Either system can provide a variety of financial statements/reports as needed.

The Lee County Clerk of Court's Internal Audit Department periodically audits the Department as part of the annual close out procedure, on a scheduled basis, or upon request.

Digital Evidence:

- [Lee County Administrative Code AC 3-10 External Fees and Charges Manual](#)
- [Lee County Administrative Code AC 3-20 Change Funds/Petty Cash/Imprest Accounts](#)
- [Operations Manual \(Chapter 3 Fiscal Operations\)](#)
- [Cash Register Z report sample](#) (tracking)
- [RecTrac](#) (tracking)
- [Purchase Order Tracking System \(POTS\)](#)
- [Lee County Purchasing Manual Section 23 Monitoring Function](#)
- [JD Edwards-Enterprise One Database](#)
- [Job Descriptions:](#)
 - Account Clerk, Senior
 - Administrative Assistant
 - Administrative Support Supervisor
 - Coordinator, Land Stewardship
 - Coordinator, Parks and Recreation Programs
 - Deputy Director, Parks and Recreation
 - Director, Parks and Recreation
 - Fiscal Manager
 - Fiscal Officer
 - Manager, Parks and Recreation
 - Office Assistant, Senior
 - Parks and Recreation Maintenance Specialist, Senior
 - Parks and Recreation Program Specialist
 - Parks and Recreation Program Specialist, Senior
 - Park Ranger
 - Senior Supervisor, Parks and Recreation
 - Supervisor, Parks and Recreation
- [JD Edwards-Enterprise One Financial Operating Budget Status Reports \(July, Aug and Sept 2015\)](#)
- [2013 Lee Clerk's Internal Audit of Parks and Recreation](#) (monitoring)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.3.4 - Independent Audit

Standard: There shall be an independent audit of the agency's fiscal activities conducted annually or at a time stipulated by applicable statute or regulation. The audit may be performed by the government's internal audit staff (external to the agency being audited) or by an outside certified public accounting firm.

Suggested Evidence of Compliance: Provide the most recent independent audit and management letter, or most recent Comprehensive Annual Financial Report (CAFR) and provide the response to the audit recommendations.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 19 – Financial Management, pp. 520-523.

Agency Evidence of Compliance:

Lee County Administration, as well as Lee County Parks & Recreation, utilizes internal and external audits to review, update and change policies and procedures. The internal auditors are a subsection of the Lee County Clerk of Court. They are available on a schedule to audit each department, but are also available upon request. The external auditors complete a comprehensive annual audit.

Digital Evidence:

- [2014 Lee Clerk's Internal Audit of Parks and Recreation and Department Response](#)
- [2014 Comprehensive Annual Financial Report \(CAFR\)](#)
 - [2014 CAFR Management Letter](#)
 - [2014 Single Audit](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.4 - Annual or Biennial Budget

Standard: There shall be an annual or biennial operating and capital improvements budgets, including both revenues and expenditures. Operating budgets include both capital and operating expenses, cover a one-year or two-year period and capital improvements may extend five or six years with annual review. The nature of an agency's budgetary system may be determined by the kind of system in use by its governmental authority.

Suggested Evidence of Compliance: Provide the current and approved operating and capital improvements budgets.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 20 – Budgeting, pp. 527-576.

Agency Evidence of Compliance:

Under the direction of the Lee County Budget Office, annual operating and capital improvement budgets are developed. The Capital Improvement Budget is a five-year budget with years six through 10 noted. The Major Maintenance Budget, which is a subsection of the Capital Improvement Budget, is a five-year budget. Budgeting five and 10 years into the future is critical for planning and management. As part of the capital improvement process (CIP), the operating impact will be determined for any new park facilities being requested.

The Florida Statutes mandates a county annual budget. The Lee County Administrative Code outlines the budget process.

Digital Evidence:

- [FY14-15 Annual Budget Report](#)
- [JD Edwards-Enterprise One Financial Budget Status Reports \(July, Aug and Sept 2015\)](#)
- [Major Maintenance FY 16 through FY 20](#)
- [CIP FY 16 through FY 20](#)
- [JD Edwards-Enterprise One CIP and Major Maintenance Project Status Reports \(July, Aug and Sept 2015\)](#)
- [Florida Statute 129](#)
- [Lee County Administrative Code AC 3-6 Budget Amendment, Revenue and Expenditure Authority](#)
- [Lee County Administrative Code AC 3-9 Criteria for Evaluating CIP Projects](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.4.1 - Budget Development Guidelines

Standard: The agency shall establish guidelines to inform the heads of organizational components of the essential tasks and procedures relating to the budget preparation process. The guidelines shall include instructions for preparing budget request documents and for providing adequate justification for major continuing expenditures or changes in continuing expenditures of budget items. Information should be included regarding operating impact.

Suggested Evidence of Compliance: Provide the budget development guidelines.

Agency Evidence of Compliance:

All County Department's follow the Budget Prep Manual in developing their operational budgets. The Department uses the Operations Manual for its budget development guidelines.

Each department/division is responsible for compiling all the necessary budget components for operational/program and capital/project budgets. The department Director, Deputy Director, Fiscal Manager and Department Managers collaborate on the three defined budget processes: Tourist Development Council (TDC), Capital Improvement/Major Maintenance budgets and Operational.

All revenues and expenses are estimated for the remainder of the current year and projected for the upcoming year. Budgets are developed with the current core level of service and current budget climate in mind. Over the past five years, some budget reductions were implemented due to the reduction in both state revenues and property taxes. The last budget year, the state has seen an increase in both state revenues and property taxes. Any new requests for staff, materials and equipment above and beyond the continuation budget must be accompanied by a business plan. All new requests must be approved by the Department Director before presenting to county administration. If the request includes a new park facility, the operating impact form must be revised and included with the business plan.

Digital Evidence:

- [FY 15-16 Budget Prep Manual](#)
- [Operations Manual - Fiscal Operations](#)
 - [Operating Budget Overall Process/Department Process](#)
 - [TDC Budget Overall/Department Process](#)
 - [Capital Improvement Program/Major Maintenance Overall Budget Process](#)
 - [Capital Improvement Program/Major Maintenance Department Process](#)
- [2014 -2015 Annual Operating Budget Document - Lee County General Budget Policy \(Section C – Financial Policy\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.4.2 - Budget Recommendations

Standard: Major organizational components shall provide recommendations, based on operational and activity analysis, for use in the development of the agency's budget.

Suggested Evidence of Compliance: Provide examples of agency component recommendations and evidence of their consideration in the budgeting process. Recommendations shall include:

- a. Assessment of current and future personnel needs;
- b. Costs per program element;
- c. Line items.

Agency Evidence of Compliance:

The Cost Benefits Analysis (CBA) report is an important tool assessing current budget obligations and helping identify area of enhancement. As part of the budget process, each area Manager is requested to review facilities and operational needs with staff and make recommendations.

Budgets are developed with the current core level of service and the current budget climate in mind. Most recently, budget reductions have been implemented due to the reduction in both state revenues and property taxes. Each Parks and Recreation Manager has input in the budget process. With participation from supervisors and other staff, requests are prepared that are reviewed and prioritized by the Director and Deputy Director. These requests may include new or deletion of positions, reclassification of existing positions, additional or reduction of operating for specific line items, new and replacement furniture and equipment, as well as vehicles and rolling stock.

Staff may determine that certain equipment and rolling stock is no longer needed and recommend that the equipment be returned to the Fleet Department.

Budget Services and County Administration review and prioritize the individual department budget requests. County Administration may elect to make changes or cuts to the department budgets.

Digital Evidence:

- [Cost Benefits Analysis \(CBA\)](#)
- [Memo from Fiscal requesting recommendations](#)
- [Staff Emails giving recommendations](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.5 - Budget Control Procedures

Standard: The agency shall have procedures for budget control with periodic reporting of revenues and expenditures, and continuous management review.

Suggested Evidence of Compliance: Provide the procedures for budget control within the agency and examples of periodic reports.

Agency Evidence of Compliance:

There are several versions of budget reports available including revenue and expenditure reports in the JD Edwards-Enterprise One Financial System and Purchase Order Tracking System (POTS).

All positions and related activity are tracked through KRONOS Workforce Timekeeper, a countywide software program that tracks personnel hours and benefit time. Position Control is a program that is used internally by the Department to further track personnel and allocation of time to facilities and programs. The Cost Benefit Analysis (CBA) is compiled by using data in the Department's internal databases to provide the cost of each facility and program within the Department.

JD Edwards-Enterprise One Financial System reports are generated monthly for all program budgets as well as the Capital Improvement Program and Major Maintenance. These reports are distributed to management staff for review.

Digital Evidence:

- [JD Edwards Financial Budget Status Reports \(July, Aug and Sept 2015\)](#)
- [JD Edwards CIP and Major Maintenance Project Status Reports \(July, Aug and Sept 2015\)](#)
- [Example of POTS report \(shows monitoring\)](#)
- [FY 2013 Cost Benefit Analysis](#)
- [Example of KRONOS Position Control Report \(Summer Camp\)](#)
- [Lee County Purchasing Manual Section 23 Monitoring Function](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.5.1 - Supplemental/Emergency Appropriations Procedures

Standard: The agency shall have established procedures for requesting supplemental or emergency appropriations and fund transfers to meet circumstances that cannot be anticipated by prior fiscal planning efforts. Mechanisms of adjustment may include transferring funds from one account to another and/or requesting that additional funds be granted for agency needs.

Suggested Evidence of Compliance: Provide the supplemental/emergency appropriations procedures.

Agency Evidence of Compliance:

The Lee County Administrative Code outlines the budget policy for supplemental emergency appropriations and fund transfers. A Department may bring an agenda item forward to the Lee County Board of County Commissioners for supplemental or emergency appropriations and fund transfers for approval.

The Department's Operations Manual outlines the procedures for requesting a SIRE Bluesheet to transfer supplemental/emergency funds.

Digital Evidence:

- [Lee County Administrative Code AC 3-6 – Budget Amendment, Revenue and Expenditure Authority \(transferring of funds\)](#)
- [Lee County Administrative Code AC 3-4 Loans Between Funds and Subfunds – Transfer forms for SIRE and Departments used for agenda items](#)
- [Operations Manual – SIRE Blue Sheets \(Department procedures\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

5.5.2 - Inventory and Fixed Assets Control

Standard: The agency shall have established procedures for inventory control of property, equipment, and other assets to prevent losses and unauthorized use, and to avoid both inventory excesses and shortages. There shall be a complete and current listing of agency assets.

Suggested Evidence of Compliance: Provide procedures for inventory and fixed asset control.

Agency Evidence of Compliance:

The Florida State Statute outlines fixed assets inventory control along with Administrative Code. Additionally, the Lee County Clerk of Circuit Court has specific written procedures for the annual physical inventory for all County departments. Internally, Parks and Recreation requires a consumable inventory as part of the year-end procedures.

Digital Evidence:

- [Florida Statute 274](#)
- [Lee County Administrative Code AC 3-14 Policy on Tangible Personal Property Owned by Local Governments \(FS 274\)](#)
- [Lee County Clerk of Courts Annual Fixed Assets Inventory Memo](#)
- [Lee County Fixed Assets User Guide 2013](#)
- [Lee County Fixed Asset Property Control Forms](#)
- [Consumable Inventory Year-End Procedure Memo and form](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 5.0 – FINANCIAL MANAGEMENT**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

6.0 - Programs and Services Management

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

A program is a means to leisure and recreation as well as a vehicle to deliver benefits to participants. High-quality programming is a dynamic process that continues as the recreation experience unfolds. A systematic and well-researched analysis should be completed in determining what programs and services should be provided by the agency. The public park and recreation program should be coordinated with related programs of other governmental, for-profit and non-profit organizations in the community, such as schools, voluntary agencies, and churches, to provide maximum coverage with a minimum of duplication, as well as to reduce competition.

The primary responsibility of the park and recreation professional is to provide programs by which leisure and recreation experiences and environments enhance the well-being and quality of life for participants. Certain program and service determinants give direction to what is provided and assessed. These determinants are: conceptual foundations of play, recreation, and leisure; agency philosophy, goals and objectives; constituent interests and desired needs; and community opportunities for the public. Program and service objectives must be benefits-focused. Many agencies put objectives in “SMART” format (specific, measurable, achievable, realistic, and timed) to assure that objectives are measurable and they use logic modeling to focus their objectives on outcomes and impacts.

The recreation programming plan includes all elements and services of the public park and recreation agency’s programming functions, including activity selection, type and scope of programs and outreach initiatives. While related to a master or comprehensive plan, the recreation programming plan shall be an outgrowth of other strategic and program forecasting tools.

Park and recreation agencies should have a program that educates the public about the intrinsic and extrinsic benefits that leisure (time, activity, experience) and participation in self-directed and leader-directed recreation activities provide. It should include the three (3) behavior domains: psychomotor (manipulation and coordination of physical skills and abilities), affective (interests, appreciations, attitudes and values) and cognitive (intellectual skills and abilities).

A leisure education program consists of six (6) components:

1. Awareness of self in leisure;
2. Appreciation of leisure;
3. Understanding self-determination in leisure;
4. Making decisions regarding leisure participation;
5. Knowledge and use of resources for facilitating leisure; and
6. Promoting social interaction.

Examples include:

- Cooperative agreements with local schools to develop classes, workshops or events to inform children and adolescents of leisure benefits.
- Community presentations regarding leisure benefits at libraries, senior citizen centers, special recreation associations, and at business and industry meetings.
- Distributing a “benefits” CD or website hyperlink to educate, publicize, and inform of agency programs and services through various social media outlets (Facebook, Twitter, etc.) and public cable TV channels.
- Organizing and categorizing agency publications and photos according to the benefits associated

with targeted programs and services, e.g., benefits of nature walks for senior populations and benefits of outdoor play for children.

- Marketing and advertising the benefits message in agency telephone messages, employee newsletters, and policy manuals, on staff apparel, facility and vehicle signage.
- Including benefit statements in brochures and program descriptions so that prospective participants will see what they can gain from participating in programs.
- Including the question of “*How have you benefited from this program?*” in program evaluations, causing the participant to reflect on the benefits of the program.
- Including the benefits of programs and services on agency websites and in email/e-blasts, press releases and public service announcements.
- Conducting benefits-based program research studies.
- Conducting and reporting follow-up assessments and data analyses.

6.1 - Recreation Programming Plan

Standard: The agency shall have a recreation programming plan covering 3-5 years that is updated periodically and a current-year implementation plan. The plan shall address all programs and services of the agency’s programming functions, including activity selection, type and scope of programs and outreach initiatives.

Suggested Evidence of Compliance: Provide the current recreation programming plan and describe the update process. This plan shall address how the agency delivers services to persons of all ages and abilities, how it develops program offerings and it shall include the following elements:

- a. Program objectives (6.2);
- b. Program and service statistics (10.5);
- c. Program and service determinants (6.1.1);
- d. Recreation and leisure trends analysis (10.5.1); and
- e. Community inventory (10.5.2).

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 8 – Recreation Program Planning, pp. 137-138.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation sets program goals in accordance with its established Core Level of Service. The Core Level of Service is annually reviewed and revised by the Board of County Commissioners. Most program goals remain constant and reflect the Department’s 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”.

The program plan includes current year program priorities as well as program plans for the next five to ten years.

Needs assessments studies are used to identify which facilities and/or programs need enhancement. These needs assessments help 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 Department’s 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.

All the above components are part of the Comprehensive Recreation Program Plan.

Digital Evidence:

- [Recreation Programming Plan](#)
- [Supervisor/Coordinator Meeting Minutes](#)
- [Managerial Meeting Minutes](#)
- [Manager's Document Review Timetable Schedule](#)
- Cost Benefit Analysis (CBA) (website) - <http://www.leegov.com/parks/about/cba>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.1 - Program and Service Determinants

Standard: A systematic and studied approach shall be taken in determining what programs and services shall be provided by the agency.

Suggested Evidence of Compliance: Provide documentation and examples demonstrating that the six (6) program and service determinants are used in providing programs and services. The programs and services provided by the agency shall be based on the

- a. Conceptual foundations of play, recreation, and leisure;
- b. Organizational agency philosophy, mission and vision, and goals and objectives;
- c. Constituent interests and desired needs;
- d. Creation of a constituent-centered culture;
- e. Experiences desirable for clientele; and
- f. Community opportunities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 155-159.

Agency Evidence of Compliance:

Lee County Parks & 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 distinctive mix requires flexibility in program service delivery.

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

In meeting the six determinants of program/services planning, the following evidence is offered:

- Conceptual foundations of play, recreation and leisure -
First and foremost, Lee County Parks & Recreation has a wealth of experienced recreation professionals who are schooled in the fundamental foundations of play, recreation and leisure. Many of the programming staff are certified professionals continually increasing their knowledge base. The Lee County Parks & Recreation Operations Manual in Chapter 7-5 is developed for all employees to follow when considering program options.
- Organizational agency philosophy, mission and vision, and goals and objectives -
Lee County's mission is to provide a core level of service throughout the County. Lee County Parks & 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.
- Constituent interest and desired needs -
Constituent needs are assessed through a variety of methods including program surveys, needs assessment, online comment cards, registration statistics, community meeting reports, Parks & Recreation Advisory Board and programmers' meetings. Program opportunities will vary across the County based upon the resources and individual community needs. The RecreationalLEE Yours program guide offers a complete list of all program offerings.
- Creation of constituent centered culture –
Lee County Parks & Recreation works directly with Lee County Department of Human Service and other community organizations to identify diverse populations and their individual cultural and recreational needs.
- Experiences desirable for clientele -
In addition to a variety of multi-generational program opportunities, Lee County Parks & Recreation has a complete work group assigned to programming for special needs.
- Community opportunities -
As evidenced in the Come Discover Lee County Parks & Recreation facility guide, community opportunities are abundant in Lee County.

Digital Evidence:

- Lee County Parks & Recreation Operations Manual (Pages [7-5](#), 7-28, 7-29, 14.4, 14.6)
- [Department Vision and Mission Statement](#)
- [Needs Assessment Survey](#)
- [Lee County Parks & Recreation Advisory Board Meeting Minutes](#)

- [Online comments](#)
- [Summer Camp Survey](#)
- [Recreational Yours Brochure](#)
- [Human Service Maps & Statistics](#)
- Special Needs Link <https://www.lee.gov/parks/programs/special-needs>
- [Come Discover Lee County Parks & Recreation](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.2 - Participant Involvement

Standard: The development of agency programs and services shall involve participants.

Suggested Evidence of Compliance: Describe the process and provide examples of how the agency obtains and utilizes participant input. Participants shall have involvement in:

- a. Recommending policy;
- b. Planning activities;
- c. Conducting activities; and
- d. Sponsoring activities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 176-177.

Agency Evidence of Compliance:

Lee County Parks & Recreation involves participants in the program planning process in a variety of ways. There are many ad hoc groups, non-profit groups/foundations and advisory committees associated with the Department. In many cases participants make their needs known through: the recreation program evaluation survey, via their representative on the Parks & Recreation Advisory Board, website feedback, direct staff interaction, needs assessment or through one of the various groups.

The following is a list of the groups working closely with Lee County Parks & Recreation:

- Aquatics Advisory Committee
- Parks & Recreation Advisory Committee
- Lakes Park Enrichment Foundation
- Conservation Lands Acquisition
- Management Subcommittee of the Conservation Lands Acquisition and Stewardship Advisory Committee (CLASAC)
- Friends of Six Mile Cypress Slough Preserve
- Friends of Matanzas Pass Preserve
- Friends of Boca Grande

Lee County Parks & Recreation

- Railroad Museum of South Florida, Lakes Park
- Bicycle Pedestrian Advisory Committee
- Metropolitan Planning Organization
- Lee County Bird Patrol

County-wide resident groups and organizations that Lee County Parks & Recreation partners with on a regular basis:

- UF/IFAS Lee County Extension
- Lee County Community Tennis Association (LCCTA)
- Florida Southwestern State College
- Edison Sailing Center
- Southwest Florida Welcome Guide-Map
- Lee County Archers
- Fort Myers Firecats
- Cypress Lake Hornets
- Lehigh Raiders
- Fort Myers American Little League
- South Fort Myers Little League
- Lee County Strikers
- North Fort Myers Soccer Club
- Latin American Soccer League
- San Carlos Park Roller Hockey Association
- AAU Softball
- Perfect Game
- Roy Hobbs Baseball
- Pine Island Little League
- Lehigh Little League
- Ultimate Frisbee Club
- Swim Florida
- Train Village At Lakes Park
- Lee County Shuffleboard Club
- Estero Mustangs
- North Fort Myers Knights
- Riverdale Wildcats
- Buckingham Little League
- San Carlos Park Little League
- San Carlos Park Soccer league
- Lehigh Acres Soccer Association
- Pan American Soccer League
- AAU Baseball
- North Fort Myers Babe Ruth and Cal Ripken Youth Baseball League
- Alva Little League
- Fort Myers YMCA
- Florida Mudcutters Mountain Bike Club
- FGCU Aquatic Center
- Gulfcoast Swim Team
- Retired and Senior Volunteer Program (RSVP)
- Fort Myers Track Club
- Lee Memorial Health Systems Share Club

Digital Evidence:

- [Needs Assessment Survey](#)
- [Parks and Recreation Advisory Committee Meeting Minutes](#)
- [Paws for Duty Naming](#)
- [Volunteer Survey](#)
- [Website Feedback Example](#)
- [Blueway Patron Survey](#)
- [Friends of Boca Annual Report](#)
- [Special Needs Survey](#)
- [Summer Camp Survey](#)
- [Lee County Extension Service Advisory Board Minutes](#)
- [Lakes Park Enrichment Foundation Meeting Minutes](#)
- Lee County Parks & Recreation Operations Manual [14-4](#), [14-6](#) and [14-7](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.3 - Self-Directed Programs and Services

Standard: The agency shall offer self-directed recreation opportunities for individuals and groups to participate without leadership, under only general supervision. Examples include picnic facilities, tennis courts, roadways in scenic areas, bridle trails, self-guiding nature trails, and open playgrounds.

Suggested Evidence of Compliance: Provide examples of how the agency provides self-directed recreation opportunities, including a list of such opportunities.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 9 – Program Services and Event Management, p. 161.](#)

Agency Evidence of Compliance:

The Program/Service Outcome and Delivery Matrix demonstrates the various program delivery methods.

The Come Discover facility guide lists all the parks and their amenities and self-directed opportunities. The Conservation 20/20 preserves are open to the public for resource-based recreational opportunities. There are more than 30 miles of marked hiking trails and hundreds of unmarked trails available to adventurous hikers. Self-directed recreation opportunities are available to the public in many forms and are identified in various publications, [online](#), and on-site. The Program/Service Outcome and Delivery Matrix demonstrates the various program delivery methods.

Digital Evidence:

- [Program/Service Outcome and Delivery Matrix](#)
- [Facilities Amenities Grid \(in “Come Discover” facility guide\)](#)
- [Conservation 20/20 Brochure](#)
- [Lee County Bicycle Map](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.4 - Leader-Directed Programs and Services

Standard: The agency shall offer leader-directed recreation opportunities that provide recreation opportunities where participant involvement is directed by a leader, including skills instruction classes. Examples include tennis, crafts, dance; synchronized swimming performance; creative dramatics for children.

Suggested Evidence of Compliance: Provide examples of how the agency provides leader-directed recreation opportunities, including a list of such opportunities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, p. 161.

Agency Evidence of Compliance:

Programs offered as leader-directed are available at all programming locations and are identified in a variety of ways including: [online](#), RecreationalLEE Yours Program Guide and on-site fliers. Leader-directed programs are offered by Department programming staff, contract instructors and volunteers. The Program/Service Outcome and Delivery Matrix demonstrates the various program delivery methods.

Digital Evidence

- [RecreationalLEE Yours Brochure](#)
- Monthly Program (website) - <https://www.leegov.com/parks/brochures>
- [Sample Service Provide Contract](#)
- [Program/Service Outcome and Delivery Matrix](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.5 - Facilitated Programs and Services

Standard: The agency shall facilitate assistance to individuals and groups of individuals that provide or want to provide recreation programs and leisure services independently from the agency. An example of facilitated programs and services is an individual or group that wishes to start a community theater organization; the agency may help initially by providing a meeting place, some administrative help in publicity, and "seed money" with the intent that the organization will become self-sustaining. Demonstration projects may be utilized for this purpose.

Suggested Evidence of Compliance: Provide examples of how the agency provides facilitated recreation opportunities, including a list of such opportunities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 161-162.

Agency Evidence of Compliance:

- Buckingham Radio Flyers
- Lee County Community Tennis Association (LCCTA)
- 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 Association
- N. Ft. Myers Soccer Association
- Gateway Soccer League
- Latin American Soccer League
- San Carlos Park Roller Hockey Association
- AAU Softball
- Perfect Games
- Babbit Baseball
- Roy Hobbs Baseball
- Pine Island Little League
- Lehigh Little League
- Estero Art League
- Swim Florida Swim Teams (Aquatic Boosters)
- 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 Association
- San Carlos Park Bridge Club
- Pan American Soccer League
- AAU Baseball
- Lee Memorial Health System SHARE Club
- Train Village at Lakes Park
- Fort Myers Miracle Baseball
- North Ft. Myers Babe Ruth Baseball
- Alva Babe Ruth Baseball
- YMCA of Lee County
- Florida Mudcutters Mountain Bike Club
- Gulfcoast Swim Team

Lee County Parks & Recreation

- Lee Memorial Health System
- GulfCoast Wave’s Youth League

Lee County Parks & Recreation facilitates many different groups to provide a variety of programs/services. The following is a list of many different agreements with various organizations.

Digital Evidence:

- [LCCTA Agreement](#)
- [Estero Art League Renewal](#)
- [Gulf Coast Wave’s Youth League Agreement](#)
- [Lee Memorial Healthy Club SHARE Club Renewal](#)
- [Facilitated Program/Service Outcome and Delivery Matrix](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.1.6 - Cooperative Programming

Standard: The agency shall enter into cooperative agreements with public, commercial, and nonprofit entities to provide programming.

Suggested Evidence of Compliance: Provide current examples of cooperative programming with documentation, such as Memoranda of Understanding (MOU), Memoranda of Agreement (MOA), or partnership agreements.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 6 – Partnerships, pp. 98-102; Chapter 7 – Planning for Strategic Management, p. 159.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation works with various public, commercial and non-profit agencies to deliver programs and reduce competition.

The Department has an interagency agreement with Lee County School Board in which the Department maintains and operates certain facilities on school board property. This allows the school and general public to utilize these recreational spaces without requiring duplication.

Working with the local Sheriff Youth Activity League, free swimming lessons and summer open swim are provided at Tice Pool.

Lee County works with the Nations Association (non-profit), The Heights Foundation (non-

profit) and YMCA to provide recreational programs. Each of these groups has their own facilities, but also works with Lee County to provide additional programming at the Department's facilities.

The Department works with the various "Neighborhood Core Groups" and Human Services to better understand what other agencies are offering and what is needed.

For areas in which services are lacking, Lee County contracts with various vendors to bridge that gap. Such services as paddling craft rental, bicycle rental and food concessions are provided by commercial operations.

Digital Evidence:

- [Inter-local School District Agreement](#)
- [Sheriff's Youth Activities League Free Swimming Flyer](#)
- Nations Association Programming (website) - <http://nationsassociation.org/youthprograms.html>
- [Nations Association Agreement](#)
- [Heights Foundation Agreement](#)
- [Human Services Maps & Statistics](#)
- [Wheelfun Concession Agreement](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.2 - Program Objectives 

Standard: There shall be specific objectives established for programs and services that are reviewed periodically. Objectives shall be specific and measurable as to the actual outcome or impact desired by the program or service so that progress on meeting objectives can be evaluated (see standard 10.2 Outcomes Assessment). Objectives shall be defined by program area, such as nature, dance, music, sports, fitness, special events and they can be further defined into levels such as beginner, intermediate and advanced.

Suggested Evidence of Compliance: Provide measurable objectives for each program and service area and the last review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 165-172.

Agency Evidence of Compliance:

Objectives for each program/service are established and communicated in a variety of ways

including the Program/Service Outcome and Delivery Matrix, RecreationalLEE Yours Program Guide (program descriptions) and individual recreation center newsletters. 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, because all have the same program outcomes, while summer camp is self-standing.

Program objectives reflect the Department's goals and mission statement and are reviewed and subsequently evaluated by the program/supervisory/management staff as a component of regularly scheduled meetings.

Digital Evidence:

- [Program/Service Outcome and Delivery Matrix](#)
- [RecreationalLEE Yours Brochure](#)
- [Recreation Center Newsletter](#) (website) - http://www.leegov.com/parks/Documents/Veterans_Voice_Calendar.pdf
- [Department Vision and Mission Statement](#)
- [Email requesting feedback on Recreation program plan](#)
- [Supervisor's Meeting Minutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.3 - Scope of Program Opportunities

Standard: The content of agency programs shall be related directly to stated program objectives and shall provide for individual differences of interests, abilities (mental, social, physical), and backgrounds. Activities selected shall be suited to and contribute toward fulfillment of the basic physical, emotional, social, and intellectual requirements of individuals. The agency should take into consideration the total community offerings; some opportunities may be offered by other organizations, private, public, and non-profit.

Suggested Evidence of Compliance: Provide a matrix or listing of programs by fields, demonstrating clearly how the agency provides opportunities for proficiency levels, socioeconomic levels, racial and ethnic backgrounds, ages, and genders.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 163-165, 174-179.

Agency Evidence of Compliance:

In following the lead of the Mission Statement (...To provide programs and services that add to the quality of life for all Lee County residents and visitors), the Department offers a

wide variety of programs for all skill proficiency levels, socio-economic levels, ages, backgrounds and gender.

The Come Discover facility guide highlights the distribution of facilities while the RecreationalLEE 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 programs are available for all skill levels and ages.

Digital Evidence:

- [Department Vision and Mission Statement](#)
- [Come Discover Lee County Parks & Recreation facility guide](#)
- [RecreationalLEE Yours program guide](#)
- [Program/Service Outcome and Delivery Matrix](#)
- [Managerial Meeting minutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.3.1 - Outreach to Diverse Underserved Populations 

Standard: The agency shall proactively extend programs and services to residents who may be underserved in the community. To encourage participation in parks and recreation programs and services, agencies shall identify and address barriers that may limit access including physical, social and mental abilities and financial, geographic and cultural barriers. Financial barriers may be addressed through reduced fees and scholarships. Agencies should offer inclusionary support services to ensure access to programs and services for people of all abilities and socioeconomic status.

Suggested Evidence of Compliance: Identify underserved populations (provide methodology and data used for this analysis), describe specific barriers within the community that limit participation and provide examples of outreach programs and services offered by the agency to meet the needs of these populations and overcome barriers to access.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 8 – Recreation Program Planning, p. 139; Chapter 9 – Program Services and Event Management, p. 177.

Agency Evidence of Compliance:

Lee County recognizes and strives hard to meet the needs of underserved populations.

Identifying these underserved populations is done through various ways. The Department works with Human Services and other agencies to identify and partner to provide services in those underserved areas. Underserved population identification is done through various crime statistics reports, population and income maps, census data, as well as teen pregnancy data.

The Harlem Heights, Charleston Park, North Park (Suncoast/Palmona Park areas) and Schandler Hall communities have traditionally been areas in which paid registration was very low. Along with other factors, language/cultural barriers and community needs demanded more self-directed activities as well as sponsored programs for those with financial need. In response to these financial and language/cultural barriers, the Department has partnered with community organizations to meet the underserved recreational needs.

Harlem Heights is a severely distressed community, with children living in poverty at twice the rate of the rest of Lee County. The Heights Foundation has taken possession of year-round programming of the community center. Their mission is to support education and wellness, promote family and community development and provide the benefits of enrichment in the arts.

The Nation's Association provides the programming at Schandler Hall, that transform at-risk youth into Points of Light in the community. They offer a variety of programs designed to enforce positive lifestyles and organize various community and family events at the park.

Lee County Department of Human Services, working with its neighborhood coordinators, share resources and provides needed programming at their facilities.

In response to a growing demand for Special Needs services, the Department operates a special needs center for many years and is the lead agency for Lee County Special Olympics. The Department has been offering special needs programs since the mid 1980's. The demand for these services is validated by the numbers of special needs participants.

Digital Evidence:

- [Human Services Maps & Statistics](#)
- [Census Data](#)
- Harlem Heights Foundation (website) - <http://heightsfoundation.org/mission/>
- [Harlem Heights Letter](#)
- [Nations Association Calendar & website](#)
- [Nations Association Agreement](#)
- [Sheriff's Youth Activities League Free Swimming Flier](#)
- [Special Needs Fliers](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.4 - Community Education for Leisure Process

Standard: The agency shall have a process to educate the general citizenry about the use of leisure time and the outcomes, benefits, values, and positive impacts of leisure and recreation services. The process shall be periodically evaluated for effectiveness. Educating the public about leisure and recreation shall be ongoing and systematic and should be done in cooperation with the community, e.g., schools, other leisure agencies, business, industry, and commercial recreation establishments.

Suggested Evidence of Compliance: Provide examples of the methods utilized by the agency to educate the community on the benefits, values, and impacts of leisure and recreation services to a diverse range of participants and non-participants. Provide the last review of effectiveness.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 9 – Program Services and Event Management, pp. 172-174.

Agency Evidence of Compliance:

The Department 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 increase/maintain fitness, socialization and increasing sense of well being, 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. The Program/Service Outcome and Delivery Matrix outcome descriptions, as well as RecreationalLEE Yours class descriptions demonstrate the benefits of the various programs.

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 through promotional spots on Lee TV and through various publications.

The [Department website](#) notes many programs (greenways, blueway, rangers, volunteers) that spotlights the benefits of utilizing leisure.

The Departments Mission Statement is as follows:

“To provide safe, clean and functional parks and recreation facilities. To provide **programs and services that adds to the quality of life** for all Lee County residents and visitors. To enhance tourism through special events and attractions. We are committed to fulfilling this mission through visionary leadership, individual dedication, and the trustworthy use of available resources.”

This mission statement is posted at all facilities and website to help promote the benefits of using parks and recreation.

Several years ago, the Department adopted the NRPA Hearts ‘N Parks program and philosophy. While NRPA no longer sponsors that program, the principles are still valid.

Since 2000, the Department has actively incorporated the Hearts 'N Parks philosophy 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.

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

Staff from various facilities help educate the public on the benefit of different parks and programs via speaking engagements and event exhibits.

The Department's Calusa Blueway website offers a host of information on the benefits of using this paddling trail.

Digital Evidence:

- [Program/Service Outcome and Delivery Matrix](#)
- [Recreational LEE Yours Program Guide](#)
- Lee TV Ad-North Fort Myers Recreation Center (website) - <http://www.lee.gov/technologyservices/leetv/update/nftmyersrec>
- Dog Beach video <https://www.youtube.com/watch?v=fyNU5FTXazY>
- Lee County Park & Recreation video - https://www.youtube.com/watch?v=aHNBb_-diKI
- First Tee (website) - http://www.thefirsttee.org/club/scripts/library/view_document.asp?GRP=27852&NS=WD&APP=80&DID=133342
- [LCPR Marketing Plan](#)
- [LCPR Marketing Analysis](#)
- [Lee County Parks & Recreation Operations Manual \(pages 11-4 to 11-7\)](#)
- [Marketing Review-Manager's Meeting Minutes](#)
- [Summer Camp Parents Guide - Hearts N Parks](#)
- [First Tee Flyer](#)
- [Lee County Parks & Recreation PowerPoint \(Department Promotional Powerpoint\)](#)
- Battle of the Blueway video - <https://www.youtube.com/watch?t=46&v=LZi26UYWJyk>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.4.1 - Community Health and Wellness Education and Promotion

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

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

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

Also provide examples of implementation.

Agency Evidence of Compliance:

The Department has a wide variety of programs that promote health and wellness in Lee County.

The newest initiative started in October, 2015, with The Healthy Lee movement. This movement was created by the local health system in partnership to empower and inspire the people of Lee County regarding healthy lifestyle choices through education and action. The initiative reflects Lee County's comprehensive sustainability strategy by promoting the integration of healthy lifestyle choices into the daily routines and built environment, while supporting the message of transformation based on free choice.

Other partner initiatives include Florida Health Department's Florida Health Clean Up; Lee Memorial Health Care to provide programs and health fairs for the senior population (Share Club); Streets Alive Lee County which encourages physical activity and healthy eating.

The Department mandates tobacco free sports within all of its youth league contracts prohibiting the use of tobacco by all league participants. The Florida Department of Health provided Lee County Parks & Recreation with 148 signs that are posted throughout 20 parks (playgrounds and ball fields) to promote healthy lungs at play and discourage smoking around youth.

In addition, the Lee County Human Resources department prohibits the use of tobacco by all Lee County staff on any County property, facilities and in vehicles.

Digital Evidence:

- [Healthy Lee Website](#)
- Florida Health Clean Up (website) - <http://lee.floridahealth.gov/about-us/index.html>
- [Senior Health Fair Flyer](#)
- [Streets Alive Lee County](#)
- [Tobacco letter](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

6.5 - Participant and Spectator Code of Conduct

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

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

Agency Evidence of Compliance:

As part of all youth sports agreements, all coaches are required to attend a Code of Conduct clinic and sign the Coaches Code of Conduct form before the season begins. The league presidents are responsible to have all parents or guardians sign the Youth Sports Parent Code of Conduct.

All league presidents are responsible to monitor and enforce Lee County’s Code of Conduct policies in order to provide children a safe environment. This Code of Conduct has been developed to clarify approved and accepted professional, ethical and moral behavior and distinguish that positive conduct from that which is detrimental to the development of youth sports in Lee County.

Digital Evidence:

- [Youth League Agreement](#)
- [Policy of Youth Sports Code of Conduct](#)
- [Buckingham Little League Coaches Code of Conduct](#)
- [Email reminder about Coaches Code of Conduct](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

VISITATION REPORT SUMMARY FOR CATEGORY 6.0 – PROGRAMS AND SERVICES MANAGEMENT

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

7.0 - Facility and Land Use Management

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Physical resource planning is a process focusing on physical resources. The planning process conforms to the vision and mission statement of the controlling agency. Natural resources planning stretches across a continuum that has strict preservation at one end and complete modification at the other.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 207-238.

The planning, development and management of physical resources are functions of all park and recreation managers, whether they are in the public, nonprofit, or for-profit sectors. Physical resources include natural undeveloped lands and waters, and developed areas including urban parks, special complexes (such as sports and aquatics), and buildings of various functions (such as fitness centers, community centers and interpretive centers).

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 12 – Physical Resource Management, pp. 239-266.

Ready access to accurate land and facility records is a basic requirement for program planning and facility management. Floor plans with square foot areas for each program space allow programmers and facility managers to determine how to most efficiently use program spaces. Building plans and specifications are invaluable for facilities management and capital programming because they provide insight into the design, materials, and equipment used in construction. Information from these documents is often used to determine the remaining useful life of building systems. Grants to purchase parkland and construct recreation facilities from such programs as the 1965 Land and Water Conservation Act (LAWCON) and the 1978 Urban Park and Recreation Recovery Act (UPARR) place restrictions on use and disposition.

High-performing maintenance operations organizations ensure quality experiences through well-managed spaces and places. Customized systems' approaches and solutions to operations management satisfy accreditation standards through the development, consistent use, and periodic review of management plans, policies, programs, and procedures as well as inspections and assessment schedules and records.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 13 – Management Operations, pp. 267-304.

7.1 - Parkland Acquisition Procedures

Standard: The agency shall have established policies and procedures for the acquisition of lands for park, recreation, conservation, and historical-cultural purposes that are backed by legal authority and periodically reviewed. This authority usually originates in state enabling acts, is delegated to local governments and is implemented through local charters and ordinances.

Suggested Evidence of Compliance: Provide policy and procedures for land acquisition, the citation of legal authority to acquire lands, and last review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 207-229.

Agency Evidence of Compliance:

The purchase or condemnation of land for the public good is the responsibility of the [Lee County Division of County Lands](#). Florida Statute 125.355 governs acquisition of land. Lee County Parks & Recreation assists the Division of County Lands by identifying suitable parcels to have them transferred or purchased for Department use. Administrative Code AC-5-8 governs the Department's acquisition procedures.

Lee County's [Conservation 20/20](#) program is given authority by Lee County Ordinance #97-08. This program identifies, nominates and ranks parcels to be obtained for conservation and passive recreation. The Division of County Lands coordinates this program.

Sensitive land acquisitions policy and procedures are outlined in the Departments Operations Manual. Land Development documents are reviewed annually by the Department's managerial team. Last review was on July 13, 2015.

Digital Evidence:

- [Chapter 125 Section 355 – 2015 Florida State Statute](#)
- [Administrative Code AC-5-8 – Real Property Acquisition-Divestures](#)
- [Lee County Ordinance #97-08](#)
- [Internal Policies and Procedures – Acquisition/Disposition Program, County Lands](#)
- [Operations Manual - Sensitive Lands Acquisition](#)
- [Managerial Meeting Minutes, Chapter 7 Review, 07-13-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.2 - Areas and Facilities Development Policies and Procedures

Standard: The agency shall have established policies and procedures for the development of park and recreation land and facilities that are reviewed periodically. Policies and procedures should consider market projections, applicable open space and design standards and coordination with overall planning for the jurisdiction.

Suggested Evidence of Compliance: Provide land development policies and procedures, with the last review.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed.,

Agency Evidence of Compliance:

Lee County Parks & Recreation uses Chapter 5 of the Lee County Comprehensive Plan (Lee Plan) and the Department’s 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 & Recreation works with various user groups, public agencies and professional services to develop facilities appropriately that meet the needs of the community.

Land Development documents are reviewed annually by the Department’s managerial team. Last review was on July 13, 2015.

Digital Evidence

- [Lee Plan: Parks, Recreation and Open Space – Goals 79 and 85](#)
- [Operations Manual - Land Stewardship, Chapter 9](#)
- [Managerial Meeting Minutes: Chapter 7 Review – 7-13-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.2.1 - ADA Existing Facility and Site Access Audit

Standard: The agency shall complete an access audit of all existing sites and facilities. Pursuant to the US Department of Justice Title II regulation at 35.105, the agency must evaluate its existing facilities and sites against the most current final and enforceable Standard for Accessible Design.

Suggested Evidence of Compliance: Submit completed checklists, digital images and site reports as evidence of completion of the access audit.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 226 and 236; Chapter 12 – Physical Resource Management, pp. 253 and 263; Chapter 13 – Management Operations, p. 288.

Agency Evidence of Compliance:

The ADA Compliance Report was compiled in 2005 and has been used to identify deficits in accessible designs.

In 2013, the Department began an internal assessment to re-evaluate its policies, programs, activities, events and facilities to determine current levels of accessibility when providing

services. The assessment intent is to determine which of its policies, programs and facilities may need to be altered to achieve compliance with the Americans with Disabilities Act (A.D.A.), the Department of Justice’s Standards for Accessible Design (S.F.A.D.), and when more stringent, the 2012 Florida Accessibility Code for Building Construction (F.A.C.B.C.).

The Department’s ADA Advisory Committee, lead by the Department’s ADA Compliance Officer, is responsible for the evaluation and revisions to facilities, programs, activities, services, events and policies. The committee is tasked to maintain program access and avoids discrimination of qualified individuals with disabilities.

In September of 2014, the Department joined efforts with Lee County as a whole and has continued site evaluations with contracted consultants from ADA Consulting of Southwest Florida and the ADA Specialist from Lee County Facilities Construction and Management.

The contracted consultants submit ADA Compliance reports based on site evaluations to the Department, a recommendation report is then created by the Department’s ADA Compliance Officer providing a rating scale of priority. The ADA Advisory Committee reviews and approves the reports. The reports are sent to the supervisory team of the evaluated site.

Digital Evidence

- [ADA Compliance Report 2006](#)
- [ADA Report – Pine Island Commercial Marina 2015](#)
- [ADA Report – Jet Blue Park 2015](#)
- [ADA Report – Pine Island Community Pool 2014](#)
- [ADA Report – Bonita Beach Park 2015](#)
- [ADA Report – North Fort Myers Recreation Center 2015](#)
- [ADA Report – Matlacha Park and Boat Ramp 2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.3 - Defense Against Encroachment Procedures

Standard: The agency shall have procedures for protecting park and recreation lands and facilities from encroachment. The procedures should include progressive steps to address escalated encroachment issues.

Suggested Evidence of Compliance: Provide the procedures regarding defense against encroachment.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 208 and 224.

Agency Evidence of Compliance:

Lee County Parks & 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 Operations Manual provides general procedures staff should use when discovering encroachment. Lee County Parks Ordinance 06-26 provides the legal authority to enforce.

Digital Evidence

- [Operations Manual- Encroachment on Parks and Recreation Property](#)
- [Operations Manual- Land Stewardship – Boundary Protection](#)
- [Ordinance 06-26](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.4 - Disposal of Lands Procedures

Standard: The agency shall have established procedures regarding the disposal of park and recreation lands to ensure that public recreational benefits are not diminished through the sale or transfer of parkland.

Suggested Evidence of Compliance: Provide the procedures for disposal of park and recreation land.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 208, 210-213; Chapter 12 – Physical Resource Management, p. 250; Chapter 13 – Management Operations, pp. 286 and 290.

Agency Evidence of Compliance:

The Division of County Lands, within the Public Works department has the procedure for disposal of all County-owned lands and is outlined in Lee County Ordinance 02-34. The Administrative Code (AC-5-8) outlines the legalities of property disposal. The Administrative Code (AC-5-1) establishes the policy and procedures for providing monetary incentives to licensed real estate brokers to participate in marketing County-owned real estate. The disposal must not conflict with adopted policies in the Lee Plan (section 5 and 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. Florida Recreation Development Assistance Program, Florida Communities 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.

Digital Evidence

- [Lee County Ordinance 02-34](#)
- [Administrative Code AC-5-8](#)
- [Administrative Code AC-5-1](#)
- [Lee Plan: Chapters V and VI](#)
- [Chapter 125, Section 35 – 2015 Florida Statutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.5 - Maintenance and Operations Management Standards 

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

Suggested Evidence of Compliance: Provide the maintenance standards for all parks, facilities and specialty areas, including evidence of park maintenance classification according to the intended use of the area, ranging from heavily used and high developed areas to those that are lightly used and less developed. Provide the most recent review or update.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 12 – Physical Resource Management, pp. 253 and 263; Chapter 13 – Management Operations, pp. 290-300.

Agency Evidence of Compliance:

The Department has well established maintenance and operations standards for all major components, including specialty facilities such as community centers, beach properties, dog parks, boat ramps, aquatic, athletic facilities and nature preserve areas.

These standards include areas based on park maintenance classifications according to the intended use of the area. Ranging from heavily used and high developed areas, to those that are lightly used and less developed. These standards were last reviewed July 13, 2015.

Sections have been included for each specialty area and a breakdown for each level of use:

1. Beaches, Shoreline Parks and Regional Parks
2. Recreation Centers and Facilities
3. Community and Neighborhood Parks / Dog Parks
4. Swimming Pools and Aquatic Facilities
5. Preserves and Conservation 20/20
6. Boat Ramps and Launches
7. Athletic / Sports Complexes
8. Athletic and Sports Turf Maintenance

Digital Evidence

- [Maintenance and Operations Standards 2015](#)
- [Managerial Meeting Minutes: Chapter 7 Review – 7-13-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.5.1 - Facility Legal Requirements

Standard: There shall be a regular review of legal requirements related to facilities, such as licenses, sanitary regulations, fire laws, and safety measures, and inspections of adherence thereto. Special attention should be given aquatic facilities, child care facilities, concessions, kitchens, and zoos.

Suggested Evidence of Compliance: Provide a matrix showing a representative sample of facilities and the types of regulatory permits, licenses or inspections that are required including copy of last review or update.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 208-210, 214-216, 225-227, 231; Chapter 12 – Physical Resource Management, pp. 251, 259, 263; Chapter 13 – Management Operations, pp. 267, 269, 286, 291.

Agency Evidence of Compliance:

Lee County Parks & Recreation works in conjunction with the local Health Department, Fire Departments and Lee County Risk Management office to ensure compliance with all applicable laws, rules and standards. The Department's Risk Management Team is tasked with collecting and filing all reports in regard to any legal requirement/guidelines the Department is obligated to perform. A matrix was created to show the laws, rules and standards that apply to each park facility. In addition, the 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. All employees according to their job description are required to have a valid driver's license. A second matrix was created to show the licenses or certificates that staff have to ensure that they can maintain safe pools, playgrounds, preserve lands and other aspects of our parks and facilities. Last review was July 13, 2015.

Digital Evidence

- [Matrix – Facility Legal Requirements](#)
- [Matrix – Staff Licenses](#)
- [Managerial Meeting Minutes: Chapter 7 Review – 7-13-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.5.2 - Preventative Maintenance Plan

Standard: There shall be a comprehensive preventative maintenance plan to provide periodic, scheduled inspections, assessment and repair, and replacement of infrastructure, systems and assets. This includes certifying, checking or testing for optimum operation based on applicable industry standards, local guidelines, city requirements and/or manufacturer's recommendation for maintenance and replacement of parks, with the intent to ensure that park assets are maintained for optimum use and safety and have the ability to reach or extend its full life cycle and expected return on investment.

Suggested Evidence of Compliance: Provide the preventative maintenance plan and examples of detailed preventative maintenance programs for identified parks, recreation areas and facilities with special attention given to playground equipment, aquatic facilities, pedestrian pathways, building infrastructure and other high impact assets, along with copies of completed, recent inspections and safety checks for a sampling of facilities/areas.

Agency Evidence of Compliance:

Lee County Parks & Recreation along with Lee County Facilities Construction and

Management, work together to ensure 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 patrons.

The Department's Maintenance and Operation Standards outlines the framework for staff responsibilities and inspections of facilities. Facilities Construction and Management has in place a preventative maintenance schedule for all aspects of buildings, lighting systems, irrigations systems, ice machines, automated gates, plumbing, HVAC systems and various park amenities.

Digital Evidence

- [Preventative Maintenance Plan – Lee County Facilities Management](#)
- [Maintenance and Operations Standards \(7.5\)](#)
- [Park Monthly Maintenance and Safety Checklist](#)
- [Park Supervisor Monthly Facility and Park Inspection](#)
- [Playground Audit](#)
- [Playground Daily Inspection](#)
- [Playground Monthly Supervisor Inspection](#)
- [Recreation Center Monthly Inspection](#)
- [Vehicle Monthly Inspection](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.6 - Fleet Management Plan

Standard: The agency shall have an established fleet management plan comprised of an inventory of all vehicles, rolling stock and other major equipment and inspection and replacement schedules.

Suggested Evidence of Compliance: Provide the fleet management plan.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 13 – Management Operations, pp. 296-297, 299-300.

Agency Evidence of Compliance:

Lee County Parks & Recreation works in conjunction with [Lee County Fleet Management](#) to ensure a well 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.

Fleet Maintenance sends the monthly preventative maintenance schedule the Department's fleet liaison who informs staff of equipment due for service. Fleet Management offers a live vehicle/equipment status report to departments with Lee County intranet access. It also offers the current preventative maintenance report via the intranet.

Digital Evidence:

- [Lee County Fleet Management Business Plan](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.7 - Agency-Owned Equipment, Materials, Tools, and Supplies Policies and Procedures

Standard: There shall be policies and procedures for the management of and accountability for agency-owned equipment, materials, tools, and supplies, including procedures for 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. Such property includes supplies, materials, tools, expendable items, vehicles, installed and mobile equipment, and personal wear items used by agency personnel.

Suggested Evidence of Compliance: Provide policy and procedures regarding agency-owned equipment and property.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 213, 217, 229, 236; Chapter 12 – Physical Resource Management, pp. 251, 253-255, 259-259, 261, 264; Chapter 13 – Management Operations, pp. 267, 277-278, 282-284, 292-293, 295-300.

Agency Evidence of Compliance:

Lee County Parks & 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.

The Department's supervisory staff is assigned the responsibility of ensuring 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.

Staff are required to report annually the fixed assets owned by Department.

Digital Evidence

- [Administrative Code AC-3-14:Tangible Personal Property Owned by Local Governments](#)
- [Administrative Code AC-5-1: County Fleet Assignment and Vehicle Usage Criteria](#)
- [Operations Manual – Agency owned equipment and property](#)
- [Fixed Asset Report Sample](#)
- [Flyer for chain saw maintenance training](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.7.1 - Building Plans and Specifications

Standard: The agency shall have on file floor plans, specifications, and/or as-built drawings for major facilities constructed since 1965. These records contain information necessary for efficient programming, quality facility maintenance and effective capital project programming. Projects funded with funds from governmental grant programs such as LAWCON and UPARR place restrictions on use and disposition.

Suggested Evidence of Compliance: Provide evidence that plans and specifications for facilities with greater than 10,000 square feet of indoor space constructed since 1965 are on file.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 8 – Recreation Program Planning, pp. 139-141; Chapter 12 – Physical Resource Management, pp. 239, 243, 250-256; Chapter 13 – Management Operations, pp. 267, 276-275, 278-288, 299.

Agency Evidence of Compliance:

All building plans and specification records are maintained by Lee County Facilities Management department. Most project documents are stored in the records warehouse. Due to the vast size of these documents and newer technology, more recent projects are stored on EADOC software (a Cloud based Construction management software) and placed on the iCloud. This has become the standard for storing documents. All documents are available upon request through the Facilities Management department.

Digital Evidence:

- [Lee County Sports Complex – SITE PLAN](#)

- [Spec Sample – Lee County Sports Complex](#)
- [North Fort Myers Rec Center – FLOOR PLAN](#)
- [Spec sample – North Fort Myers Rec Center](#)
- [Terry Park – First Floor Layout](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.7.2 – Land and Lease Records

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

Suggested Evidence of Compliance: Provide evidence that land records for land acquired since 1965 are on file.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 208-213, 216-217.](#)

Agency Evidence of Compliance:

The Department’s Land and Lease Records are maintained by the County Lands department, who provides high quality cost-effective Government real estate services for County business. The County Lands department handles all aspects of the County’s real estate acquisition and disposition services.

Inventory records are scanned and saved to the County’s KWIKTAG system and are in digital format. Records are available to departments upon request.

Digital Evidence:

- [Leases and Agreements – Jet Blue Park](#)
- [Leases and Agreements – Wa-Ke Hatchee Recreation Center](#)
- [Leases and Agreements – Terry Park Administration Building](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.8 - Environmental Sustainability Policy and Program

Standard: The agency shall have an established policy on environmental sustainability that states the agency position on energy and resource conservation. The policy should address sustainable product purchasing; reduction and handling of waste; wise use and protection of land, air, water and wildlife; and sustainable design/construction of buildings and facilities.

Suggested Evidence of Compliance: Provide the agency’s environmental sustainability policy and examples of projects and initiatives that demonstrate the agency’s commitment to implementation. Examples include ecosystem and green infrastructure plans/programs, capital improvements utilizing green/sustainable designs, carbon footprint analysis and reduction goals, internal/external communication and outreach programs.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 210, 215-216, 226, 232-233, 236; Chapter 12 – Physical Resource Management, pp. 240, 247; Chapter 13 – Management Operations, pp. 286-295.](#)

Agency Evidence of Compliance:

In 2010, the Lee County Board of County Commissioners established the Community Sustainability Advisory Committee, followed by the County Manager’s initiative to establish the new Office of Sustainability. The new office created a Sustainability Strategy and put it into place. Lee’s Office of Sustainability — created completeLEE in an interactive online format. The plan prioritizes 14 goals that include natural resource protection, workforce readiness / education issues. Contained in completeLEE were data from more than 1,000 survey responses, interviews with all county department heads, external interviews with 16 community leaders, social media outreach and public workshops.

To measure success in those areas, completeLEE joined a voluntary self-reporting system produced by Sustainability Tools for Assessing and Rating (STAR) Communities, a nonprofit that helps cities and counties evaluate their performance by considering health, culture, education, economic, equity, climate and natural system objectives. When Lee County joined STAR in 2012, it was chosen as one of the program’s 32 pilot communities in North America.

In 2013, completeLee produced an annual report highlighting the work the department accomplished.

In 2014, the County Manager announced that County sustainability policies would be handled by a newly formed Environmental Policy Management Office. It had a 2014-15 proposed budget of \$705,704, which was more than a \$435,000 increase over the Office of

Sustainability's past budget.

Lee County Parks & Recreation continues to work within the agency to educate all staff and patrons in coordination with other Lee County Departments to foster: Energy Independence, Climate Protection, Air Quality, Wise Use of Material Resources, Public Health and Nutrition, Urban Design - Land Use - Green Building and Transportation, Parks - Open Space and Habitat Conservation, Water Resources and Flood Protection, Public Involvement and Personal Responsibility. The Department also follows the Environmental Education, Programs and Policies.

Some ways Lee County Parks & Recreation is moving forward are:

- Partnering with IFAS/Extension Services in promoting their ongoing trainings and seminars on sustainability.
- Working with solid waste to ensure recycling is being achieved at all sites.
- Opening and maintaining LEED Certified public buildings and a stadium.
- Environmental Education programming all year long at targeted facilities.

Digital Evidence:

- [STARS Report](#)
- [2013 Lee County Office of Sustainability Annual Report](#)
- [Operations Manual - Environmental Education](#)
- Lee County Extension Sustainability
- Six Mile Cypress Slough website – environmental programming
- LEED Certified public buildings - <http://www.leegov.com/facilities/leed>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.9 Natural Resource Management Plans and Procedures

Standard: There shall be natural resource management plans for environmentally unique or sensitive areas such as valuable wetlands, riverbanks and woodlands and there shall be environmental protection procedures, such as for erosion control, conduct of nature studies, wildlife and habitat preservation, and protection of water supply reservoirs and water recharge areas. Even if the agency does not own or control the natural resource, there shall be procedures to encourage and ensure environmental stewardship through volunteer steward programs and/or interpretive education and other learning opportunities. The agency should work with other agencies to meet and promote environmentally sound maintenance and land management standards.

Suggested Evidence of Compliance: Provide the natural resource management plan(s) and procedures and examples of outreach and education.

Agency Evidence of Compliance:

Lee County Parks & Recreation is sensitive to the environment and has taken action to do its part to protect and preserve resources. The Land Stewardship Section of the Department is responsible for the Natural Resource management of all resource-based parklands. Land Stewardship's role is described in the Department's Operations Manual. The Department's land stewardship plans are available for the public to view on the website.

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 conservation lands.

Several of our environmentally focused facilities offer educational activities and programs.

Digital Evidence:

- Land Management Plans - <http://www.leegov.com/conservation2020/landmanagement/land-stewardship-plans>
- [Operations Manual - Land Stewardship](#)
- [Operations Manual - Environmental Programs](#)
- [Management Status Reports Copies for Various Preserves](#)
- [Conservation 20/20 Acquired Properties Report](#)
- [Conservation 20/20 Nominations Map](#)
- Educational Programs brochure - <http://www.leegov.com/parks/Documents/Educational%20Programs%20at%20the%20Slough%20-%202015.pdf>
- Teacher's Packet with educational activities for students prior to their field trip <http://www.leegov.com/parks/Documents/Teachers%20Packet%202015%20-%20Compressed.pdf>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.9.1 - Recycling and/or Zero Waste Plan

Standard: There shall be a recycling and/or zero waste plan for park and recreation facilities and administrative offices that is systematically monitored and periodically reviewed. The plan shall also include an educational component for both users and employees. The recycling and/or zero waste plan should include all major products suitable for recycling in the given

region with an emphasis on making the recycling process easy and convenient for park and recreation users.

Suggested Evidence of Compliance: Provide a description of the recycling and/or zero waste plan for facilities and administrative offices and provide the last review with statistics on the amounts of materials recycled or the percent of total waste recycled for the most recent reporting period.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 13 – Management Operations, pp. 290-292.

Agency Evidence of Compliance:

Lee County Parks & Recreation recognizes that it takes everyone’s help, every day and in every way to reduce the growing amount of trash in Lee County. All Department employees are asked to do their part at home and in the work place. Pursuant to The Lee Plan, Policy 62.1.2, all Lee County Departments and employees are asked to implement resource recovery and recycling programs for glass, paper, plastic and nonferrous metal containers.

The Recycling and Zero Waste Plan was reviewed December 14, 2015.

The Department’s Operation Manual provides guidance in reusing, reducing and recycling.

A staff workshop titled “Trash Talk” is held annually and a recyclable items list is provided to all staff in attendance. All Department’s facilities and administrative offices have recycling containers.

The Department collects techno trash and scrap metal and recycles it with a local vendor for cash.

Digital Evidence

- [Lee Plan 62.1.2](#)
- [Recycling and Zero Waste Plan](#)
- [LCPR Operations Manual – Environmental Education, Programs, & Policies](#)
- [Recycling at Parks and Rec 5-13](#)
- [Managerial Meeting Minutes: Recycling/Zero waste plan review 12-14-15](#)
- [Stats on scrap metal and techno trash](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.10 - Maintenance Personnel Assignment Procedures

Standard: The agency shall have procedures for the assignment of competent personnel with clearly defined duties for routine maintenance, repairs, and improvement of areas, facilities, and equipment, including responsibility for general cleanliness and overall attractiveness. Effective maintenance of grounds and facilities requires the selection, training, and supervision of workers in a wide variety of tasks ranging from seasonal laborers to skilled trades. Supervisory staff must be able to focus on maintenance management, such as workload control, as well as supervise the technical details of maintenance work.

Suggested Evidence of Compliance: Provide examples of methods used by the agency to assign staff.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 12 – Physical Resource Management, pp. 254 and 259; Chapter 13 – Management Operations, pp. 284 and 295.

Agency Evidence of Compliance:

The Department's supervisors are tasked with managing work schedules and job assignments of maintenance personnel. This includes ensuring that staff is properly trained and able to meet the required duties as assigned. Assignments are made based on staff experience and ability to meet the demands of the facility. The supervisor also ensures that staff with relatively limited experience is given the opportunity to develop the skills necessary to perform specific, more advanced tasks.

Lee County Parks & Recreation employs personnel with specific skill sets. Certain positions within the Department require specific certifications or experience. An example of this methodology would be the grounds crew position. When hiring grounds crew personnel, ballfield experience is paramount. Certain aspects of the job can be taught, but a strong background in field maintenance is required.

Lee County Parks & Recreation will assign and reassign employees based on changing needs within the Department. Specific tasks and jobs may require positions with certain competencies. As the Department grows and develops more parkland, new tasks and jobs become prevalent and the Department must assign and reassign employees to meet those needs.

Lee County Parks & Recreation works with the assistance of [Lee County Human Resources](#) to obtain the best qualified staff possible. The Department identifies personnel need based on vacancies, enhancement of existing locations or new facilities. Part of that identification includes writing clear, concise job descriptions with specific qualifications (i.e., pesticide license, CDL licenses, etc.) and offering competitive pay and benefits, which in turn attracts 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 requests and justifications.

Human Resources conducts job classification surveys periodically to ensure Lee County is competitive with wages and benefits.

Digital Evidence

- [Sample Job Descriptions for Maintenance Positions](#)
- [Administrative Code AC-3-6](#)
- [Lee County Parks & Recreation Organizational Chart](#)
- [Example of Pro Am Business Case Plan](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

7.11 - Capital Asset Depreciation and Replacement Schedule

Standard: The agency shall have an established depreciation and replacement schedule for all park and recreation capital assets including buildings, facilities, and equipment that have predictable life cycles. Schedules should identify the useful life of each element and the associated costs of replacement. Capital asset depreciation and replacement schedules, including projected costs of replacement, should be reflected in the agency’s financial plan.

Suggested Evidence of Compliance: Provide the capital asset depreciation and replacement schedule.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 208, 213-215, 217-218, 220, 225-259, 231; Chapter 12 – Physical Resource Management, pp. 240 and 247; Chapter 13 – Management Operations, pp. 289 and 294.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a replacement schedule for all capital maintenance items such as playgrounds, fencing, signage, paving, athletic court resurfacing and lighting through the County’s Capital Improvement Program (CIP) budget process. This document is referred to as the Major Maintenance report. The CIP process is the mechanism by which facilities are renovated. Chapter 6 of the Lee Plan outlines capital policy for larger facilities and recommended levels of service.

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.

Digital Evidence

- [Major Maintenance FY16 thru FY 20](#)
- [Major Maintenance FY16 thru 11/30/2015](#)
- [Playground Replacement Priority List](#)
- [CIP Project List FY16 – FY20](#)
- [CIP FY15 thru 9/30/2015](#)
- [Lee Plan Chapter VI – Capital Improvements](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 7.0 – FACILITY AND LAND USE MANAGEMENT**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

8.0 - Public Safety, Law Enforcement, and Security

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Laws and ordinances provide the foundation for controlling activities and behavior within the jurisdiction of the agency. General municipal codes, laws and ordinances and state and federal laws are applicable to parks and recreation areas and facilities. However, these laws generally have broad application and lack specificity as they relate to the control and management of parks and recreation areas and facilities. Special laws and ordinances may be enacted to specifically address and guide public use and behavior and may delegate authority to issue and enforce permits, licenses, rules and regulations applicable to parks and recreation areas and facilities.

Agency staff are first-in-line to gain compliance with ordinances, rules and regulations. Regardless of whether the agency employs law enforcement officers or contracts for law enforcement services, agency staff have responsibility to educate patrons on the proper use of parks, recreation areas and facilities. However, when patrons fail to comply, enforcement becomes the responsibility of sworn law enforcement officers.

For agencies relying on the services of law enforcement officers from other jurisdictions or departments, it is essential that formalized liaison relationships be established between agency staff and the official law enforcement organization.

Particular attention should be given to national, state and local emergency plans and procedures directed toward large-scale natural disasters, such as earthquakes, tornadoes, hurricanes, forest fires, and floods. Plans should include evacuation procedures, inventories and locations of equipment and materials, displacement plans for facility residents and activities, and provision of psychological aid for staff affected by emergencies.

8.1 - Codes, Laws, and Ordinances ★

Standard: Public safety and law enforcement within parks and recreation areas and facilities shall be governed by codes, laws, and ordinances, some of which may be enacted specifically for the control and management of parks and recreation areas and facilities. The codes, laws and ordinances shall be posted or readily available to park patrons.

Suggested Evidence of Compliance: Provide documentation of the codes, laws, and ordinances that pertain specifically to areas and facilities under the jurisdiction of the agency and describe how they are posted or otherwise readily available to park patrons.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 2 – Management and the Law, pp. 19-22.](#)

Agency Evidence of Compliance:

The Lee County Parks & Recreation Department is governed by Lee County Ordinance 06-26, which establishes the park rules and regulations for the safety and welfare of the park visitors. The purpose of Ordinance 06-26 is to efficiently utilize County parks for recreation purposes, preserve park resources and provide for protection and safety of lives and property on and within the parks and recreation facilities. All ordinances pertaining to the

Department are made available to the public on the Lee County Parks & Recreation website under the Park Ranger section.

Digital Evidence

- [Ordinance 06-26 and approval](#)
- Park's Ranger website <https://www.lee.gov/parks/about/ranger>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.1.1 - Staff Liaison to Law Enforcement Officers

Standard: There shall be established liaison assignments for agency staff to the official law enforcement officers providing public safety and law enforcement service to the agency.

Suggested Evidence of Compliance: Provide current documentation of staff liaison assignment(s) with the law enforcement authority responsible for enforcement of laws and ordinances within the parks and recreation areas and facilities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, p. 604.

Agency Evidence of Compliance:

The Senior Supervisor and Supervisor of the Park Ranger Unit are the Department's designated liaisons to local law enforcement. The Liaison to Community Law Enforcement section of the Department's Operations Manual describes the ongoing relationship between the Lee County Ranger Unit and the Lee County Sheriff's Office (LCSO).

The LCSO is heavily relied upon for any circumstances that exceed the scope of duties for a Lee County Park Ranger or staff. The Ranger Unit provides a letter annually to the LCSO identifying the designated Department Liaisons.

Digital Evidence:

- [Liaison to Community Law Enforcement – Operations Manual](#)
- [Letter showing Sheriff Office Liaison](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.2 - Authority to Enforce Laws by Law Enforcement Officers ★

Standard: The authority of law enforcement officers to enforce laws and ordinances pertaining specifically to activity within parks, recreation areas, and facilities shall be clearly established to ensure that enforcement actions are upheld. Authority to enforce laws and ordinances within parks and recreation areas and facilities must be established through assignment within the agency, by contract with another agency, or by policy of the government jurisdiction in which the agency operates.

Suggested Evidence of Compliance: Provide documentation that establishes the authority of law enforcement officers to enforce laws and ordinances within parks, recreation areas, and facilities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 606-612.

Agency Evidence of Compliance:

The Department is charged with the duty of administering, protecting, controlling and governing the park property of Lee County. The Lee County Park Ranger Program is established under the Lee County Ordinance. The Park Rangers are vested with complete authority to enforce the provisions, requirements and regulations within the Ordinance. Those designated as Park Rangers of Lee County shall have the authority to issue citations to enforce the Ordinance.

When the scope of duties exceeds those of the Park Ranger, the primary responding unit for criminal enforcement within Lee County is the Lee County Sheriff's Office (LCSO) and for resource violations, the State of Florida, Fish and Wildlife Conservation Commission (FWC).

Several documents are collected annually to show the continued partnership with the Ranger Unit and local law enforcement agencies.

Digital Evidence:

- [Ordinance 06-26 section 2.3](#)
- [LCSO Trespass Letter](#)
- [Bluesheet for mutual aid agreement](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.3 - Law Enforcement Officer Training

Standard: Law enforcement officers with the authority to enforce laws within areas and facilities under the jurisdiction of the agency must have proper training in order to carry out their roles and responsibilities.

Suggested Evidence of Compliance: Provide a summary of the current training program for law enforcement officers having jurisdiction within the parks and recreation agency, including provision for refreshers and updates.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 612-616.

Agency Evidence of Compliance:

The Lee County Sheriff's Office (LCSO) and the Florida Fish and Wildlife Conservation Commission are both highly trained and accredited law enforcement agencies that fall under the Florida Department of Law Enforcement (FDLE) regulation standards for criminal justice professionalism and training.

FDLE requires ongoing training for local certified law enforcement officer. The officers then work together with the Park Ranger Unit to continue education between staff.

Digital Evidence:

- [FDLE Mandatory Training Matrix](#)
- [LCSO Operations Manual – Training and Career Development](#)
- [Example Staff completion of parking enforcement with LCSO](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.4 - Public Information on Laws, Ordinances, Rules, Regulations, and Policies

Standard: Agency staff shall participate in educating and informing the public on laws, ordinances, rules, regulations, and policies that apply to parks and recreation areas and facilities. This role shall be established through policy directive.

Suggested Evidence of Compliance: Provide documentation that defines the role of agency staff in providing public information and education on laws, ordinances, rules, regulations, and policies. Provide examples of education and provision of information.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 616-617.

Agency Evidence of Compliance:

As set forth in the Operations Manual, all employees and persons acting as representatives of Lee County Parks & Recreation shall educate park visitors regarding the park rules and regulations. The Operations Manual describes the role of the Park Ranger and the specific duty of educating the park visitor regarding the rules and regulations and issuing citations.

The Ranger Unit completes a daily patrol log, recording education and enforcement activities regarding patrol and enforcement activity.

Digital Evidence:

- [Role of the Ranger – Operations Manual](#)
- [Example of Ranger’s educating program](#)
- [Example of Ranger patrol log](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.4.1 - In-Service Training for Staff on Public Safety and Law Enforcement

Standard: Agency staff shall understand their role in public safety and law enforcement and relationships with law enforcement officers having jurisdiction within parks and recreation areas and facilities. The purpose of this training to ensure that staff understand where their authority ends and when an incident should be referred to law enforcement. In-service training shall be extended to front line staff such as lifeguards and park attendants to assure they are fully prepared to respond to law-enforcement incidents.

Suggested Evidence of Compliance: Provide documentation of most recent in-service training for agency staff, defining their role in public safety and law enforcement, including agendas and attendance rosters

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, p. 614.

Agency Evidence of Compliance:

The Department has specific protocol outlining the role that each employee plays addressing park violations and law enforcement issues. According to the Operations Manual, all employees and persons acting as representatives of the Department shall educate the public on park rules when necessary and contact either a park ranger or a law enforcement officer for incidents that exceed their scope of duties. In addition, park rangers are required to be fully trained and certified in code enforcement, parking enforcement, first aid, CPR and ATV operations.

The Ranger Unit's staff conducts training programs annually for volunteers and staff regarding various public safety topics and the enforcement of park rules and regulations. One example of this type of training is the Addressing Park Visitors with Ease program.

Digital Evidence:

- [Staff protocol for addressing park violations – Operations Manual](#)
- [Address Park Visitors with Ease Powerpoint](#)
- [Training sheet and roster 12/9/2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.4.2 - Handling of Disruptive Behavior Procedures

Standard: There shall be established procedures for agency staff on response to disruptive behavior at agency areas and facilities. Procedures shall identify the role of staff in intervention when an incident occurs, documentation of behavior and delineation of law enforcement roles in handling behavioral issues.

Suggested Evidence of Compliance: Provide current procedures regarding handling of disruptive behavior.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 620-624.](#)

Agency Evidence of Compliance:

Guidelines set forth in the Operations Manual apply to park patrons in general and participants enrolled in structured and non-structured recreation programs. Procedures for minors and adults differ based upon age-appropriate circumstances.

Specific expectations regarding appropriate behavior are outlined in Lee County Ordinance. Rangers and supervisors review with staff how to handle patrons. When patrons fail to comply with staff, the Lee County Sheriff's Office is contacted.

Digital Evidence:

- [Inappropriate Behavior Procedures – Operations Manual](#)
- [Issuing Citations Procedure – Operations Manual](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.4.3 - Traffic Control, Parking Plans, and Crowd Control

Standard: The agency shall coordinate with the official law enforcement agency having jurisdiction on large-scale events hosted or facilitated by the agency that require planning and coordination of traffic, parking and crowd control. Plans shall specifically define the roles of the event sponsor, agency staff, and the law enforcement agency regarding traffic layouts at the venue, traffic routes and personnel assignments.

Suggested Evidence of Compliance: Provide a recent example of coordination with law enforcement on traffic control, parking plans and crowd control for activities and events hosted or facilitated by the agency.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 624-637.

Agency Evidence of Compliance:

All events with greater than 1,000 attendees require a Special Event Permit, which all Lee County law enforcement and emergency response agencies must approve. This permit guarantees adequate personnel coverage for control during the planned event.

Digital Evidence:

- [Special Events Permit](#)
- [Request for LCSO coverage on holiday](#)
- [LCSO 4th of July Invoice](#)
- Special Event Permits website - <http://www.leegov.com/dcd/BldPermitServ/AppsProcd/SpecEvent>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.4.4 - Handling of Evidentiary Items Procedures

Standard: Procedures shall be established that guide agency staff in the preservation and handling of evidence until transferred to the appropriate law enforcement authority. Procedures shall be established in coordination with the appropriate law enforcement agencies to define staff roles in ensuring that evidentiary items are preserved until the proper law enforcement agency assumes command of the scene.

Suggested Evidence of Compliance: Provide the procedures defining the role and responsibility of agency staff in the discovery, preservation and handling of evidentiary items.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 622-623.

Agency Evidence of Compliance:

The Department’s Operations Manual contains guidelines for handling of evidentiary items. The Lee County Sheriff’s Office (LCSO) is the primary responding agency in dealing with evidentiary items.

Digital Evidence:

- [Handling of Evidentiary Items Procedures - Operations Manual](#)
- [Chapter 83 LCSO Manual - Collection and Preservation of Evidence](#)
- [Chapter 84 LCSO Manual - Property and Evidence Control](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.5 - General Security Plan

Standard: The agency shall have a comprehensive general security plan addressing areas, buildings and facilities under its jurisdiction that is updated periodically. Plans for each major area, building or facility should be available at each site. The general security plan may be a compilation of security plans from each major area, building or facility. Hazardous or flammable materials storage areas should be clearly identified in plans and at each specific site. Signage at each site should be installed in accordance with the unified signage system. To be effective, the security plan should be updated when a new area, building or facility is added, security systems are modified or when legislation requires change.

Suggested Evidence of Compliance: Provide the agency’s general security plan or compilation of security plans from each major area, building or facility with the most recent review or update. At a

minimum, these plans should include:

- a. Locking key systems and associated assignments;
- b. Alarm system and assignment of security codes;
- c. Opening and closing procedures;
- d. Fire alarm and fire suppression systems;
- e. Emergency evacuation procedures; and
- f. Critical incident response procedures.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 627-637.

Agency Evidence of Compliance:

The Operations Manual includes guidelines for the general security and safety of all buildings and facilities under the jurisdiction of Lee County Parks & Recreation. Lee County Administration code also gives procedures for an Employee Emergency Action Plan.

The Department has a comprehensive general security plan for all buildings and facilities. Additional security measures, as required during planned events, are documented through the Lee County Special Event Permit. The most recent review of the General Security Plan was by the management team on February 8, 2016.

Digital Evidence:

- [General Security Plans – Operations Manual](#)
- [Manager Meeting presenting the General Security Plan 06-02-14](#)
- [Example of Facility Security Plan](#)
- [AC Code Employee Emergency Action Plan](#)
- [All Hazards Plan websites](#)
- [Special Events Permit](#)
- [Managers Minutes reviewing General Security Plan 2-8-16](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.6 - Emergency Management Planning

Standard: The agency shall be aware of emergency operations planning within their jurisdiction and its role in emergency management systems. Roles may vary depending on the scope of services provided by the agency and the location of its facilities. Recreation agencies, having roles in emergency management systems within their local jurisdiction, shall be aware of the applicable operations plan. The agency's specialized staff, buildings and equipment may be

integral to the plan and may be deployed in the event of a large-scale emergency. The U. S. Office of Homeland Security provides guidance and support for the preparation and maintenance of emergency management plans.

Suggested Evidence of Compliance: Provide the applicable emergency management plan with the most recent date of approval. If, due to security concerns, the emergency management plan is not available for public review, provide the emergency management plan table of contents.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 634-637.

Agency Evidence of Compliance:

The Lee Comprehensive Emergency Management Plan (CEMP) was approved by the State of Florida Division of Emergency Management on November 1, 2013. In addition, the Senior Supervisor of the Ranger Unit is a member of the Disaster Advisory Council. The Disaster Advisory Council meets on a regular basis at the Emergency Operations Center to discuss local agency emergency planning strategies and event preparation.

The Department is under the jurisdiction of the Lee County Emergency Operations Center during a state of emergency. All operations in Lee County, as well as the State of Florida, use an all-hazards approach to planning. The CEMP is based on the fact that the consequences of disasters are the same regardless of the hazard and most of the functions performed during emergency situations are not hazard specific.

Digital Evidence:

- [Lee County CEMP Table of Contents](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.6.1 - In-Service Training for Staff on General Security and Emergency Management

Standard: Through in-service training, agency personnel shall understand their role in ongoing security and emergency management. In-service training should inform staff of their role in response to critical incidents and emergencies and provide specific procedures for routine operations.

Suggested Evidence of Compliance: Provide documentation of in-service training programs on general security and emergency management, including a dated outline of the presentation topics and a roster of participants.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, p. 636.

Agency Evidence of Compliance:

The Lee County Emergency Operations staff provides specific training to the staff on the Lee County Emergency Management Plan, the purpose of the Emergency Management Plan, how it is implemented and the role of the Department within that plan.

Supervisors conduct monthly safety and security meetings as ongoing in-service training for their employees. These trainings address various aspects of the Emergency Management Plan, employee safety and park security, as well as the role each employee will play.

Digital Evidence:

- [Disaster Preparedness Training Powerpoint](#)
- [Disaster Preparedness training roster](#)
- [Monthly Safety Topics](#)
- [Roster for Monthly Safety Topic](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.6.2 - Emergency Risk Communications Plan

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

Suggested Evidence of Compliance: Provide a copy of the Emergency Risk Communications Plan and the most recent review.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 22 – Law Enforcement and Security, pp. 634-637.

Agency Evidence of Compliance:

The Lee County Government has a specific office designated as Public Information Officer (PIO). The PIO is required to provide accurate and timely information to the community and media partners to allow people to prepare for, respond to and recover from disasters. The PIO uses all available communications mechanisms, including television, radio, print and social media to communicate with the citizens of Lee County. Additionally, the PIO

works with all available resources to provide information in alternative formats and languages to meet the information needs of the whole community. The PIO guidelines are set forth in Lee County's Comprehensive Emergency Management Plan. The most recent review was November 9, 2015.

Digital Evidence:

- [2015 Standard Operating Guide for Media Relations \(Emergency Risk Communication Plan\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

8.6.3 - Care and Shelter Procedures

Standard: There shall be procedures to coordinate with agencies designated to provide care and shelter to those in need during disasters or emergencies.

Suggested Evidence of Compliance: Provide procedures to coordinate with agencies designated to provide care and shelter during emergencies.

Agency Evidence of Compliance:

The Department works with the Emergency Operations Center to follow the Comprehensive Emergency Management Plan (CEMP). In the event a Lee County Parks & Recreation facility becomes an emergency shelter, the American Red Cross will take command of the facility and follow all established guidelines according to their policies and procedures.

Digital Evidence:

- CEMP (website) - <http://floridadisaster.org/cemp.htm>
- [Red Cross Shelter Management](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

**VISITATION REPORT SUMMARY FOR
CATEGORY 8.0 – PUBLIC SAFETY, LAW ENFORCEMENT, AND SECURITY**

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

9.0 - Risk Management

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

A comprehensive risk management plan is essential to minimize legal liabilities and personal injuries. The agency shall implement approaches for identification and control of risks based on the specific needs of the agency. There is no prescriptive method for identification of all risks suitable for all entities; the method and tools used will vary. Risk management is an on-going process that must be systematically evaluated for effectiveness and adjustments made as appropriate. Responsibilities must be assigned and structure set in place to implement an effective plan. The analysis shall include the direct costs (staffing, insurance, prevention) and indirect costs (time lost from work by injured employees, damage to equipment and facilities, failure to provide services and loss of income).

In some cases, the risk management plan and function may occur outside the park and recreation agency by another government authority. Special cooperative arrangements should be in place with other public departments and agencies, private contractors, and community organizations.

9.1 - Risk Management Policy

Standard: The agency shall have a policy for risk management that sets direction and gives appropriate authority for implementing operational practices and procedures that is approved by the proper authority.

Suggested Evidence of Compliance: Provide the risk management policy including indication of approval by the proper authority.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 21 – Risk Management, pp. 579-598.

Agency Evidence of Compliance:

Lee County has a Risk Management Plan that sets forth the policies to ensure the safety of all County employees, property and the public.

The Plan describes the responsibility for carrying out the Plan, which rests with the County Manager and Department Directors. The Plan was amended and approved by the Board of County Commission on April 18, 2006.

The Department's Operation Manual has a Risk Policy Standard.

Digital Evidence:

- [Copy of the amended Lee County Risk Plan - \(Revised 1/06, adopted by Board of County Commissioners\)](#)
- [Copy of consent agenda with approval](#)
- [Blue Sheet \(item for Commission vote\) #20060452](#)
- [Operation Manual - Risk Policy Statement](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

9.1.1 - Risk Management Plan and Procedures ★

Standard: The agency shall have an established risk management plan and operating procedures that are reviewed periodically, accessible to all agency personnel and approved by the proper authority that encompasses analysis of risk exposure, control approaches and financial and operational impact for the agency. The plan shall analyze the programs/services offered and facilities/areas managed for personal injury and financial loss potential and identify approaches to manage such injury, loss, and business and operational impact.

Suggested Evidence of Compliance: Provide the current risk management plan with approval by the proper authority, the most recent review, and indication of how the plan and procedures are available to staff. The risk management plan shall reflect all three phases of risk management:

- a. Identification and assessment;
- b. Response strategies; and
- c. Management planning.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 21 – Risk Management, pp. 583-596.

Agency Evidence of Compliance:

Lee County has a Risk Management Plan that was adopted by the Board of County Commissioners in April 1981 and was last amended on April 18, 2006.

The Plan also delegates the authority to carry out the Plan to the County Manager and Department Directors.

Lee County Parks & Recreation developed procedures the Operations Manual to comply with the Lee County Risk Management Plan and policies as set forth in the Plan. The Lee County Operations Manual is revised and was last reviewed and approved by the management team on November 16, 2015. It was then reviewed and approved by the Lee County Parks & Recreation Advisory Committee on January 28, 2016.

Digital Evidence:

- [Copy of the amended Lee County Risk Plan](#)
(Revised 1/06, adopted by Board of County Commissioners)
- [Copy of consent agenda with approval](#)
- [Blue Sheet \(item for Commission vote\) #20060452](#)
- [Operation Manual – Safety and Security \(Table of Contents\)](#)
- [Minutes Manager meeting approving Operations Manual 11-16-15](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

9.1.2 - Accident and Incident Report Procedures

Standard: There shall be established procedures for accident and incident reporting and analysis of accident and incident reports. There shall be an accident/incident report form available to all employees. Data shall be obtained in an appropriate manner to support planned and coordinated accident prevention programs within the agency.

Suggested Evidence of Compliance: Provide the accident/incident form(s) and the procedures for documenting and analyzing accidents and incidents. The accident/incident form(s) shall include identification information (who), specific location of accident (where), and description of accident in terms of sequence of activity (what).

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 21 – Risk Management, pp. 583-589.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation follows the guidelines set by the Lee County Risk Management Claims Reporting Procedures when reporting any incidents.

The Lee County Risk Manager monitors expenditures and claims of all County Departments through the services of PMA, Inc. PMA provides statistics, analysis and data to the Risk Manager using comparative data of representative counties. PMA also provides recommendations to the Risk Manager for reduction and mitigation of claims and current trends for focus as part of their services. PMA provides updates to reports as requested.

Accident and incident forms are available to all staff electronically through the main website. Ongoing trainings are given to all regular staff and summer seasonal staff on the procedures use and completion of forms.

Digital Evidence:

- [Lee County Risk Management Claims Reporting Procedures](#)
- [Claims Summary Analysis for the past five years](#)
- [Example of Risk Claimant Form](#)
- [Example of Employee Injury-Illness Report](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

9.1.3 - Personnel Involvement and Training

Standard: The agency risk management function shall involve and train personnel at all levels on risk management procedures.

Suggested Evidences of Compliance: Demonstrate how personnel at all levels are involved and trained regarding risk management.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 21 – Risk Management, pp. 594-596.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a Code of Safe Practices as a part of the Department's Operations Manual.

Staff at all levels participate in risk management by conducting inspections, following established safety procedures, and taking a pro-active approach to making facilities safe. Supervisors train staff on various safety and risk topics by hosting regular "safety meetings" with staff.

The Department's safety committee is made up of all levels of staff and conducts comprehensive site inspections. The safety committee provides reports that are distributed department-wide to appropriate staff.

All staff are required to attend Workers Comp training and Accident Reporting 101 training hosted by Lee County Risk Management.

Digital Evidence:

- [Operations Manual - Code of Safe Practices](#)
- [Operations Manual - Policy on responsibilities of department directors, supervisors and employees](#)
- [Safety Inspection and supervisor response to safety committee 6-03-15](#)
- [Accident Reporting 101 Training](#)
- [List of mandatory Safety Trainings](#)
- [Email from Department's Risk Management Team](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

9.2 - Risk Manager

Standard: A specific position within the agency shall be designated with risk management responsibility and authority to carry out the policies established for risk management.

Suggested Evidence of Compliance: Provide the position description that includes responsibility for risk management.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 21 – Risk Management, pp. 582-583.

Agency Evidence of Compliance:

The Lee County Risk Manager reports to the Lee County Budget Services Director. The Lee County Parks & Recreation risk management team is supervised by Department Director and Deputy Director.

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 & Recreation risk team ensures that staff are inspecting facilities and parks for compliance with standards for maintenance, safety, security, and risk. The documentation is reviewed regularly.

Supervisors are a part of the risk management team by hosting regular “safety meetings” with staff.

Digital Evidence:

- [Job description of Lee County Risk Manager](#)
- [Job descriptions of the Lee County Risk Generalist](#)
- [Matrix of Risk Management Team Job responsibilities](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

9.3 - ADA Compliance and Face-to-Face Resolution

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

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

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 12 Physical Resource Management, p. 253; Chapter 13 – Management Operations, p. 287; Chapter 16 – Human Resource Employment, p. 400; Chapter 21 – Risk Management, pp. 584-588.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a formal Grievance Procedure that outlines the steps to take for anyone one who wishes to file a complaint alleging discrimination on the basis of disability within the Department’s programs, activities, events, benefits, and services.

Digital Evidence:

- ADA Compliance and Face to Face Resolution – Grievance Procedure
<https://www.leegov.com/parks/about/ada>

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

VISITATION REPORT SUMMARY FOR CATEGORY 9.0 – RISK MANAGEMENT

Reviewed By: (*Visitor Name*)

Unmet Standards: (*List the Standard # and Name*)

Provide clarification for all unmet fundamental standards  :

10.0 - Evaluation, Assessment, and Research

NOTE: Standards marked with a star (★) are fundamental standards, and are required of all agencies seeking accreditation.

Evaluation and research are systematic processes that park and recreation professionals use to better understand the impacts of their efforts on the communities they serve. What is learned through evaluation and research is used to demonstrate the value of what is provided and to learn how to make improvements. Analyses of reliable data and qualitative information are essential to track progress in implementing master plans and strategic initiatives. Products of evaluation, measurement, and research become important components to support planning, development and programming decisions.

Benchmarking is the process of making comparisons to the processes, programs, and services of other providers. Comparisons are most frequently made to other park and recreation agencies, but benchmarking can be done also with business and non-profit organizations. The National Recreation and Park association developed PRORAGIS, which is a tool to capture uniform data on park and recreation agencies across the nation. PRORAGIS is the only national benchmarking tool for the park and recreation profession. As such, it can be successful as a reliable research tool only with broad participation from park and recreation agencies.

10.1 - Systematic Evaluation Processes ★

Standard: The agency shall have systematic processes for evaluating programs, facilities and services and operational efficiency and effectiveness.

Suggested Evidence of Compliance: Describe what is evaluated and the methods and frequency of evaluation of programs facilities and services. Evaluation is the process of determining the effectiveness of current practice and procedures.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 23 – Evaluation and Action Research, pp. 641-647.

Agency Evidence of Compliance:

Lee County Parks & Recreation systematically evaluates programs for learning outcomes and effectiveness; facilities for safety, cleanliness/usability; services for meeting customer's needs/satisfaction; and efficiency/effectiveness for significant return on investment and contact with a diversity of clientele. The Department uses formal evaluation tools such as satisfaction surveys, program evaluations, user needs assessment, pre and post tests, competency assessments and a biennial Cost Benefit Analysis. The Department's Operations Manual also outlines policy and procedures about evaluation. Also in use are informal, qualitative evaluations such as staff meetings at various levels, formal and ad-hoc advisory and friends groups and customer feedback through comment cards, reviews and customer correspondence. The data and feedback are then analyzed, interpreted for areas of excellence, improvement and/or gaps in services. The results are used in planning or improving future programs, parks, activities and facilities.

University of Florida IFAS employees are required to provide their annual report of

accomplishments which includes an evaluation of all programs offered throughout the year.

Volunteer Services conducts an annual survey to evaluate the program.

Digital Evidence:

- [User Needs Assessment Survey](#)
- [Summer Camp evaluation with staff meeting minutes](#)
- [Summer Camp Survey Results 2015 \(public input\)](#)
- Cost Benefits Analysis - <http://www.leegov.com/parks/about/cba>
- [Operations Manual - Department Evaluation Plan](#)
- [UF/IFAS Reports of Accomplishments](#)
- [Volunteer Program Survey 2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.1.1 - Responsibility for Evaluation

Standard: The agency shall assign specific responsibility for managing elements of the evaluation program, including planning, training, evaluation, and analysis.

Suggested Evidence of Compliance: Provide job descriptions for the person(s) (staff or consultants) responsible for supporting and monitoring evaluation processes, including planning, training, evaluation, and analysis. If consultant services are used, provide the current contracts or service agreements. The documentation should also include the resumes of persons providing the service, including experience and training.

[Informational reference in the *Management of Park and Recreation Agencies*, \(2010\), 3rd Ed., Chapter 23 – Evaluation and Action Research, p 644.](#)

Agency Evidence of Compliance:

Lee County Parks & Recreation has designated several staff members within the Department who are responsible for evaluation and research involving planning, operations and programming. Joy Hazell is an Extension Services Agent whose role is educating staff about the process evaluation and analysis along with conducting her own program evaluations.

Kristie Valone (Marketing/Media Coordinator) is the specific personnel within the agency responsible for managing the evaluation analysis. Part of various staff's roles includes evaluations. Evaluations are conducted through staff meetings at various supervisory levels.

Digital Evidence:

- [Extension Service Agent Job Description](#)
- [Joy Hazell's résumé \(Extension Service Agent\)](#)
- [Job Description for Coordinator](#)
- [Kristie Valone's résumé \(Coordinator\)](#)
- [Parks and Recreation Manager Job Description](#)
- [Debbie Derums' résumé \(Park Manager\)](#)
- [Job Description of Senior Planner](#)
- [Jason Lamey's résumé \(Senior Planner\)](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.1.2 - Staff Training on how to Evaluate Programs, Services, and Facilities

Standard: The agency shall provide training on how to evaluate programs, services and facilities for personnel involved in managing facilities and delivering programs and services.

Suggested Evidence of Compliance: Provide examples of recent evaluation trainings completed by the agency, including curriculum content, training dates and participant lists. Examples of training subjects could include but are not limited to qualitative and quantitative measurement, identification of applicable evaluation tools, data analysis and use of findings.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 23 – Evaluation and Action Research, p. 644.

Agency Evidence of Compliance:

In 2014 Joy Hazell, Lee County IFAS Extension Agent, conducted a ninety minute training at the Lee County Parks & Recreation Quarterly Supervisors' Training on evaluation including topics such as question wording, analysis of results and focusing an evaluation.

Digital Evidence

- [Quarterly Supervisors Training Agenda](#)
- [Quarterly Supervisors Training Attendee List](#)
- [Quarterly Supervisors Training Evaluation](#)
- [Evaluation Training PowerPoint](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.2 - Outcomes Assessment

Standard: The agency shall use evaluation results to assess the outcomes of park and recreation programs, services, and facilities and assess the operational effectiveness of the organization. Outcomes show the relationship between resource inputs and the resulting impacts and benefits of the outputs. Outcomes are measurable changes in behaviors, attitudes, knowledge, conditions or skills.

Suggested Evidence of Compliance: Provide examples of how evaluation results are used to determine levels of performance and effectiveness in the organization and how evaluation are used to determine if specific programs, services or facilities are achieving planned or projected results.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 8 – Recreation Program Planning, p. 151; Chapter 9 – Program Services and Event Management, pp. 167-171; Chapter 23 – Evaluation and Action Research, p. 642.

Agency Evidence of Compliance:

Lee County Parks & Recreation strives to meet the needs of both internal and external customers. In an effort to better understand those needs, the Department continually performs evaluatory practices through user surveys, program evaluations and biennial Cost Benefit Analysis reports. Analysis is then performed on the feedback and data so the results can be used to determine if programs and services are meeting their performance goals.

Lee County Extension develops yearly Specific, Measurable, Achievable, Realistic and Time-bound (SMART) goals to track knowledge and skill gain and behavior change for selected programs. After the goals are evaluated and analyzed, the results are reflected in their year-end reports of accomplishments.

The Parks and Recreation volunteer program conducts regular surveys of volunteers, the results of which have led to changes to the volunteer program and increases in satisfaction. An example is in the 2012 volunteer satisfaction survey where requests were made to include the northern region of the County in volunteer events. As a result, the volunteer holiday potluck was moved to the northern region of the County.

Another example would be the review of the Summer Camp Report and Analysis.

Digital Evidence

- [Plan of Work/Report of Accomplishments for Extension Faculty](#)
- [Results of Volunteer Survey – more events north](#)
- Various survey analysis results
 - [Marine Fisheries Regulation Workshop Outcomes and Impacts](#)

- [Survey Analysis Outline for Attendee Survey \(Calusa Blueway Event\)](#)
- [Summer Camp Report and Analysis](#)
- [Summer Camp Report and Analysis – Meeting Minutes](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.3 - Performance Measurement

Standard: The agency shall have a procedure for tracking and monitoring data trends and measuring performance against targets linked to achievement of goals and objectives.

Suggested Evidence of Compliance: Provide performance targets and measurement in use by the agency.

Describe the process and frequency of performance measurement and cite examples for how the results have been used by the agency to affect decisions. The measures may include data gathered from the following qualitative and quantitative sources:

- a. Recreation and demographic trends;
- b. Needs assessment;
- c. Community inventory;
- d. Surveys;
- e. Program and service statistics;
- f. Inspections;
- g. Customer feedback;
- h. Program evaluation;
- i. Risk management reports; and
- j. Budget and financial reports.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 222-224; Chapter 23 – Evaluation and Action Research, p. 656.

Agency Evidence of Compliance:

Lee County Parks & Recreation tracks and monitors data trends and measures performance through multiple methods as listed in the suggested evidence of compliance.

- Trends Analysis (10.5.1)
Lee County Parks & Recreation has a Trends and Analysis task force that meets to analyze recreation and leisure. The task force monitors the trends to make sure they are in line with the Department’s goals and objectives. The trend of lifelong learners (baby boomers) was identified by the task force in 2012 as a growing population. The Department strengthened its partnership with Extension Services to increase services for this user group.

In 2014, the Department updated its vision statement to include the word “learn” to recognize this relationship with extension services. This accomplishes goal number three of the goals and objectives in the strategic plan. Goal number three states “To build partnerships with outside agencies to increase services and eliminate duplication”.

- Needs assessment and Managerial Meeting Minutes to discuss Needs Assessment (10.4)
A needs assessment is conducted every two years; the analyzed results are brought to all levels of management and evaluated against goals and objectives.
- 2015 Lee County Parks Mapbook (Community Inventory) (1.3)
Lee County Parks & Recreation has a map of the geographical boundaries of Lee County as well as maps that show locations of all Parks and Recreation facilities. All facilities are maintained in a GIS database and a printed Mapbook is available showing all facilities with descriptions. Supplemental materials from presentations and brochures also outline, identify and catalog the geographical sites that comprise Lee County Parks & Recreation.
- Surveys
Lee County Parks & Recreation conducts biennial needs assessments and also conducts surveys on specific audiences such as Special Needs, Summer Camp, etc.
- Recreation Program Plan (Program and service statistics) (6.1)
Lee County Parks & Recreation sets program goals in accordance with its established Core Level of Service. The Core Level of Service is annually reviewed and revised by the Board of County Commissioners. Most program goals remain constant and reflect the Department’s 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”.
- Inspections (7.5.1)
Lee County Parks & Recreation works in conjunction with the local Health Department, Fire Departments and Lee County Risk Management office to ensure compliance with all applicable laws, rules and standards. There are monthly facility and playground inspections conducted along with safety and turf committee inspections. The Parks and Recreation Risk Management Team is tasked with collecting and filing all reports in regard to any legal requirement/guidelines the Department is obligated to perform.
- Customer feedback
Customer feedback is collected through program evaluations, comment cards, social media and website comments.

- Program evaluation (10.2)
Various programs are evaluated for knowledge gained, customer satisfaction and achieving program goals.
- Risk management reports (9.1.2)
The Lee County Risk Manager monitors expenditures and claims of all County Departments through the services of PMA, Inc. PMA provides statistics and data to the Risk Manager using comparative data of representative counties. PMA also provides recommendations to the Risk Manager for reduction and mitigation of claims and current trends for focus as part of their services. PMA provides updates to reports as requested.
- Cost Benefit Analysis (Budget and financial reports)
The [Cost Benefit Analysis](#) reports are used to determine how to allocate staff and financial resources, to determine which areas need enhancements and which may need reductions of services, hours and/or opportunities. It is also used as a comparison between like sized facilities to highlight discrepancies or similarities.

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.3.1 - Level of Service Standards

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

Suggested Evidence of Compliance: Provide the LOS standards and describe how LOS standards are used to establish facility and service priorities.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 223-224.

Agency Evidence of Compliance:

The Department's LOS standards are established by its comprehensive planning document called the Lee Plan. This document includes a framework for growth and development within the County through the year 2030. This living document is a compilation of 13

chapters or “elements” and contains various goals, objectives and policies on matters such as future land use, transportation, schools, libraries, capital improvements, conservation, coastal management, historic preservation and housing. Element V, “Parks, Recreation and Open Space”, is devoted entirely to parks and recreation and contains 12 goals along with numerous objectives and policies. In this document, formulas are set to establish parkland and facilities per a set amount of population, depending on type of facility. These policies have been adopted by the Board of County Commissioners in the form of ordinances to establish:

- The distribution of facilities
- Development design requirements for open space
- The aesthetics of landscape and wayside parks
- Boat ramps and the increased recreation of Lee County’s waterways
- Community parks
- Regional parks
- Park planning and design
- Environmental and Historic Programs
- Capital Planning
- Parks and Program Administration.

Digital Evidence:

- [Lee Plan 2014 – Chapter V](#)
- [Come Discover Map – showing equitable distributions and opportunities](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.4 - Needs Assessment

Standard: The agency shall periodically conduct an assessment of assets and needs to identify existing and projected gaps in service and determine land, facility and service priorities. Need assessments are used to help determine priorities for developing services with the agency. Needs assessments can use a variety of methods to obtain input from the community, including focus groups, advisory boards, forums, and surveys.

Suggested Evidence of Compliance: Provide the current needs assessment, describe the procedural steps in conducting the assessment, describe the frequency of updates, and describe the use of the assessment in agency planning.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 5 - Organization Structure and Administrative Operations, p. 107; Chapter 8 – Recreation

Agency Evidence of Compliance:

The Department collects data from citizens and visitors in order to identify gaps in service and determine facility and service priorities. The primary way in which this is accomplished is through the use of online surveys including the biennial Needs Assessment administered through the Department’s website.

The most recent survey was posted on the website in early 2015 for four months and had a total of 404 respondents. Demographically, roughly 80% of those who responded to the question “Do you live in Lee County year round?” are full-time residents, while the remaining 20% are either seasonal residents or visitors to the area. Additionally, 53% of those who responded to an employment related question are currently employed. When asked the question “What grade would you give the facilities that you use?” over 60% of those who responded gave the Department an “A” on safety matters, cleanliness of its buildings and grounds and overall value. On a less positive note, only 32% of these respondents doled out this grade when asked about whether or not the Department adequately markets its programs to the community.

Common responses from patrons regarding additional services, activities or programs they would like to see offered, walking/running, nature trails, lectures/informative talks, yoga and “fitness/workout” were the top five, respectively. As a result, future planning for new parks and preserves includes a focus on trails. In addition the Department conducts surveys targeting specific areas, such as Cusic baseball, inclusion/special needs, summer camp and volunteer services survey.

Digital Evidence

- [2015 Lee County Parks & Recreation User needs assessment](#)
- [Future park with more walking trails](#)
- [2015 Cusic Baseball Survey](#)
- [Volunteer Services Survey](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.5 - Program and Service Statistics

Standard: The agency shall collect and analyze statistics on its programs and services for evaluation and future program and service development.

Suggested Evidence of Compliance: Provide examples of statistics collected, describe the frequency of updates, and describe how the agency makes use of the information.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 226-227; Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 370-372; Chapter 23 – Evaluation and Action Research, pp. 660-663.

Agency Evidence of Compliance:

Statistical data are collected in various ways. The Department uses the RecTrac program and facilities' reservation system. This system tracks addresses (zip codes), ages, gender, numbers, etc. of program participants.

The Department's User Needs Assessment survey conducted biennially tracks demographic data of participants.

Annual summer camp analysis highlighting trends and observation helps provide for guidance in camp programming.

Income, teen mothers' data and block population numbers provided by Human Services helps the Department identify areas of need.

These data are used to develop a snapshot of current users and to help drive programmatic planning for various ages, locations and which programs have the larger/smaller participation in order to enhance/delete as needed.

Digital Evidence:

- [RecTrac Report](#)
- [User Needs Assessment](#)
- [Summer Camp Reports and analysis 2014](#)
- [Manager Minutes on camp report 2014](#)
- [Human Services demographic maps](#)

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 11 – Physical Resource Planning, pp. 226-227; Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 370-372; Chapter 23 – Evaluation and Action Research, pp. 660-663.

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.5.1 - Recreation and Leisure Trends Analysis

Standard: The agency shall assess periodically societal and local recreation and leisure trends and determine how those trends impact existing and projected user populations.

Suggested Evidence of Compliance: Provide trends analysis, describe frequency of updates, and describe linkage to agency goals and objectives.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 23 – Evaluation and Action Research, p. 644.

Agency Evidence of Compliance:

Lee County Parks & Recreation has a Trends and Analysis task force that meets periodically to assess societal and local recreation and leisure trends to determine how they impact existing and projected user populations. The committee meets to analyze recreation and leisure trends and then updates on the Trends and Analysis Matrix. The task force monitors the trends to make sure they are in line with the Department’s goals and objectives. The trend of lifelong learners (baby boomers) was identified by the task force in 2012 as a growing population. The Department strengthened its partnership with Extension Services to increase services for this user group. In 2014, the Department updated its vision statement to include the word “learn” to recognize this relationship with Extension Services. This accomplishes goal number three of the goals and objectives in the strategic plan. This goal states “To build partnerships with outside agencies to increase services and eliminate duplication”.

Digital Evidence:

- [Trends Analysis 2011-2015](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.5.2 - Community Inventory

Standard: The agency shall compile a complete and current inventory of parkland and recreation facilities, programs and services in the service area, including those provided by the agency and those offered by schools and other alternative public, private, non-profit providers.

Suggested Evidence of Compliance: Provide a complete and current inventory of parkland, programs and services available in the community, describe the frequency of updates, and describe how the agency makes use of this information.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 8 – Recreation Program Planning, pp. 129-130.

Agency Evidence of Compliance:

Lee County Parks & Recreation partners with [Welcome Guide Maps of SWFL](#) to provide a full map of all area parks, restaurants, attractions and other leisure activities. The Department provides this full color map at all facilities and is a great resource to residents and visitors. This publication is updated and printed on a regular basis.

Lee County tracks for-profit and not-for-profit program providers as listed in the United Way – Lee County Directory of Human Services. This guide is produced by United Way and is updated regularly as needed. Department staff can use this document as a referral tool for customer inquiries.

Lee County prepares an annual report on the state of developed regional and community parkland in Lee County by provider in relation to population trends, required and desired levels of service as set forth in the Lee Comprehensive Plan. These figures are in the annual Concurrency Report in accord with the Land Development Code requirements. The Concurrency Report is useful in preparing the Department’s Capital Improvements Program (CIP) and ensures appropriate levels of service for parkland in Lee County for residents and visitors alike.

Digital Evidence:

- Welcome Guide SWFL - [Welcome Guide Maps of SWFL](#)
- [United Way – Lee County Directory of Human Services](#)
- [Lee County Concurrency Report 2014](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.5.3 - PRORAGIS

Standard: The agency shall create an online profile and enter operating data into PRORAGIS, the national park and recreation database.

Suggested Evidence of Compliance: Provide a copy of the agency Custom Report from the PRORAGIS database.

Agency Evidence of Compliance:

Lee County Parks & Recreation has utilized PRORAGIS since inception and updates profile annually.

Digital Evidence:

- [PRORAGIS Custom Report for Lee County Parks & Recreation](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.6 - Research Investigation

Standard: The agency shall conduct at least one experimental exploration or research investigation each year related to park and recreation operations. These are demonstration or pilot projects where performance data are collected before and after the test to determine effectiveness.

Suggested Evidence of Compliance: Provide a report on a current or recent experimental or demonstration research project designed to improve a product or to test a new process or procedure, including methods used and research findings; provide brief descriptions of other research investigations undertaken over the past five (5) years.

Informational reference in the [Management of Park and Recreation Agencies](#), (2010), 3rd Ed., Chapter 23 – Evaluation and Action Research, pp. 658-659.

Agency Evidence of Compliance:

The Department seeks out new research projects, exploratory investigations, operational studies and demonstration projects to try new approaches or products and is always willing to test the newest innovation. Many of the research programs are done in partnership with other counties for a regional and/or statewide result.

Digital Evidence:

- [Wildland Weeds Herbicide study at Caloosahatchee Regional Park – Spring 2014](#)
- [Pine Island Sound Scallop Search resource-monitoring program – 2008-2015](#)
- [Great Goliath Grouper Count - 2010-2014](#)
- [Awareness, Knowledge and Perceptions of Barotrauma and Barotrauma Mitigation: A Survey of Florida Saltwater Anglers - 2011-2013](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

10.6.1 - Quality Assurance

Standard: The agency shall monitor and evaluate the quality of its programs, services and facilities from the user perspective. Examples include but are not limited to customer comment cards, secret/mystery shopper surveys, user satisfaction surveys, program evaluations and focus groups.

Suggested Evidence of Compliance: Provide recent examples of methods used to collect, monitor and evaluate quality assurance data from users.

Informational reference in the *Management of Park and Recreation Agencies*, (2010), 3rd Ed., Chapter 15 – Public Relations, Marketing, and Customer Service, pp. 370-372.

Agency Evidence of Compliance:

Lee County Parks & Recreation is sensitive to the issue of quality assurance and customer relations. Besides customer relations training for staff, the Department uses online feedback, social media, verbal surveys of users, program evaluations and focus groups to ensure quality programs and facilities.

Digital Evidence:

- [Summary of Participation Program Evaluation Survey](#)
- [2015 Needs Assessment Survey](#)
- [Pine Island Pool Facility Survey](#)
- [Special Needs Survey](#)
- [WebTrac Online Registration Website Survey](#)
- [Lee County Parks & Recreation Website Feedback](#)
- [2015 Summer Camp Parents' Survey](#)

Agency Self Review: Met Not Met

Visitor Comments:

Visitor Evaluation: Met Not Met

VISITATION REPORT SUMMARY FOR CATEGORY 10.0 – EVALUATION, ASSESSMENT, AND RESEARCH

Reviewed By: *(Visitor Name)*

Unmet Standards: *(List the Standard # and Name)*

Provide clarification for all unmet fundamental standards  :

