

# COMMISSION FOR ACCREDITATION OF PARK AND RECREATION AGENCIES

## SELF-ASSESSMENT REPORT AND VISITATION REPORT 2019 CAPRA STANDARDS, 6TH EDITION

**Lee County Parks & Recreation  
Mack Young, Director**



**VISITATION DATES: 5/6/24 - 5/10/24**

### **CRT TEAM:**

Shauna Lewallen, CPRE CRT Lead  
Tom Hartwig, CPRP 1<sup>st</sup> CRT Member  
Katrina Williams, CPRP 2<sup>nd</sup> CRT Member  
Jayne Miller, CPRP CRT Advisor

# Visitation Report Introduction

The Commission for Accreditation of Park and Recreation Agencies (CAPRA) continued to utilize virtual visits for agencies seeking re-accreditation in 2024. While the review team would have preferred to perform an on-site evaluation for Lee County Florida Parks & Recreation, video conferencing, emails and file sharing in the provided Google Folder allowed the review team to review the agency's narrative and supporting evidence of compliance.

The review team was composed of Shauna Lewallen (Site Visit Team Lead,) Tom Hartwig (1st Visitor) and Katrina Williams (2nd Visitor). The review team began communication on 1/11/24 and held their first virtual meeting on 2/13/24. The visitors agreed to the general schedule for the visit and the following section assignments were made:

- Shauna Lewallen: sections 1, 2, 5, 10
- Tom Hartwig: sections 3, 4, 7
- Katrina Williams: sections 6, 8, 9

Communication between the review team and the agency began via email on 2/23/24 with an introduction and a request for access to the agency's digital platform for EOC. Upon receiving necessary access, the review team completed a thorough review of materials in order to provide initial feedback to the agency over one month prior to the May visit.

Over the course of the month of March 2024, the review team provided the results of their preliminary review to the agency lead, Steve Cox. The preliminary review showed a need for additional evidence for 43 standards (or 28%) with several fundamental standards on the list.

In April, the agency began providing additional evidence via the shared Google Folder. After completing their secondary review of the additionally provided items the week before the scheduled visit, the review team still had outstanding questions for 14 standards. At this point, CRT Advisor, Jayne Miller, found it necessary to get the CAPRA Commission and CAPRA Accreditation Senior Manager involved.

NRPA instructed the review team to stop their review of information and to wait for further instruction from the Commission on how to proceed. Team Lead, Shauna Lewallen, was instructed to email the agency to inform them that their review was on hold and the Commission would be scheduling a meeting with them. After meeting with the Commission, the agency decided to continue with their visit and the review team continued their review of information. The review team provided the remaining questions to the agency on the Friday before their scheduled visit and the agency replied later that same day.

During visit week, three virtual meetings were scheduled:

- Kick-off meeting: Monday, May 6, 2024 @ 10am EST
- Additional EOC meeting: Monday, May 6, 2024 @ 3pm EST
- Closing meeting: Thursday May 9, 2024 @ 2pm EST

After the kick-off meeting, there were still numerous pieces of evidence that were needed by the review team to appropriately review standards. The review team had followed-up multiple times for requested or additional items and it was decided that an additional EOC meeting would be scheduled later that day to discuss what was needed in more detail. During the second meeting, both parties found it easier to discuss the needs over video call rather than over email.

All additional requested information was provided by the agency by the end of the day on Wednesday of visit week.

At the closing meeting, the Assistant County Manager joined the meeting to provide the review team with statements of resounding appreciation for the agency. The review team appreciated her acknowledgement of the importance of our field and the regard and esteem with which she held the members of the Lee County Parks & Recreation team.

The visitors walked through each section, providing highlights and challenges in each of the sections. The visitors noted that this process demonstrated the greater effectiveness of in-person visits over the virtual format as requesting additional evidence and information solely through email proved challenging for both parties. The visitors agreed that in-person, real-time conversations would have provided deeper context and a richer information gathering experience than a string of emails.

The agency was upfront that they had gone through a very challenging time with both COVID and a major hurricane during the review period. Despite those enormous challenges, the agency pulled together when it mattered and provided what was needed.

## **OVERALL VISITATION TEAM SUMMARY**

### **AGENCY STRENGTHS**

The visitation team identified the following item(s) as being particular strengths of the agency:

- The Assistant County Manager's presentation during the final meeting demonstrated that the County, and not just the Parks & Recreation Department, understands the value of CAPRA Accreditation.
- The leadership team of LCPR has significant tenure with the organization. This speaks volumes about the agency because that number of employees wouldn't stay there that long if it wasn't a great place to work.
- Chapter 9: Risk Management was well done and the agency provided an abundance of evidence regarding plans, management, review, risk management positions and roles, etc.

## AGENCY PREPAREDNESS

The visitation team assessed the preparedness of the agency in conducting the accreditation process (i.e., document accuracy and completeness, staff awareness, file system organization):

- After preliminary review, CRT asked for additional evidence on 43 out of 154 (28%) of standards. This is quite a high percentage for a re-accrediting agency.
- The CRT had to request many items that were directly spelled out in the standard. In future accreditations, the agency should take care to provide all aspects that are required in the standard.
- The agency often provided large documents without pointing visitors to particular parts that answered the standard – no highlights, bookmarks, or page numbers were initially provided.
- In a few examples, the EOC that was needed for multiple standards was only provided in one standard. For example, in Chapter 6 items were needed for the RPP, and then again later as a standard alone standard.
- There are several policies that require annual or frequent review in the CAPRA standards and more emphasis should be placed on reviewing and documenting the review of those policies. This should be completed over the next five years to prepare for future accreditations.

## STANDARDS

- The visitation team identified the following standard(s) as unmet: none
- **Provide clarification for all unmet fundamental standards★: n/a**
- Number of standards **met**: 154
- Number of fundamental standards **not met**: 0
- Number of non-fundamental standards **not met**: 0

*Total must equal 154*

## OTHER CONCERNS RELATED TO MAINTAINING ACCREDITATION

The visitation team identified the following item(s) as areas of general concern related to the agency's ability to maintain accreditation: Nothing additional to report

## SIGNATURES OF CAPRA REVIEW TEAM

The CRT Team attests to its findings contained within this report.

1) Shanna Lewallen  
CRT Lead Signature

May 21, 2024

Date

2) [Signature]  
1st CRT member Signature

5/21/2024

Date

3) Katrina Ciri  
2nd CRT member Signature

5/21/2024

Date

4) Jayne Miller  
CRT Advisor Signature

5/24/2024

Date



## Commission for Accreditation of Park and Recreation Agencies

June 10, 2024

Mr. Mack A. Young  
Director  
Lee County Parks and Recreation  
3410 Palm Beach Blvd  
Fort Myers, FL 33916-3736

Dear Mr. Young,

Congratulations on the completion of your agency's Commission for Accreditation of Park and Recreation Agencies (CAPRA) reaccreditation visit. Please find enclosed the visit report executive summary and the CRT Record of Review including all CAPRA Review Team (CRT) comments.

The Commission has approved the release of this report to your agency. The report identifies each standard as "met" or "not met".

Accreditation is based on an agency's compliance with 154 standards for national accreditation. To achieve accreditation, an agency must comply with all 36 Fundamental Standards and 106 (90%) of the 118 Non-Fundamental Standards upon initial accreditation and 112 (95%) of the 118 Non-Fundamental Standards upon reaccreditation.

**The Commission requires a response to the visitation report if the report indicates one or more fundamental standards are not met and/or less than 95% upon reaccreditation of the non-fundamental standards are met.** If a response is required, it should specifically address the standards identified as not met and must be transmitted via email to [CAPRA@nrpa.org](mailto:CAPRA@nrpa.org) within **thirty days** of receipt. Once received, the response will be reviewed and a determination made for how to proceed.

**The Commission will not request or accept a response to the visitation report if the report indicates all fundamental standards are met and at least or 95% upon reaccreditation of the non-fundamental standards are met.**

Reaccreditation reviews - The Commission no longer requires attendance of the agency director and/or CRT Lead except only in certain circumstances. Unless the agency is asked to participate in a hearing, the Commission will take action through consent agenda. The CRT members and agency representatives are welcome to attend the hearing; however there will be no opportunity for open discussion of the agency's review.

The Commission will request the agency director to participate in the hearing in the following circumstances:

1. The visitation report reported any unmet fundamentals; and/or
2. The visitation report reported less than 95% upon reaccreditation of the non-fundamental standards were unmet; and/or
3. The CRT Lead recommends to the Commission that the agency should participate in the hearing.

Please immediately confirm receipt of this report by email to [CAPRA@nrpa.org](mailto:CAPRA@nrpa.org).

The Commission is pleased Lee County Parks and Recreation is committed to maintaining CAPRA Accreditation and hopes that participation in this program of peer review is of considerable value to the agency.

Sincerely,

A handwritten signature in black ink, appearing to read 'Troy Houtman', with a stylized flourish at the end.

Troy Houtman, CPRE  
Chair, Commission for Accreditation of Park and Recreation Agencies



# Lee County Parks & Recreation 2024 CAPRA Accreditation Team



## CAPRA LEADERSHIP - OVERALL

Steve Cox	Kristie Valone	Liz Szurminski
Colleen Via	Lisa Weaver	
Mack Young	Kathy Loomis	Alise Flanjack

## Chapter One – Agency Authority, Role and Responsibility

Christie Tvardek – lead  
 Ben Johnson \*  
 Shay Thomas \*

## Chapter Two - Planning

Armand Regnaert – lead	Jason Lamey - <i>consultant</i>
Brandon Kaczmarek	Laurie Goshorn

## Chapter Three – Organization and Administration

Christine Bailey– lead	James Pittro
Ross Becker	Stephen Cuffe
Andy Miller	Dave Raybuck

## Chapter Four – Human Resources

Makenzie Vance - lead	Alise Flanjack - consultant
Brittany Bremer *	
Brittany Peruski *	Wendy Burks - Advisor

## Chapter Five – Financial Management

Susan Laco - lead  
 Ana Diaz  
 Denise Potter

## Chapter Six – Programs and Services Management

Trever Snearley – lead	Lisa Weaver - <i>consultant</i>
Judi Alvarado	Becca Wemer
Mary Vance	Rebecca Flora

## Chapter Seven - Facility and Land Use Management

Tim Gard – lead	Steve Cox – <i>consultant</i>
Mike Hammond	Jen Hamil
Laura Carr	Jason Eash

## Chapter Eight – Public Safety, Law Enforcement and Security

Dan Ryan - lead	
Chad Roy	Rena Gerhardinger
Kory Covaci	*

## Chapter Nine – Risk Management

Kim Garrett – lead	RiSK??? - Advisor
Mickey Miller	
Liz Cullen	

## Chapter Ten – Evaluation and Research

Jen Hagan – Lead  
 David Outerbridge

## STANDARD TASK FORCES - Leaders

2.4 Master Plan – Jason Lamey, Armand  
 2.5 Strategic Planning – Jason, Armand, Lisa  
 4.1 Policy and Procedure – Alise, Kathy L.  
 4.4.1 Leadership/Succession Planning – Alise, Kathy L.  
 7.5 Maintenance and Operations Standards – Tim Gard  
 10.4 Needs Assessment – Jason Lamey  
 10.5.1 Recreation Trends Analysis – Rebecca Flora

**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.

**Advisors** are employees that do not work in our department but have insight and experience in the chapter they are assigned. They attend chapter meetings to bridge the gaps between countywide departments.

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.

Folks looking for a team:

- \*

Those seeking certification (CPRP):

- Judi Alvarado – Chapter 6 - certified
- Jen Hamil – Chapter 7
- Stephen Cuffe – Chapter 3
- Brittany Bremer – Chapter 4
- Rena Gerhardinger – Chapter 8
- Liz Cullen – Chapter 9

Updated 4/8/2024





CAPRA Review Team Record of Review

**1.0 - AGENCY ROLE AND RESPONSIBILITY**

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>1.1 - Source of Authority</b>	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).	The agency provided the Florida State Statute 418.20 which gives authority for counties to create recreation districts. Also provided were minutes from the 6/17/1959 Board of County Commissioners (BOCC) meeting giving direction for the Parks Board to hire a Parks and Recreation Director.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.1.1 - Approving Authority/Policy Body</b>	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.	The agency provided a narrative of county organizational structure, including Lee County Administrative Code 1-10 (last amended 8/9/2005) which gives Department/Division Directors discretion in organizing their programs. Evidence included a high level organizational chart for Lee County along with a detailed Lee County Parks & Recreation (LCPR) organizational chart.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.1.2 - Citizen Advisory Boards/Committees</b>	Provide list of boards/committees with membership, authority, responsibilities and duties, terms of office, meeting minutes.	<p><i>Provided partial information about the Parks and Recreation Advisory Committee. Would like to see information for authority and responsibilities/duties. The agency explained the limits of the advisory committees' authority and their primary responsibilities.</i></p> <p><i>Provided partial information about the Friends of Six Mile Cypress Slough Preserve. Would like to see information for authority and responsibilities/duties. The agency explained the purpose of the Friends committee and their primary responsibilities.</i></p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

		<i>Would like to see further examples of other citizen boards/committees that are advisory to the agency.</i> Additional information regarding the Lakes Park Enrichment Foundation and the Conservation Land Acquisition and Stewardship Advisory Committee were provided.		
<b>1.2 - Periodic Timetable for Review of Documents</b>	Provide the agency review schedule for the document, program, policy or procedure referenced in the enumerated standards.	The agency provided a matrix detailing their agency review schedule for all 28 required items. The matrix included the standard number, review period, department responsible, reviewing body, and last date of review.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.2.1 - Document Approval Authority</b>	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.	<p>The Board of County Commissioners is responsible for agency budget approval. The FY 23-24 budget was adopted by Board Resolution 23-09-43 on 9/19/2023. Per Administrative Code 1-10 the Department Director has discretion in approving the Department Master plan which was done on 1/24/2022.</p> <p>The agency provided a matrix detailing their agency review schedule for all 11 required items. The matrix included the standard number, review period, department responsible, reviewing body, and last date of review.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.3 - Jurisdiction</b>	Provide a map with geographical boundaries of jurisdiction and service areas, including location of facilities identified.	The agency provided the geographical boundaries of jurisdiction and service areas on the LCPR District Map while GIS details were provided in the 2019 Mapbook. Locations of facilities such as beaches, pools, sports complexes, boat ramps, parks, and rec centers were shown on the Come Discover guide map.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.4 - Mission</b>	Provide the established mission statement.	The mission statement was provided via a link to the LCPR public web page in the About Us section.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<p><b>1.4.1 - Agency Goals and Objectives</b></p>	<p>Provide the measurable goals and objectives for each organizational component, with evidence of periodic review and distribution.</p>	<p>The 2022-2023 LCPR Strategic Plan is organized into three focus areas with a total of 8 broad goals falling under those categories. Per the narrative, the plan was last reviewed at a Manager Staff Meeting on 1/24/2022 (minutes provided).</p> <p><i>Please provide evidence of any Strategic Plan review after 1/24/22. Are there any updated matrices for the appendix of the Strategic Plan?</i> Upon request, the agency provided meeting minutes for Strategic Plan review on 2/23/2024 along with a matrix update from January 2024.</p> <p><i>Can you share some established goals or objectives for smaller organizational components such as a particular recreation center, park, program, or sports complex and then demonstrate periodic review?</i> Upon request the agency provided their Program Objectives Matrix and meeting minutes from managers meeting and quarterly supervisors meeting where the objectives matrix was discussed and reviewed.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>1.4.2 - Personnel Involvement</b></p>	<p>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.</p>	<p><i>Please provide more documented info regarding listening sessions (minutes, agenda, invitation, sign in sheet, etc)</i> Upon request the agency provided examples for staff listening sessions including invitation, agendas, and sign in sheets.</p> <p><i>Are there other examples of gathering staff input? Linked agenda did not demonstrate this.</i> Agency provided camp director meeting minutes and post summer camp feedback on the “good, bad &amp; ugly” from the camp season.</p> <p><i>Please provide evidence of communicating department goals and objectives to staff. Linked email and newsletter did not demonstrate this.</i> Agency sends Management Team meeting minutes via email to all staff members. Emails may also include Strategic Plan review notes.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>

<b>1.5 - Vision</b>	Provide evidence of an adopted Vision statement that is available to the approving authority, staff, and participants.	The LCPR vision statement “Lee County Parks & Recreation...the Natural Place to Learn and Play” was adopted at a P&R Managerial Staff Meeting on 2/10/2014 and reviewed and left as is at a Manager Staff Meeting on 1/13/2021. Minutes from both meetings were provided. Staff and members of the public can find the vision statement on the LCPR public web page in the About Us section.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.6 - Policies, Rules, Regulations, and Operational Procedures</b>	Show delegation of responsibilities among approving authority, chief administrator, and staff regarding development and implementation of policies, rules, regulations, and operational procedures.	Board of County Commissioners policies along with State/Federal regulations can be found in the provided Lee County Administrative Code or various State Statutes. The provided Lee County Policies and Procedures Manual (website) helps to carry out the BOCC policies. Finally, the provided LCPR Operations Manual (website) gives the staff the procedures for following those policies, rules and regulations. Section 1.1.1 of the Operations Manual states that “Annually the management team reviews, proposes changes and updates this document. The proposed revisions are then approved/declined by the Director.”	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.6.1 - Administrative Policies and Procedures</b>	Provide access to agency policies and procedures, demonstrate how they are made available to personnel, and provide evidence of periodic review by the approving authority and administrators.	The Lee County Policies & Procedures Manual (website) is available to staff on the Lee County Human Resources website. It is periodically reviewed by the Board of County Commissioners with the last review coming on 2/4/2020.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.7 - Agency Relationships</b>	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.	A matrix was provided detailing lease/license agreements and staff liaison responsibility. An extension agreement with the University of Florida and an interlocal agreement with the local school district provided additional evidence.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>1.7.1 - Operational Coordination and Cooperation Agreements</b>	Provide examples of cooperative agreements.	Per Objective 87.2 in The Lee Plan, LCPR is directed to work with other public/private agencies to meet recreational demand. A matrix was provided detailing lease/license agreements and staff liaison responsibility. An agreement with the Lee County Community Tennis Association and an interlocal agreement with the local school district provided additional evidence.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

## 2.0 PLANNING

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>2.1 - Overall Planning Function within Agency</b>	Provide the responsibilities and functions of the planning entity. Provide resumes of training and experience for staff and/or consultants who have planning capabilities.	The Planning Division’s duties are detailed in Chapter 13 of the LCPR Operations Manual. The agency has four full time staff members with planning-related job duties (Principal Planner, Senior Planner, Natural Areas Planner, and Parks and Recreation Operations Manager). Job descriptions and resumes were provided for all four staff members.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>2.2 - Involvement in Local Planning</b>	Demonstrate the role of the agency in local planning through personnel assignments and documentation of involvement, e.g. minutes, agendas, and cooperative agreements.	<p><i>Several items are from 2017. Do you have any more recent items demonstrating staff involvement with the Local Planning Agency?</i> Agency answered that the department's planning staff provides involvement as-needed at the request of Lee County Department of Community Development but that they haven’t requested department involvement in a case since 2017. In their additional evidence the agency added that their staff is involved on a regular basis with entities such as the Town of Fort Myers Beach, Lee County Hearing Examiner, and the Metropolitan Planning Organization and referenced the information previously provided.</p> <p><i>Narrative stated that “Park planning staff recently completed a new draft of the "Parks, Recreation and Open Space Element" chapter of the Lee Plan and passed it on to the Department of Community Development for final edits and incorporation.” Can you share evidence of this work?</i> The agency provided communication over the course of several years between their department and the Department of Community Development along with a draft of the chapter that they worked to rewrite.</p> <p>Evidence demonstrated staff participation in local committees such as the Bicycle Pedestrian Coordinating Committee and the Interdepartmental Planning Coordination Team.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<p><b>2.3 - Planning with Regional, State, and Federal Agencies</b></p>	<p>Define the role of agency personnel and documentation of involvement (minutes, agendas, cooperative agreements) in regional, state, and federal agencies planning.</p>	<p>The narrative explained working relationships with various state, federal and regional agencies in regard to the planning of facilities, programs and services. EOC demonstrated agency and personnel involvement in the following ways:</p> <p><u>Regional:</u> evidence provided for both the Metropolitan Planning Organization (Bicycle Pedestrian Coordinating Committee, TIGER wayfinding plan) and South Florida Water Management District (disc golf course compliance).</p> <p><u>State:</u> the agency provided a Local Planning Agreement with the Florida Department of Transportation for a greenway project.</p> <p><u>Federal:</u> the agency worked with the Army Corps of Engineers on a shoreline stabilization project in Caloosahatchee Regional Park.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>2.3.1 - Community Comprehensive Plan with Park and Recreation Component</b></p>	<p>Provide the current plan, with date of official approval.</p>	<p>The agency provided Lee County’s Comprehensive Plan “The Lee Plan” which lays out a framework for growth and development within the County through the year 2030. The document is regularly updated with the most recent update occurring in January 2023.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>2.4 - Park and Recreation System Master Plan</b></p>	<p>Provide the current plan with documentation of official approval; describe update process; and describe a phased implementation program with linkage to the agency's capital improvement budget. The system master plan shall include:</p> <ul style="list-style-type: none"> <li>a. Agency mission (1.4);</li> <li>b. Agency objectives (1.4.1);</li> <li>c. Recreation and leisure trends analysis (10.5.1);</li> <li>d. Needs assessment (10.4);</li> <li>e. Community inventory (10.5.2); and</li> <li>f. Level of service standards (10.3.1).</li> </ul>	<p>The Lee County Parks &amp; Recreation Master Plan was reviewed and approved at a Manager Staff Meeting on 1/24/2022. The agency’s narrative explained that the plan is a living document that is reviewed and updated on an as needed basis with more comprehensive updates occurring every five years. The narrative also explained linkage of goals to the capital improvement program. The master plan includes all required items in the following locations:</p> <ul style="list-style-type: none"> <li>a. Agency mission (1.4) - Section 3.2</li> <li>b. Agency objectives (1.4.1) - Section 3.2</li> <li>c. Recreation and leisure trends analysis (10.5.1) - Section 4.5</li> <li>d. Needs assessment (10.4) - Section 4.2</li> <li>e. Community inventory (10.5.2) - Sections 2.1, 2.2, 2.3, 2.4, 2.5</li> <li>f. Level of service standards (10.3.1) - Section 4.1</li> </ul>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>

<b>2.5 - Strategic Plan</b>	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.	The 2022-2023 LCPR Strategic Plan is organized into three focus areas with a total of 8 broad goals falling under those categories. Minutes from the Park Managers Planning Session on 10/13/2023 indicate that the plan was reviewed and approved by the Management Team.  <i>Please provide evidence of progress being made in implementing the plan.</i> The agency provided a matrix with updates from October 2023 and January 2024.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>2.6 - Feasibility Studies</b>	Provide examples of recent feasibility studies such as market, cost benefit, site, transportation, environmental and economic analyses.	The agency provided feasibility studies for a project development and environment study in relation to a canal pathway (2018), wetland evaluation in relation to a boat launch project (2020), subsurface soil evaluation in relation to a dog park project (2021), and closed-circuit television system installation at several parks (2022).	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>2.7 - Site Plans</b>	Provide a representative sampling of the agency's area and facility site plans.	The agency provided a link to the Lee County Mapbook which shows the boundaries and information about all parks in their system. Also included was a screenshot of Cartegraph (asset management software) and several detailed site plan PDFs.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>2.8 - Historical and Cultural Resource Management Plans</b>	Provide the historical and cultural plan(s).	Chapter 9 of the Lee Plan is dedicated to historical preservation. It lays out several goals, objectives and associated policies related to identification and evaluation, recognition, preservation, public education and coordination. Information that addresses cultural and historic sites can be found in park specific plans such as the Wild Turkey Strand Preserve and Caloosahatchee Regional Park land management plans. The agency also provided a list of parks and preserves with historical significance.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>2.9 - Community Involvement</b>	Describe how the diverse interests (community organizations, businesses and individuals) of the community were involved in the planning process.	In addition to the formal Board of County Commissioners appointed Parks and Recreation Advisory Board, the agency gathers input from the community via needs assessment surveys, program surveys, public meetings, and direct interaction between staff members and community groups.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<b>2.10 - ADA Transition Plan</b>	Submit minutes of the approving authority meeting approving the transition plan, or a copy of the plan noting the dates and times when plan tasks were completed.	The Lee County ADA Title II Compliance Self Evaluation Report and Transition Plan FY19/20 was last reviewed and approved by the Management Team on 10/13/2023. The agency provided a matrix detailing ADA-related projects that were completed from 2015-202.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
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### 3.0 ORGANIZATION AND ADMINISTRATION

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>3.1 - Organizational Structure</b>	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.	Map and organizational charts are difficult to read and follow due to the size of the organization. This makes it difficult to see the interrelation between groups. However, the required information is provided and there is probably not an easy way to make that work better.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.2 - Administrative Offices</b>	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.	The agency provided a pdf showing screen shots of various technologies utilized by staff. The second EOC was a link to the website with staff information which is also viewable by the public. Would have been helpful to include pictures of the facilities showing office spaces and equipment to bolster the EOC.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.2.1 - Support Services</b>	Describe the equipment, technology, and services used to support professional staff.	The agency provided EOC was sufficient for this standard. They provided a list of equipment and technology utilized by support services as well as a list of staff. This standard also could have included pictures of areas and or equipment for stronger EOC.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.3 - Internal Communication</b>	Provide a communication matrix illustrating how internal communications are managed by the agency.	Provided two operations manual properties, communication matrix and evidence of manager meeting minutes all were good EOC.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.4 - Public Information Policy and Procedure</b>	Provide the written statement of policy and procedure, indicating approval by the proper authority.	The agency provided section 11.2.1 from the operations manual along with the Emergency Risk Plan, meeting minutes from December of 2021, and the website as evidence.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<b>3.4.1 - Public Information and Community Relations Responsibility</b>	Provide the position description that reflects responsibilities for public information and community relations functions.	Provided position descriptions as evidence.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.4.2 - Community Relations</b>	<p>Provide the community relations plan and latest evaluation. The community relations plan shall address the following:</p> <ul style="list-style-type: none"> <li>a. Community relations policies for the agency;</li> <li>b. Process and procedure for establishing contact with community organizations and other community groups;</li> <li>c. Training needs for staff and community.</li> </ul> <p>The community relations plan and marketing plan is often included in a single document.</p>	<p><i>Has 11.2.1 been approved? It states at the top of the document that it is pending. How often is this reviewed? When was the last time it was reviewed?</i></p> <p><b>Agency response: The Community Relations Plan is reviewed periodically as reflected in our “Periodic Timetable for Review of Documents”. The last date of review was October 19, 2023. Meeting minutes have been added to the Google Doc folder to review. The plan is maintained in our department operations manual as a resource for staff but is a living document that is updated as needed.</b></p> <p>Reviewer found the update added to the bottom left corner of the coversheet. This was not present on the original EOC in the self assessment. Reviewer was able to locate the answer to my original question about the agencies EOC #1. subsection 11.2.1. The original EOC at the end of the title for 11.2.1 showed “pending”. Reviewer went back to the original submission and it now states “review”. If you hover over the “i” it states the policy was adopted 11/29/21 and reviewed 12/8/21. Reviewer could not locate the Periodic Table of Review minutes from 10/19/23. There is a review listed in the 10/13/23 Strategic Planning Session agenda/ minutes. The meeting minutes added to the google drive for 3.4.2 do not seem to apply to this question.</p> <p><i>The Parks Managers Planning Session EOC looks like an agenda and not minutes. Can you clarify if these are minutes or the agenda?</i></p> <p><b>Agency response: Due to the nature of the Planning Session, minutes were recorded for the business portion of the meeting in the first half. The second half of the meeting was a working</b></p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

		<p>planning session, where formal meeting minutes were not recorded.</p> <p><i>Can you highlight in the Community Relations Plan where the suggested changes from the 10/13/23 review were made?</i></p> <p>Agency response: Added a Community Relations Plan with highlighted changes into the Google Doc Folder.</p> <p>The plan added to the google drive does not have any highlights. Reviewer was able to locate the Community engagement Department change but not the other suggestion.</p> <p><i>In your narrative for 3.4.2 and in the Community Relations Plan you reference and list multiple groups that LCPR works with. Are there any minutes, agendas, or other evidence of meeting with those groups?</i></p> <p>Agency response: Added the following documents to Google docs.</p> <ul style="list-style-type: none"> <li>● Mudcutter meeting recaps</li> <li>● LCSD meeting agenda and minutes approving the Inter-local agreement.</li> <li>● CLASAC meeting minutes can be found here- <a href="https://www.leegov.com/parks/conservation2020/meetings">https://www.leegov.com/parks/conservation2020/meetings</a></li> </ul> <p>The first two additional EOC items fulfill the reviewer's question. The third item leads to a website but does not highlight or show what the agency would like reviewers to look at for this EOC.</p>		
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<b>3.4.3 - Marketing Plan</b>	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.	<p><i>This standard requires the marketing plan to show an examination of demographic trends, economic climate, Market coverage by other providers, Segmentation, targeting, and positioning, and evaluation. The EOC should show the research that supports the direction of the marketing plan. There should also be evaluation in the form of surveys, focus groups, comment cards, mystery shoppers, or any other form of feedback that is used to help show how the marketing plan is evaluated. Can you provide and or highlight in the EOC provided where these elements are?</i></p> <p><b>Agency response:</b></p> <ul style="list-style-type: none"> <li>● Added Summer Camp Survey</li> <li>● Social media analytics</li> <li>● Website traffic analytics</li> <li>● Needs Assessment Survey</li> <li>● Public Meeting Survey(s) for Civic Center</li> <li>● VCB visitor profile</li> </ul> <p>With the additional information and EOC provided this standard has been met.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.4.3.1 - Marketing Responsibility</b>	Provide the position description that includes responsibility for marketing.	The agency provided job descriptions for two staff members that are responsible for marketing along with a subsection of the operations manual that pertains to the standard.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.4.3.2 - Social Media Policy</b>	Provide a copy of the Social Media Policy	Social media policy provided. In the self review they had marked that the standard had not been met but the narrative and the policy provided met the standard. The only issue was that for some reason this standard was not in line on the self review and showed up at the end of the list.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<b>3.5 - Utilization of Technology</b>	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.	There was only one item provided as evidence but it did show various technologies utilized by the agency. The narrative was long and informative.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.5.1 - Management Information Systems</b>	Provide examples of recent statistical and data summaries and describe their use in management decision-making.	<p><i>The EOC is good for the statistical and data summaries collected. IN your Narrative you state “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.” Can you highlight in the provided EOC or provide any examples of how this information is used in decision-making?</i></p> <p>Agency response:</p> <ul style="list-style-type: none"> <li>● Added email from Supervisor and Manager to Deputy Director proposing to eliminate their Club Rec after school program due to poor attendance.</li> <li>● Added Club Rec roster from Estero showing significant reduction of participation this year vs. past year..</li> </ul> <p>The additional information provided meets this standard.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.6 - Records Management Policy and Procedures</b>	Provide records management policy and procedures and a copy of the most recent review.	The agency provided the request portal, SOP guidelines, and State of Florida General Records schedules and this was sufficient.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>3.6.1 - Records Disaster Mitigation and Recovery Plan and Procedures</b>	Provide the records disaster mitigation and recovery plan and procedures and a copy of the most recent review.	The agency provided the Disaster Recovery plan that was last reviewed in April of 2021. As with many standards the latest reviews seem like they should be more recent.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

## 4.0 HUMAN RESOURCES

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<p><b>4.1 - Personnel Policies and Procedures Manual</b></p>	<p>Provide the personnel policies and procedures manual and the date of latest review. The personnel practices shall include procedures for</p> <ol style="list-style-type: none"> <li>a. Selection, hiring, and dismissal;</li> <li>b. Benefits including retirement, insurance, leave, and other benefits;</li> <li>c. Salary schedule;</li> <li>d. Incentive system; and</li> <li>e. Staff development program.</li> </ol>	<p><i>Please highlight the following policies:</i></p> <ol style="list-style-type: none"> <li>1. <i>Selection, hiring, and dismissal.</i> <ul style="list-style-type: none"> <li>● <b>Selection - Section 1.4 of the Operations Manual</b></li> <li>● <b>Document has been added to the Google Docs folder</b></li> <li>● <b>Hiring - Policy 301 <u>Policy 301 Hiring</u></b></li> <li>● <b>Dismissal - Policy 310 <u>Policy 310 Separation of Employment</u></b></li> </ul> </li> <li>2. <i>Benefits including retirement, insurance, leaves, and other benefits</i> <ul style="list-style-type: none"> <li>● <b><u>Employee Benefits webpage</u></b></li> </ul> </li> <li>3. <i>Salary Schedule</i> <ul style="list-style-type: none"> <li>● <b><u>Policy 501 Salary Administration</u></b></li> </ul> </li> <li>4. <i>Incentive System</i> <ul style="list-style-type: none"> <li>● <b><u>Policy 505 Incentive Pay</u></b></li> </ul> </li> <li>5. <i>Staff Development Program</i> <ul style="list-style-type: none"> <li>● <b><u>Educational Assistance</u></b></li> <li>● <b>Professional Development is encouraged by LCPR and staff is allowed to attend classes and programs after submitting a request to attend if registration and travel is involved.</b></li> </ul> </li> </ol> <p><i>Please also provide EOC with how the manual is provided to employees. I know that the document exists on your Human Resources Home page but how do you make sure that your employees know how to access it? Is there a sign-off when they are hired, during an orientation or onboarding procedure, or on</i></p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>

		<p><i>an annual basis?</i></p> <ul style="list-style-type: none"> <li>● New employees are provided this information during orientation and sign an acknowledgment form.</li> <li>● Added acknowledgment form as evidence.</li> <li>● Policies and procedures are also available on the website-<a href="https://www.leegov.com/hr/policies">https://www.leegov.com/hr/policies</a></li> </ul> <p>After additional information was provided this standard was met.</p>		
<b>4.1.1 - Code of Ethics</b>	Provide the Code of Ethics.	Code of Ethics was provided.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.1.1 - Staff Acceptance of Gifts and Gratuities</b>	Provide the policy on acceptance of gifts and gratuities by staff members.	Provided the Code of Ethics policy which covers gifts and gratuities.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.2 - Recruitment Process</b>	Provide recruitment procedures, recruitment objectives, and last review.	The agency provided their hiring policy which is located on the website, SOP for creating a post, and their guide to effective job postings. Last review was 2017. Reviewer would suggest that this policy be reviewed on a more timely schedule.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.3 - Equal Opportunity Employment and Workforce Diversity</b>	Provide the equal opportunity and workforce diversity policy and show evidence of implementation.	The EOC was good on this standard and included their Affirmative Action Plan and EEOC plan on the website.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.4 - Selection Process</b>	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.	The agency provided the operation manual subsections that apply, intent to hire packets and current openings. Their hiring policy is also located on the website for all to view.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<b>4.1.5 - Background Investigation</b>	Provide the background investigation procedures and examples of background checks completed.	The agency provided their SOP for background checks and examples of screenings from their online system for completing those checks.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.6 - Employee Benefits</b>	Provide the employee benefits plan.	There were six submissions covering all of their employee benefits plans.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.7 - Supervision</b>	Provide examples of processes, procedures, or tools used to assure constructive and effective employee supervision.	The agency provided several items for compliance with this standard including evaluations examples, probation policy, training, and tips sheets.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.8 - Compensation Plan</b>	Provide the compensation plan and a copy of its most recent review or update.	Agency provided their Pay Plan via website and a resolution which was the latest review in June of 2022.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.9 - Performance Evaluation</b>	Provide the procedures and a sample of completed performance evaluations without identifying personal information.	For this standard the agency provided a copy of a completed performance evaluation along with the policy via their website and an evaluation booklet tool.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.10 - Promotion</b>	Provide the policy and procedures, and indicate how they have been communicated to employees.	<p><i>Please provide an example of how the Promotion Policy has been communicated to employees. The policy is good and the job list and Broadcast email show how open positions are disseminated but the standard is looking for how the Policy is given to staff.</i></p> <p><b>Agency response:</b></p> <ul style="list-style-type: none"> <li>● <u>Policy 305 Promotion</u></li> <li>● All policies are provided at New Hire Orientation. Acknowledgement forms are signed by new staff staging that they have received the information.</li> <li>● Added acknowledgment form to Google Doc folder as evidence.</li> </ul> <p>With additional EOC this standard has been met.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig



<b>4.1.11 - Disciplinary System</b>	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.	We were provided with evidence of compliance from the agency showing a new hire acknowledgement form, a new hire orientation from 2021, the employee behavior policy via the website and their corrective action disciplinary procedures which is also housed on their website.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.12 - Grievance Procedures</b>	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.	The agency provided the grievance policy which can be found on the website which is accessible to all staff and it is appropriately written.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.1.13 - Termination and End of Employment</b>	Provide the termination and end of employment policies and procedures, and indicate how they have been communicated to employees.	The agency provided the separation policy via the website which allows for staff to have access to the policy. Their probation and at will policies were also included.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<p><b>4.1.14 - Social Media Policies Regarding Staff Use</b></p>	<p>Provide the social media policies and procedures regarding staff use of social media. The agency shall provide evidence for dates of adoption, review, annual updating and staff training.</p>	<p><i>Please highlight or provide evidence for dates of adoption, review, annual updating and staff training for this policy. The provided EOC shows the policy and only an update for March 2020.</i></p> <p><b>Agency response:</b></p> <p>As outlined in the EOC provided, the policy was last updated in March 2020 and states “Social Media Policy Updates: Social media is constantly evolving. This SOP will be updated/revised as necessary.” This SOP encompasses both staff personal use and staff professional use of social media. No further updates have been made. The standard states “Standard: There shall be established policies and procedures regarding the use of social media by staff.” and does not require evidence of periodic review.</p> <p>Additional supporting evidence added to the Google Doc Folder is the “Lee County BoCC Human Resources 213 - Social Media Policy”.</p> <p>The standard requires that the agency has an established policy and procedures regarding the use of social media by staff. The agency has met that standard but not the suggested EOC. This policy has not been updated since March of 2020 and as they note in the answer above, social media is constantly evolving however this policy has not. There is also no EOC for staff training, annual review, or updating.</p> <p>Agency response: Lee County Government has not updated their use of social media by staff policy since March 2020. This policy is governed by Lee County BoCC and is not within the scope of governance by the Parks Department. There is a quarterly meeting facilitated through Lee County’s Community Engagement team in which the Department’s communications team members attend. Social media policies and guidelines are reviewed and then communicated to the department. A sample of the Quarterly Social Media Coordinators Meeting presentation and sign in sheets can be provided if needed.</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>
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		<p>Please provide the samples of the Quarterly Social Media Coordinators Meeting presentation and sign in sheets.</p> <p>After meeting virtually with the Lee County team, they provided additional EOC including the Social Media Plan adopted in 2017 and meeting powerpoints and sign in sheets showing training and review of the policy. It is understood that the County Board has not updated the Social Media Policy since 2020 but that is out of the Recreation Departments control and they have done what they could to provide review.</p>		
<b>4.2 - Staff Qualifications</b>	Provide job descriptions for a representative sample of key positions and resumes for the current incumbents.	The agency provided several examples of job descriptions and resumes to comply with this standard.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.3 - Job Analyses for Job Descriptions</b>	<p>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:</p> <p>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.</p>	The agency listed several documents for evidence including job descriptions for various positions. As with other standards the last review dates show that there should be more current formal reviews of the job descriptions.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.4 - Chief Administrator</b>	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	The Director's resume was included as evidence for this standard.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

	relate to park and/or recreation management.			
<b>4.4.1 - Leadership Succession Procedure</b>	Provide the written procedure, such as continuity plan, which indicates approval by the proper authority.	Evidence for this standard was subsection 1.11.1 from the operations manual and minutes from a managers meeting dated December 2023.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.5 - Workforce Health and Wellness Program</b>	Provide evidence of the agency's employee health and wellness program, level of participation and most recent evaluation.	<p><i>Please highlight or provide employee participation in wellness programs and the recent evaluation of the program.</i></p> <p><b>Agency response: The document Lee County Wellness Metrics offered as evidence #5 indicates the participation numbers. The orientation of the document has been revised for better viewing of the information provided.</b></p> <ul style="list-style-type: none"> <li>● Added Lee County Wellness Metrics 2023</li> </ul> <p><b>Program evaluation</b></p> <p>Strategic planning for wellness programming is based on the following factors:</p> <ul style="list-style-type: none"> <li>● Trending analysis of medical, dental and pharmaceutical claims history from the year prior, targeting the top 5-10 key impactable areas.</li> <li>● Review and analysis of aggregate biometrics and population health information to determine trends and key areas of focus.</li> <li>● Analyze utilization across all benefits to determine areas where we can increase participation and engagement.</li> <li>● Review and analysis of new programs offered by Aetna and other partners in these specific arenas, market and industry trends in response to common areas of concern.</li> <li>● Review of alternative options for members that reduce costs, increase education and prevention, increase early detection to aid in better treatment outcomes.</li> <li>● Review of utilization of Telemedicine programs and Employee Assistance Programs to determine frequent</li> </ul>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

areas of concern/interest.

- Review of participation in preventative utilization and attempt to increase participation in preventative and early detection screenings by removing barriers and offering easier options for participation.
- Review utilization of high cost options like Emergency Room in order to focus education efforts on lower costs options.
- Review of Primary Care utilization to determine if members have centralized care or if they are piecing care together via telemed, urgent care, emergency room, etc.
- Review plan demographics such as age to identify indicators of most relevant programming.
- Review Network Management statistics to determine out of network utilization for key areas of focus.
- Examine employee survey results to determine trending areas of interest or concern.

Lee County partners with Aetna for the facilitation of the workforce health and wellness program. Annual review meetings are held to discuss the program. The following documents are produced for the review.

The following have been added to the google Docs folder

- 2023 Lee County BOCC - Medical Review
- 2023 Lee County BOCC - Dental Review
- 2023 Lee County BOCC - Rx Insights

It is clear that there is a wellness program by the EOC provided. In response to reviewer's initial review questions there is a narrative provided regarding Program Evaluation. *Please provide EOC of when the Program Evaluation occurred. Are there meeting minutes and or agendas showing when the evaluation was conducted?*

Remaining EOC was located in the original submission under Lee County BOCC Wellness Program 2023.pdf. This standard is now met.

**Date of Review of Report:** 5/9/24

**Agency Name:** Lee County Parks and Recreation, 21

<p><b>4.6 - Orientation Program</b></p>	<p>Provide outline of the orientation program and a representative example of materials distributed at an orientation. The orientation program should include:</p> <ul style="list-style-type: none"> <li>a. Philosophy, goals, and objectives;</li> <li>b. The history and development of the agency;</li> <li>c. Pertinent sociological and environmental factors of the community and specific neighborhoods in which the individual is to serve (environmental scan); and</li> <li>d. Review of program/parks policies and procedures manuals, job duties, staff procedures, first aid and safety concerns and guidelines and forms review.</li> </ul>	<p>The agency provided their new hire orientation document from 2021 and a new hire orientation presentation.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>
<p><b>4.6.1 - Employee Training and Development Program</b></p>	<p>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.</p>	<p><i>I was not able to open the HR &amp; Training Development website. I am not sure if the following issues were answered on the website.</i></p> <p><b>Agency response: This is located on the County Intranet. It may not be accessible to you.</b></p> <p><i>The standard is asking for an outline of the training both mandatory and discretionary which I cannot locate in your EOC.</i></p> <p><b>Agency response: Departmental mandatory and discretionary trainings are provided on evidence #5 - Monthly Safety Training Topics. Trainings with an asterisk are mandatory trainings</b></p> <ul style="list-style-type: none"> <li>● <b>Added to Google Doc folder - Monthly Safety Training Topics</b></li> <li>● <b>Mandatory Trainings</b> <ul style="list-style-type: none"> <li>○ <b>Blood Borne Safety</b></li> <li>○ <b>Hazard Communication Practices</b></li> <li>○ <b>Back Safety - Proper Lifting Techniques</b></li> </ul> </li> </ul>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>

- CPR/AED and First Aid
- Fire Extinguisher Training
- Fire Drill
- Hurricane Procedures
- General Security and Safety Plan Review

County wide trainings are conducted through Lee County Human Resources. Several of the initial trainings are held in person, with refreshers conducted online though NeoGov Learn website.

- Mandatory Trainings
  - Harassment Avoidance
  - Benefits Training
  - Defensive Driving
  - Incident Reporting 101
  - Workers' Comp 101
  - General Boost 2,3,6,9

*Is there a list of participants from just the last calendar year who attended mandatory and discretionary training? That would be just 2023. Please either provide or highlight within the EOC those participants. I did open the Excel spreadsheet, but it contained participants going back much further than requested making it difficult to find just 2023.*

Agency response: Document has been sorted chronologically by due date on individual tabs. The full list remains set alphabetically. Document has been added to the google Doc folder

- Mandatory New EE Training 04-2024

*Since I am unfamiliar with how you train as far as if all of your training is done online, in person, at outside agencies, or a combination of those can you please explain or show how you track who has completed training? I am assuming that the spreadsheet is a record of the employee signing on to a computer system so you can prove it is that employee taking the training. Is any of the training done in person and are there sign-in sheets for those?*

**Date of Review of Report:** 5/9/24

**Agency Name:** Lee County Parks and Recreation, 23

		<p>Agency response: Most trainings are virtual. Employees are required to log in the system with their individual secure login for both the computer station and the NeoGov website. The system automatically logs when the training has been completed.</p> <p>Sign-in sheets are provided In-person trainings. These trainings are manually entered into the NeoGov Tracking System for documentation. An example of a Harassment Avoidance training sign in sheet has been added to the google doc folder.</p> <ul style="list-style-type: none"><li>● HA - P&amp;R Supv - 11.15.23</li></ul> <p>New Hires attend a county overview orientation on their first day. They also receive a departmental overview training within their first month of employment. This powerpoint has been added to the google doc folder.</p> <ul style="list-style-type: none"><li>● New Hire Orientation Powerpoint</li></ul> <p>Trainings for new hires are also conducted on-site with the supervisor. a training checklist is signed off on by staff and supervisor upon completion. The checklist is then turned in for documentation purposes. A sample checklist has been added to the Google Doc folder.</p> <ul style="list-style-type: none"><li>● Supervisor's Checklist</li></ul> <p>The additional EOC shows that the agency has met this standard.</p>	
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<b>4.6.2 - Professional Certification and Organization Membership</b>	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.	As evidence for this standard the agency provided a certification report from 2024, along with license and other certification report from 2023. They also included a professional membership organization participation report from 2023.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.7 - Volunteer Management</b>	Provide the volunteer management manual.	EOC was good on this standard as they provided several subsections of the Operations Manual regarding volunteers and the volunteer handbook.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.7.1 - Use of Volunteers</b>	Provide list of functions in which agency volunteers are used, the extent of use, and examples of volunteer position descriptions.	A list of volunteer opportunities was provided as well as NRPA metrics and a report of the wage value of all of the volunteers that they use.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.7.2 - Volunteer Recruitment, Selection, Orientation, Training, and Retention</b>	Provide the agency's recruitment, selection, orientation, training, and retention procedures. Provide the agency's background investigation procedures for volunteers and evidence of implementation.	<p><i>I. Policies</i></p> <p><i>11.6.3 references the Background Check. Without giving private information there should be evidence of background checks done on volunteers.</i></p> <p><b>Agency response: An example of a completed report is included in Evidence #3 under step 7 NCSI Background Procedure Step by Step</b></p> <p><i>11.6.3 also references orientation. Is there an orientation process and is there EOC showing that? Is there training for volunteers and EOC?</i></p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

Agency response: Training for volunteers are provided periodically throughout the year, primarily as part of a welcome back start to the winter season. Included are sign-in sheets for various trainings from recent years.

- Slough New Hire Volunteer Orientation 2024 presentation
- 2024 Front Desk Refresher presentation
- 20221207 Trail Host Refresher sign in sheet
- 20230208 Safety in the Park sign in sheet
- 20231113 Refresher Workshop sign in sheet
- 20240209 New Moon Walk sign in sheet

*2. Retention*

Agency response: Retention of Lee County Volunteers is high, shown by longevity of service by several volunteers. They take great pride in their work and seasonal volunteers return year after year. The “Parks Perks” incentive program allows volunteers to redeem hours of work for various items. The most popular item being an annual parking pass to park free and various parks and beach areas throughout the county. The Parks Perks flyer has been added to the Google Docs folder, along with a statistics sheet (2 screenshots) depicting the many hours and years that a volunteer has worked.

- Parks Perks Program flier and order form
- Volunteer Statistics
- Volunteer Statistics - additional information

Several events are held throughout the county to show appreciation to the volunteers, to include holiday luncheons and the county-wide end of season event.

*3. NCSI Portal*

Agency response: Background check information was provided as evidence and above in #1 Policies

		<p><b>NCSI Background Procedures Step by Step</b></p> <p>4. <i>Volunteer welcome letter.</i></p> <p><i>References a volunteer handbook. Please provide if it helps provide EOC for any of what the standard is asking for.</i></p> <p><b>Agency response: The Volunteer Handbook has been added to the Google Docs folder.</b></p> <p><b>The following has been supplied in support of this standard:</b></p> <ul style="list-style-type: none"> <li>● Volunteer Services website - Recruitment</li> <li>● <a href="https://www.leegov.com/parks/volunteers">https://www.leegov.com/parks/volunteers</a></li> <li>● Volunteer Handbook - Orientation/Training</li> <li>● Various training sign-in sheets - Training</li> <li>● Appreciation Brunch Invitation - Retention</li> <li>● Parks Perks - Retention</li> </ul> <p>Additional EOC meets standard.</p>		
<b>4.7.3 - Supervision and Evaluation of Volunteers</b>	Provide written description of the monitoring system including current practices for supervisory visits, and examples of evaluations.	The agency utilizes volunteers in many different areas of their system. As evidence they included subsection 11.6.4 from the operations manual, a conference report from an issue with a volunteer, and volunteer program matrix.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.7.4 - Recognition of Volunteers</b>	Provide a description of the recognition program and recognitions given over the past calendar year.	The agency provided information from the Volunteer appreciation brunch. They also provided a great program called Park Perks which allows volunteers to earn merchandise and services based on the number of volunteer hours they work.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>4.7.5 - Liability Coverage for Volunteers</b>	Provide documentation indicating coverage of volunteers for negligence liability.	The agency provided documentation for their liability coverage and the volunteer handbook explaining it.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<b>4.8 - Consultants and Contract Employees</b>	Provide the agency’s policies and procedures regarding the use of consultants and contract employees.	As evidence the agency provided four subsections of their operations manual concerning this standard as well as a list of consultant contracts located on their website so that anyone can view that list.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
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## 5.0 FINANCIAL MANAGEMENT

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>5.1 - Fiscal Policy</b>	Provide policies for fiscal and legal authority.	Florida State Statute 125.74 establishes the responsibilities of the Lee County Board of County Commissioners (BOCC). The Lee County Administrative Code AC-3-6 “Budget Amendment, Revenue and Expenditure Authority”, established by the BOCC, outlines the management of all county funds including administration and amendment authority (section 3). Once funds are allocated to the department, they are responsible for tracking revenue and expenses by following state statute and county code and ordinance. Details are laid out in the Fiscal section of the LCPR Operations Manual.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.1.1 - Comprehensive Revenue Policy</b>	Provide the policy on fees and charges, the current fee schedules or cost-recovery procedures, and the most recent review or update.	The agency provided the Lee County BOCC External Fees and Charges Manual which was last updated in October 2023. Section 18 of the manual applies to Parks and Recreation Department fees such as programs, rentals, athletics, parking, etc.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.1.2 - Agency Acceptance of Gifts and Donations</b>	Provide the policy on acceptance of gifts and donations.	Lee County BOCC Administrative Code AC-3-12 “Cash & Capital Asset Donations Policy” provides the policy on acceptance and administration of charitable donations. In the LCPR Operations Manual chapter 3 there are procedures for common donations to the department such as property, funds, trees, etc.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<p><b>5.1.3 - Grants Procedures</b></p>	<p>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.</p>	<p>The LCPR Operations Manual section 3.15.1 and Lee County BOCC Administrative Code 3-17 “Grant Program Administrative Procedures” set forth procedures for soliciting grants. The provided Parks and Recreation Grants 2019-2024 matrix has headings of Grantor Agency, Date Awarded, Type of Project, and Monetary Value. <i>The matrix does not include all required items (missing agency match).</i> The updated matrix contained all required items.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.1.4 - Private, Corporate, and Non-Profit Support Procedures</b></p>	<p>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.</p>	<p><i>The provided information details how to accept donations. Do you have any information on <u>soliciting</u> donations?</i> The agency answered this question as follows: “As a general practice, the Department does not solicit donations from the community. When community groups, organizations and businesses want to partner for specific activities or programs, they can provide financial support. Chapter 3.10 of the Operations Manual dictates the procedure for accepting donations.”</p> <p><i>Evidence is missing information of “such support received by the agency for the past five years”. Please ensure that provided information has all of the required components.</i> The Parks Grant Inventory 2019 - 2024 is a summary of all support received over the past five years.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.2 - Fiscal Management Procedures</b></p>	<p>Provide the procedures for the fiscal management of the agency.</p>	<p>Chapter 3 “Fiscal Management” of the department Operations Manual lays out department fiscal procedures. The chapter references associated BOCC Administrative Code where necessary.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.2.1 - Authority and Responsibility for Fiscal Management</b></p>	<p>Provide documentation demonstrating clear delegation of fiscal authority for the agency.</p>	<p>BOCC Administrative Code AC-3-6 “Budget Amendment, Revenue and Expenditure Authority” authorizes the Department Director to administer the department budget. The large size of the agency necessitates additional professional staff to assume daily fiscal management of the department. Job descriptions were provided for Director, Fiscal Manager, Senior Fiscal Officer, and Operations Manager.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>

<b>5.2.2 - Purchasing Procedures</b>	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.	The agency provided Lee County Ordinance No 23-21, BOCC Administrative Code AC 3-20 “Change Funds/Petty Cash/Imprest Accounts”, and the LCPR Operations Manual Chapter 3 - Fiscal Operations. All required items can be found in this documentation. <i>a. Bidding procedures - Ordinance Section 5</i> <i>b. Criteria for the selection of vendors and bidders - Ordinance Section 5</i> <i>c. Procedures for disbursement of petty cash and issuance - Operations Manual section 3.1, AC 3-20</i> <i>d. Use of procurement cards - Operations Manual section 3.8</i>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.2.2.1 - Emergency Purchase Procedures</b>	Provide the procedures for emergency purchases.	Emergency purchase procedures were shown in Section 3.4 of the Lee County Procurement Management Ordinance.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.3 - Accounting System</b>	Provide a description of the accounting system.	The agency described the JD Edwards-Enterprise One Financial System (financial applications), WORKS (credit card system) and OneBase Utility (invoicing system). Sample outputs from each system were provided.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.3.1 - Financial Status Reports</b>	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.	<i>Only one month was provided rather than the required three months. Please provide reports for the three previous months and ensure that all information a-e in the standard are included in the reports.</i>  Upon request, the agency provided Financial Budget Status Reports for October 2023, November 2023, and December 2023.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.3.2 - Position Authorization Procedures</b>	Provide the position authorization procedures and budgeted positions.	BOCC Administrative Code AC 3-6 “Budget Amendment, Revenue and Expenditure Authority” provides authority to the Department to hire and compensate staff however all new position requests (including changing a position from part-time to	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

		full-time status) is done through the budget process or a separate BOCC action. A document was provided showing all budgeted positions for FY23.		
<b>5.3.3 - Fiscal Control and Monitoring Procedures</b>	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.	The agency complies with BOCC Administrative Code AC 3-20 "Change Funds/Petty Cash/Imprest Accounts" and the LCPR Operations Manual Chapter 3 - Fiscal Operations. The provided 2018 Lee County Clerk of Court's Internal Audit found the agency to be performing satisfactorily. Additionally, the Fiscal Officer performs random surprise internal audits (Operations Manual section 3.11.1) No department positions are restricted from handling cash but several have this role built into their job descriptions (Administrative Specialist, Fiscal Manager, Fiscal Officer, Rec Center Specialist, Supervisor)	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.3.4 - Independent Audit</b>	Provide most recent independent audit and management letter or most recent Comprehensive Annual Financial Report (CAFR) and provide the response to the audit recommendations.	The agency provided the Lee County Annual Comprehensive Financial Report dated April 2, 2023, which included the Independent Auditors' Report and Management Discussion and Analysis. The 2017 Audit of the Lee County Parks and Recreation Department was also provided.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.4 - Annual or Biennial Budget</b>	Provide the current and approved operating and capital improvements budgets.	The agency provided the Annual Budget FY 2023-2024 and the BOCC resolution from 9/19/2023 showing the approval. Pages 99 - 103 of that document provides the Capital Improvement Program Detail Report FY 23/24 - FY 27/28. Further breakdown and detail of CIP projects was provided by the Capital Improvement Program Detail Report and Major Maintenance Detailed Report.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>5.4.1 - Budget Development Guidelines</b>	Provide the budget development guidelines.	The Lee County Budget Prep Manual provides "a schedule of budget tasks, various tools to assist in developing budgets, and training on developing and entering budget data into the EnterpriseOne system budget prep module." Various sections of the LCPR Operations Manual Chapter 3 - Fiscal Operations further break down the department budgeting process.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<p><b>5.4.2 – Budget Recommendations</b></p>	<p>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.</p>	<p><i>Please point to items a, b and c in the currently provided email thread and show evidence of their consideration in the budget process. Or provide additional evidence that meets all of the items in the standard and shows evidence of consideration in the budgeting process.</i> Agency further explained the County’s annual budget process.</p> <ul style="list-style-type: none"> <li>a. Personnel needs are discussed in budget meetings and requests for new positions are submitted in a Business Case during the annual budget cycle (example provided).</li> <li>b. Capital Improvement and Major Maintenance items are submitted with a business case, detailed project list, or line item detail (examples provided)</li> <li>c. Annual budget preparation includes line item budget review (example provided)</li> </ul>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.5 - Budget Control Procedures</b></p>	<p>Provide the procedures for budget control within the agency and examples of periodic reports.</p>	<p>Lee County Ordinance 23-21, which is administered by the Procurement Department, provides the procedures for budget control. Various sample reports or screenshots were provided from JD Edwards-Enterprise One Financial System, Purchase Order Tracking System (POTS), and KRONOS Workforce Timekeeper. The agency stated that the reports are regularly distributed to management staff for review.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.5.1 - Supplemental/ Emergency Appropriations Procedures</b></p>	<p>Provide the supplemental/ emergency appropriations procedures.</p>	<p>BOCC Administrative Code AC-3-4 "Loans Between Funds and Subfunds" provides the budget policy for supplemental emergency appropriations and fund transfers. The LCPR Operations Manual section 3.16.1 outlines the procedures to request an item (such as a transfer supplemental/emergency funds) to be on a BOCC agenda.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>5.5.2 - Inventory and Fixed Assets Control</b></p>	<p>Provide procedures for inventory and fixed asset control.</p>	<p>Florida State Statute 274 “Tangible Personal Property Owned By Local Governments” and BOCC Administrative Code AC-3-14 "Policy on Tangible Personal Property Owned by Local Governments" outline fixed asset inventory control.</p> <p><i>EOC #2 will not open. It says “500 Internal Error.” “The Lee County Fixed Asset User Guide” was provided.</i></p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>



## 6.0 PROGRAMS AND SERVICES MANAGEMENT

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<p><b>6.1 - Recreation Programming Plan</b></p>	<p>Provide the current Recreation Program Plan and describe the implementation process. This RPP shall address how the agency delivers programs and services to persons of all ages and abilities and shall show how it develops and addresses the lifecycle of high-quality offerings (how programs are developed, evaluated and discontinued). Mission, goals, and evaluation measures shall be included in a planning and framework model. Provide evidence of how the RPP connects with the Master and Strategic Plans while referring to the following enumerated components in the Plan (to be explained in greater detail in Standards 5, 6 and 10):</p> <p>a. Cover page with visible approval signature and date;</p> <p>b. Table of contents (electronically linked to the page where the section begins);</p> <p>c. Introduction (vision, mission, core program/organizational philosophy, conceptual foundations, community opportunities/participant involvement, commitment to</p>	<p>The Recreation Program Plan clearly provides for the following:</p> <ul style="list-style-type: none"> <li>● Cover page with visible approval signature and date;</li> <li>● Table of contents (electronically linked to the page where the section begins);</li> <li>● Purpose/Introduction (vision, mission, core goal)</li> <li>● Program/organizational philosophy, conceptual foundations, community opportunities/participant involvement</li> <li>● Staff organizational chart</li> <li>● Program Planning Model and Framework</li> <li>● Program and service determinants (6.1.1);</li> <li>● Program goals (with broad outcomes/benefits) (10.3);</li> <li>● Program and service statistics (10.5);</li> <li>● Recreation and leisure trends analysis - See a reference to how it is completed, but not the actual analysis. (10.5.1);</li> <li>● Community inventory (10.5.2)</li> <li>● Fees and charges policy and schedules (5.1.1) - <i>Link to a 204 page document provided. Reviewer found information starting at Page 123 of the document.</i></li> <li>● Measurement, evaluation genders, life stage/age groups (pre-school, teen, senior, family, etc.);</li> <li>● Data/statistical collection (surveys, demographic reports, etc.); with data collection (10.3) (show how programs are developed, evaluated and improved; include how new programs are introduced and, when appropriate, programs are discontinued).</li> <li>● Programs and Services Management Matrix (include agency's matrix for a sample facility, program, service and special event with the following categories):</li> <li>● Program types (self-directed [6.1.3], leader-directed [6.1.4], etc.);</li> </ul>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>

	<p>community education for the leisure process (6.4), connection to strategic plan and master plan);</p> <p>d. Staff organizational chart</p> <p>e. Program Planning Model and Framework</p> <p>i. Program and service determinants (6.1.1);</p> <p>ii. Program goals (with broad outcomes/benefits) (10.3);</p> <p>iii. Program and service statistics (10.5);</p> <p>vi. Recreation and leisure trends analysis (10.5.1);</p> <p>v. Community inventory (10.5.2) vi. Fees and charges policy and schedules (5.1.1)</p> <p>vii. Measurement, evaluation with data collection (10.3) (show how programs are developed, evaluated and improved; include how new programs are introduced and, when appropriate, programs are discontinued).</p> <p>f. Programs and Services Management Matrix (include agency's matrix for a sample facility, program, service and special event with the following categories):</p> <p>i. Program types (self-directed [6.1.3], leader-directed [6.1.4], etc.);</p>	<ul style="list-style-type: none"> <li>● Genders, life stage/age groups (pre-school, teen, senior, family, etc.); Data/statistical collection (surveys, demographic reports, etc.);</li> <li>● SMART (specific, measurable, relevant, achievable, time-bound) program objectives and evaluation (6.2*); Evidence provided for 6.2 demonstrated in the Appendix.</li> <li>● Scope of program opportunities/classification formats (6.3) (special event, drop-in, etc.; equipment rental and checkout, etc.; leisure education open house, checklist, etc.; aquatics, after school, arts, etc.);</li> <li>● Outreach to diverse and underserved populations (6.31*);</li> <li>● Health and wellness promotion (6.4.1) (physical, emotional, social, etc.);</li> </ul> <p>Appendices</p> <ul style="list-style-type: none"> <li>● Agency Organization Charts</li> <li>● Evaluation Forms</li> <li>● Participant and Spectator Code of Conduct (6.5)</li> <li>● SMART goals and objectives for programs</li> <li>● Outreach to Underserved Populations</li> </ul>		
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	<ul style="list-style-type: none"> <li>iii. Data/statistical collection (surveys, demographic reports, etc.);</li> <li>iv. SMART (specific, measurable, relevant, achievable, time-bound) program objectives and evaluation (6.2*);</li> <li>v. Scope of program opportunities/classification formats (6.3) (special event, drop-in, etc.; equipment rental and checkout, etc.; leisure education open house, checklist, etc.; aquatics, after school, arts, etc.);</li> <li>vi. Outreach to diverse and underserved populations (6.31*);</li> <li>vii. Health and wellness promotion (6.4.1) (physical, emotional, social, etc.); and</li> <li>viii. Program promotion</li> <li>g. Appendices <ul style="list-style-type: none"> <li>i. Agency Organization Charts</li> <li>ii. Evaluation Forms</li> <li>iii. Participant and Spectator Code of Conduct (6.5)</li> </ul> </li> </ul>			
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<b>6.1.1 - Program and Service Determinants</b>	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 <ol style="list-style-type: none"> <li>a. Conceptual foundations of play, recreation, and leisure;</li> <li>b. Organizational agency philosophy, mission and vision, and goals and objectives;</li> <li>c. Constituent interests and desired needs;</li> <li>d. Creation of a constituent centered culture;</li> <li>e. Experiences desirable for clientele; and</li> <li>f. Community opportunities.</li> </ol>	Agency provided documentation and examples demonstrating that the six (6) program and service determinants are used in provided programs and services. Evidence includes: <ul style="list-style-type: none"> <li>● LCPR Operations Manual, 7.2.1 ABCs of Programming Recreation,</li> <li>● 2021 Needs Assessment,</li> <li>● Various program surveys,</li> <li>● Volunteer Opportunities bulletin,</li> <li>● PPA Advisory minutes, etc.</li> </ul>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.1.2 - Participant Involvement</b>	Describe the process and provide examples of how the agency obtains and utilizes participant input. Participants shall have involvement in: <ol style="list-style-type: none"> <li>a. Recommending policy;</li> <li>b. Planning activities;</li> <li>c. Conducting activities; and</li> <li>d. Sponsoring activities.</li> </ol>	Agency provided several examples of how the agency obtains and utilizes participant input. Examples of Recommending policy; Planning activities; Conducting activities; and Sponsoring activities were provided via the LCPR Operations Manual; various participants and vendor surveys; a needs assessment; and Parks and Recreation Advisory Board and other stakeholder/ partner groups meeting minutes.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.1.3 - Self-Directed Programs and Services</b>	Provide examples of how the agency provides self-directed recreation opportunities, including a list of such opportunities.	Agency provided examples of how the agency provides self-directed recreation opportunities, including a list of such opportunities via the Come Discover Guide Map, an online Park Finder app; and a LCPR Program & Services Management Matrix.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

<b>6.1.4 - Leader-Directed Programs and Services</b>	Provide examples of how the agency provides leader-directed recreation opportunities, including a list of such opportunities.	Agency provided examples of how they provide leader-directed recreation opportunities, including a list of such opportunities via flyers, social media posts, and the LCPR Program & Services Management Matrix.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.1.5 - Facilitated Programs and Services</b>	Provide examples of how the agency provides facilitated recreation opportunities, including a list of such opportunities.	Agency provided examples of how they facilitated recreation opportunities via partnership agreements with arts, tennis, football groups and other entities. A list of such opportunities are provided via the LCPR website and the LCPR Program & Services Management Matrix.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.1.6 - Cooperative Programming</b>	Provide current examples of cooperative programming with documentation, such as Memoranda of Understanding (MOU), Memoranda of Agreement (MOA), or partnership agreements.	Agency provided examples of cooperative programming with documentation such as: <ul style="list-style-type: none"> <li>• Interlocal Agreement with the School Board of Lee County, Florida</li> <li>• Spring Training Facility Lease Agreement Between Lee County and the Boston Red Sox Baseball Club.</li> </ul>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.2 - Program Objectives</b>	Provide measurable objectives for each program and service area and the last review.	Agency provided a program matrix which indicates measurable objectives for each program. The last review was conducted in December 2023.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>6.3 – Scope of Program Opportunities</b>	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.	Agency provided a matrix of programs by fields. When asked to address opportunities for different racial and ethnic backgrounds or genders, the agency responded that “all program offerings are open to all Lee County residents and visitors regardless of racial and ethnic backgrounds or gender. The Program and Services Management Matrix does not include these fields as the programs are not delineated as such.”	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

<p><b>6.3.1 - Outreach to Diverse Underserved Populations</b></p>	<p>Identify underserved populations (provide methodology and data used for this analysis), describe specific barriers including physical, social, financial, geographic, and cultural 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.</p>	<p><i>Underserved populations due to physical abilities are addressed but no evidence for any other type of underserved population.</i></p> <p>Narrative, PowerPoint presentation and assessments provided as additional evidence.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>
<p><b>6.4 - Community Education for Leisure Process</b></p>	<p>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.</p>	<p>Agency has provided examples of how they educate the community on the benefits, values and impacts of leisure and recreation services to a diverse and range of participants and non-participants. This was done via a variety of methods to include social media, published videos, guides, etc. A review of effectiveness for FY 23 was also provided.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>
<p><b>6.4.1 - Community Health and Wellness Education and Promotion</b></p>	<p>Provide the agency's policies, procedures, or programs to educate and promote health and wellness in the community such as: a. Physical activity; b. Healthy food and beverage offerings; c. Nutrition education; d. Substance abuse prevention. Also provide examples of implementation.</p>	<p>Agency provided evidence of programs to educate and promote health and wellness programs in the community. Programs were provided via employee wellness fairs, community health fairs, community and senior activity centers and the Family Nutrition Program. Wellness topics included physical activity, nutrition education, substance abuse prevention, etc.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>
<p><b>6.5 - Code of Conduct</b></p>	<p>Provide a copy of approved code of conduct for all users and describe how the users are informed of the code of conduct.</p>	<p>Agency provided several examples of how the approved code of conduct is made available for all users and how the users are informed of the code of conduct. Examples include:</p> <ul style="list-style-type: none"> <li>● LCPR Operations Manual</li> </ul>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>

		<ul style="list-style-type: none"> <li>● Lee County Ordinances 18-12 and 18-27</li> <li>● Patron Code of Conduct</li> <li>● Volunteer Handbook, and</li> <li>● Youth League Parents Code of Conduct</li> </ul>		
<b>6.5.1 – Concussion Protocol</b>	Provide a copy of an approved concussion policy and /or procedure for addressing concussion protocol.	Agency provided procedures for addressing concussion protocol via the LCPR Operations Manual and their Concussion Policy.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

## 7.0 FACILITY AND LAND USE MANAGEMENT

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>7.1 - Parkland Acquisition Procedures</b>	Provide policy and procedures for land acquisition, the citation of legal authority to acquire lands, and last review.	<p>The policies and procedures are strong for this standard as they provided state and local statutes and ordinances which govern their parkland acquisition procedures. Also included were internal procedures and specific criteria for acquisition of open land based on various factors.</p> <p><i>Highlight in the EOC or provide documentation of the last review that was mentioned in the narrative. Add any other reviews of the policies or codes.</i></p> <p><b>Agency response: Policies and procedures for the County Lands Acquisition/ Disposition Program are reviewed and revised on an as needed basis. The cover sheet of the Internal Policies and Procedures lists the revision dates for each policy. The most recent revision was conducted on 3/27/2023, for the acquisition of Conservation 20/20 parcels and is on page 29 of the document.</b></p> <p>Additional EOC provides sufficient information to meet standard</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.2 - Areas and Facilities Development Policies and Procedures</b>	Provide land development policies and procedures, with the last review.	<p>There were 4 items of Digital Evidence in the EOC for this standard.</p> <p><i>Highlight the areas of each piece in the EOC and explain how it pertains to the standard for 1-3. There is no way to read all of the information provided to determine how the agency feels that this evidence shows that this standard was met</i></p> <p><b>Agency response: Added to google docs folder</b></p> <ul style="list-style-type: none"> <li>● <b>Word document CAPRA 7.2 Responses explaining how evidence pertains to the standard.</b></li> <li>● <b>Lee plan pages - highlighted</b></li> <li>● <b>Ordinance 17-19 - highlighted</b></li> </ul>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig



		<p>EOC #4 covers the policies and procedures as required in this standard.</p> <p><i>Please highlight or provide evidence of review of the Lee Plan as it pertains to standard 7.2</i></p> <ul style="list-style-type: none"> <li>● The Lee Plan is reviewed on an as needed basis.</li> <li>● Updates shown here - <a href="#">Lee Plan Amendment Dates</a></li> <li>● The last entry is the amendment date for Ordinance 23-33, that pertains to this standard.</li> <li>● Ordinance 23-33 is in the google docs folder, along with a screenshot highlighting the update on the list. The ordinance was approved on 12/11/2023.</li> </ul> <p>This standard has been met with the additional EOC as requested.</p>		
<b>7.2.1 - ADA Existing Facility and Site Access Audit</b>	Submit completed checklists, digital images and site reports as evidence of completion of the access audit.	Provided evidence were compliance inspection reports and the Lee County Transition Plan regarding ADA.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.3 - Defense Against Encroachment Procedures</b>	Provide the procedures regarding defense against encroachment.	Subsections of the operations manual were included as evidence along with ordinances 1-12, and 18-27 from the county which pertain to encroachment issues.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.4 - Disposal of Lands Procedures</b>	Provide the procedures for disposal of park and recreation land.	Disposal of land evidence was provided by the Florida state Statutes, Lee County Ordinances as well as Lee County Administrative codes.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.5 - Maintenance and Operations Management Standards</b>	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.	<p>EOC #1 references that the entire document was to be worked on by staff. That was in December of 2021.</p> <p><i>Is there a more recent review of this document?</i></p> <p><b>Agency response: December 2021 was the last review for this document. It is currently scheduled to be reviewed on a periodic and as-needed basis. The next review will be in July 2024.</b></p> <p>Evidence originally provided was the most recent review and the agency has met the standard.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<p><b>7.5.1 - Facility Legal Requirements</b></p>	<p>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.</p>	<p>A legal requirements matrix last reviewed in 2023 was provided as EOC along with meeting minutes for the time period. A clipped shot of the Cartegraph system was included but was not highlighted and was not accessible. This evidence was not needed to fulfill the standard.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>
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<p><b>7.5.2 - Preventative Maintenance Plan</b></p>	<p>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.</p>	<p><i>I have been struggling with the EOC's for this standard. The Standard and Suggested EOC is looking for a comprehensive preventative maintenance plan. I do not see that in the EOC you provided. The standard is looking for plans for parks, recreation areas, facilities, playgrounds, aquatic facilities, pedestrian paths, &amp; building infrastructure.</i></p> <p><i>Provide that plan or plans.</i></p> <p>Additional information was not in the Google File as indicated.</p> <p><i>It is also looking for a sampling of completed inspections and or safety checks for the areas listed above. The inspections or safety checks need to be recent. Inspections are done anywhere between daily to annually. Occasionally there are longer periods but the majority of inspections that were provided would not be considered recent. Anything done in 2023 or 2024 would be considered recent.</i></p> <p><i>Provide a sampling of recently completed inspections or safety checks for Parks, Recreation Areas, facilities, Playgrounds, aquatic facilities, pedestrian paths, &amp; building infrastructure.</i></p> <p><b>Agency response: Added to Google docs folder:</b></p> <ul style="list-style-type: none"> <li>■ Inspection Report - NFM Community Park</li> <li>■ Inspection Report - Mary Moody Park</li> <li>■ Inspection Report - Lehigh Community Pool</li> <li>■ Inspection Report - Three Oaks Playground</li> <li>■ Playground Committee Audit - Lakes Park Playground</li> </ul>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>
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		<p><i>The inspection reports were provided for this standard but there were no plans as requested in the additional EOC. Please provide the Preventative Maintenance Plans for all 7 areas.</i></p> <p>Upon request, the agency provided preventative maintenance plans for all 7 areas. With the additional items provided on 5/3/24 this standard has been met.</p>		
<b>7.6 - Fleet Management Plan</b>	Provide the fleet management plan.	<p>The EOC was good except for inspections. Included for EOC was subsections 15.24.7 &amp; .8. The fleet management budget fleet plan, and user manuals were also included as EOC for this standard. The agency also provided a master list of fleet vehicles and a replacement plan.</p> <p><i>Provide fleet inspections.</i></p> <p><b>Agency response: Added to the Google Docs folder</b></p> <ul style="list-style-type: none"> <li>■ CLT Shop Guidelines</li> <li>■ Fleet - C-Service Checklist</li> <li>■ Flet - C-Service Check Sheet</li> <li>■ LCFM Truck PM check list</li> <li>■ Needed Repairs form</li> </ul> <p>The additional EOC meets the standard.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.7 - Agency-Owned Equipment, Materials, Tools, and Supplies Policies and Procedures</b>	Provide policy and procedures regarding agency-owned equipment and property.	This standard was met with several subsections of the operations manual along with a sample of training. Additional pdf.s showing the Lee County administrative code policy on surplus property and personal property were included.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.7.1 - Building Plans and Specifications</b>	Provide evidence that plans and specifications for facilities with greater than 10,000 square feet of indoor space constructed since 1965 are on file.	The EOC on this standard included building plans from four different facilities.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.7.2 – Land and Lease Records</b>	Provide evidence that land records for land acquired since	The agency provided three examples of leases with Florida Power and Light, Trico-Shrimp, and South Florida Water Management	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

	<p>1965 are on file.</p>	<p>District which were strong EOC for this standard. Also included was a screenshot example of their GIS system. The narrative included mention of the Cartegraph system for cataloging leased and owned land.</p> <p><i>Please provide evidence of owned property. That evidence needs to include legal description and easement or covenants that restrict use or disposition. It should include when and how the property was acquired.</i></p> <p><b>Agency response:</b></p> <ul style="list-style-type: none"> <li>■ All legal documents pertaining to land ownership are housed on the Cartegraph system under the individual facility page.</li> <li>■ A screenshot link has been added to google docs</li> </ul> <p>The additional EOC shows that the agency has a listing of land owned. Please provide an example of the information listed in the standard from the list shown form the Cartegraph System. The standard is requiring ownership, leases, legal description, any easements or covenants that restrict use or disposition</p> <p>Agency is prepared to share information from the Cartegraph system to complete the standard.</p> <p>During the review meeting on Monday, May 6th at 3:00 pm the agency did provide the remaining EOC required and requested showing all of the components required by the standard such as legal descriptions, easements and covenants. The additional information has met the standard.</p>		
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<b>7.8 - Environmental Sustainability Policy and Program</b>	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.	This standard had an extensive narrative with great information and included several good examples of evidence supporting the narrative. Referenced also is the Lee Plan which shows the County's efforts to plan for the future of their system. This was the best example of meeting standards that the Reviewer had reviewed.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.9 Natural Resource Management Plans and Procedures</b>	Provide the natural resource management plan(s) and procedures and examples of outreach and education.	The agency provided several subsections of the operations manual as in other standards along with land management plans and educational brochures.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.9.1 - Recycling and/or Zero Waste Plan</b>	Provide a description of the recycling and/or zero waste plan for facilities and administrative offices and provide the last review with statistics on the amounts of materials recycled or the percent of total waste recycled for the most recent reporting period.	This was another good example of EOC as the agency provided several documents to support their narrative and satisfy the standard. Those include the Operations Manual Subsection 11.18.1 which references the Lee plan and reduce, reuse, and recycling policy. Also included were examples of the Electronic waste plan, solid waste plan, recycling and zero waste plan. Also included was the all encompassing Lee Plan. The agency also provided EOC with meeting minutes and sign in sheets from 7-16-21 and 5-3-23.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig
<b>7.10 - Maintenance Personnel Assignment Procedures</b>	Provide examples of methods used by the agency to assign staff.	The agency provided a very helpful narrative and several documents to satisfy the standard. The evidence for review was the Business Case-Six Mile Slough-Part-time-TO-Full-time-SrMainSpec. The agency also provided the Budget Amendment, Revenue and Expenditure Authority AC-3-6.pdf along with FT Maintenance Position descriptions for several areas, sample job descriptions and job postings. The organization chart was also provided as EOC for this standard.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Tom Hartwig

<p><b>7.11 - Capital Asset Depreciation and Replacement Schedule</b></p>	<p>Provide the capital asset depreciation and replacement schedule.</p>	<p><i>There should be a document or possibly on your Cartegraph system or somewhere else that has a list of your Capital assets and a replacement schedule. This is usually held within a capital improvement plan or something similar. Please review the standard and suggested EOC and highlight or provide that information. EOC #7 is more like what this standard is calling for and you stated in the narrative “LCPR has a replacement schedule for all capital maintenance items such as playgrounds, fencing, signage, paving, athletic court resurfacing and lighting through the County's Major Maintenance budget process” The items listed in the quoted sentence should be on the list as well as vehicles, buildings and facilities.</i></p> <p>Agency response: The Fixed Asset Inventory is a listing of all capital assets for the Parks Department. While there is no formal replacement schedule for these assets, this inventory is used to guide decision making when developing the annual budget for countywide park improvements, capital improvement projects, and major maintenance.</p> <p>The FY 24/25 Budget Cycle – Countywide Park Improvements will show the submitted improvements for the upcoming fiscal year. These improvements will either repair or replace existing assets that have reached the end of their life cycle, such as athletic court resurfacing, athletic field improvements/reconstructions, gate replacements, IT upgrades, etc. Each year, Parks District Managers can request projects to be incorporated into this budget. The Parks Administration Team reviews all requests and selects the projects that will be submitted to County Administration as part of the annual budget review process. Final approval for all budgeting is provided by the Board of County Commissioners.</p> <p>An example of Fixed Asset Inventory and FY24/25 Budget Cycle - Countywide Park Improvements have been added into the google doc folder.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Tom Hartwig</p>
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		The additional information provided as EOC meets this standard, however in a 514 page document, nothing was highlighted or bookmarked. The reviewer was able to find the necessary items but in the future, the agency should be specific as to where to look for required EOC.		
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## 8.0 PUBLIC SAFETY, LAW ENFORCEMENT AND SECURITY

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>8.1 - Codes, Laws, and Ordinances</b>	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.	The agency provided Lee County Ordinance No. 18-12 and No. 18-27 which document the codes, laws and ordinances of Lee County Parks & Recreation. Also provided was a link to the LCPR website where ordinances are posted.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.1.1 - Staff Liaison to Law Enforcement Officers</b>	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.	Original evidence provided is noted as “pending approval”.  Updated 5/6/24 - Reviewer returned to original file which is now directing to LCPR Operations Manual, 11.10.3 Liaison to Community Law Enforcement section which shows required evidence.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.2 - Authority to Enforce Laws by Law Enforcement Officers</b>	Provide documentation that establishes the authority of law enforcement officers to enforce laws and ordinances within parks, recreation areas, and facilities.	The agency provided Lee County Ordinance No. 18-12 and No. 18-27 which document the codes, laws and ordinances of Lee County Parks & Recreation, as well as the authority of Park Rangers and other law enforcement officers to enforce ordinances within LCPR property. Administrative Code 1-8 Lee County Trespass Policy and Procedures further extends the authorities to trespass.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.3 - Law Enforcement Officer Training</b>	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.	There is a mutual aid agreement between Lee County and the LCSO which provides the parking enforcement training for Park Rangers. This is a one-time training with no refresher or updates. The FDLE Florida Officer Mandatory Retraining Requirements Matrix states the various trainings required for Florida Officers. They must complete 40 hours every 4 years to maintain certification.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

**Date of Review of Report:** 5/9/24

**Agency Name:** Lee County Parks and Recreation, 48



<b>8.4 - Public Information on Laws, Ordinances, Rules, Regulations, and Policies</b>	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.	The agency provided evidence of Lee County Ordinance No. 18-12 which defines the role of agency staff in providing public information and education on laws, ordinances, etc. Also provided is the website as an example of the provision of information to the public.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

<b>8.4.1 - In-Service Training for Staff on Public Safety and Law Enforcement</b>	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.	Agency provided evidence of in-service training that is presented via a PowerPoint presentation. A sign-in sheet denoting the date of 12/6/2023 and staff attendees / roster was also provided.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.4.2 - Handling of Disruptive Behavior Procedures</b>	Provide current procedures regarding handling of disruptive behavior.	Agency provided evidence of current procedures regarding handling of disruptive behavior via the LCPR Operations Manual subsections 11.14.4, 11.9.1 and 11.10.1.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.4.3 - Traffic Control, Parking Plans, and Crowd Control</b>	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.	Agency provided Lee County Event Permit Application, as well as an Agreement for Extra-Duty Detail Services executed with the Lee County Sheriff's Office. Agreement provided evidence of parking plans and crowd control as late as March 2022.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.4.4 - Handling of Evidentiary Items Procedures</b>	Provide the procedures defining the role and responsibility of agency staff in the discovery, preservation and handling of evidentiary items.	Agency provided evidence of procedures defining the role and responsibility of agency staff in the handling of evidentiary items via the Lee County Parks & Recreation Operation Manual section 15.9.6.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

<p><b>8.5 - General Security Plan</b></p>	<p>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. These plans typically include:</p> <ul style="list-style-type: none"> <li>a. Locking key systems and associated assignments;</li> <li>b. Alarm system and assignment of security codes;</li> <li>c. Opening and closing procedures;</li> <li>d. Fire alarm and fire suppression systems;</li> <li>e. Emergency evacuation procedures;</li> <li>f. Critical incident response procedures and training;</li> <li>g. Location and training of AED (Automated External Defibrillator);</li> <li>h. Procedures of Open Carry weapons; and</li> <li>i. Training and Plan on Active Shooter</li> <li>j. Access protocol</li> </ul>	<p><i>Do not see Procedures of Open Carry weapons; and Training and Plan on Active Shooter. Please point out sections.</i></p> <p>LCPR provided the following: General Security Plan (last modified 5/23); Facility Security Plan for Lehigh Acres Community Pool (last modified 1/24); the Hammond Stadium Incident Action Plan (last modified 3/23); and Administrative Code 7-2 Employee Emergency Action Plan (last modified 11/23).</p> <p>These plans address: locking keys systems; alarm system and assignment of security codes; Opening and closing procedures; Fire alarm and fire suppression systems; Emergency evacuation procedures; Critical incident response procedures and training; and Location and training of AED (Automated External Defibrillator).</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>
<p><b>8.6 - Emergency Management Planning</b></p>	<p>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.</p>	<p>LCPR provided the Lee County Comprehensive Emergency Management Plan last approved 12/14/2018.</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Katrina Williams</p>

<b>8.6.1 - In-Service Training for Staff on General Security and Emergency Management</b>	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.	Agency provided a copy of the Employee Emergency Role (E-Role) Programt, and the E-Role Emergency Management Sheltering Program training presentations. In addition, evidence of training rosters and outlines were provided. .	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.6.2 - Emergency Risk Communications Plan</b>	Provide a copy of the Emergency Risk Communications Plan and the most recent review.	Agency provided a copy of their 2021 Emergency Operations Center Standard Operating Guide for Media Relations During Activations.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>8.6.3 - Care and Shelter Procedures</b>	Provide procedures to coordinate with agencies designated to provide care and shelter during emergencies.	Agency provided Administrative Code AC-7-6 which outlines the responsibilities of county administrative staff necessary to support a viable emergency response structure, the Comprehensive Emergency Management Plan; E-Role Program; Shelter Workers Job Description and Mass Care Purpose and Scope.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

## 9.0 RISK MANAGEMENT

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<b>9.1 - Risk Management Policy</b>	Provide the risk management policy including indication of approval by the proper authority.	Agency provided Lee County Risk Plan, Administrative Code 7-4 (and subsequent update) which established a comprehensive risk plan to ensure a safe and healthy working environment to safeguard employees, equipment, property and assets.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>9.1.1 - Risk Management Plan and Procedures</b>	Provide the current risk management plan with approval by the proper authority, the most recent review, and indication of how the plan and procedures are available to staff. The risk management plan shall reflect all three phases of risk management: a. Identification and assessment; b. Response strategies; and c. Management planning.	<p>Agency provided the Safety/ Risk Management Administrative Code, and referred to Section 15.1.1 in the LCPR Operations Manual.</p> <p>Upon request, more information was provided to include the entire Chapter 15 (58 pages total). Evidence of the sections that reflects all three phases of risk management was provided as follows:</p> <p><i>a. Identification and assessment</i> - sections 15.7.2-15.7.6; 15.8.1-15.8.4 and 15.9.1-15.9.4</p> <p><i>b. Response strategies</i> - sections 15.6.3-15.6.15; 15.7.1-15.7.6</p> <p><i>c. Management planning</i> - sections 15.1.1, 15.2.1, 15.3.1-15.3.4 and 15.4.1-15.4.4</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>9.1.2 - Accident and Incident Report Procedures</b>	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).	Agency provided evidence of accident and incidents reports and procedures. Forms include: Employee Injury/Illness Report; Liability Accident/Incident Report; etc. which contain the specific information as required by the standard.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>9.1.3 - Personnel Involvement and Training</b>	Demonstrate how personnel at all levels are involved and trained regarding risk management.	Agency provided several examples of evidence regarding personnel roles, notifications and training rosters..	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

<b>9.2 - Risk Manager</b>	Provide the position description that includes responsibility for risk management.	Agency provided the Risk Management Analyst and Parks and Recreation Supervisor position descriptions showing their responsibilities for risk management.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams
<b>9.3 - ADA Compliance and Face-to-Face Resolution</b>	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.	Agency provided evidence of a written policy and procedure to the public that outlines the required steps for filing a complaint, and for resolution via the ADA Compliance and Inclusion Statement on their website, as well as the Lee County Grievance Procedure under the American Disabilities Act.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Katrina Williams

## 10.0 EVALUATION AND RESEARCH

Standard	EOC - Suggested Evidence of Compliance	Comments	Met or Not Met	CRT Member
<p><b>10.1 - Systematic Evaluation Processes</b></p>	<p>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.</p>	<p>Section 14.7.1 of LCPR Operations Manual describes reasons for evaluating programs and expectations for analysis of survey reports. The agency described formal evaluations such as surveys, evaluations, needs assessments, etc. and provided examples (2021 Needs Assessment and July 2023 Program Survey). The agency also described informal ways of collecting feedback such as staff meetings, friends groups, comment cards, etc. and provided the agenda from a Camp Committee Meeting as the only example.</p> <p><i>Since it was a large part of their narrative, the reviewer asked to see a stronger example of informal procedures and further understand how these methods are used to evaluate effectiveness.</i></p> <p>The agency responded with further examples of agency response to the 2021 Needs Assessment (formal) and the invitation, agenda and sign in sheets for parks staff listening sessions (informal).</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>10.1.1 - Responsibility for Evaluation</b></p>	<p>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.</p>	<p>The agency provided the resumes and position descriptions for staff members responsible for managing and evaluating programs/operations, research, and planning. Those positions are Planning Manager, Senior Planner, Strategic Operations Manager, and UF/IFAS Extension Service Agents.</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>

<p><b>10.1.2 - Staff Training on how to Evaluate Programs, Services, and Facilities</b></p>	<p>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.</p>	<p>The agency provided information for Program Evaluation training conducted on 5/3/2023 including the powerpoint presentation, agenda, and sign in sheet. <i>Reviewer asked for an additional example.</i></p> <p>Upon request, the agency provided two additional EOC for this standard. The first addition provided content, dates and participant lists for UF/IFAS New Agent Training which covered teaching and learning, program development, and program evaluation. The second provided content, dates and participant lists for Turf Maintenance Training focusing on evaluation of turf.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
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<p><b>10.2 - Outcomes Assessment</b></p>	<p>Provide <u>examples</u> of how evaluation results are used to determine levels of performance and effectiveness in the organization and how evaluation are used to determine if specific programs, services or facilities are achieving planned or projected results.</p>	<p>The agency provided a Record of Accomplishment from a UF/IFAS Extension Agent which describes his Objectives/Outcomes and Accomplishments for the year.</p> <p><i>The 2022 End of Summer Camp Final Report and Analysis included financials and units of service but did not include any analysis of if the program was achieving “planned or projected” deliverables. With additional evidence, the agency provided answers to one question on the parent survey that indicated that 64% of parents believe that their child “learned a new skill, recreational activity, or leisure pastime while at camp.” No mention of if 64% meets their “planned or projected results.”</i></p> <p><i>Reviewer was still looking for evidence of how evaluation is used to determine if specific programs, services or facilities are achieving <u>planned or projected results</u>. Again the EOC suggests that more than one example should be provided so the reviewer asked for a different example to be provided.</i></p> <p>Upon request the agency provided evidence that the created a new full time Digital Communications position following feedback on the 2021 Needs Assessment. They also provided evidence that adding this position had the impact they were looking for according to the uptick in social media followers over the past 3 years.</p>	<p><input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
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<p><b>10.3 - Performance Measurement</b></p>	<p>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:</p> <ul style="list-style-type: none"> <li>a. Recreation and demographic trends;</li> <li>b. Needs assessment;</li> <li>c. Community inventory;</li> <li>d. Surveys;</li> <li>e. Program and service statistics;</li> <li>f. Inspections;</li> <li>g. Customer feedback;</li> <li>h. Program evaluation;</li> <li>i. Risk management reports; and</li> <li>j. Budget and financial reports.</li> </ul>	<p>The 2018 LCPR Performance Roadmap identifies the mission, core competencies, core services, customers, partners, and more of the agency; <i>however, on the provided document the targets/metrics are mostly blank (after page 9). Agency has not provided <u>performance targets and measurements</u>.</i></p> <p>Upon request the agency provided their Performance Measurement Form which provides information such as performance measurement description, why the measurement is important, what is measured, and how the agency is performing.</p> <p>The agency demonstrated that it gathers data from a variety of sources (Performance Dashboard, survey results, risk management analysis, customer feedback, financial budget status reports, etc.). Several examples were provided to demonstrate how the data have been used by the agency to affect decisions.</p> <ul style="list-style-type: none"> <li>● Playground Safety Committee 02/09/2023 Audit of Lakes Park Lakefront laid out the identified problem, severity rank, recommendation, and notes.</li> <li>● Lee County 2023 Level of Service and Concurrency Report demonstrates that Lee County meets, or prioritizes capital improvements, to meet the adopted level of service on public facilities.</li> <li>● Trend Analysis Matrix from 2011 through 2024 identifies trends, explains what is currently being done and lays out future plans.</li> </ul>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>
<p><b>10.3.1 - Level of Service Standards</b></p>	<p>Provide the LOS standards and describe how LOS standards are used to establish facility and service priorities.</p>	<p>LOS standards can be found in section VI “Capital Improvements Element” of the Lee Plan. Section V “Parks, Recreation, Open Space and Landscaping” lays out 11 goals with corresponding objectives and policies. The narrative explained how the agency is meeting LOS standards for types of parkland.</p>	<p><input checked="" type="checkbox"/> Met</p> <p><input type="checkbox"/> Not Met</p>	<p>Shauna Lewallen</p>



<b>10.4 - Needs Assessment</b>	Provide the current needs assessment, describe the procedural steps in conducting the assessment, describe the frequency of updates, and describe the use of the assessment in agency planning.	LCPR completes an in-depth biennial Needs Assessment with the most recent survey taking place January - May 2021. The agency described how lessons learned in prior assessments contributed to methods used to collect stronger and more relevant information in the 2021 survey. Findings from the 2021 Needs Assessment were used to complete Section 4 “Needs and Priorities Assessment” of the department Master Plan.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>10.5 - Program and Service Statistics</b>	Provide examples of statistics collected, describe the frequency of updates, and describe how the agency makes use of the information.	The agency provided three different ways that statistics were collected (Needs Assessment, Summer Camp financial report, RecTrac roster) and stated that the data provides a snapshot of current users and drives programmatic planning.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>10.5.1 - Recreation and Leisure Trends Analysis</b>	Provide trends analysis, describe frequency of updates, and describe linkage to agency goals and objectives.	<p>The LCPR Master Plan which included section 4.5 Recreation and Leisure Trends was provided.</p> <p>The agency provided a trends &amp; Analysis Matrix from 2011-2024. The matrix columns were Identified Trend, What Are We Doing, Future Plans. The LCPR Trends and Analysis Group meets periodically to analyze and update the matrix.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>10.5.2 - Community Inventory</b>	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.	<p>The Lee County 2023 Public Facilities Level of Service and Concurrence Report and the 2019 LCPR Mapbook provide the required information on park land. The agency uses the information in preparing CIP and assuring appropriate levels of service for residents and visitors.</p> <p><i>There is no mention of programs and services as required in the standard. In additional evidence the agency described the partnership between LCPR and Welcome Guide Maps of SWFL to provide a full color map of all area parks, restaurants, attractions and activities for residents and visitors (link provided). They also shared an available United Way hotline that staff can access as a referral tool to for-profit and not-for-profit programs for customer inquiries.</i></p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
<b>10.5.3 – Park Metrics</b>	Provide a copy of the agency Custom Report from the Park Metrics database.	The 2023 NRPA Agency Performance Review was provided.	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen

<b>10.6 - Research Investigation</b>	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.	The agency provided information on the following research studies: <ul style="list-style-type: none"> <li>● Regional Strategy for Agricultural Sustainability for Small to Mid-sized Farms in the Southwest Florida Promise Zone (2018)</li> <li>● Change and innovation within Florida’s food system in response to COVID-19 (undated, post-pandemic)</li> <li>● Saw Palmetto Management and Policy Survey (2022)</li> </ul>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
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<b>10.6.1 - Quality Assurance</b>	Provide recent examples of methods used to collect, monitor and evaluate quality assurance data from users.	<p>The agency provided the 2021 Needs Assessment, 2023 Summer Camp Survey, a response to a customer email, and a social media comment reply.</p> <p><i>The narrative made mention of customer relations training for staff. Can you share evidence of that training?</i> Agency provided a 11/22/22 social media post celebrating the completion of Guests First Customer Service Training.</p>	<input checked="" type="checkbox"/> Met <input type="checkbox"/> Not Met	Shauna Lewallen
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### **CRT General Review Comments:**

- After preliminary review, CRT asked for additional evidence on 43 out of 154 (28%) of standards. This is quite a high percentage for a re-accrediting agency.
- Several standards had discrepancies between the narrative in the CAPRA portal and the narrative in Sharepoint. Agency was asked to review all narratives to ensure that they match in both locations to ensure consistency.
- In many cases, the agency did not provide information that was directly required by the standard (example - a standard asked for three months worth of reports but only one month was provided) which required the reviewers to ask for information that should have been easily provided in the first place.
- Stronger narratives are needed in both the original submission and the agency's response to reviewer questions. Rather than assuming that the reviewers will figure out how each piece of evidence meets the standard, the agency should directly say it.
- Agency often provided large documents without pointing visitors to particular parts that answered the standard – no highlights, bookmarks, nor page numbers were initially provided.
- In several standards, LCPR provided a link to their website instead of a link directly to the evidence; direct links are recommended.
- Chapter 9: Risk Management was well done. The agency provided an abundance of evidence regarding the plans, management, review, risk management positions and roles, etc.

### **CRT Items with Special Attention:**

- 4.1.14 - Social Media Policies Regarding Staff Use: The Social Media Plan was adopted in 2017. The County Board has not updated the Social Media Policy since 2020 but this is outside of the Recreation Department's control and they have done what they could to provide review. Since 2020 is within the 5 year window for reaccreditation, the agency's social media policy is good for this review, however, the policy will need to be updated for the next re-accreditation cycle.
- Chapter 10: The review team sent back more than half of the standards to ask for additional evidence. This chapter should be focused on and strengthened for future reviews.

### **CRT Advisor Comments:**