

RECREATION CONFERENCE – SESSION OUTLINE

Session Title:

BE “ESSENTIAL” BY TRACKING AGENCY PERFORMANCE MEASURES

SESSION DESCRIPTION (25 words):

Excel with Microsoft Excel; Highlighting your agency as an “Essential Service” to your Elected Policy Makers and the community; Properly tracking your agency’s Performance Measures.

SESSION DESCRIPTION (Full Text):

Learn how to harness the Power of Excel by turning basic data into vital information, presenting it in a beautiful report, which will highlight your agency as an “Essential Service” to your Elected Policy Makers and the community. We’ll investigate how to properly track Performance Measures, and we’ll cover unique ideas for accomplishing Budget Projections that are accurate and reliable.

SESSION TARGET MARKET: Recreation Programmers, Agency Directors, Management Analysts

Speaker’s Name: Mark Honberger

Total Length: 1.25 hour session

SESSION LEARNING OBJECTIVES: Participants will:

- 1) Discover the power of Excel and gain a comfortability with this powerful tool.
- 2) Uncover the importance of “Performance Measures,” what they are, how to track them, and how to report the results to their elected officials to show their agency as essential.
- 3) Understand the importance of Budget Projections and learn techniques to make them accurate and reliable.

SESSION NEEDS IDENTIFICATION: It is vital for agency leaders to understand the Full Scope of their operation, and the way to do that is to track and report on your agency's "Performance Measures." It is not just about participant numbers (although important), but it is more about showing measurable impacts on the community. Attendees will dive into the "KEY INDICATORS REPORT," as well as the "COST-PER-PARTICIPANT REPORT." these reports will show the character of the agency. We will also cover what it means to "project" a budget, why projections are important, and how to do them. By taking the effort to project your costs prior to a fiscal year, or especially prior to a particular program, your staff will be able to compare the projection with the actual results and thereby gain an understanding of where their projections were correct and where they may have gone wrong. Undertaking this process will cause your staff to be better at doing their projections, which will in turn make your agency better able to accurately project its agency-wide budget. This will allow your elected board/commission to have stronger confidence in staff's budget projections and thereby know what they are approving. Attendees will dive into an amazing tool called, "RECREATION PROGRAM PLANNING WORKSHEET." By utilizing this tool for each program, attendees will be well on their way towards projecting their entire budget. We know your agency is "Essential;" attending this workshop will help you prove it!

MARK'S EXPERIENCE PRESENTING EDUCATION SESSIONS: Throughout his 30+ years in the Parks and Recreation Profession, Mark Honberger has annually provided training presentations on a variety of recreation topics. He has provided training sessions for the California Park and Recreation Society (District Training Events & State Conferences), the Arizona Park and Recreation Association (State Conference 2017, 2018, 2020, 2021), the Nevada Park and Recreation Society (State Conference 2018, 2019), & the New Mexico Park and Recreation Association (State Conference 2019). Additionally, Mark has conducted numerous Team Building sessions for parks and recreation agencies.

MARK'S EXPERIENCE WITH THIS SUBJECT MATTER: Throughout his 30+ years in the Parks and Recreation Profession, Mark Honberger has utilized the power of Microsoft Excel to demonstrate the ways that his agencies are "Essential." Stakeholders, such as councils and commissions, have loved his end-result reports that boil down a variety of data points into very useful and bite-sized pieces of information that they can use to support and sell the agency's successes to the community. As a high-end user of Excel, Mark will share his methods for tracking agency performance, but will do so in a clear and concise manner that allows attendees to take these methods back to their agencies. Additionally, he will show those end-result reports, developed from many years of experimenting with different methods, so that attendees can then apply them to prove their agencies as "Essential."

SESSION OUTLINE

Introduction of Speaker (2 Minutes)

Introduction of Topic (10 Minutes)

- A) Attention Grabber: Bring out the importance of utilizing Excel for the benefit of their agencies. Ask Audience to raise hand to share any successes with Excel. Ask Audience to also share any Excel phobias or horror stories. Reward those who answer with a sweet treat.
 - a. Make Agency more efficient
 - b. Show Agency as Essential
 - c. Gain confidence of Elected Officials
 - d. Give stake holders tangible talking points to highlight the benefit of the agency

- B) NEEDS IDENTIFICATION: Discuss the need for this topic and this session. (from above)

Cover Learning Objectives (3 Minutes)

PRESENTATION OF TOPIC SPECIFICS

Excel does not need to be THAT scary (5 Minutes)

(LEARNING OBJECTIVE #1)

- A) Benefits of Excel
- B) Electronic Filing System (Storing Data)
- C) It does the work for you
- D) Turning Data into Vital Information
- E) Attractive and well-organized reports that clearly highlights the Vital Information

Understand the importance Performance Measures (20 Minutes)

(LEARNING OBJECTIVE #2)

- A) Knowing the character and Full-Scope of your organization
- B) Definition of Performance Measures?
- C) Showing the measurable impacts your agency has on your community
 - a. Not just about participant numbers (although important)

- D) Show your agency as an “Essential Service” to your Policy Makers (Boards and Commissions) and to your community
- E) What items (data points) to track
 - a. PERFORMANCE OUTPUTS (*Programs offered, Programs held, Cancellation percentage, Participants attended, Program Expense, Program revenue*)
 - b. PERFORMANCE OUTCOMES (*facility drop-in hours for rec swims, senior centers, etc., participant health, facility rental hours, volunteer hours, free lunches, agency mission items met, and everything else your agency is doing*)
 - c. CALCULATED DATA (*Cost Recovery, General Fund Subsidy, Net Cost-Per-Participant*)
- F) How to go about tracking them
- G) How often to track them
 - a. Annually, Quarterly, Monthly
 - b. See in “Real-Time” how your agency is doing
- H) Dive into the “Key Indicators Report”
- I) Dive into the “Cost-Per-Participant Report”

Understand the importance of Budget Projections (20 Minutes)

(LEARNING OBJECTIVE #3)

- A) What does it mean to “Project” a budget
- B) Why are they important
- C) Give your Policy Makers the confidence they need to have in your organization’s budget
- D) What items (data points) to project and track
 - a. PROJECTED & ACTUAL (Expenses, revenues, net program cost, participant count, net cost-per-participant, and the part time staff FTE’S hours/costs)
- E) How to go about projecting
- F) How often to project
- G) How often to check in with those projections
- H) Dive into “Basic Budget Worksheet”
- I) Dive into “Recreation Program Planning Worksheet”
 - a. An amazing tool
 - b. For one specific program
 - c. Shows those data points we collected from above (item D)
 - d. Compares the projected with the actual, and gives the calculated percentage
 - e. This tool will also show that program’s specific goals and measurable outcomes
 - f. Plus, a participant evaluation tool

QUESTION AND ANSWERS (15 Minutes)