Appendix 6.3
Parks & Community Services Program Evaluation Tools

ANNUAL/SEASONAL PROGRAM SUMMARY *Analysis by Instructor, Contract or Budget Area*	

Division/GL Account Name:	**Date:**
Program Title:	**Evaluation Period:**
Originator:	**Program Manager:**

I. Description (provide more in depth description than the Brochure)

II. History

III. Program Analysis:
    A. Registration Number Comparison

IV. Budget Analysis:
    A. Direct
    B. Indirect
    C. Operating
    D. Fully Loaded

V. Benefit & Value:
    A. Master Plan Goals
    B. Strategic Plan Goals
    C. Council Priority

VI. Trends & Observations:
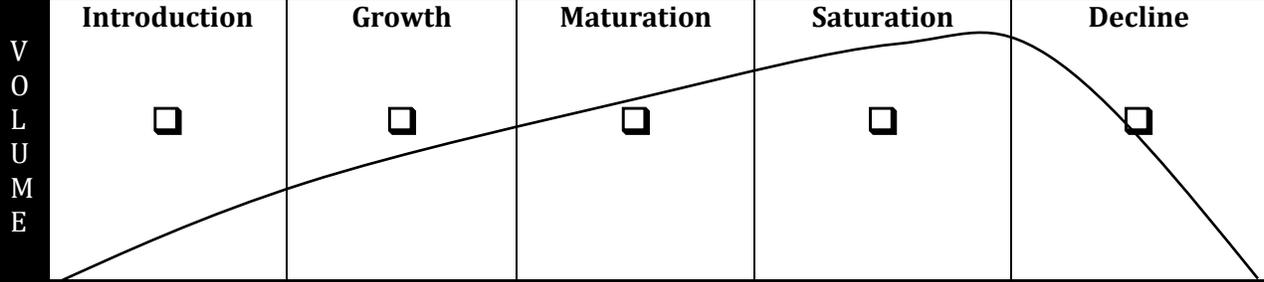   A. Trends within the program (Not National or State Trends)

VII. Evaluation Results/Customer Recommendations:
    A. Department/Division Feedback (Frontline, Facilities, Public Services)
    B. Attach back-up documents as needed

VII. Future Recommendations:
    A. Program Life Cycle
    B. Budget/Community Impact

Program Life Cycle Audit: (If NEW program, skip this section)				
Introduction	**Growth**	**Maturation**	**Saturation**	**Decline**

V O L U M E

❑ ❑ ❑ ❑ ❑

Program Stage Indicators – Use to Identify Life Cycle Stage and Develop Potential Interventions/Program Termination Decisions				
Introduction	**Growth**	**Maturation**	**Saturation**	**Decline**
1. Staffing costs are High 2. Attendance and Service Hours are Low 3. Program enrollment is one half or below capacity 4. Average costs per participant is high	1. Enrollment, service hours, and attendance increase substantially 2. Average cost per participant decreases 3. Revenue increases 4. Enrollment is at 75% or capacity	1. Revenue increases slow 2. Average cost per participant decreases 3. Enrollments begin to decline	1. Revenue declines 2. Average cost per participant increases 3. No new participants Staff/participant ratios increase	1. Staff hours increase; staff/participant ratios increase 2. Revenue decreases significantly 3. Attendance drops dramatically (below 25% of capacity)

Program Life Cycle Audit Results

Action plan to move program into maturation/saturation:

If program is now in "decline," does evaluation support program termination? ❑ Yes ❑No ❑Other (Explain)

Staff Name, Title	Program Manager	Date Completed:

Review Notes:

SAN RAMON PARKS & COMMUNITY SERVICES

Creating Community through People, Parks, Partnerships & Programs

FEE CLASS SUMMARY

Analysis by Instructor, Contract or Budget Area

SECTION I – BASIC INFORMATION

Division/GL Account Name:	**Number of Distinct Activities:** *(Should equal or exceed the number of courses budgeted)* **Budgeted:** **Offered:**
Number of Courses Cancelled:	**Percentage of Classes held***: (P&CS Benchmark 75%)*
Participation: *(Ratio residents to non-residents 8 to 1 or higher)* *Residents:* *Non-Residents:*	**Number of waitlisted potential participants:** *(Waitlists should not be greater than the minimum number for a course per course.)*
Number of courses added because of waitlists: *(Benchmark is one added course when waitlist equals minimum for a course.)*	

Revenue: Attach Course Revenue Report or Course Revenue report exported to EXCEL (if courses include 'in house' programs): *(Benchmark of 50 – 59% is P&CS cost-recovery benchmark – Net revenue/total revenue)*				
Total Revenue:	**Net Revenue:** *(after instructor costs/direct costs)*	**Percentage:**	**Net Revenue/Total Revenue:**	

Distinct Activities participants have been evaluated by instructor at least once per year: *Attach evaluations*
All participants have been surveyed to determine interest in the Department offering a new course, or modifying existing course, and what the new course they would like us to offer is: *Attach survey results*

Recommendation:	Sessions offered ☐ 1 ☐2 ☐3+	Customer satisfaction:
	Location *(any modifications)*	Identified issues to resolve *(attach narrative)*
	☐Nurture/grow program	☐Discontinue
Market Price:	**What would the market price be for this program? _____** **Step 1: Income= (Production cost/Production %)** **Formula Price = (Income/Projected Registrations)** **Step 2 Nearest Price Break** **Step 3: Consider best price in price break range**	

What would the market price be for this program? _____

Step 1: Income= (Production cost/Production %)
     Formula Price = (Income/Projected Registrations)
Step 2 Nearest Price Break
Step 3: Consider best price in price break range

Price Breaks for Programs:				Pricing Rules
$10	$40	$80	$300	• Use 5's and 9's
$20	$50	$100	$400	• Stay close to price break
$25	$60	$150	$500	• Do not put decimals and zeros after the price
$30	$75	$200	$1,000	• Avoid round numbers

SECTION II - QUARTERLY PROGRAM STATISTICS

PROGRAM AREA:
Fiscal Year:

DESCRIPTION	Last Years ACTUALS	QTR 1 Current Projected	QTR 2 Current Projected	QTR 3 Current Projected	QTR 4 Current Projected	Total Projected
GL/Division_____						
Participants						
Classes offered						
Classes held						
Classes cancelled %						
Waitlisted Part.						
Total Revenue						
Ave. Enrollment						
Ave. Course fee						
Program Maximum						
Program Minimum						

Last Years Actuals figures is arrived at running the Program Status Reports from the last fiscal year
Current projected by quarter is taken from H TE Budget worksheets and recorded by session

Current Year Actuals	7/1-9/30	‖	10/1-12/31	‖	1/1-3/31	‖	4/1-6/30	‖	
		‖		‖		‖		‖	
	1ST	‖	2ND	‖	3RD	‖	4TH	‖	
	QTR	‖	QTR	‖	QTR	‖	QTR	‖	**TOTALS**
GL/Division_____		‖		‖		‖		‖	
Participants		‖		‖		‖		‖	0
Classes offered		‖		‖		‖		‖	0
Classes held		‖		‖		‖		‖	0
Classes cancelled %	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!
Waitlisted Part.		‖		‖		‖		‖	0
Total Revenue		‖		‖		‖		‖	$0.00
Ave. Enrollment	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!
Ave. Course fee	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!	‖	#DIV/0!
Program Maximum		‖		‖		‖		‖	
Program Minimum		‖		‖		‖		‖	

SECTION III – PROGRAM LIFE CYCLE

Program Life Cycle Audit: (If NEW program, skip this section)				
Introduction	**Growth**	**Maturation**	**Saturation**	**Decline**
❏	❏	❏	❏	❏

VOLUME

Program Stage Indicators – Use to Identify Life Cycle Stage and Develop Potential Interventions/Program Termination Decisions				
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Program Life Cycle Audit Results
Action plan to move program into maturation/saturation:
If program is now in "decline," does evaluation support program termination? ❏ Yes ❏No ❏Other (Explain)

_____   _____   _____
Staff Name, Title   **Program Manager**   **Date Completed:**

Review Notes:

SAN RAMON PARKS & COMMUNITY SERVICES
Creating Community through People, Parks, Partnerships & Programs

SPECIAL EVENT/ONE TIME PROGRAM EVALUATION

SECTION I – BASIC INFORMATION

Quarter/Year:	Division:	Event:
Event Date:		Originator:
Event Location:		Event Times:

	This Year	Last Year		This Year	Last Year
Total Attendance:			**# of Cancellations (if any):**		
Revenue Projected:			**Revenue Received:**		
Expenditures Projected:			**Actual Expenditures:**		

Event Goals:	Intended Audience/Age Group:
Event Benefits:	Event Partners:
Describe the Event Components (program/schedule, entertainment, refreshments, decorations, staffing and volunteers) attach event timeline or program if applicable:	
Please describe how the event met or did not meet the Master Plan Goals:	

Event Feedback Narrative

Please provide narrative from the feedback received about the event from the following groups. If a group is not applicable to your evaluation please mark as N/A. If your information was obtained via survey or other tool, please attach and provide a summary below.

Customer Feedback:

Customer Service/Frontline:

Facilities:

Other City Departments:

Stakeholders:

Partners:

Program Manager/Division Manager:

Volunteers/Other Staff:

Others (please identify):

Evaluation Summary

Volunteers/Staff	Were there enough volunteers and staff to handle the event? ☐ YES ☐ NO
	Were they properly trained to handle their duties? ☐ YES ☐ NO
	If NO, please explain:

Budget	Were there sufficient funds? ☐ YES ☐ NO If not, in what area were funds lacking and by how much?

Market Price:	What would the market price be for this program? _____
	Step 1: Income= (Production cost/Production %)
	Formula Price = (Income/Projected Registrations)
	Step 2 Nearest Price Break
	Step 3: Consider best price in price break range

	Price Breaks for Programs:				Pricing Rules
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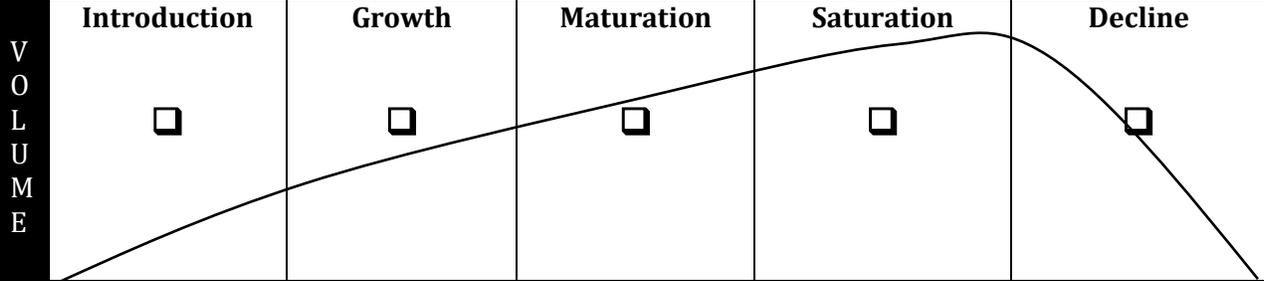|	
Facility	Did the facility, field, park and/or room work for this program/event? ☐ YES ☐ NO. If yes, please comment.
	What future facility recommendations would you have for this program/event's success?
	Was this program/event an appropriate use of the space? ☐ YES ☐ NO. If yes, please comment.

Marketing	Please describe the events publicity plan (attach flyers, press releases or link to the G drive files)
	Was the marketing for the event adequate? ☐ YES ☐ NO?
	If no, please explain why:
	If yes, are there any marketing changes or additions to improve or grow this event:

Program Life Cycle Audit: (If NEW program, skip this section)					
V O L U M E	**Introduction** ❑	**Growth** ❑	**Maturation** ❑	**Saturation** ❑	**Decline** ❑

Program Stage Indicators – Use to Identify Life Cycle Stage and Develop Potential Interventions/Program Termination Decisions				
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Program Life Cycle Audit Results

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BUDGET WORKSHEET

Event Name Expenditures GL#			
Professional Services 2010	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Rentals 2710	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Other/Marketing 2910	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Publications 3410	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Temp Salaries 1050	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Rec supplies 3510	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -

Event Name Revenues GL#			
	Proposed	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -
Complete Below Upon Request			

Public Works Expenditures	**Proposed**	**Actual**	**Difference**
TOTAL	$ -	$ -	$ -

Police Department Expenditures	**Proposed**	**Actual**	**Difference**
TOTAL		$ -	

Total Full Time Salaries PCS		$ -	
Total Actual Expenditures PCS	$ -	$ -	
Total PW Expenditures		$ -	
Total Police Expenditures	$ -	$ -	
Total Expenses		$ -	

CORE SERVICES CATEGORIES

Rank proposed class/program/event below:

☐ **1. CORE SERVICES: Those services that are "Must Haves." To lose them would have negative consequences to the City's   health, safety, and vitality.**

- **Safety**
- **Security**
- **Reduce Crime**
- **Reflects a large City investment**
- **Represents a service that cannot be duplicated**
- **Represents large segments of the community**
- **A City Council Priority**

☐ **2. IMPORTANT SERVICES: Those services that define the San Ramon Community – Services that the City "should have".**

- **Services that support, expand or enhance Core Services**
- **Services that provide community wide benefits (i.e. youth at risk, senior services, youth programs and youth centers, 4th of July and Art & Wind)**
- **Services that recover an approved percentage of operating costs or are funded through grants, sponsorships or other sources**
- **Services that provide important social value to the community**

☐ **3. DISCRETIONARY SERVICES: Services that the City "may" provide when funding or revenue exists to offset the cost of   operating those services. These are *added value services* to the residents – over and above what is *expected* by residents.**

- **Services that provide individual/personal benefits for residents (i.e. enrichment classes for adults, tennis, golf, computer classes, etc.)**
- **Services that recover 100% of direct costs**
- **Services that enhance or expand Category #2 Services**

BENEFIT PYRAMID

Rank proposed class/program/event below:

☐ 1. **MOSTLY COMMUNITY BENEFIT: (ALL TAXPAYERS) Benefits the community as a whole, enhances basic quality of life for all residents, address social needs, may increase property values and public safety.** Ex. Participatory fountain/spray park

☐ 2. **CONSIDERABLE COMMUNITY BENEFIT:** Ex. Pool

☐ 3. **INDIVIDUAL/COMMUNITY BENEFIT (Balanced beneficiaries):** Ex. Swim lessons

☐ 4. **CONSIDERABLE INDIVIDUAL BENEFIT:** Ex. Swim team

☐ 5. **HIGHLY INDIVIDUAL BENEFIT:** Ex. Elite swimming or diving team

Staff Name, Title	**Program Manager**	**Date Completed:**

Review Notes:

Title: Program, Class, Service —

Services Assessment Matrix		(II) Financial Capacity Economically Viable		(II) Financial Capacity Not Economically Viable	
		(IV) High/Large Coverage (Lots of Competition in the Tri-Valley)	(IV) Limited/Low Coverage (Little to no Competition in the Tri-Valley)	(IV) High/Large Coverage (Lots of Competition in the Tri-Valley)	(IV) Limited/Low Coverage (Little to no in the Tri-Valley)
(I) Good Fit (With values / Mission) List Master Plan Goal # _____ _____ _____ _____	(III) Strong Market Position (Has Community Support -	Maintain Market Position 1	Move Onward with Market Position 2	Partnering / Complementary Development 5	Service/Offering that requires a high level of Subsidy 6
	(III) Weak Market Position (No support from the Community—community does not think we should do it)	Eliminate (4) 3	Invest, Collaborate (3) Or Eliminate (4) 4	Collaborate (3) Or Eliminate (4) 7	Collaborate (3) Or Eliminate(4) 8
(I) Poor Fit (Does meet mission / values	Eliminate (4)				9

(V) Define Program, Class or Service on Page 2