Program-Planning in Recreation

Program-Planning in Recreation

A 12-STEP Guide

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OpenAI. (2024). *ChatGPT* (4) [Large language model]. https://chat.openai.com

Prompt: Create an image of a diverse group of people of different ages and types enjoying various outdoor activities in a park. The scene should include children playing with a ball, adults jogging and walking dogs, teenagers skateboarding and listening to music, families having picnics, and elderly people sitting on benches and feeding birds. The park is lush and green with a pond, ducks, footpaths, trees, and benches.

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Introduction

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> "*Recreation programming is designing, staging, and delivering leisure opportunities by intervening in social interactions; by manipulating and creating environments in a manner that maximizes the probability that those who enter them will have the leisure experience they seek*" (Rossman & Schlatter, 2015, p. 6).

Recreation programming happens everywhere in Canada and is considered an essential skill in the field of Parks, Recreation and Leisure Services. No matter where you go, you will find parks, recreation, leisure and tourism professionals creating and facilitating dynamic, client-centered, engaging programs for all ages – from the very young to the very old. Recreation programming can be found in municipally-run Community Recreation Centres, Long Term Care homes, at children's summer camps, in nonprofit organizations, retirement homes, libraries, eco-tourism outfits, healthcare settings, wilderness therapeutic programs...and beyond.

The venues and programs vary widely, from indoor-adventure facilities offering structured trampoline and high ropes experiences to outdoor guided sea-kayaking adventures on the open ocean; from seated chair yoga in a multi-purpose room to exploring the unstructured delights of a Snoezelen room in a therapeutic recreation facility, recreation programming is everywhere!
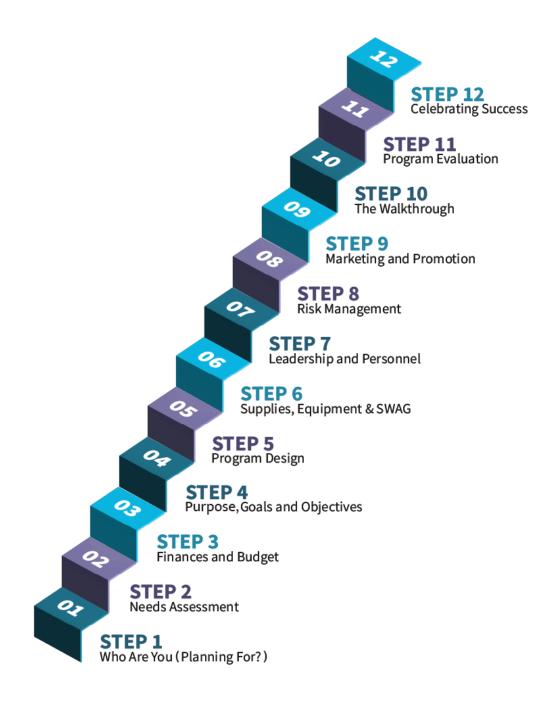
The purpose of this OER is to provide Recreation & Leisure Services students an introduction to the art of recreation-based program planning. By following 12 detailed 'STEPS', students will learn how to bring a recreation-based program or event to life and how to take a program from the dreaming "idea" stage to reality.

This textbook contains introductory-level information, principles and fundamentals of recreation program planning to equip the novice program planner with the tools necessary to dream up, design, deliver and evaluate quality recreation programs that will benefit the participants and allow all involved to "re-create" and improve participants' leisure experiences,

Program-planning skills develop over time. The more you do it, the better you get at it. It all starts with learning how to use a step-by-step process to design, organize, administer and evaluate quality, meaningful recreation and leisure activities. Let's go!

The 12 STEPS

In the recreation field, programmers can think of program and event development as a staircase, with each STEP representing a specific aspect of the program or event planning process. Except for STEPS 1 and 2, completing one STEP is not a prerequisite to working on the next. Programmers will often find themselves running up and down the staircase as required, building and flushing out the remaining STEPS as the program plan unfolds.

STEP 12
Celebrating Success

STEP 11
Program Evaluation

STEP 10
The Walkthrough

STEP 9
Marketing and Promotion

STEP 8
Risk Management

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Leadership and Personnel

STEP 6
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STEP 5
Program Design

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Purpose, Goals and Objectives

STEP 3
Finances and Budget

STEP 2
Needs Assessment

STEP 1
Who Are You (Planning For?)

"The 12 Steps for Program Planning" by Freddy Vale, CC BY-NC-SA 4.0

STEP 1: WHO ARE YOU (PLANNING FOR)?

Chapter Overview

1.0 Learning Objectives

Learning Objectives

By the end of STEP 1, the student will be able to:

- *Describe* the overarching goals of recreation programming (Canadian Perspective) as they relate to Greenleaf's Servant Leadership Model (1970)
- *Define* the terms "Mission," "Vision," and "Values" as they pertain to organizational philosophy
- *Recognize* how recreation professionals create and adapt programming approaches and content to align with an Agency's specific Mission, Vision and Values
- *Explain* the importance of getting to know client characteristics and demography before planning any program

Imagine you are a recreation employee who has just been charged with developing a new, innovative recreation program at your place of work. How do you get started? What things need to be considered? Starting at STEP 1 of the 12-STEP program-planning framework will simplify the process. Before you begin planning any program, you must thoroughly understand your participant audience and who exactly you are planning the program for. This is STEP 1.

Before diving into the process of creating any recreation or leisure-based program or event, STEP 1 of the Program-Planning process requires the program planner to thoroughly familiarize themselves with the population they are being asked to serve, the Mission, Vision and Core Values of the larger organization being programmed for, and the available places and spaces that will be available to accommodate the program in question. Novice program-planners and recreation leaders often quickly dive into the idea stage for a new program or event without first considering precisely *who they are programming for and why*.

The best recreation programs serve the people participating and can inspire, enlighten, engage, and improve the participants' lives. After all, the word "recreation" itself implies some degree of *re-creating* reality – providing renewal or refreshment through experiences that provide enjoyment and personal growth for all who participate.

> **Recreation** is the experience that results from freely chosen participation in physical, social, intellectual, creative and spiritual pursuits that enhance individual and community wellbeing.
>
> *(Canadian Parks and Recreation Association/Interprovincial Sport and Recreation Council, 2015).*

With this definition in mind, the program-planner should adopt a "Servant-Leadership" mindset that places the programmer squarely in service of the client's wellbeing through the effective creation an facilitation of recreation-based programs and activities.

1.1 A Servant Leadership Philosophy

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> *The great leader is seen as Servant first... (Greenleaf, 1970, as cited in Greenleaf, 1991).*

Whether it's organizing a trapeze class, a Senior's Trivia night, a cooking and nutrition workshop, a pickleball game, a hiking club day trip, St. Patrick's day, or a multi-day back-country kayak excursion, recreation professionals have opportunities to create rich, meaningful programming experiences for people of all ages and stages. The tenets of Greenleaf's Servant Leadership model (1970) are derived from recognizing the benefits of selfless, 'other-centered' leadership. These form a foundation for excellence in recreation-based programming.

> ***Servant Leadership*** *is a non-traditional leadership philosophy, embedded in a set of behaviors and practices that place the primary emphasis on the well-being of those being served (greenleaf.org).*

A summary of Spears & Lawrence's (2002) ten key characteristics of Servant Leaders follows. All ten have a great degree of relevance and relationship to excellence in program-planning:

1. **Listening:** Servant Leaders listen intently to others and seek to identify and clarify the will of a group when faced with making decisions. Additionally, Servant Leaders demonstrate a deep commitment to getting in touch with one's "inner voice" (p.5) and ensure there is adequate time to not only listen but also reflect on what was heard.

2. **Empathy:** Servant Leaders strive to understand and empathize with others and believe that people need to be accepted and recognized for their special and unique spirits. The most successful Servant Leaders are those who have become skilled empathetic listeners.

3. **Healing:** One of the greatest strengths of a servant-leadership approach is its ability to heal oneself and others. Many people have broken spirits and have suffered a variety of emotional hurts. Servant-leaders recognize that they have an opportunity to "help make whole" those with whom they come in contact.

4. **Awareness:** General awareness, especially self-awareness, helps strengthen the servant-leader. Awareness also aids one in understanding issues that involve ethics and values. In making a commitment to fostering awareness, you never know what you are going to find!

5. **Persuasion:** Servant-leaders rely on persuasion, not positional power, to help make decisions in an organization. Servant-leaders are effective at building consensus (agreement) within groups. The servant-leader seeks to convince others of an idea or activity rather than coerce (force) compliance.

6. **Conceptualization:** Servant-leaders tend to nurture their abilities to "dream great dreams". This means thinking beyond day-to-day realities and leaning into what is possible...becoming a visionary. "Servant-leaders are called to seek a healthy balance between conceptual thinking and a day-to-day focused approach" (p.7)

7. **Foresight:** Closely related to conceptualization, Servant-leaders have the ability to foresee the likely outcome of a situation. Foresight enables the Servant-leader to understand the lessons from the past, the realities of the present and the likely consequence of a decision for the future. Servant-leaders have keenly intuitive minds!

8. **Stewardship**: In simplest terms, stewardship is the act of taking care of someone or something. Servant-leaders are concerned with acting in trust for the greater good of society. Stewardship "...assumes first and foremost a commitment to serving the needs of others" (p.8).

9. **Commitment to the Growth of People:** Servant-leaders believe that people – all people – have intrinsic value. As such, the Servant-leader is deeply committed to the growth of each and every individual" (p.9) within their follow-ship. The Servant-leader recognizes the tremendous responsibility to do everything within their power to nurture a person's personal, professional and spiritual growth.

10. **Building Community:** Servant-leaders recognize that many people feel disconnected or in some way apart from, rather than a part of, their communities. They, therefore, seek to identify some means for building a sense of community and belonging among the group members they work with and the institutions they work for.

A Servant-Leadership mindset provides a foundation on which rich, client-centered programs and events can be based. Although the age, stage, ability and nature of a given program or event will inevitably impact programmatic decisions, if the novice programmer begins with a Servant-leadership approach, the result is almost bound to be successful.

1.2 Agency Mission, Vision and Values

MISSION   VISION   VALUES

"Mission, Vision, Values" by Freddy Vale, [CC BY-NC-SA 4.0](#)

When asked to create a recreation-based program for an agency, organization or business, it may be difficult for the novice program-planner to know where to begin. A great place to start is with the agency's stated Mission, Vision and Values. These will provide insight into the agency's identity and what they are all about. It is important to note that not every organization has a Mission statement, a Vision Statement, or articulated Core Values. Some organizations, especially those in the non-profit or charitable sectors, have all three. Some have just a Mission, others just Core Values. Every organization is different!

The team-building day you design for a group of executives from the Ivey Academy whose Mission states, "We develop leaders who think globally, act strategically, and address critical issues facing organizations and society, through impactful research and transformative learning experiences" (Ivey Business School, n.d., para. 3) is going to be vastly different from the team-building day you design for a group of counsellors at the Regional HIV/AIDS Committee, whose Mission states, "We are community-inspired and dedicated to positively impacting the lives of individuals and diverse communities living with, at-risk for or affected by HIV/AIDS and Hepatitis C." (Regional HIV/AIDS Connection, 2024, para. 1).

Terms to Learn

A Mission Statement conveys an organization's philosophy or purpose - what they stand for, how they serve their stakeholders, and sometimes even their "why" - in a concise phrase or a few short sentences. The Mission captures the essence of an organization in the present moment.

A Vision Statement is a short statement - usually no more than a sentence or two - that conveys an organization's hopes for the future. A well-crafted Vision Statement serves as a guide or pathway to inspire and motivate the employees to work toward the organization's greater goals.

Values, aka "Core Values" are the essential, 'root' beliefs that anchor an organization and set it apart from others. They are the philosophical and principle perspectives that guide the behaviour of an organization's employees, and the manner in which the organization interacts with others.

Example Mission Statements:

"Provide pathways to success, an exceptional learning experience and a global outlook to meet student and employer needs".
Fanshawe College, London, ON (2024)

"To be a catalyst for girls empowering girls"
Girl Guides of Canada (2024)

"To empower young people and communities worldwide to build a just, sustainable, equitable and inclusive world, where every person can thrive in body, mind and spirit".
(YMCA of Southwestern Ontario, 2024)

Example Vision Statements:

"Unlocking potential"
Fanshawe College, London, ON (2024)

"A better world, by girls"
Girl Guides of Canada (2024)

"To create 'Resident-Centric' environments where our seniors are inspired to experience fulfillment – whatever that means to them".
(Verve Retirement Living, 2024)

Example Core Values:

Integrity, Passion for Excellence, Collaboration, Flexibility, Empathy
(Verve Retirement Living, 2024)

Caring, Respect, Honesty, Responsibility, Inclusiveness
(YMCA of Southwestern Ontario, 2024)

"Focus on students, involve our communities, utilize resources wisely, embrace change, engage each other"
Fanshawe College, London, ON (2024)

In parks, recreation or leisure-based organizations, a well-defined Mission, a focused Vision, and well-articulated Values can be the jumping-off point for programmers as they begin considering how or what to program. Embedded in an organization's Mission, Vision and Values statements are its key hopes and dreams, the organization's mandate (why it exists in the first place), and its philosophy pertaining to how it serves its clients, constituents and stakeholders.

The job of the program-planner is to keep these ideals front and center when making programmatic decisions for a new event or program. Doing so will preserve the integrity of the programming process, and ensure that the resulting program or event is nicely aligned and congruent with the organization's deeply held values.

1.3 Individuals Served

After familiarizing yourself with an agency's Mission, Vision and Values, the next step is to find out more about the population you are planning to serve with your program. Basic factors to consider include client age, their maturity, prior experience or skill level in the program area (if any), gender, primary language spoken, relevant cultural traditions and customs, and the general cognitive, physical, mental, and emotional characteristics typical of the group. Thus a 1-hour "golden oldies" sing-a-long at a Long Term Care home serving predominantly older adults with dementia or Alzheimer's disease is going to look vastly different than a 2-hour homework club ASP (After-School Program) at the local Boys & Girls Club serving children in Grades 4-7.

Ages and Stages

Program-planners (and leaders) need to be responsive to their program participants by developing programs uniquely suited to the "age and stage" of their participants. Based on participants' cognitive, emotional and physical abilities will have great implications for how a program is designed. The typical characteristics of a given group will greatly impact the decisions programmers make on the content of a program, the level and intensity at which it is programmed, and the program's format and manner of delivery.

Learn More

Below is a table that succinctly captures the various life stages and age groups, from early childhood (4-5 years) to senior (65+ years):

Age/Stage	Physical	Cognitive	Social	Implications for Programmers
4-5: Early Years – Note: In the very early years (babies, toddlers), recreation is most often provided by parents or caregivers so not described here Ministry of Education (a) (2024)	Run, hop, skip, stand on one leg, jump, dress themselves, follow-the-leader, walk up and downstairs, hold a paintbrush or pencil, can copy basic pictures and shapes. Love to dance and move!	Intense curiosity about the world around them; love to explore. Can speak clearly, use basic grammar conventions, understand stories and make-believe.	Enjoy cooperative play with other children, may have imaginary friends. May or may not be okay with sharing; can become competitive. Attention span about 5-10 minutes.	Provide lots of supervision, a lot of variety in the activities offered. Provide balance between high-energy and low-energy activities. Use simple speech and provide few rules. Balance activities that develop gross and fine motor skills. Get outside (safely) in all weather.
6-9: Middle Childhood Ministry of Education (b) (2024)	Physically energetic and focused on gross motor skills: enjoy climbing, running, hopping, skipping, dancing, running. May tire easily and need frequent breaks.	Find it tough to concentrate on more than one thing at a time; don't use a lot of logic – Imagination and make-believe play are still the thing.	Impulsive, low emotional control. Like playing with other children but can be highly sensitive in conflicts. Can take turns. Some will have a well-developed sense of fairness. Impressions of socially imposed gender roles are forming.	Continue balancing activities that develop gross and fine motor skills, encourage free and risky play, provide activities for inter-generational play, and continue close supervision. Rules (e.g., for games) can be more structured. Encourage and structure time for nature play.
10-12: Older Childhood Aptos et al., (2016)	Physical coordination is improving; can sustain longer periods of physical activity. Understand principles of cause and effect. Ability to acquire skills is high; enjoy experiential (hands-on) learning. Onset of puberty (earlier in girls), bodies are changing.	Heightened awareness of self-concept. Increased ability to resolve conflicts, but feelings can run high, and criticism from adults is generally not well-received due to emotional sensitivity. Declared interest in arts, sports and hobbies begins.	Socially imposed gender roles have formed. Children generally do not wish to be embarrassed or singled out by adults; a desire for independence from adults is developing. Social cliques form; some can experience feelings of isolation.	Offer opportunities for pro-social skill development through group activities and outdoor play. Encourage trying new things and risk-taking. Rules can be more complex. Maintain close (but subtle) adult supervision; perceived gender norms may play a role in engagement.

Age/Stage	Physical	Cognitive	Social	Implications for Programmers
13-15: Adolescence Palinkas et al., (2022)	Significant physical growth and development; puberty well-established; sex characteristics continue to develop. Height and muscle mass increases. Can be significant physical differences between individuals of the same age.	Energy has evened out; less impulsive, more measured approach to activities. Personal interests begin to deepen. Increased ability to empathize & see others' points of view. Problem-solving and conflict-resolution skills increase.	Feelings of inclusion and belonging play key roles in maintaining a healthy self-image. Increased dependence on friend group for identity and self-esteem. Emotional states and moods often in flux according to hormones.	Where possible, use a participative leadership style to involve participants in decision-making. Get outside. Program unique, exciting, novel activities; structure group activities that focus on teamwork and communication.
16-20: Late Adolescence Aaron et al., (2022)	Many have reached full adult height. Puberty and sexual maturity still underway. There can still be significant physical differences between individuals of the same age. Physical coordination generally more refined; excellent ability to acquire and refine physical skills. Physical competence increases.	Curiosity about the world expands, personal interests become more refined, deeper development of problem-solving skills and abstract thinking. Many crave adventure and risk; some will be drawn to engage in unhealthy risk-taking.	Social groups and peer relationships remain of great importance; sexual maturity continues; romantic relationships form. Increased need for independence from adults. Experimentation with different friend groups and social circles.	Continued use of a participative leadership style involves participants in decisions. Offer a variety in recreation offerings: special events, sports, outdoor recreation, arts. Provide opportunities for group and team activities that promote belonging but also time for quiet self-reflection.
21-30: Young Adulthood Calgar et al., (2009)	Fitness and physical abilities peak; participation in team sports often wanes as post-secondary school, travel, career or family obligations get established.	Executive functions (focus, memory, self-regulation, flexible thinking) become refined. Experiences are processed as learning opportunities; intellectual development is high.	Often stability-seeking, as self-identity becomes more apparent, older individuals may appear to settle down. Multiple social or friend groups from work, school, or community can form.	Provide recreation opportunities that foster social connections and friendships; be aware when planning the timing of programs that some will have work commitments and young families to consider. Provide hobby or interest-specific programming.

Age/Stage	Physical	Cognitive	Social	Implications for Programmers
31-50: Middle Adulthood Freysinger, (1987)	Often characterized by a general slowing down of physical recreational activity due to family or work obligations. Some individuals may become deliberately more physically active as a way of maintaining good physical health. Time spent on hobbies and specialized recreational interests increases in this stage.	For those who enjoy being challenged intellectually, a desire for learning may emerge, either through workshops, hobbies or further education. Creativity, problem-solving, and understanding abstractions are at their peak. For some, this stage triggers an increase in community engagement and a desire to give back.	Horowitz (2022) calls Middle Adulthood the sandwich years, as those in this stage are in the middle if caring for both aging parents while still raising children. Many in this age bracket have a strongly developed work or family identity. Work and family-related stress can be significant. Those without children may have a strong social emphasis on a romantic partner or friend group.	Recreation programs geared to mental and emotional wellness are popular with this age group, as are fitness programs designed to help maintain healthy body weight. Events like art exhibits, music festivals, trade shows and special interest events (e.g., the Western Fair Wine & Food Show) tend to be popular. Provide opportunities for intergenerational activities, couples-based programs and singles.
51-64: Older Adulthood Sweeney & Zorotovich, (2018)	Changes in physical abilities become evident. Eyesight, muscle strength, flexibility and metabolism tend to diminish and slow, and weight gain is common. For women, menopause and its related physical changes occurs. The development of diabetes, heart disease and cancers can affect people frequently at this life stage.	Individuals in this age group demonstrate strong cognitive and intellectual skills and abilities. There is an increased awareness of global and social issues as people in this age group consider their own mortality. There may be a decline in short-term memory.	Social relationships take on increased significance as people in this age group as they approach retirement age. Family (direct, extended) become increasingly important. Mortality-related midlife crises may arise resulting in stress that can trigger sudden, radical changes in behaviour.	Provide programs for groups and individuals and inter-generational activities. Focus programs on themed special events and hobbies, couples and small friend groups. Programs geared to mental and emotional wellness are popular with this age group, as are the addition of more flexible time periods for recreation.

Age/Stage	Physical	Cognitive	Social	Implications for Programmers
65+: Seniors DeCarlo (1974)	Great variation exists in this age group. Some people exhibit energy and vitality, while others seem diminished and frail. Physical changes in eyesight, hearing, balance, physical strength, ability to sleep, and cognitive ability inevitably change, but many seniors remain sharp well into old age. Decrease of bone mass and strength can result in bones fracturing more easily. Loss of balance (and subsequent falls) is also commonly seen in people in this age group.	May see cognitive decline and the impact of memory loss and dementias through diseases like Alzheimer's, although some stay mentally acute through end of life. Some seniors, especially those on multiple medications, can be negatively impacted by the side effects of medications taken to regulate heart irregularities, blood pressure, etc. Many seniors will enjoy storytelling and reminiscing. Depression is quite common among people in this age group.	With the deaths of spouses and friends, the risk of isolation and loneliness is high. Seniors of all ages have a strong need for social activities that foster relationships and keep them connected to others. Hobbies, social activities, inter-generational activities and travel are especially popular with younger seniors. For the elderly (80+) spending time with family and/or receiving social supports is key to maintaining quality of life.	Program for small groups and keep programs short and sweet. Offer a wide variety of program choices that enhance the physical, mental, social, intellectual, emotional and spiritual domains. Be prepared to modify activities to accommodate those with mobility issues and those in cognitive decline. Provide programs that support hobbies and enjoyable pastimes. Provide comfortable programming outdoors when possible.

Download a PDF version of the table: Ages and Stages Table (PDF)

1.4 Places and Spaces

The final consideration of the program-plan pre-design phase is spatial requirements.

- What is a suitable venue or location for the program?
- What basic requirements does the program have to run? (Are multiple electrical outlets required? A sprung wood floor? An ample, obstacle-free outdoor space? A cozy room with tables and chairs? Excellent ventilation? A built-in sound-system? Access to a change-room?)

The physical environment must be suitable for the activity, program or event being held in that space. A pick-up basketball session cannot happen in a boardroom no more than a drum-making workshop can occur in the pool at the Community Center. Before starting on the next 11 STEPS in the program-planning process, the programmer needs to seek out the availability of suitable spaces for their program.

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1.5 Key Takeaways

Step 1 Key Takeaways

Incorporating the 10 Characteristics of Greeneaf's Servant-Leadership model (Spears & Lawrence, 2002) is intrinsic to excellence in program planning:

- Researching an organization's Mission, Vision and Values is essential before beginning the creative process of imagining a program or event to ensure alignment;
- Getting to know the characteristics of the population you are developing your program for (age, cognitive ability, physical abilities, unique characteristics) is absolutely crucial to its success and its ability to serve the clients' needs first;
- Ensuring you have a space available that will be suitable to host your program is important before you invest time and energy on developing a program idea only to realize you have nowhere to hold it.

If you have worked through the contents of STEP 1 and have satisfied all the questions from this STEP, you are ready to move on to STEP 2: Needs Assessment.

STEP 2: NEEDS ASSESSMENT

Chapter Overview

2.0 Learning Objectives

Learning Objectives

By the end of STEP 2, the student shall be able to:

- *List* the various ways in which a programmer can obtain information on the client
- *Locate* appropriate resources on the programming client (an individual, group or agency) in order to understand their recreation needs
- *Define* the idea of 'need' through the lens of recreation programming
- *Rationalize* why recreation, event and leisure programs must meet a client, Agency, or community need or want

> ...[M]ake sure that other people's highest priority needs are being served. The best test, and difficult to administer, is: Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? (Greenleaf, 1970, as cited in Greenleaf, 1991).

> "Needs are the gap between what is and what should be" (Edginton, et al., 2019, p.170)

Needs (noun): Circumstances in which something is necessary or that require some course of action...a thing that is wanted or required (Dictionary.com, 2024).

Once a program-planner has established the identity of the individual or group they are programming, it is time to determine their programmatic needs. Programmatic needs can vary wildly depending on the nature and characteristics of the individual client, client-group or organization. Using the participant-centered approach fostered through the application of the Servant-Leadership Model (Greenleaf, 1991), recreation program-planners are expected to design, deliver and evaluate engaging, meaningful programs and events that address a physical need, an emotional need, a social need, a spiritual need, a psychological need, or any combination of these!

Performing a needs assessment answers a couple of important questions: (1) "Why are we offering the programs and services we do, and should we be offering these?" and (2) "Does the creation of the proposed program or activity somehow serve the needs of the public or the organization, and will it have beneficial impacts and outcomes?" (Edginton et al., 2019, p.169)

Conducting an effective needs assessment allows organizations (and, by extension, the recreation staff) to make informed decisions when deciding which recreation programs and services to offer. Needs assessment allows for fulfilling programmatic and service gaps and practical short and long-range budgeting.

FOOD FOR THOUGHT: Need versus Want

Need: Something required for survival

Want: Something nice to have but not required for survival

It is important to note the difference between a programming need and a programming want.

A community might *want* a wave pool with multi-level water slides when what would serve their *needs* better might be a standard pool. Similarly, the staff of a retirement home may *want* a beautifully landscaped garden space complete with fountains and a koi pond, when what the residents *need* is a wheelchair-accessible path to be built through the existing garden, thereby increasing accessibility.

2.1 How Agencies are Meeting Needs

Non-profit Sector Organizations

Depending on the nature of the population or group, those served by nonprofit organizations often have specific needs that can be met or causes and initiatives that can be supported through that Agency's programs or events that have been designed especially for them.

Example 1: Fusion Youth Centre

Fusion Youth Centre (Ingersoll, Ontario) offers professional Recording Studio services, Video Production and ReBuildIT social enterprise programs to youth. These programs fulfill several different needs: The need for skill-building opportunities for youth aged 12-18, a need for funds to re-invest in youth-centered programs, and the need of the local community to have refurbished computers to purchase.

"Fusion Youth Centre" by SEontario [3:58] is licensed under the Standard YouTube License. *Transcript Available on YouTube.*

Example 2: YMCA Calgary YMAP Program

The YMCA of Calgary Alberta offers the YMAP (YMCA Achievement Program) in partnership with Immigration, Refugees and Citizenship Canada. Free of charge to newcomer high school youth and young adults (new immigrants, refugees, International students and second generation Canadians) from more than 50 countries, YMAP meets the needs of young people when it comes to language-learning, employability skills, financial literacy and health and wellness through community service experiences, field trips and volunteer opportunities, (YMCA Calgary, 2024).

"YMCA Achievement Program – 20yr Anniversary Celebration" by YMCA Calgary [9:21] is licensed under the Standard YouTube License. *Transcript available on Youtube.*

Private Sector Organizations

In the private sector, recreation-related businesses serve their clients by offering leisure, sport and amusement-based recreation activities and experiences, often aligning their offerings with current recreation trends in the community.

Example 1: The Factory Indoor Adventure Park

The Factory (London, ON) Indoor Adventure Park is a massive indoor entertainment complex boasting a "20,000 square-foot trampoline park, arcade, virtual reality, zip lines, and so much more". (The Factory, 2019).

Additionally, the Factory offers corporate events, kids' summer camps, PA Day programs, birthday parties and class trips, likely in response to an expressed need in the community for such services.

"The Factory" by The Factory [0:57] is licensed under the Standard YouTube License. *Music only.*

Example 2: East Park Golf Gardens

East Park Golf Gardens (London, ON) offers indoor and outdoor leisure activities, including an 18-hole golf course, mini-golf, a batting cage, a water park (complete with wave pool and water slides), an indoor rock-wall, a summer day camp, Go-Karts, an arcade and more (East Park, 2024). Designating itself "London's place to play" (East Park, 2024), co-owner and facility Manager Alon Shatil has changed and evolved East Park's offerings over the years in response to constituent needs and wants.

"East Park" by Tourism London [1:56] is licensed under the Standard YouTube License. *Transcript Available on YouTube.*

Public Sector Organizations

From recreation programs offered through a municipality's Parks and Recreation department to in-house therapeutic recreation programs offered to those living in a publicly-funded Long-Term Care home, public sector recreation answers the needs and requirements of those whose tax dollars fund their programs with a holistic view of serving the constituents through varied, quality programs.

Example 1: City of London Recreation & Sport

City of London Recreation & Sport (London, ON). Offering programs and courses year-round in everything from aquatics, fitness, technology, arts & crafts, dance, skating, sports, music and drop-in programs to leadership training, First Aid training, writing, cooking and Senior's programs (City of London, 2024), London's municipal recreation and leisure options are plentiful. Varied enough to meet the recreational needs of stakeholders of all ages, London prides itself in being "A respected and inspired public service partner, building a better city for all" (City of London, 2024).

Note: This is a short clip of the relevant piece of a longer video

"City of London – At Your Service" by CityofLondonOntario [3:35] is lice.nsed under the Standard YouTube License. *Transcript Available on YouTube*

Example 2: Dearness Home Adult Day Programs

Dearness Home Adult Day Programs (London, ON) offer drop-on programs for Seniors in order to "give

caregivers a break" (Dearness, 2024, :20-22) while enriching the lives of the clients through "fun and friendship" (Dearness, 2024, :22-26). By offering safe, structured Seniors Day Programs, Dearness Home is meeting the needs of tired family members by easing the caregiver fatigue and burnout often experienced by those caring for an elderly family member at home.

"City of London – Dearness Home Adult Day Program and Wellness Centre – London, Ontario" by SWCCAC [1:44] is licensed under the Standard YouTube License. *Transcript*.

2.2 Benefits of Recreation and Leisure Programs

In 2015, the Interprovincial Sport and Recreation Council and the Canadian Parks and Recreation Association created a framework for Recreation in Canada. Contained within this document were 5 Benefits of investing in Recreation.

The evidence on the benefits of recreation and exposure to nature suggests that recreation and parks can address existing challenges with policies and practices that can:

1. Enhance Mental and Physical Wellbeing:

Public recreation and parks services have an important role in enhancing physical activity, which in turn, is a critical factor in improved physical and mental health. Increased physical activity levels are associated with the presence of trails for walking, hiking and cycling, and organized events, including sport competitions and other attractions. For children, the presence of a playground within a nearby park is significantly associated with enhanced levels of physical activity. Among all ages, recreational experiences involving physical activity facilitate the maintenance of healthy weights, and thus a reduction in health care costs.

Participants in recreation report improvements in mental wellbeing, including increased self-esteem and life satisfaction. Recreation provides opportunities for personal growth and development for people of all abilities and can be especially helpful to people living with disabilities.

2. Enhance Social Wellbeing:

Participation in recreational experiences is shown to enhance social wellbeing. For example, participation in after-school recreation programs provides many developmental opportunities for children and youth. For both children and adults, recreation can facilitate and support social relationships – through clubs, social organizations, participating on a team or making a new friend. Among youth, recreation can help decrease anti-social behaviours.

3. Help Build Strong Families and Communities:

Recreation can be an important vehicle for promoting family cohesion, adaptability and resilience. Culture and recreation help build social capital in the form of arts, recreation and parks programs, and community celebrations, such as festivals, parades and block parties. Community events help keep neighbours in touch with each other and reinforce relationships that make neighbourhoods strong. Participation in cultural and artistic programs has been shown to promote social connectedness and social cohesion, and positively influence civic behaviour, mutual caring and voluntarism. Recreational activities can help build welcoming communities for people and families from diverse cultures.

4. Help People Connect with Nature:

Enhancing opportunities to connect people with nature can result in both environmental and human benefits. Natural playgrounds (which incorporate natural elements like logs, flowers and trees) stimulate physically active and imaginative play and help children connect with nature. Studies have shown that exposure to the natural environment and green spaces have an independent, positive effect on health and health-related behaviours. From lowering blood pressure, to reducing stress levels, to supporting children's cognitive development, nature has a profound ability to support both physical and mental health. Nature-based recreation fosters a better understanding and appreciation for all aspects of nature. This may be especially important in Aboriginal communities, where fishing, hunting and nature conservation are traditional activities.

Recreation and parks has a key role as a steward of natural environments: protecting and interpreting parks, trails, waterways and wilderness areas, managing and balancing the needs of natural ecosystems with the needs of users, and minimizing any negative impacts resulting from services and programs.

5. Provide Economic Benefits:

Though economic benefit is not the primary driver for recreation service decisions, recreation is an important contributor to community economic development and cost reductions in other areas. Spending on recreation creates jobs, fosters tourism, and makes communities more attractive places in which to live, learn, work, play and visit. "Upstream" investments in recreation can lead to improvements in individual and community wellbeing, which helps to reduce costs in health care, social services and justice.

Additional Benefits...

There are additional advantages to participating in recreation or leisure programs and activities, including:

Skill Development:

Many recreation programs offer opportunities for skill development, learning and personal growth. Whether getting the hang of a new sport, honing artistic talents, or mastering a hobby, participants can acquire valuable skills that enhance self-confidence and self-esteem and generally enrich their quality of life.

Promotion of Equity, Diversity and Inclusion (EDI):

Recreation and leisure programs often cater to diverse interests and abilities, making them inclusive spaces where people from different backgrounds can come together and participate equally. This promotes understanding, respect, and an appreciation for the increasingly diverse communities that exist across Canada.

Ultimately, recreation programs play a vital role in promoting physical, mental, and social well-being, fostering community connections, and enhancing the quality of life for individuals and society as a whole. Recreation professionals have the opportunity to fill needs-gaps and deficits using creative program planning skills!

2.3 What Kinds of Needs Can Be Met Through Leisure Programming?

Determining Need

To determine the programmatic need/s of an individual, group or agency, recreation professionals must collect data on recreation users and non-users to obtain a fulsome picture of what is needed recreation-wise and what is not. Data can be gathered from websites, personal interviews with agency managers, directors and staff, through client focus groups, surveys and questionnaires, or from community town hall meetings, local Chambers of Commerce, personal phone calls or informational interviews. The kind of information that needs to be collected may be on individuals, groups and/or organizations:

Demographic Data:

Demographic data includes basic, descriptive, factual information on a given person, group or agency. The information you gather can include age, gender, ethnic identifiers, language/s spoken, physical and cognitive and physical abilities/disabilities, level(s) of education, addresses and postal codes, employment and unemployment levels, income levels and occupation (what people do for work). Gathering this information allows programmers a foundational understanding of "indicators" – pieces of data on the individuals, group or agency in question – and allows programmers to create and manipulate the program environment and its associated elements to meet the needs of the participants, thereby increasing the chances of programmatic success. Note: Personal information is a precious, valuable and often protected commodity in Canada, and should therefore be handled with respect and mindfulness by the programmer. Professional programmers should endeavour to gather only the most essential client information, and only when necessary, in order to get a clearer picture of an individual, group or agency.

> ### 💡 *Helpful Tip*
>
> A considerable amount of demographic information can be obtained by visiting Stats Canada – Canada's national statistical office. "(Statistics Canada) ensures Canadians have the key information on Canada's economy, society, and environment that they require to function effectively, as well as citizens and decision-makers" (Statistics Canada, 2024).

Municipal strategic plans – reports generated by local government – can offer a wealth of data and information on a village, town or city's vision, mission and priorities that reflect the needs and expectations of the community. Most strategic plans include strategic areas of focus, often including those related to recreation, that act as a roadmap for local governments to organize and implement existing financial and social resources. A link to London, Ontario's 2023-2027 Strategic Plan (London Canada, 2023) is here as an example: 2023-2027 Strategic Plan City of London (PDF)

Engagement Data:

Similar to demographic data, engagement data is purely factual. Are there a high number of older adults participating in existing aquatics programs, or are the numbers here consistently low? What drop-in sports programs at the local Recreation Centre have seen waning attendance (tennis), while others are seeing an uptick in popularity (pickleball)? What programs and events are already available at an agency and should not be duplicated? What kinds of programs are people NOT engaging in, and why might this be? Asking these questions can give you an idea of the recreation resources or programs in high demand, as well as those underutilized or non-existent. Engagement data can also reveal specific barriers facing a group (i.e., cognitive impairment, financial viability of a program for an agency, affordability of program enrolment fees, transportation barriers, lack of information about how to get involved) and spark a conversation among programming professionals on how to address and hopefully remove those barriers.

Pre-existing Skills and Experience:

Before planning any recreation program, the programmer needs to determine the pre-existing level of skill or experience (if any!) in the group for whom the program is being designed. Creating an advanced archery program will not do stakeholders any good if 90% of them are at a novice level, just as a beginner class introducing the fundamentals of lapidary will be a frustrating waste of time to those already skilled or experienced in rock tumbling. Obtaining information on pre-existing skills and experience can be obtained through several means:

Observation – sitting in on a class or activity and watching how easy (or challenging) the participants find the activity;

Self-reporting Tools – asking stakeholders to fill out a paper or electronic self-assessment survey or questionnaire that will help present a clear idea of programmatic preferences as reported by the people themselves – what they would like to see offered – and at what level (beginner, intermediate, advanced) to offer these programs;

Program Evaluations and Registrations – digging through old program evaluations, registration forms and feedback summaries is a great way to obtain historical information on prior participants' pre-existing skills and experience in a given program area.

2.4 Key Takeaways

STEP 2: Key Takeaways

- Regardless of sector, all Recreation and Leisure-related agencies, facilities, organizations and businesses can find it challenging to strike a balance between meeting client and constituent needs and ensuring excellence in program quality and service;
- Needs are dynamic, always changing and rarely static;
- Needs can intensify or fade depending on trends, demographics, the local economy, the political climate and current consumer demand for unique experiences;
- The best program-planners are those who take time to find out the needs of the groups for whom they are programming *before* they begin the dreaming and designing processes, and view these needs as opportunities to create and deliver programs that will benefit not only the participants, but also the communities in which they live.

If you have figured out the programmatic needs and wants of your client or community, it's now time to figure out how much money you have to play with to make the needs and wants a reality. On to STEP 3: Finances and Budget!

Check Your Understanding

- Can you explain the term "Needs Assessment" as it relates to recreation program planning?
- Why is conducting a Needs Assessment before planning a recreation program or event important?
- Can you explain the difference between a need and a want?
- Can you list and describe at least 3 different ways to conduct a needs assessment?

STEP 3: FINANCES AND BUDGET

Chapter Overview

3.0 Learning Objectives

Learning Objectives

By the end of STEP 3, the student shall be able to:

- *Recognize* that the idea of "doing more with less" is common in recreation-related agencies, especially those in the non-profit and public sectors.
- *Outline* the components of a simple program/event budget
- *Differentiate* between the different revenue streams and sources available (donations, GIKs, sponsors, membership fees, entrance fees, etc.) for a given recreation agency, organization or business based on the provision of services and the sector under which it falls
- *Define* the terms Fixed, Variable, Direct, and Indirect costs.

3.1 Funding and Sectors

FACT: Securing the funds to enable organizations to offer excellent programs and events is frequently at issue for those offering exclusively recreation and leisure-based programs and services. Simply put, there rarely seems enough money for the 'fun' stuff. The pervasive theme across the three major sectors – nonprofit, public and private – is "doing more with less". This is especially evident in the nonprofit and public sectors.

Agencies in the **nonprofit sector** rely heavily on funds from grants, donors and sponsors to maintain (or expand) existing programs, and to support the creation of new programs. Additionally, the high cost of staff wages often requires nonprofit organizations to engage volunteers rather than paid staff in coaching, instructing, facilitating, and leading recreation programs and events. Although nonprofits might ideally prefer to have paid staff in these positions as a quality control measure, the reality is that relying on the expertise, talents and skills of volunteers is often the only feasible way to go, as this will dramatically offset the cost of wages by reducing the number of hours to be compensated.

Helpful Tip

- Many nonprofit charitable organizations, like Canada's YMCAs and Boys & Girls Clubs, receive millions of dollars in donations and grants each year.
- This does NOT, however, make them rich!
- Not-for-profits and charities are required to ensure that a certain percentage of the money that comes is funnelled back into the organization to fund programs, capital projects, staff wages, research, staff development, special events, special initiatives and essentials, like heating and electrical expenses.

Agencies in the **public sector** rely either partially or solely on funding from the Canadian government – frequently municipal, often provincial, occasionally federal, and in rare occasions all three – which can change from year to year depending on what's trending among community stakeholders and the priorities of the political party/ies in power. Some recreation-based services, like those found in clinical healthcare settings, for example, are often deemed by the government as essential to public health and are therefore prioritized for funding. Other public recreation services, like public parks and swimming pools, are more often deemed non-essential and often face uncertainty when it comes to receiving reliable, sustainable funding.

Agencies in the **private sector** rely on revenue generated from user fees, memberships, ticket sales and merchandise. As private sector organizations tend to be less reliant on the whims of government, grant-writers or donors to support their programs/services financially, there may be less financial insecurity for

recreation or leisure programs run in this sector. That is not to say that staying financially viable is not an issue for private-sector businesses, however. For-profit organizations are under constant demand to ensure their marketing and promotion strategies generate sufficient public interest and participation in their programs/services, thereby securing consistent and steady cash flow into the organization. For many, there is often an additional requirement to create and innovate new programs in response to constituent demands and desires; a tall order for organizations concerned with turning a consistent profit.

Food for Thought

Fact: Every program plan begins with a vision…but ultimately ends with a budget.

Fact: There are only a limited number of dollars to go around, so the need to financially justify your program or event idea, regardless of what sector you are planning for, is critical to receiving funding.

Definitions

Revenue: Money that comes into an organization, business or agency for the provision of goods or services.

Expenses: The cost or money required for the provision of goods of services, often with a view to generating revenue.

Profit: The financial gains or benefits enjoyed by an organization, business or agency after the expenses are paid.

The Magic Equation

Revenue minus (−) **Expenses** Equals (=) **PROFIT**

3.2 Where Does the Money Come From?

Every recreation and leisure-based organization has its way of generating **revenue**, managing **expenses**, and (with any luck) turning a **profit**. Every organization does this differently, and it can vary wildly based on the size of the agency, the sector the agency operates under, and the nature of its goods and services.

Sources of Revenue

All recreation-based organizations, agencies, and businesses have different ways of generating revenue (making money). Here are eight ways the leisure-based businesses in our communities keep the lights on and keep their programs going for their clients:

1. **User Fees:** The basic cost to the client, customer or patron for being able to participate in, or gain entrance to, a given activity or program. Examples: Renting ice-pad time at a local arena, the cost of a ski-lift ticket, amusement park entrance fees, the green fee for a round of golf, the ticket price for a concert, a Provincial Park vehicle fee. User fees are often set at different price points, depending on factors like the age (a children's ticket versus an adult's ticket), the length of the activity (a less expensive day-use fee, versus a multi-day overnight camping fee at a Conservation Authority), or the perks and benefits associated with that fee.

Photo by *Caroline Cagnin*, *Pexels License*.
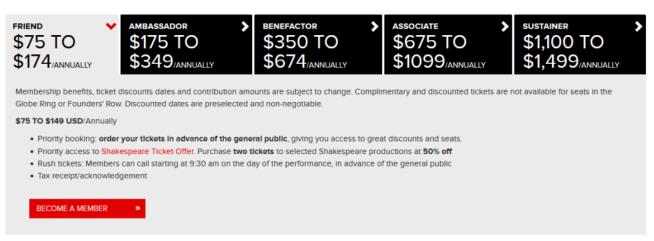
2. **Memberships:** Memberships are costs that allow an individual to have regular access to a program, club or activity, OR, the price members pay to be affiliated with an association or organization from across sectors. Examples: Membership at a private golf club, a fitness club membership, becoming a seasonal theatre ticket holder at the Stratford Festival, signing up for a family membership at the local YMCA. Members often pay a reduced price for services over a longer run of time, making memberships, in many cases, highly economical. Memberships are a great way to provide stability and predictability to an organization, as they allow administrators to accurately predict attendance and project revenue. Membership is not without its drawbacks, however. Membership fees may be out of reach for some. The long-term commitment that comes with membership may be unappealing to some people who may not be sure whether they will still be interested in the organization months down the road. Some organizations, like the Stratford Festival, offer tiered memberships, different levels of membership that come with increased perks, incentives and rewards:
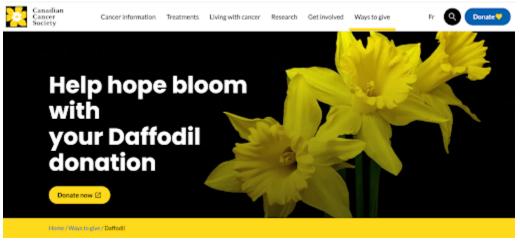
Screenshot of [Stratford Festival tiered membership levels](). Used under Fair Dealing for Educational Purposes (Canada).

3. **Tax-based Funding**: Canadian Public sector organizations often struggle with finding adequate financial resources to fund and support recreation-based programs and services, as much of the money is generated from constituent taxes and is therefore uncertain, as it is based on facility and services usage. As such, municipal recreation budgets are rarely robust enough to adequately support the recreation and leisure needs of the community (Pitas et al., 2017) without needing to dip into constituent pocketbooks. Municipal parks and recreation departments are given annual base budgets in which to operate. As public entities, they are held closely accountable to these budgets. Sadly, "Recreation is vulnerable to budget cuts, as it is seen as a non-essential service" (Imagine a Winnipeg, 2018, p.41), which means municipalities are often looking for ways to offset the high costs of recreation programming, often coming by way of increased taxes to those who live in the community. For example, on July 1, 2010, the City of Ottawa implemented the HST (Harmonized Sales Tax) on recreation services. This meant constituents "…will have to pay more for using facilities such as swimming pools and soccer fields". (Soloman, 2010). Arguing for more equitable and affordable access to recreation services, a 2021 Value Survey conducted by PRO (Parks and Recreation Ontario) determined, "97% of Ontarians believe parks, green spaces and community recreation are important to quality of life" (p.3) and "91% believe municipal investment in parks and green space make their communities a desirable place to live" (p.3). Given that recreation is deemed so valuable by Ontarians, there is little doubt that local governments will continue to increase recreation-related usage fees and municipal taxes to ensure the continued funding for public recreation-based organizations and services.

4. **Fundraising:** Ranging from small face-to-face community-based events to large-scale national campaigns, nonprofit organizations frequently hold fundraisers and fundraising campaigns to continue or increase funding for programs and services relied upon by their clients. As nonprofits often rely heavily on financial support from the public, fundraisers are often deemed essential to making ("raising") monies. Whether it's an ongoing appeal, a targeted annual campaign occurring over the span of 2 months, or a single evening, fundraising efforts are frequently found in the nonprofit sector. Fundraisers can take the form of just about anything – a bake sale, a silent auction, a live dessert auction, an annual gala, a charity

paint night, a large annual campaign stretched out over months and more. Organizations put individuals (or committees) in charge of creating fundraisers that will appeal to stakeholders, staff, alumni, members, businesses, friends and families, with the goal of seeking financial contributions to the organization. Many fundraisers have specific themes and are designed to generate funds to support a specific cause or division of the organization. *Example*: Annual Fundraising Campaign – The Daffodil Campaign, Canadian Cancer Society. Occurring in the spring for more than 65 years, the Canadian Cancer Society's Daffodil Campaign raises money for cancer research. Donating is as simple as clicking their website's "Donate Now" button.

Screenshot of Canadian Cancer Society Daffodil donation page. Used under Fair Dealing for Educational Purposes (Canada).

5. **Donations:** (Occur mostly in the not-for-profit sector, occasionally in the public sector). For many non-profit organizations, gifts and donations are a significant form of revenue. Sometimes, gifts and donations occur as part of a fundraising campaign. In other instances, gifts and donations can occur at any time.
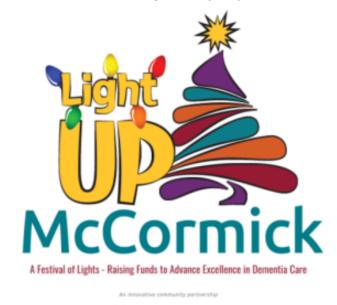
Term to Learn:

"Gifts In-Kind" (GIK) – A gift-in-kind (also known as an "In-Kind" donation), is any physical asset or materials freely given to an agency or organization by a donor who does not wish for or require any financial transaction or compensation for the gift. Examples: A piano or other musical instrument, books, plants, office supplies, sleeping bags, a vehicle, etc. In-kind gifts can also include services, like a sharing or donation of labour, facilities and/or other equipment, OR any donation of time performing a service that the non-profit organization would otherwise have to pay for. Examples: A yoga instructor commits to offering 4 weeks of beginner yoga classes, a chef gifts his time to run a 3-hr cooking workshop, an Art Therapist offers a free painting workshop at a Long Term Care Home.

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6. **Sales:** Sales are most frequently found in the commercial/private sector. Although direct sales of goods and services are generally associated with businesses in the private sector, nonprofit and public organizations sometimes engage in sales as well. When it comes to sales, a profit is almost always built

into the retail costs to the consumer, known as a 'mark-up'. Examples: Concession stand food items, company merchandise (t-shirts, mugs, pens), tuck shop items in a retirement home, branded t-shirts and ballcaps for purchase at the local sports arena.

7. **Sponsorships:** Refers to the position of a person, group or organization to vouch for, support, advise or help fund another person, organization or project. Sponsorships almost always involve a promise from the recipient to somehow acknowledge the sponsor, often by way of advertising or the inclusion of the sponsor's name or logo on marketing materials and merchandise. Sponsorships provide an organization with financial support or revenue while providing the sponsor with market recognition and promotional opportunities. The key to effective sponsorships is ensuring the relationship is mutually beneficial and reciprocal – a consciously created win-win. Corporate sponsorship is commonly seen at sporting events, museum programs, art installations, and festivals. "The conventional wisdom is that a corporate sponsor facilitates a mental link between a brand and a popular event, program, project or person, and customers—the so-called 'halo effect'" (Kenton, 2021).

8. **Partnerships** Partnerships happen most often among organizations in the nonprofit sector; however, partnerships can occur across sectors and involve partners in different sectors. Partnerships occur when one organization reaches out and connects with another, often like-minded, organization in the community. They create a vision together for a specific service, a project or an event designed to benefit both sides equally. In some cases, grant money may be involved. Partnerships allow organizations to work together to effect positive change in the community and to support or amplify each organization's Mission, Vision and Core Values. Some partnerships are singular one-off events, while others are events that have been occurring annually for years.

"LUM Logo" by Michelle Hancock.

Example: For several years, a partnership has existed between McCormick Care Group (in the non-profit sector) and the Fanshawe College Recreation and Leisure Services program (a public sector educational institution). Each year, the students design and facilitate a fundraising event for McCormick Care Foundation, aimed at advancing excellence in programs and research in dementia care. The partnership is mutually beneficial: Students have the opportunity to serve the needs of a non-profit organization and to practically apply their event-planning skills under the mentorship of fundraising professionals, while the McCormick Care Group benefits from the proceeds of the fundraising event. A win-win!

3.3 What's the Difference Between Sponsorship and a Donation?

WHAT'S THE DIFFERENCE BETWEEN
SPONSORSHIP
AND A
DONATION

SPONSORSHIP

A sponsorship is a marketing tactic to put the company's name on an event.

Types of Sponsorships

Cash Sponsor: Money is given to support an event, and the company is given public recognition.

In-kind Sponsor: A business donates services or goods and is given recognition for the donation.

DONATION

Given for the greater good of the community. They can be harder to obtain since most companies also seek recognition.

Types of Donation

The difference with a donation is the amount of control your organization has. Companies shouldn't feel nervous about donating if you have an excellent reputation.

Why Donation?

Companies can help the

Image Description

What's the difference between sponsorship and a donation?

Sponsorships:

- A marketing tactic to put the company's name on an event.
- Types of sponsorships
  - Cash sponsor: Money is given to support an event, and the company is given public recognition.
  - In-kind sponsor: A business donates services or goods and is given recognition for the donation
- Why Sponsorship?
  - Exposure or, in some cases, to reduce a loss in profits.

Donations (or Corporate Philanthropy)

- Given for the greater good of the community. They can be harder to obtain since most companies also seek recognition.
- Types of Donations
  - The difference with a donation is the amount of control your organization has. Companies shouldn't feel nervous about donating if you have an excellent reputation.
- Why Donation?
  - Companies can help the local community or put employees to good use.

3.4 Program Budget

A program budget is simply a way to present a program's expected income and expenditures. In simplest terms, a program budget is a written plan, electronic or otherwise, that allows an organization to forecast (predict) the costs and the revenue of a specific program, event or service. Programmers will often find recreation and leisure-based organizations have several budgets housed within different areas or divisions of a larger organization. Budgets offer loads of at-a-glance information, usually for a set time period (e.g., the YMCA's annual budget for camperships), and are a convenient, one-stop-shop for information. A well-designed, carefully detailed budget answers questions like "How much will the supplies, materials, facilities, equipment and staffing for the XYZ Program cost?" and "How much revenue is projected to come in, based on projected (expected) sales/memberships/participation?"

Budgets help program-planners and organizations make responsible financial decisions in the present and future by offering clear numbers that reflect how and where to allocate precious financial resources. Remember that pervasive theme in recreation, *"doing more with less"*? A budget provides structure to an existing (or proposed) program or service by predicting and tracking expenses and incomes, thus preventing overspending or underspending.

Here's why budgets are important:

- **Financial Planning:** Developing a budget allows recreation agencies to plan their finances effectively. Developing a budget helps Agencies estimate income (revenue) from various streams (specific programs, donors and grants), allocate resources, forecast expenses, and enable the organization to operate efficiently.
- **Resource Allocation:** A budget ensures that resources are allocated appropriately to support various programs, services, and initiatives the recreation Agency offers. These allocations help maximize the impact of available funds and ensure that each area receives adequate support.
- **Fiscal Responsibility:** Sticking to a budget promotes fiscal responsibility within an organization. It ensures that spending remains within predefined limits, preventing overspending and potential financial crises. This responsibility is essential for maintaining the trust of stakeholders, including taxpayers, donors, and granting organizations.
- **Goal Alignment:** Budgets help align financial resources with the goals and priorities of the Agency. By allocating funds to specific programs or projects, the organization can focus on effectively achieving its Mission and Vision.
- **Performance Evaluation:** Budgets serve as a basis for evaluating the performance of programs, events and activities within the Agency. By comparing "actuals" (actual financial results) with what was budgeted, the organization can assess a program's financial health and future viability and make informed decisions for future planning.
- **Transparency and Accountability:** Developing and sticking to a budget promotes transparency and accountability within the organization. It provides stakeholders with clear insight into how financial resources are utilized and ensures that funds are managed responsibly and ethically.
- **Risk Management:** Budgeting helps Agency staff identify potential financial risks and challenges the Agency faces. A written budget provides a clear picture of the overall health of a recreation Agency and can be instrumental in planning for contingencies and establishing reserves. A sound budget can help an organization mitigate risks and ensure its financial sustainability over the long term.
- **Grant Compliance:** Many recreation agencies, especially those in the non-profit and public sectors, rely on grants and funding from external sources. Developing a budget is essential for demonstrating compliance

with grant requirements, including budgetary restrictions, reporting obligations, and performance 'metrics' (numbers – how did the Art Therapy program use the $5000 United Way grant last year?).

Helpful Tip

Use a spreadsheet! Computer programs like Excel or Google Sheets can help Programmers create customized program budget spreadsheets. Budgets do not need to be complicated. Numbers are inputted (i.e., the projected costs of googly eyes and popsicle sticks, catering costs, and fees for a professional workshop facilitator…) as Expenses in different cells. Dollar amounts are also inputted for incoming money (Projected Revenue). Formulas are applied to calculate revenues, deficits and/or profits. Spreadsheets are a great way to structure your budget, and to see whether you are spending too much, too little, or whether you are projected to lose or make money on your program.

3.5 Finance and Budgeting: Terms to Learn

Program Budget: A document that presents the specific **expenditures** associated with a program or event.

Expenditure: A specific expense; something that costs money (i.e., fruit to make a fruit salad for a high school reunion event, paper for your origami craft session, centrepieces for the tables at your upcoming gala).

Expenses: A collection of expenditures (e.g., overall food expenses for your high school reunion).

Revenue: Also called income/profit, is the money left over after paying expenses.

Direct Costs: Costs that can be linked *directly* to a specific program. Example: Hiring a DJ to play your event, buying popsicle sticks for the Valentine's Day craft you plan to run with at the children's after-school program, or hiring a lifeguard to teach swimming lessons at the community centre swimming pool. *Note: Direct costs may be both fixed and variable!

Direct Fixed Costs: Costs that can be traced directly to a specific program that will not change, no matter how many people participate in that program. Fixed costs remain constant during a specified time period (e.g., the duration of a program or event) and do not change. Example: The DJ you hired will charge the same fee per hour, regardless of whether 20 or 100 people show up. Similarly, the booking fee to rent a group campsite at a Conservation Area will not change, regardless of how many individuals attend the camp skills weekend.

Direct Variable Costs: Variable Costs are costs that can fluctuate depending on volume/numbers. Direct variable costs can be traced directly to a specific program that will vary based on the number of people attending. For example, if you choose to mail a thank you card to each VIP who attended your event, the cost of cards and stamps will depend on how many people attended. In an aquatics program where each child receives a swimming badge, the costs for badges are *variable* because the number of participants in the swimming lessons will fluctuate. In some cases, like a children's summer camp, staff wages may be considered a direct variable cost, as staff are hired to meet ratios according to the number of weekly participants.

Indirect Costs: Costs that an organization incurs regardless of whether or not it operates a specific program or runs an event. Examples: Office supplies, administrative salaries, hydro, Internet, monthly phone bills, licensing fees, etc.

Sponsor: An individual or organization that provides financial support to an event or program through the provision of products or services, usually in return for advertising. Example: In 2023, the Montreal Canadiens signed a multi-year jersey partnership agreement with Air Canada, which will see the Air Canada logo featured on the club's away jerseys for the duration of the deal.

"[Canadiens-Air Canada](#)" by Montreal Canadiens Public Relations. Used under Fair Dealing for Educational Purposes (Canada).

Donor: Any person who donates money or material goods to an event, an individual, an organization, or a cause.

Gift-in-Kind: A charitable act of giving a product or service rather than cash. For example: Food, clothing, furniture or building materials.

Total Cost of a Program = Indirect Costs + Direct Fixed Costs + Direct Variable Costs

3.6 Key Takeaways

Step 3: Key Takeaways

- Every program begins with a vision...and ends with a budget;
- The theme "doing more with less" is ubiquitous throughout the field of Recreation and Leisure Services and requires programmers to have the ability to defend and rationalize every dollar proposed to be spent;
- Remember the magic Equation: **Revenue** minus (–) **Expenses** Equals (=) **PROFIT**
- The ways in which organizations generate revenue can vary widely and will be informed largely by the sector under which the organization falls.

STEP 4: PURPOSE, GOALS AND OBJECTIVES

Chapter Overview

4.0 Learning Objectives

Learning Objectives

By the end of STEP 4, the student shall be able to:

- *Identify* the importance of 'planning with purpose'
- *Develop* S.M.A.R.T. goal-writing techniques
- *Create* themed programmatic goal statements and meaningful objectives
- *Describe* the difference between over-arching programmatic goals and specific programmatic goals

4.1 Planning With Purpose

The most skilled program-planners design recreation-based programs and events with intention and *purpose*. Programming with purpose ensures that participants will be provided the opportunity to experience some personal meaning, learning, growth or development. Purposeful programming can include ambitions or aspirations around:

- Improved physical fitness
- Play that promotes prosocial behaviour
- Increasing personal resilience
- Community-building
- Fundraising
- Emotional and mental wellness
- Amplifying an educational message

Programming with purpose is a quality-assurance measure – the best programs always have meaning! When we use the word 'program' in recreation, it implies that the activity has a specific start and end time, a specific date and location, and some kind of leader or facilitator. Programs with no clear purpose are the first to go when budgets are cut or funds are limited. Often, the purpose of a program or event can be found in its goals – broad-based statements of intention or ambition for the future. Goal setting helps recreation professionals and the organizations they work for stay motivated to satisfy the greater purpose.

Developing and achieving goals can be an exciting and rewarding process for the program-planner. Goals can be short-term (achievable within a day, a week or over a couple of months) or long-term (achievable over several months or many years). When created correctly, goals can help provide a certain structure to a given program that will allow individuals and/or organizations to achieve a desired state or outcome. Note: Not all leisure or recreation-based activities must be overtly purposeful or goal-driven! Indulging in unstructured activities in one's leisure time, like strolling through a community garden, stopping in at a playground to play on the swings, star-gazing, or making snow angels, do not require tangible goals to make them meaningful. For leisure activities such as these, as there is no designated start or end time, no budget to adhere to, and no facilitation schedule, so goals are unnecessary. In these instances, the making of meaning is individualized and personal. The participant is obliged to please no one except themselves.

On the other hand, when professional programmers write goals for structured recreation programs, they are required to consider their obligations and commitments. Obligations and commitments can include serving the needs of the participants, serving the needs of the larger community, upholding the recreation organization's Mission, Vision and Core Values, or being held accountable to adhering to set budget parameters.

TYPES OF GOALS

Depending on the nature and scope of a recreation-based program or special event, it may have specific types of goals that lend meaning and purpose to the activity:

- ***Societal Goals** *("to reduce childhood obesity and raise public awareness of the importance of healthy eating")*
- ***Agency or Organizational Goals** *("to offer participation opportunities to all members of the organization, regardless of income")*
- ***Programmatic Goals** *("to reduce the negative impacts of social anxiety by offering structured courses in mindfulness and meditation")*

FOOD FOR THOUGHT: Goal Statements

Depending on who you're talking to, the goals of an organization, its program leaders, and the participants might be very different. The organization, whose Core Values include celebrating diversity, may hope its youth program brings in participants of differing abilities and ethnicities. The program leader may echo the organization's goal and have a personal goal of ensuring 100% participant safety and wellbeing with no incidents or accidents. Finally, the participants: There is a good chance none will be aware of the goals of the greater organization or the leader, and may simply be in attendance because their parents made them attend or just to have fun.

Goal statements tend to be broad, vision-based, and abstract. They provide a view of the big picture. This is why goal statements are frequently followed by "objectives" – actionable, specific, and easy-to-measure statements of intent that act as stepping stones to achieving the big picture outlined in the larger goal statement. Where a goal statement provides an outline of the dream, objectives provide the fine details, measurements and deadlines that will help achieve the dream. When goals are formally articulated and written down, they act as a kind of achievement roadmap and can be used as a progress-checking tool toward achievement. When goal statements and objectives come together, we call them SMART Goals.

4.2 S.M.A.R.T. Goals

Figure 4.2.1 "*Smart Goals*" by Graeme Robinson-Clogg and Kwantlen Polytechnic University, *CC BY-SA 4.0*. *Recoloured by Fanshawe College.*

Setting goals that are realistic, clear, and attainable can be a challenging task. Therefore, it is important that each goal follows the "SMART" approach. Specifically, a goal should be:

- **S**pecific
- **M**easurable
- **A**ttainable/Achievable
- **R**elevant
- **T**ime-bound

SPECIFIC

Try to make your goal as detailed and concise as possible. When doing so, asking yourself the following questions will help you along the way:

- What do I want to achieve?
- When do I want to achieve this?
- Where will I achieve this goal?
- Who may help?
- Why do I want to achieve this goal?

MEASURABLE

Measuring and tracking your progress is important as it can help you maintain your motivation and know when you have reached your current goal so that a new goal can be set. For example, a goal of "I want to complete 30-60 mins of exercise for 3-5 days each week" is easily measured compared to "I want to exercise every day."

ATTAINABLE/ACHIEVABLE

Try and ensure your goal is actually attainable and not so lofty that it is out of reach! Try to set a goal you believe you can accomplish. Otherwise, it will be difficult to stay focused and motivated. Remember: A goal can be flexible, meaning it can be changed or altered if need be. For example, a goal of "I will exercise every day for four hours" may not be as attainable (or attractive!) as "I will exercise for 30-60 minutes a day."

RELEVANT

Does this goal matter to you or your organization? This is the question you should ask yourself. If the goal is not pertinent and applicable to you or your organization, then you may have a harder time accomplishing the goal. However, a meaningful goal that aligns with your overall plan will be much more beneficial in the long run and increase motivation.

TIME-BOUND

It is important to have an intended date with which the goal will be accomplished. The result of having a certain time limit will improve your focus and help you stay on course to be successful. Also, having a time frame enables you to measure your progress to coincide with your intended deadline. For example, the goal of "I want to complete 30-60 minutes of exercise for 3-5 days each week" is good, but you could also include "I want to complete 30-60 minutes of exercise for 3-5 days each week for the next 3 months."

Look at the example below of how to set a "SMART" goal pertaining to personal fitness:

S – I want to be able to run a 5k.

M – I want to be able to run a 5k in 25 minutes.

A – I want to be able to run a 5k in 25 minutes. I will achieve this by running 1 mile twice a week in 7 minutes.

R – I want to be able to run a 5k in 25 minutes so I can successfully complete the Athens Moonlight 5k Run.

T – I plan to be able to successfully run a 5k in 25 minutes by July 15th, 2026.

4.3 Improving Your Goals: Make them S.M.A.R.T

Let's start with a common goal and see how to revise it using SMART. Imagine your goal is to save money to buy a car. This is a good goal, but it is vague, which means it will be more difficult to achieve and lacks the planning needed for you to stay on target. Let's look at how to make this a SMART goal.

Goal: "I want to save money to buy a car."

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1. Specific

The first step is to make it specific. This means that you need to narrow and focus on your big idea. Ask questions like who, what, where, when, why and how. In this case, you should ask, how much money do I need to save? What exactly do I want to buy? You may need to do some research to help.

Revision 1 (Specific):

Goal: "I want to save $5000.00 to buy a used car."

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2. Measurable

This is now specific and somewhat measurable, but how can we make it more measurable? The fact that you have identified an amount is a big help. However, it isn't clear how you will meet that goal. Adding specificity increases the chance of accomplishing your goal. Also, making it measurable helps you keep track of your progress. Creating a visual or adding incentives to help you keep going may be worth it. For this goal, you might ask, how will I save the money? One way to add another measurable element might be to save a set amount from each paycheque or each month or to set an end date or other time frame.

Revision 2 (Measurable):

Goal: "I want to save $5000.00 to buy a used car by saving $150.00 per paycheque."

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3. Attainable

Attainability means that it is possible to meet your goal. Your goal needs to be manageable with everything else going on in your life. Sometimes, this means going a bit slower or sacrificing a bit more. Can you manage with $150.00 less each paycheque and still pay all of your bills? If so, great; if not, you must adjust your goal to be more attainable. Most of the time, making a goal attainable means balancing this priority against others. You may need to take something else away. For example, you could lower your monthly bills by ordering food less frequently. Ensure that your goal is attainable; if you attempt something that is so far out of reach, it is easy to become discouraged and give up.

Revision 3 (Attainable):

Goal: "I want to save $5000.00 to buy a used car by saving $150.00 per paycheque by never ordering takeout."

4. Relevant

You can see your goal is getting bigger, but you are also planning a way to make it successful. To determine if your goal is realistic, you must do some reflection. Think about your personal circumstances, skills and past behaviours. To determine if it is relevant, do some research. Sometimes, our expectations are much bigger or smaller than they should be. Explore options and see how other people have done it. You must check to ensure that each part of your goal is realistic and relevant. Will $5000.00 buy you a good used car? Is saving $150.00 per paycheque realistic? Is never eating out realistic if you usually order takeout every night? If so, great; if not, this is the time to make adjustments. Ensure you choose something that is relevant to your situation, if you love take out and your workplace is on the bus route, maybe saving for a car isn't really relevant for you.

Revision 4 (Realistic and Relevant):

Goal: "I want to save $5000.00 to buy a used car by saving $150.00 per paycheque by ordering take out only twice a week instead of every night."

5. Time-Bound

The final element of a SMART goal is time-bound. This is where we add the element of time to the goal. Goals need to have end dates to help keep them practical and attainable. Your time element still needs to be realistic and relevant. Sometimes, times are connected to major life events, like graduation. Other times will be based on other factors, like your income or level of skill development. If you wanted to save $5000.00 by setting aside $150.00 per paycheque, that would take roughly 34 paycheques. If you are paid biweekly, saving this money

would take 16 and a half months. Is a little more than a year a reasonable amount of time to save? When and why do you need the car? If you want a car sooner than this, you need to adjust one of the elements, such as how much you save each paycheque.

Revision 5 (Time Bound):

Goal: "I want to save $5000.00 to buy a used car by saving $150.00 per paycheque for 34 pay periods by ordering take out only twice a week instead of every night."

4.4 Key Takeaways

Step 4: Key Takeaways

- Establishing the **purpose, goals and objectives** for a recreation program or event is quite straightforward;
- The key to developing **S.M.A.R.T. goals and objectives** is understanding the **"why"** of a program or event;
- Experienced programmers **keep an eye on the established goals and objectives** during a program's rollout to make subtle on-the-fly adjustments to ensure the goals are met;
- Afterwards, **goals and objectives can be used as tools** to measure the success of a program during the evaluation process (Step 11 – Evaluation).

STEP 5: PROGRAM DESIGN

Chapter Outline

5.0 Learning Objectives

Learning Objectives

By the end of STEP 5, the student shall be able to:

- *List* the formats found most frequently in recreation program planning
- *Describe* different Physical Environments: Facilities and Venues that house recreation-based programs and events
- *Explain* how thoughtful activity sequencing, pace and transitions contribute to program flow and participant enjoyment
- *Describe* "Head, Heart and Hands," and how these relate to and directly influence, a client's enjoyment of a given program or event

In STEP 1, you established exactly who you are programming for. In STEP 2, you identified the needs of your group or organization. In STEP 3, you figured out how much money you have to play with for your program, and where that money is coming from. In STEP 4, you designed meaningful, SMART goals and objectives for your program, with a view to creating meaning and purpose for the participants and the Agency. Now comes STEP 5 – the fun part – designing the program!

Some programs are short – an hour or less – and relatively low-needs in terms of personnel and equipment, i.e., a spin class, an aqua-fit class, or a crochet workshop. Others are lengthier, occur over several hours, days, weeks or months, and have several moving parts that require multiple leaders with specific skills and a considerable amount of materials.

There are many things to consider when designing a program. When will the program begin and end? What skill level does the program appeal to? Where will the program be held? What kind of supplies and equipment are needed? What kind of risks need to be managed? And ultimately...what will participants actually do? There are myriad decisions to be made, all of which are to enhance and benefit the participant experience. Let's go!

5.1 Benefits

As practitioners in the Recreation and Leisure Industry, we strive to enhance wellbeing for our participants. The activities may vary, but all result in engaging the entire being to achieve wellness. One of the best depictions of this holistic approach is found within many FNMI communities through their medicine or healing wheels.
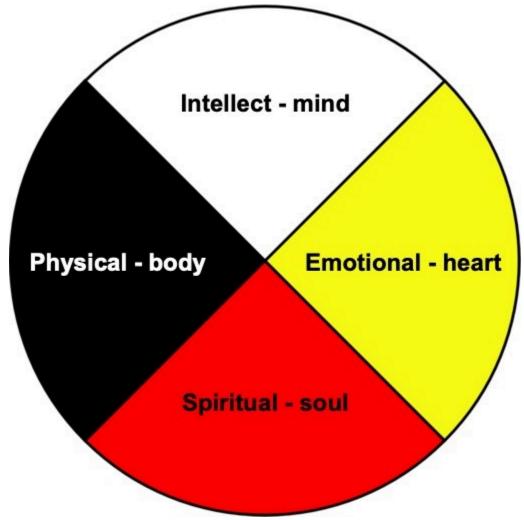
Figure 5.1.1 Medicine Wheel image by ManidooWilkie, CC BY-SA 4.0 Adapted to include text.

Wellbeing in FNMI communities is visually represented in a medicine or healing wheel. The medicine or healing wheel is a circle split into four quadrants, with everything being pulled towards the center. The center represents balance. Different FNMI communities will vary in the meanings and colours of each quadrant. It is important to note that not all First Nations, Métis, or Inuit people use the medicine wheel. One commonality of the wheel across FNMI communities who use it is the representation of the 4 aspects of being: Intellect, Emotional, Spiritual and Physical. For good health and a happy life, these aspects pull to the centre in harmonious balance. Many wheels depict this holistic approach towards communities and the environment. The circle represents the continuity of connection to all aspects of one's being, one's community, and the environment.

Creating opportunities for people to participate in recreation and leisure activities that lead to improved health and happiness – enhanced wellbeing – is at the core of what recreation program-planners do, and why they do it.

5.2 Program Formats

Every program or event has some kind of "format" – the way in which the program is designed, organized, or arranged for the participants. The format (or formats – you may find yourself using more than one!) you choose to structure or frame your program will be informed by the nature and scope of the program you are designing, the resources available to you, as well as the program's goals and objectives. When it comes to selecting a format, it is important to keep participant needs and expectations front and centre to ensure the best possible outcomes for the program.

Camps

Recreational camps typically run for a set duration, usually over several days or weeks, and usually over the summer months when children are out of school. In Canada, camps are most often geared to children and teens, but occasionally, camps are offered for adults, as well. 'Traditional' camps offer a variety of activities such as outdoor living skills, canoeing, sports, arts and crafts, adventure-based challenges like high ropes and low ropes, and team-building exercises.

Day Camps run throughout the summer months and during school breaks, offering traditional camp activities (hiking, games, arts & crafts) and non-traditional activities [computer-coding camp, STEM (Science, Technology. Engineering, Mathematics) camps, theatre camps] at a set location, usually between the typical business hours (8:00 A.M.-5:00 PM) Monday to Friday (hence "day" camps). Day Camps are often run by non-profit organizations and municipal parks and recreation departments.

Overnight Camps, also called "sleepaway" camps, are summer camps that offer camp activities in a communal setting, with participants – campers – sleeping away from home on the camp property for usually somewhere between 1-3 weeks. Overnight camps are most often run by non-profit and private organizations. Canadian Camps are pro-social in nature, meaning they provide opportunities for developing and cultivating camp skills while promoting a camper's physical, mental, and social well-being. As Michael Brandwein, Chicago-based author, keynote speaker and camp expert, said at the 2009 Ontario Camps Association (OCA) conference, "*Camps are construction zones for building better people*". (Brandwein, 2009).

Classes, Workshops, and Instructional

These are structured sessions focused on teaching specific skills or sharing knowledge related to a particular recreational activity. Instructional formats are very common in recreation and include classes, seminars, workshops and clinics. As the goal of an instructional format is to teach a skill (or skills) to the participants, classes or workshops are usually highly structured, with the expert Instructor or leader exercising a great degree of control over the timing and method of instruction. Examples include art classes, cooking workshops, or dance lessons.

Clubs

Recreation clubs (ie, chess clubs, homework clubs, angling clubs, book clubs, athletic clubs...) serve as hubs for enthusiasts of a particular activity to come together, share their passions, and engage in the specific recreational activity. Clubs provide opportunities for social interaction and networking. Clubs usually hold regularly scheduled meetings, which are opportunities to connect with others to enjoy the activity together, exchange tips and advice, and build friendships. Clubs contribute to the enrichment of individuals' lives by

fostering skill development, social connections, and a sense of belonging within a community of like-minded individuals.

Drop-in Programs

These are informal recreational activities that participants can enjoy without having to commit to a long-term schedule. Casual or "drop-in" participation encourages spontaneous involvement by participants within a specified time period (e.g., 6:00 P.M.-8:00 PM) of unstructured play or activity. Examples of the drop-in format include pick-up sports, large and small group games, open swim sessions, trade shows or conference-type events, or community center activities.

Fitness Programs

Structured exercise programs designed to improve physical fitness and overall health. This can include group fitness classes, personal training sessions, themed fitness classes (i.e., Zumba, Tai Chi, yoga, spin class) or outdoor fitness boot camps.

Leagues, Tournaments, and Competitions

Organized competitions are called leagues or tournaments when participants compete against each other in a specific sport or game. This format often includes regular matches or games leading up to a final tournament or championship. In a competition format, the performance of an individual or a team of individuals is compared to the performance of another individual or team against an established criteria or standard. In the field of recreation, not all competitions are sport-related. There can be karaoke competitions, cooking competitions, Euchre tournaments, costume competitions, trivia competitions and more!

Outdoor Adventure Programs

Outdoor Adventure programs involve participating in outdoor activities such as campcraft (fire-lighting, weather-prediction, expedition skills), overnight wilderness camping, hiking, rock-climbing, canoeing, kayaking, geo-caching, sailing or orienteering. These programs often focus on promoting environmental stewardship and cultivating and developing specific outdoor skills. Most often held at specialized facilities like Outdoor Education Centres, Camps and Wilderness Resorts.

Outreach

Sometimes, people cannot attend a recreation program or event at a designated recreation or leisure facility due to a barrier: poor health, lack of money, lack of time, lack of transportation or psychological reasons. The outreach format can eliminate these barriers by bringing a specific recreation-based activity or activities *to the people where they are*, such as a school, retirement home, or personal dwelling. Examples of the outreach format include therapeutic recreation services, professionally facilitated team-building sessions, and instructional sessions.

Recreational Trips (Field Trips, Field Excursions)

Often identified with travel, tourism, outdoor recreation and adventure-based recreation. Recreational Trips are organized outings and visits to destinations such as recreation facilities, nature parks, amusement parks, museums, zoos, casinos, shopping malls, or historical sites. Some trips may include transportation, guided

tours, and admission fees and can range in length from an afternoon at the mall to a multi-day backcountry wilderness expedition.

Service and Volunteer Opportunities

Recreational activities that involve people willfully and voluntarily contributing to the development and pleasure of others. Sometimes, the focus is on preserving or conserving a natural space or area. Service and volunteer opportunities are most often offered through non-profit or charitable organizations. In this format, participants enjoy the benefits of volunteering and helping others while giving back to their communities. Examples include beach and park cleanups, habitat restoration projects, coaching children's sports, volunteering at local parks or shelters, or volunteering with an organization such as [London and Area's Big Brothers and Big Sisters organization.](#)

Special Events

Special Events are one-time or occasional events designed to provide a unique recreational experience to those in attendance. Special Events can include festivals, themed parties, holiday celebrations, or community-wide events like fun runs or charity walks. Other examples include carnivals, banquets, shows, exhibitions, fairs, and any other activity or combination of activities that don't fall into any of the other format categories. Note the difference between a "program" and an "event": *Programs* (camp programs, clubs, fitness programs, etc.) tend to run in sessions and over multiple weeks or months. *On the other hand, events tend to be shorter* – an afternoon, an evening, a full day (possibly 2-3 consecutive days, like a music festival) and have a distinct beginning, middle and end.

Virtual Programs

Explosive advancements in technology has allowed many recreation programs to be now be offered virtually. Examples: Online recreation classes, virtual tours, Esports tournaments, fundraisers, virtual fitness challenges and more. Advanced digital technology has revolutionized recreational activities and has people engaging in online gaming, social media interactions and virtual communities, transcending geographical boundaries. Digital platforms offer cultural exchange and collaboration opportunities in recreation and creative endeavours such as fitness classes, music, art, and storytelling.

> ### 💡 Good To Know
>
> There can often be some crossover or overlap among the various program formats. For example, a 2-week children's overnight **camp** session may include a 3-night hiking **trip** away from the camp property, while a 5-hr culinary-themed **special event** may be structured in a **drop-in** format and offer several **instructional workshops** and a cooking **competition** within the event timeframe.

5.3 Physical Environments: Facilities and Venues

An important aspect of program design is deciding where a program or event will be offered. Every recreation-based activity is held somewhere...perhaps in a **facility** like a gymnasium, a hotel ballroom, a library, a school, a boardroom, a fitness studio, or a Provincial Park Visitor Centre, or at a **venue** like an outdoor soccer pitch, a beach pavilion, a music hall, or a boathouse. Whatever space you choose needs to be safe, welcoming, accessible, and appropriate for the recreation activity in question.

Facilities

Facility: *A facility is a fixed, often permanent structure or building used for recreation and leisure activities, events, and sports—a place for a particular purpose.* The word "facility" usually refers to any place with four walls and a roof – a building. Examples: Gyms, pools, yoga or fitness studios, conference centres, sports arenas, community centres.

"Fanshawe Wellness Centre" by [Fanshawe College](). All rights reserved and used with permission.

Venues

Venue: *A general term that refers to a designated place, indoor or outdoor, where something happens, especially an organized event such as a concert, conference, celebration, or sports event. Examples: A picnic shelter, an amphitheatre, a classroom, an auditorium.*

"[McKeller Picnic Area, Scenic Loop, International Peace Garden, Manitoba](#)" by [Ken Lund](#), [CC BY-SA 2.0](#).

Spaces

"Space" is a term that is widely used by recreation program-planners to describe a continuous area in which something happens. The word "space" in this context can refer to a facility or a venue.

Examples:

- "It wasn't the best place to hold the event – the chairs and tables took up too much of the **space**, so the children had no room to run around".
- "What **space** have you reserved for the Tuesday book club meetings?"
- "This **space** would be perfect for next week's Euchre tournament!"
- "The **space** was gorgeously decorated – the program-planning committee did an amazing job!"

Third-Party Contracts and Permits

A Third-Party Contract is an agreement that involves a person who isn't a primary part of an existing contract, but is involved with the transaction. For example, when the Original Kids Theatre Company administrative staff rent space at Huron University College each summer to run their 10-week "Camp-OK" children's theatre camp program, they enter into a legal agreement -a third-party contract – with Huron to allow them to use the space.

A Permit is an official document that gives someone authorization and express permission to do something. If a Program-Planner chooses to use a **facility, venue or space** to host a program or event outside of their place of employment, they may have to obtain a permit – a legally binding contract – to use that space. Examples: Obtaining a permit from the municipality to use public parkland for a 2-day music festival, obtaining a permit to close-off certain roads to accommodate a parade, march or road-race. Other types of permits to consider when program-planning include building permits, work permits, and study permits. Like permits, licenses grant permission to carry out a specific activity. Examples: Obtaining an F-Class Driver's license to drive a 15-passenger van to transport your participants, obtaining fishing licenses for wilderness camp staff so they can fish while on a canoe trip, or obtaining a Special Occassion Permit (SOP) from the Alcohol and Gaming Commission of Ontario (AGCO) permitting the sale and consumption of alcohol at your special event.

Considerations

There is much to consider when selecting a suitable facility or venue for your program. Programmers determine the suitability of a given space using a number of criteria, including the physical size of the room/space, capacity, atmosphere, cost, and amenities. Consider...

- **The Personal Schedules of the Attendees** – *Example: Scheduling a program for 10-year olds on Tuesdays at 1:00 PM at your community centre won't work as the children will be in school.*
- **Avoiding Offering Conflicting Programs at the Same Time or Proximity** – *Example: Placing a Hip-Hop Dance class in the room next to Yoga-for-Relaxation workshop.*
- **Is the Location Ideal?** *Example: If the Tai Chi class is currently scheduled to be held in the gym – a very large, echo-y space, could it be moved instead to a more suitable quiet multipurpose room?*
- **Is the Venue Suitable for the Program, Given the Weather or Season?** *Example: Indoor Soccer is not ideal to hold indoors in spring. In the warmer weather, most people want to start getting outside more and would likely prefer an outdoor soccer pitch.*
- **Amenities** – Depending on the program being offered, is a kitchen available? Are washrooms nearby? Are there break-out rooms? Elevators? Is there reliable Wifi? Is there a sprung floor, a stage, or suitable lighting for what you have in mind?
- **Availability of the Venue or Facility** – Whether it's a double gymnasium, a ballroom, an outdoor amphitheatre or a museum lobby – is the space available when you require it?
- **Equipment and Gear** – Is the equipment and gear you need for your program or event readily available at your venue, or will you have to bring it in?
- **Risk Management** (See STEP 8 – Risk Management) – Managing the venue's risks is another consideration. Is the area you plan to offer your program safe and suitable for your participants?

The types of facilities, areas, and spaces used to deliver recreation programs are almost infinite and only as limited as the programmer's imagination! Gardening can take place in a private room in a long term care home, a night of board games can be enjoyed outdoors by candlelight, a drum-making workshop can take place in a corporate boardroom. The sky's the limit!

Helpful Tip

The [Ontario Recreation Facilities Association (ORFA)](#) offers guidelines and best practices for the operation of ice arenas, aquatic facilities and other recreational facilities in Ontario. Created in 1947, ORFA is a provincially-recognized, not-for-profit, volunteer-driven recreation organization. Today, the ORFA has over 7,500 card-bearing members who operate and manage recreation facilities in municipalities, educational institutions, government agencies, First Nations communities and in the private recreation sector. Members also include businesses and industries that support the recreation sector. As a member-based organization, the ORFA is dedicated to providing leadership in training and development, as well as in products and services for the benefit of the recreation facility profession (ORFA, 2024).

5.4 Types of Programs and Examples

Aquatics

- Aquafit classes
- Community swims and swimming lessons
- Lifeguard training and certification
- Long-distance swimming
- Splash pads
- Scuba
- Snorkeling

Arts & Crafts

- Beading
- Carving
- Ceramics
- Jewelry making
- Painting
- Pottery
- Stitching

Camps (Wilderness)

- Camping
- Camp and bushcraft skills
- Adventure programs (e.g.; high ropes)
- Environmental education

Clubs & Service Organizations

- Book club
- Chess club
- Computer club
- Guides/Scouts
- Hobby Clubs
- Social Activity Clubs (4H, Toastmasters)

Dance

- Ballet
- Ballroom
- Contemporary
- Folk
- Nia

Environmental Activities

- Birdwatching
- Bushcraft
- Ecology activities
- Field ecology
- Gardening

Fitness

- Gym workouts
- Organized sports
- Nutrition

Hobbies

- Collecting
- Creative projects
- Painting
- Puzzles

Music

- Choral ensembles
- Drumming/Drum circles
- Listening party
- Ukulele club

Outdoor Activities

- Hiking
- Nature interpretation
- Neighbourhood walks
- Open air concerts
- Paddling
- Picnics

Service Opportunities

- Coaching
- Community garden
- Neighbourhood clean-up
- Tree planting

Sports and Games

- Competitions – individual, team
- Individual sports and games
- Round Robin tournament

Travel and Tourism

- Day trips
- Ecotourism
- Field excursions
- Organized tours
- Overnight trips
- Travel (domestic, international)

Wellness

- Forest bathing
- Journaling
- Meditation
- Retreats
- Yoga

5.5 Activity Planning: Sequencing, Pace, and Transitions

Remember: Good program planners don't just randomly throw programs together. They happen deliberately and on purpose and are highly intentional in their goals, content and flow.

Sequencing

Sequencing: A leader's ability to select and arrange activities in a specific order with a view to maximizing participant growth, development and enjoyment.

If a leader runs activities in the wrong order, like starting a group off on a day of team building with a super-challenging activity before they've had a chance to succeed at something easier, group members may not feel emotionally safe, may experience frustration or even become disillusioned with being part of the group. A day of well-sequenced activities will maximize participant enjoyment by giving them an opportunity to learn about each other and themselves and to develop competence through participating in increasingly challenging activities. Groups need to learn how to walk before they can run! Good sequencing allows participants to have small successes and then build on those successes with even more challenging activities or problem-solving scenarios. Get the sequencing out of order, and you risk facilitation failure.

Pace

Pace: The rate at which activities roll out. Individually, activities may be considered "fast-paced" (highly physically engaging, busy or noisy), or "slow-paced" (low physical engagement, calming and quiet).

Good programmers know that providing a balanced mix of faster- and slower-paced activities can add quality flow to a program and increase the enjoyment of the program for everyone involved.

Transitions

> **Transitions:** The process of changing from one energy, state or condition to another.

When activity-leaders run a program, regardless of length, it is important to consider exactly how and when they will transition – flow – from one activity chunk to the next. Will there be a verbal announcement? *("Closing remarks will begin in 5 minutes!")* Will the transition consist of a break between activities? *("Alright folks, take a 10-minute bio-break, and when we come back, we will move into the second half of the activity!")* Will the transition be abrupt and jarring, like the sounding of an alarm, blowing of a whistle, or a loud directive *("….and…STOP! Time's up! Volleyballs down! Move back to your original spots!")* or will the transition be more subtle and smooth, like signalling the end of an event by gently turning the lights up or gradually increasing the volume of a piece of music as it plays?

Head, Heart, and Hands

A great habit to get into when planning a program or event is to consider what the participants will experience through Head, Heart and Hands. The Head, Heart, and Hands model integrates thinking and critical reflection (head), feeling (heart), and engagement (hands) to create a transformative recreational experience. When all three domains have been considered and incorporated into a recreation or leisure program, the potential for participant enjoyment is greatly increased. Intentional inclusion of the three elements results in engaging, enlightening and enjoyable recreational experiences. The Head, Heart, and Hands model serves to "re-create" someone's lived experience, allowing participants an opportunity to develop a skill, learn something new, or have a unique experience of some kind.

Head
What have you learned?

Heart
How do you feel?

Hands
What are you going to do?

"Head, Heart, Hands" by Freddy Vale, CC BY-NC-SA 4.0

Head: This is the cognitive domain. In other words, what will you give the participants to think about, learn about, or consider?

Heart: This is the affective domain. In other words, what kinds of emotions do you want to elicit in your participants through your program or event? How do you expect them to feel while participating?

Hands: This is the psychomotor/physical domain. What will the participants physically engage in – actually do – during the program? Will they be running, biking, using their hands for crafting, or moving around a kitchen?

5.6 Session Plans

Part of program design is knowing what you are doing, where you are doing it, with who you are doing it with, and what you need material and equipment-wise to do it! Having a written plan on hand for your session, lesson or workshop will help you stay organized, keep your session tracking on time, and ensure you haven't skipped or missed anything. A good session plan should answer the 5 W's:

- **Who** is participating? Instructing?
- **What** is the session called? What is the topic?
- **When** is the session being held (date)? What time?
- **Where** is the session being held? Exact location?
- **Why** is the session being held? (ie, It's the second in a series of 8 lessons, it's a team debrief, it's a special event, it's a Round Robin)

In addition to answering the "5 W's", a good session plan should also include an additional "What" that lists the supplies and equipment (materials) needed to run the session and the quantities needed of each item (See [STEP 6: Supplies, Equipment and Swag](#)). For a straightforward lesson, session or workshop, a simple session plan will do. For a more complex recreational session or for a special event with lots of moving parts involving multiple people, it is recommended that a full Walkthrough checklist be completed and written up (See STEP 10: The Walkthrough). The idea is to avoid winging it. A poorly designed recreational program or event is bound to fall apart, appear haphazard, or fail entirely. The better the program is designed, and the more details are included in the session or event plan, the easier and less stressful it will be to execute.

Sample Session Plans

Sample Session Plan 1

Session Information

Name of Session: Head, Heart, and Hands: The Art of Facilitation, Session II
Date: Saturday, October 12, 20XX
Time: 1:00 P.M. – 3:00 P.M.
Location: Community Room B, Aspenside Community Centre
Instructor(s): Shelby Smith
Description and number of participants: 24 Youth-Leaders-in-Training – YLIT Program

Supplies and Equipment

Supplies	Equipment
• Prepared flip chart papers • 2 Flip chart markers • Masking tape	• 25 back-jacks • Flipchart stand (set to low) • Virtual slideshow clicker • Debrief ball • 4 tennis balls

Session Plan

Time	Activity	Description	Formation/Space	Materials
12:45 P.M.	Instructor Arrives	Session Set-Up	Community Room B	All
1:00 P.M.	Grabber: "Wah!" (deinhibitizer game) • Play: 10 min • Debrief: 5 min (Debrief thumb ball)	Launch into game • no introductions other than game rules to set tone, energize, model the Art of Facilitation	1 large circle; Shelby starts in circle, steps out when game is underway	• Debrief thumb ball
1:15 P.M.	Review: • Group Process Theory • Risk Management • Diversity and Inclusion • Q&A	Welcome group back for Session II • Review of content from Session I • Establish launchpad for learning this week • Session roadmap	Group seated on floor on back-jacks horseshoe formation Teach from opening of horseshoe	• Flipchart stand • Flipchart papers • Masking tape *Note: Post flipchart pages around room*
1:35 P.M.	Activity: "Warp Speed" (prop initiative) • Play: 10 min • Debrief: (One Word Whip) 5 min	Opportunity for participants to demonstrate listening skills, problem-solving skills, patience	Groups break into 4 circles of 6, away from back-jacks	• 4 tennis balls
1:50 P.M.	New Material: Art of Facilitation II • Engaging Head, Heart, and Hands • Meta-processing • The Art of the Debrief	Instruct group using prepared flip chart papers; Q&A	Group seated on floor, back-jacks in horseshoe formation	• Flipchart stand • Flipchart papers • Markers
2:10 P.M.	Bio Break			

Time	Activity	Description	Formation/Space	Materials
2:20 P.M.	Activity: "Nose Jousting" (prop initiative) • Play: 5 min • Debrief: (What, So What, Now What) 10 min	Risk-management awareness, meta-processing skills, importance of appropriate sequencing	Move back-jacks to perimeter of space; group moves through space freely	• Masking tape
2:40 P.M.	Warm Down: • "Virtual Slideshow" and discussion	Memory takeaway	Back-jacks back into circle formation	• Virtual sideshow clicker
2:55 P.M.	Closing: • Summary of learning, questions and answers, confirm date of next session	Land learning from today's session	Back-jacks in circle formation	None
3:00 P.M.	Depart	Session tear-down	Space tidied, back-jacks stored	All other equipment & materials leave with Instructor

Sample Session Plan 2

Session Information

Name of Session: Motion in Canoes: Lesson Plan
Date: Tuesday, July 15th, 20XX
Time: 10:00 A.M. – 11:15 A.M.
Location: Waterfront
Instructor(s): Pete and Sally
Description and number of participants: 8 Campers: Adventurers (Ages 11-12 years)
Equipment:

- 5 canoes
- 11 paddles
- 1 PDF per person

Time	Activity	Formation
9:50 A.M.	**Prep:** Meet group at boathouse, fit campers for paddles and PFDs; grab canoes, head down to beach	XX xxxxxxxx
10:00 A.M.	**Intro/Grabber:** Paddle Song (beach)	XX x x x x xxxx
10:05 A.M.	**Review:** Parts of canoe (beach) *(Canoe is in red, in the middle)*	XX x || x x || x x x x x
10:10 A.M.	**New Skill:** Strokes (forward, reverse, pull, push)	On the water: pinwheel formation
10:30 A.M.	**Activity:** Follow the leader	On the water
10:45 A.M.	**Warm-down:** Canoe Tag	On the water: extra paddle begins in stern of instructor canoe
11:00 A.M.	**Clean Up:** Learning debrief (beach) Gear and canoes away (boathouse)	XX x x x x xxxx
11:15 A.M.	**Class Ends**	N/A

Sample Session Plan 3

Let's Zumba! (Dance Lesson)

Date: Saturday, June 4th, 20XX
Time: 10:00–10:30 A.M.
Lesson Focus: Let's Zumba!
Instructor: Daniel B.
Group Size: 19 students
Group Age/s: 8-9 years
Space/Venue: Medium-sized workout room
Equipment: Console, projector, screen, Wifi to play YouTube Video
Desired Learning Outcomes: • Introduction to dance – Zumba • Develop, refine, and demonstrate the ability to apply Zumba moves to music
Warm Up (10 min): Students perform each movement ×10: • Arm circles: forward & backwards • Marching in place: "High knees" • Jumping Jacks: "Rocketship & Pencil" • Latissimus Dorsi stretch: "Make a rainbow" • Arms up: "Reach to the sky" • Trunk twist • Tricep Stretch: "Scratch your back" • Deltoid Stretch: "Give yourself a hug and touch your nose" • Quadricep Stretch: "Grab food and balance like a flamingo" • Wrist and ankle circles
Zumba Activity (5 mins): "[I Like to Move It](#)" Watch & dance along with the movements demonstrated in the video: • Bicycle arms and jumps • Arm waves, arm pumps • Arms side to side and above head
Warmdown (10 min) • Standing chest opener • Child's pose

5.7 Key Takeaways

Step 5: Key Takeaways

- Being mindful to incorporate intentional **program sequencing, pace, and transitions** will allow the program-planner to create purposeful program flow, making it easier to reach programmatic goals;
- Keeping the **Head, Heart, and Hands** model in mind when designing programs is key to creating powerful, transformative recreational experiences for participants.

STEP 6: SUPPLIES, EQUIPMENT AND SWAG

6.0 Learning Objectives

Learning Objectives

By the end of STEP 6, the student shall be able to:

- *Differentiate* between programming equipment and programming supplies
- *Define* what is meant by the term 'SWAG'
- *Recognize* the relationship between program supplies & equipment and the program budget

6.1 Gotta Have Stuff

Before diving into figuring out what supplies and equipment are required for your program, revisit STEP 5 – Program Design and ensure you have confirmed the facility, venue or space where you will hold your program or event. Once you have physically scouted the space to ensure suitability and determined that the venue has the amenities needed for your program, you can then start thinking of the physical stuff – the supplies and equipment – you need to run your program successfully.

Considerations

Your Budget

Your working budget for the program or event will have a direct impact on not only the type of supplies and equipment you use but also the quality and quantity of these items as well. Many recreation programs work with limited budgets. Your job as a program-planner is to ensure you are doing as much as you can with what you have, and to stretch those dollars as far as they will go!

Feeding Your Participants' Senses

Participating in a recreation program or event is an entirely holistic experience that engages the senses – sight, hearing, smell, taste, and touch. The supplies, décor, props and equipment you use in your program will have a great impact on the quality of your participants' experiences. Human beings generally enjoy having their senses fed and delight in experiences that include new, creative or novel phenomena. It's important to keep this in mind when deciding on what "stuff" you will use for your program, as the stuff you include will have an impact on the feelings elicited in your participants. Ask yourself – how do you want the space and the activities perceived by your participants? Imagine your program or event components through their eyes and ears. What will they see? Hear? Smell? Touch? Taste? With the money and resources you have, what can you do to amp up the novelty and quality of their experience?

Supplies

Supplies: Items used in a program or event that are *consumable and generally not reusable*. Examples: Food, clay, glue, confetti canons, hot-glue sticks, googly eyes, paper, stickers, balloons, name tags, paper plates, beads, paint, coffee creamer, stir-sticks, etc. Supplies are physical items that can be touched, tasted, held, or manipulated by participants that can be used up (consumed) and then replenished. From origami paper to pamphlets, you will need to make a comprehensive list of the *consumable* supplies you need for your program or event and the quantity required for each.

Props and Equipment

Props & Equipment: Items used in a program or event that are *generally reusable and somewhat permanent in nature*. Examples: Hot glue guns, basketballs, gym mats, chairs, tables, hockey sticks, tent pegs, paintbrushes, beanbags, parachutes, helmets, tents, kayaks, metal cutlery, backpacks, etc. Anything that can be packed up and put back in a supply cupboard likely falls under this category. Props and equipment are physical items that can be touched, held, or manipulated by participants that are reusable (non-consumable) or generally permanent in nature (rubber balls, maps and compasses, dice, etc). From rubber chickens to hiking boots to

extension cords, you will need to determine the *non-consumable* items needed for your program or event and the quantity required for each.

Décor

Décor refers to anything that decorates a space. This can be signage, decorative table centrepieces, flowers, tablecloths, candles, photographs, colour-themed napkins, posters and more. Furnishing, plus anything that gets put up on a wall, hung from a ceiling, or displayed in some way, is décor. How do you want the furnishings laid out and the decoration of your space to look? What feelings do you want the décor to elicit in your participants?

Prizes

Prizes are anything that can be won by program or event participants. Prizes can be as big as a round-trip holiday to Québec City or a diamond ring or as small as a $5 Gift Card to a local coffee shop. Prizes can vary from artwork to gift baskets, from tote bags to books. Prizes can be won through the purchase of raffle tickets, (in which numbered tickets are sold, drawn at random, and the holder of the winning ticket number gets the prize), or through the drawing of names for door-prizes. If you will have prizes, what will they be? Given your budget, how many can you afford? Or...will they be donated?

Audiovisual (A/V)

Another consideration is your A/V (Audiovisual) equipment. A-V can include microphones ('mics'), mic-stands, speakers, turntables/DJ equipment, wedge monitors, a soundboard, extension cords, projection equipment, screens, etc. – anything used to enhance the audio or visual experience for the participant falls under this category. If your program has audiovisual components (music, a PowerPoint presentation), does your venue have the required A/V technology built in for you to use, or will you need to bring in equipment from outside?

6.2 SWAG - Stuff We All Get

'SWAG' ("**S**tuff **W**e **A**ll **G**et") refers to free things and cool giveaway programs or events that participants receive that are branded with a company name or logo. Examples: Pens, hats, t-shirts, mugs, ribbons, notepads, keychains, water bottles, pop-sockets, glassware (and more!). SWAG is most often given out to participants at large Special Events, but sometimes SWAG shows up at smaller recreation programs, too. Although SWAG is great (who doesn't love free stuff?) Program Planners should know it is not required to pull off a successful program or event.

Branded SWAG (items branded with the logo or name of a program, event or organization) is an easy and slick advertising stream for the provider and is a great way for sponsors and donors to brag about their part in bringing your event to life. At large events, like trade shows, galas, fundraising events or open houses, SWAG items are often gathered together and given to participants in a "SWAG bag" (also called a Goodie Bag) upon entry.

Note: If you have not secured a sponsor or donor who will provide SWAG at your program or event, but you really want to provide it, it will need to be purchased out of your program budget. *Depending on the type of SWAG item you have in mind and the quantities you need, this can get expensive*! This is why not every large event provides SWAG, as the cost can be prohibitive. Another reason SWAG may not be provided is when suitability might be at issue: Not every event or program theme warrants SWAG.

There are a great number of companies that will provide personalized, customized or branded items to you in bulk. One such provider in Canada is [Vistaprint](#).

6.3 Example: Equipment and Supply List

Below is a sample Equipment and Supply list for an Outdoor Event Registration Tent. Each supply and equipment need is captured in Column One, followed by the related quantities and the associated costs for each item in columns two, three and four. The fifth column indicates whether the item is (a) provided by the venue (thus zero cost), (b) requires purchase (the seller or vendor is noted), or (c) being loaned out from an individual or organization.

Equipment/Supplies	Quantity	Cost/Unit ($)	Total Cost ($) *before tax*	Provided/Bought/ Loaned + *Notes*
Tables	2	0.00	0.00	Provided *by venue*
Chairs	4	0.00	0.00	Provided *by venue*
Black Tablecloths	2	0.00	0.00	Provided *by venue*
Pop-Up Tent (8×8)	1	0.00	0.00	Provided *by venue*
Garbage Can	1	0.00	0.00	Provided *by venue*
Extension cord (30')	1	0.00	0.00	Provided *by venue*
Twinkle Lights for pop-up tent	1 string (5 metres)	29.99	29.99	Purchase – Canadian Tire Note: Comes with x4 strings
Name Tags	150	5.19 (30)	25.95	Purchase – Staples
Sharpie Coloured Markers	12	15.79	15.79	Purchase – Staples
Large Welcome Sign	1	3.00	3.00	Purchase – Dollarama (created by Programmers)
Masking Tape	1	0.00	0.00	Provided by *Programmers*
Clipboards	3	0.00	0.00	Provided by *Programmers*
Ballpoint Pens (Black)	24	1.69	3.38	Purchase – Staples
Cash Box	1	29.99	29.99	Purchase – Canadian Tire
Cash Float for Cash Box	–	50.00	50.00	Provided by *Programmers; small bills, coins*
Calculator	1	0.00	0.00	Provided by *Programmers*
Volunteer Sign-in Forms	2 copies	0.05	0.10	Provided by *Programmers*
Event Evaluation Forms	150 copies	0.05	7.50	Provided by *Programmers*
SWAG Item: Branded Hotel/Motel key-fobs	100	100 units	42.61	Purchase – Etsy Canada

Download an Excel version of this table: Sample Equipment and Supply List (Excel)

6.4 Key Takeaways

STEP 6: Key Takeaways

- Your program or event plan should include **a comprehensive list** of every single physical thing you will need to successfully run your lesson, program or event;
- You will need to list the **quantity** required of each item, the **cost** of each item, and **where** you will be getting the item from;
- As you consider your **Supplies, Equipment and SWAG,** you will need to strike a balance between what you can afford budget-wise while doing as much as you can to enhance the participant experience by feeding their senses.

STEP 7: LEADERSHIP AND PERSONNEL

Chapter Outline

7.0 Learning Objectives

Learning Objectives

By the end of STEP 7, the student shall be able to:

- *Name* the common types of personnel and staffing roles that frequently show up at recreation-based events and programs
- *Describe* the importance of having recreation events and programs led by competent professionals
- *Predict* the various personnel needs for a given recreation program or event based on its nature/theme, size, and other distinguishing characteristics
- *Evaluate* the financial viability of a program or event based on its staffing and volunteer requirements

Recreation programs and events require leadership – human resources. Leadership can take on many guises – it's not just about running activities! Simply put, a leader is any person who uses skills to help a group identify and achieve its goals. When it comes to program-planning, figuring out how to use available person-power – the human resources you have at your disposal – to run the various pieces of your program or event is an essential piece of the program-planning process.

7.1 Main Leadership Areas in Recreation

1. Those with Technical Skills

People with skills or knowledge in a specific area, for example, an instructor running an Ashtanga yoga class, an art therapist, a lifeguard overseeing a free swim at the local pool, or an individual calling a bingo game.

"[Art Therapy: A Marriage of Expression and Healing](#)" by [NMCCL Public Affairs](#), identified by [DVIDS](#). Used under the [Public Use Notice of Limitations](#). The appearance of U.S. Department of Defense (DoD) visual information does not imply or constitute DoD endorsement.

2. Those with Human Relations Skills

People who possess strong human relations skills tend to be excellent communicators, are great at problem-solving and relate well to others. Individuals with strong human relations skills are highly valued in roles that involve direct contact with the public.

Photo by *Priscilla Du Preez*, *Unsplash Licence*.

3. Those with Conceptual Skills

People who engage in critical thinking, creative problem-solving, organizational tasks and "big picture" thinking. Conceptual skills are essential for anyone in higher-level leadership roles in events and programs, like project managers or event managers. Individuals with conceptual skills often find themselves establishing and nourishing partnerships with volunteers, donors, sponsors, partnering agencies and other 3rd parties.

Photo by *Pavel Danilyuk*, *Pexels Licence*.

Good Servant Leaders...

1. Focus on the potential of participants
2. Strike a balance between completing necessary tasks and maintaining positive relations
3. Get excited about what they are doing – emotions are contagious!

7.2 Personnel Roles

> The bigger your program or event, the more people you will need to help you run it.

Common Personnel Roles at Recreation Events

- **Activity Leaders:** Run and facilitate games and activities; lead the various components of a program or event;
- **Attendance Taker:** Records the number of people at the program or event;
- **Coat-Check Attendant(s):** Take coats and issue receipt tickets for checked garments/items;
- **DJ:** Provides musical entertainment, sometimes makes announcements;
- **Emcee:** Most often found at special events, the Emcee looks after communicating important information to guests or attendees; keeps the event on track by facilitating the movement and flow of participants through the various transitions or stages of the event;
- **First-Aider:** Administers First Aid and executes emergency procedures as required;
- **Food and Beverage Servers:** Serve refreshments to guests either at designated tables or behind buffet-type tables;
- **Greeters:** Greet people as they arrive at the venue;
- **Instructors:** Skilled individuals who supervise or teach specific recreation activities. Most often, the term "Instructor" implies there is a sharing of a certain skill with others;
- **Parking Lot Attendant(s):** Safely manage the logistics (arrival and departure) and parking of vehicles in a designated space;
- **Project Manager:** An organized, goal-oriented professional who creates, designs and oversees a special event or project and ensures its alignment with the vision of the group or agency;
- **Security:** Crowd control, client safety, safeguards prizes/valuables, works the door checking ID, responds to emergencies and unusual situations that require secure interventions;
- **Ticket-Takers:** Take tickets at the door as people arrive;
- **Workshop Facilitators/Instructors:** Special guests with specialized skills who have been brought in as experts in a specific area;
- **Volunteers:** Can do any of the above (if qualified), plus any other duties as assigned;
- **Volunteer Wrangler/Coordinator:** Coordinates, schedules and supervises volunteers; delegates tasks and ensures adequate activity personnel coverage as required;
- **And more...!** There are tons of different roles that can show up at any given event!

Figuring out the degree of "person-power" needed to run a program or event will depend on its size, scope and budget. It's worth noting that not all leadership roles need necessarily be filled by paid professionals. Depending on the size and nature of an activity or event, some roles can be filled by eager volunteers.

When figuring out the personnel needs for a specific program or event, it is important to create (and eventually share) a job description for each role. The job description acts as an informative guideline for the people involved in your program or event and serves to clear up any confusion or misinformation about the scope or parameters of a specific job or role.

Example: Greeters for the Charity Auction Event

Greeters will reside at (a) the front doors of the venue (2 greeters) and (b) the registration table (4 greeters) and warmly greet guests as they arrive. Greeters will provide information and direction to guests about logistical items like where to find the coat-check, the washrooms and the water-bottle refilling station, where to validate parking, where to purchase drink tickets, where to find the seating plan (so the guest knows where to sit), and where to pick up and pay for won auction items at the end of the night.

7.3 Key Takeaways

STEP 7: Key Takeaways

- The bigger your recreation-based program or event, the more people you will need to help you run it;
- Your personnel will consist of those with technical skills, those with human relations skills, and those with conceptual skills;
- Enthusiastic Volunteers can take on *any* role, provided they have the requisite skills and abilities.

STEP 8: RISK MANAGEMENT

Chapter Overview

8.0 Learning Objectives

Learning Objectives

By the end of STEP 8, the student shall be able to:

- *Describe* the *Identify-Assess-Manage-Review* and the *Risk Management Matrix* theoretical approaches
- *Describe* the scope and role of program/event security, logistics, policies, procedures, accident prevention, risk assessment and the importance of having a sound risk-management plan for any program/event
- *Identify* the various inherent risks in a given activity and offer strategies on effective management and mitigation
- *Discuss* terms: Duty of Care, negligence, liability, waivers, assumption of risk, SOPs (Standard Operating Procedures), EPs (Emergency Procedures)

8.1 Introducing: Risk!

> **Risk**: The chance of something happening due to factors or events that will have an impact on the achievement of goals or objectives. Risk is often measured in terms of likelihood and consequences, and can have both positive or negative effects.
>
> **Risk**: The chance of something going wrong.

People need to feel safe AND be kept safe when participating in recreation or leisure programs. When individuals register for recreation activities, they expect the recreation professionals to provide high-quality experiences with a low risk of personal injury. Willing participation is an expression of *trust* – trust that the recreation leaders, instructors or program-planners will diligently provide a **Duty of Care** – protection from the inherent emotional and/or physical harms associated with a specific program. For the program-planner, earning and keeping this trust occurs through a process known as **Risk Management**.

Simply put, *recreation is risky*. Risks of various kinds and severity are inherent in all recreation areas across formats. A child using a hot glue gun while crafting is risky due to the possibility of getting burned. Carrying a canoe over a rocky trail is risky due to the potential for a turned ankle or back strain. Supervising adults with wandering dementia while on an outing is risky, as someone might get lost if they slip away from the group.

One might ask – *"If some activities are so risky, why do recreation professionals continue to offer them?"* The answer is simple: Risk is attractive. Risk is exciting. For many, risk is a powerful motivator for engaging in recreation-based programs (Jordan & Degraaf, 2019, p.201)!

"*Danger thin ice keep off*" *by* *Dano*, *CC BY 2.0*.

Rather than avoiding risks, recreation professionals often intentionally incorporate risky elements into their programs because they know few people experience personal development or growth unless they go to the edges of what is comfortable and familiar.

The job of recreation professionals is to provide participants with opportunities to go to those edges with as little actual risk of injury or harm as possible. But how can one do this without taking all the risk out of programmed experiences, which might destroy the very character of the experience they provide (Jordan & Degraaf, 2019. p.201)? This is where Risk Management comes in.

What is Risk Management?

Risk Management is a planning process specific to individual organizations, constantly reviewed and updated by management and staff that outlines steps to minimize the undesirable risks found in the various programs conducted through parks, recreation, and/or leisure service organizations.

In its application, Risk Management is the effective management of potential opportunities for adverse effects in a given situation. It's a decision-making process that considers all the possible results of unfortunate or unfavourable incidents or accidents. When risk is managed effectively, it can protect a recreation staffer's professional reputation and also the organization they work for from lawsuits. Excellent Risk Management is an expression of Servant Leadership insofar as it serves the participant's greater good. Risk Management is the thorough identification and evaluation of inherent and potential risks, as well as the careful selection and implementation of risk control strategies.

Effective Risk Management

- Draws people to attend programs and events (good reputation)
- Allows participants to feel safe from emotional and physical harm
- Develops client-provider trust and increases professionalism
- Decreases the chances someone is going to get hurt

We Manage Risks Because…

- We have a duty to protect our participants from foreseeable injury and harm.
- Doing so protects the reputations of recreation instructors and agencies
- This prevents those in positions of authority from abusing their power
- Having a formal plan in place to respond to incidents, accidents, and injuries reduces the chance of undesirable outcomes
- It saves money – getting sued can be expensive, even if the agency wins
- It creates great professional role models (just like you!)

People working in leisure services, sports and recreation need to be concerned and informed about how the law expects them to behave in carrying out their duties and managing the risk of injury (and death) to those under their care and supervision.

Risk Management Requires

1. A basic understanding of some key legal principles
2. Paying careful attention to a Risk Management process
3. Ongoing commitment to the process by everyone involved
4. A good dose of common sense

8.2 Identifying Inherent Risks

Inherent risks are those that are generally associated with and considered to be an unavoidable or naturally occurring part of a particular activity. Knee injuries from playing soccer, getting sunburned while playing outdoors on a hot sunny day, pulling a hamstring during a fitness class, or cutting a finger during a cooking workshop are all considered inherent risks; risks that would not be present if the activity were not being offered or engaged in. In organizations, inherent risks can be identified by walking around and/or talking with staff, volunteers, and participants in 5 areas:

1. *Facilities* – Maintenance, up-keep, damage, vandalism
2. *Equipment* – worn, damaged, broken; age-appropriate, activity-appropriate
3. *Personnel* – adequate supervision, qualifications
4. *Program/event/activity* – location, activities, security, etc.
5. *Participants* – medical history, readiness for the activity, ability, mental/emotional state

Risk Management Matrix

The magnitude (size) of a risk can be determined by using a simple formula:

$$\text{Frequency} \times \text{Severity} = \text{Magnitude}$$

The term Frequency refers to the likelihood of an injury/damage/loss occurring. The term Severity refers to the seriousness of the resulting injury/damage/loss. In the formula, a points system is applied to both Frequency and Severity, from 1-4:
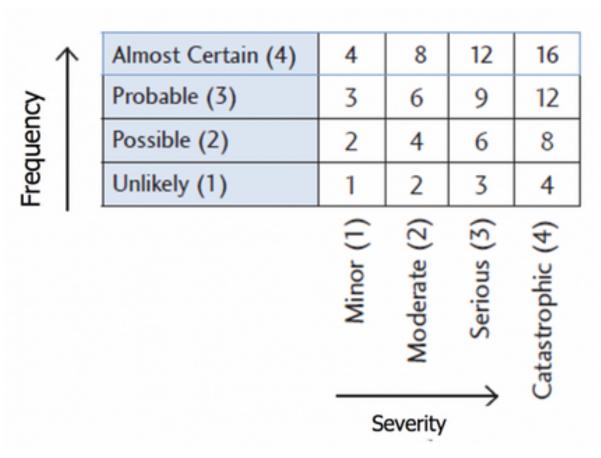
Frequency (1-4)

1 – Unlikely – less likely to happen than not

2 – Possible – just as likely to happen as not

3 – Probable – more likely to happen than not

4 – Almost certain – sure to happen

Severity (1-4)

1 – Minor = will have an impact, BUT can be dealt with through internal adjustments

2 – Moderate = will have an impact and will require a change

3 – Serious = will have a significant impact

4 – Catastrophic = will have a debilitating impact

After determining the **Frequency** (1-4) and the **Severity** (1-4) of a given risk, multiply the two numbers to arrive at the **Magnitude** of the risk (from 1-16 points). The higher the number, the higher the potential for a catastrophic outcome. It can be expressed in chart format:

"Risk Matrix" by Allison Menegoni CC BY -NC -SA

Identify-Assess-Manage-Review (IAMR)

IAMR is a Risk Management process tool that can be applied by anyone involved in the planning, leading or evaluating of a recreation activity.

Identify

- List all the potential risks inherent to the activity
- Examine what else could go wrong (within reason) in the indoor or outdoor space(s) where the activity is taking place.
- Environmental Domain (Environmental Hazards): Things in the immediate environment that pose a danger where the activity is happening, indoors or outdoors. Outdoor examples include severe weather, animal encounters, rocky or uneven terrain, proximity to water elements, and broken equipment. Indoor examples include exposed electrical wires, sagging ceiling tiles, and trip hazards like loose carpeting or cables.
- Human Domain (Human Hazards): Things to do with the human condition that pose a danger to participants, indoors or outdoors, before or during the activity. Examples include participant or leader fatigue, lack of qualifications or experience (leader), unresolved conflicts among participants, hunger, anger, leader immaturity, over-estimation of participant capabilities, and lack of emergency procedures.
- Note: In any given recreational activity, the number and severity of Human Hazards almost always

outweigh Environmental Hazards.

Assess

- After identifying each individual risk (there can be many), each gets assessed for its magnitude using the Frequency × Severity = Magnitude formula.

Manage

There are four primary ways in which risks can be effectively managed:

1. **Accept** – When an organization or activity leader is prepared to accept the risk(s) of having participants take part in a specific activity. The activity leader(s) deems the risk minor enough to be acceptable and leaves it as is (e.g., a paper cut while doing an Origami paper-folding activity).

   - The programmer must be very aware of public perception (optics) when making the decision to accept a risk
   - Used most frequently when the consequences are small and the frequency low
   - Be aware that if something does go wrong, the public will be quick to pass judgment and demand to know, "WHAT WERE YOU THINKING?!"

2. **Reduce** – Judging that risk is acceptable but serious enough to require proactive reduction, often through modification of the activity (like adding frequent hydration breaks) or the addition of safety equipment (ie, helmets, safety goggles, application of sunscreen

3. **Transfer** – Liability for the risk is transferred from the activity leader/agency to an insurance provider, often by means of a participant signing a waiver or assumption of risk form. In the event of an accident or incident (barring gross negligence on behalf of the provider), accountability falls to the participant and the burden of responsibility to the insurance provider.

   A Note about Waivers:

   - Signed waivers and/or Assumption of Risk forms can effectively distancing the organization from responsibility, however, waivers do not absolve activity leaders or agencies from showing a Duty of Care
   - When signed, a waiver is legally binding
   - Waivers discourage lawsuits. They can heighten a participant's awareness that they have a role to play in ensuring their own safety. If a participant is injured during the course of an activity, a signed waiver 'proves' the participant was aware of the risks when they chose to participate
   - Only adults can sign waivers (18+ yrs). You cannot waive the rights of a child
   - Waivers can bring an aura of seriousness to an activity prior to engaging in it (ie; white-water rafting, rock-climbing, zip-lining)

4. **Eliminate (Avoid)** – The most extreme course of action: Judging that a risk associated with an activity could be severe or catastrophic, the activity is therefore eliminated or avoided. Sometimes, ELIMINATING a behaviour or specific activity is clearly the safest and arguably most correct course of action. For example:

   - The elimination of tackle football in some Canadian high schools
   - The prohibition of body-checking at all levels of recreational hockey divisions in Ontario (with the exception of competitive divisions)

- Camps eliminating games or activities that have historically caused physical injuries like British Bulldog, Piggyback Races, or building human pyramids).

When you remove the activity, you remove the risk. However, elimination is rarely seen as the best answer to reducing risk, as going to this extreme often means destroying the very nature or aims of a given activity, like the thrill that comes with bungee-jumping or free-diving, or the feelings of joy that comes after a successful outing with a group of adults with complex health concerns.

Review

"Review" is a crucially important step in the Risk Management Process.

- The recreation leader reflects on how effectively risks were managed in a given activity.
- Questions to ask: What could have gone better? Were there any unexpected safety issues or risks that occurred that needed to be noted so they could be addressed proactively next time?
- The Review step establishes if there is anything the recreation leader will do differently the next time they run this activity.

8.3 Legal Liability

In Parks and Recreation, in terms of legal liability, having a "duty of care" is an occupier's responsibility. It is the occupier's duty to ensure they have done everything reasonable to ensure their property is safe for the public.

While anyone who comes onto a property (like a recreation facility) or participates in a recreation program willingly assumes responsibility for what happens on that property, they are entitled to an expectation that the property or program is reasonably safe. Consider the following situations:
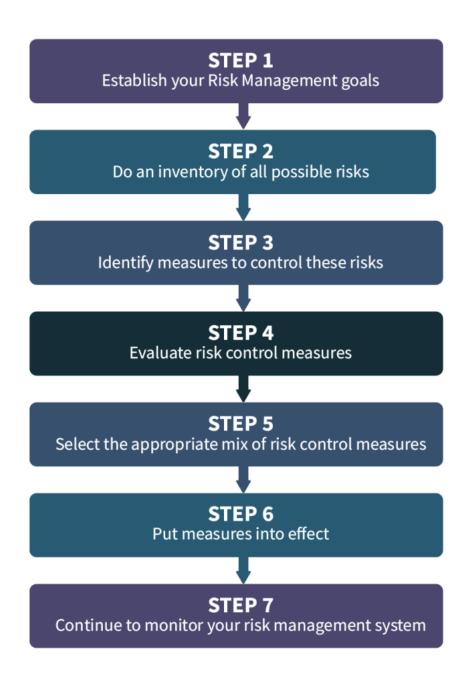
- If a participant playing baseball at a municipal baseball diamond rounds 2nd base steps into a gopher hole and tears their knee, the question will be, "Why did that happen"?
- If a parent enrolls their child in swimming lessons at the local aquatics centre and discovers their child is being instructed by a convicted pedophile, the question will be, *"How could this happen?"*

How is it that a baseball player still got injured despite the best efforts of the municipal Parks and Recreation employees who look after maintaining the baseball diamond? How is it that a convicted pedophile managed to obtain employment with a city-run pool despite the municipality's stringent applicant screening process?

What is really being asked is this: Did the Instructor/Agency or municipality do the best they could with the resources they had? Or was the Duty of Care breached? For someone to sue, there must be a breach of the duty of care – they should have done better. Further to that, the breach must have resulted in some damages (e.g., personal injury, pain or suffering).

8.4 Risk Management: A Planning Process

As a planning process, Risk Management includes all management, staff and volunteers of a specific agency, organization or business – not just the individuals who plan or lead activities. Although many risk-management standards are shared across the field and various sectors of the field, risk-management plans should be specific to the organization – you can't borrow a plan from somewhere else – and need to be reviewed and updated regularly as standards evolve. Recreation professionals go through the following steps to ensure excellence in risk management, no matter how big or small the activity:

"7 Risk Management Steps" by Freddy Vale, *CC BY-NC-SA 4.0*

Image Description

Step 1. Establish your Risk Management goals

Step 2. Do an inventory of all possible risks

Step 3. Identify measures to control these risks

Step 4. Evaluate risk control measures in light of:

- ◦ The magnitude of the risk (see the Frequency × Severity Matrix)
- ◦ Standard of care expected
- ◦ Available resources on hand

Step 5. Select the appropriate mix of risk control measures

Step 6. Put measures into effect

Step 7. Continue to monitor your risk management system

Policies and Procedures

Recreation organizations, agencies, facilities and businesses have established policies and procedures for employees to follow in the event of an emergency or unusual situation.

Policies: *Give direction to how an Agency operates and are an integral part of the Risk-Management process. Policies are published guidelines that govern the behaviour and actions of employees and volunteers so that they are consistent with the philosophy, values, goals and objectives of the Agency. Although policies tend to be broad in scope and application, they help reduce unfavourable events (accidents, disasters) from occurring by providing guidelines for conduct.*

Procedures: *Specific actions or approved steps required to carry out Agency policies. While policies tend to be broad in scope, procedures are more specific.*

Types of Procedures

When something is injured on your watch, whether it be at the ice rink, on the ski hill, in a gymnasium, or in the yoga studio, if that individual shows up an hour after being injured and says, "Show me what it is you have written down to prevent accidents like mine from happening. Show me what you were supposed to have done before and during my accident. Show me the part that explains and justifies why you acted or reacted the way you did". You need to be able to pull out the Procedures Manual in some form – hardcopy or digital – and show them. Written Policies and Procedures act as a roadmap and guide for preparing for risk, planning for risk, managing risk and reviewing risk management processes. Policies and Procedures are not static but malleable. Policies need to reflect reality, and so they tend to change and get updated frequently, according to the law and current trends in the industry.

1 – Operational Procedures (aka Standard Operating Procedures or "SOPs")

- Correct use of an A-Frame ladder
- How to book the gymnasium
- How to write and file an incident report
- How to safety inspect a high-angle environment (ropes course) site prior to use

2 – Emergency Procedures (What to do in the event of an emergency)

- What to do if a participant experiences a medical event during program
- What to do if a physical fight breaks out between 2 participants
- What to do in the event of a missing person
- What to do if a trespasser/unwelcome person is detected in the facility

Terms to Learn

Duty of Care: The obligation one person owes to another based on a legal relationship between that individual and the other. A Duty of Care is a legal obligation imposed on an individual – an "occupier" – the person in legal possession of a property (ie; a Recreation Agency or a Community Centre) who has control over, and responsibility for, the condition of the property. A Duty of Care requires the occupier(s)' adherence to a standard of reasonable care to avoid careless acts that could foreseeably harm others and lead to a claim of negligence.

> For example: By purchasing a gym membership, you have entered into a legally binding relationship – they owe you a *duty of care*. In recreation, the leader /instructor has an obligation to provide reasonably hazard-free activities and facilities.

Breaching a Duty: When an occupier fails to meet reasonable standards for a duty of care.

Inherent Risks: Risks that are generally associated with and considered to be an unavoidable or natural part of a particular activity.

In Loco Parentis: Latin, meaning "*in place of the parent.*" Recreation professionals are very often "in loco parentis" in that they are expected to pay the same duty of care to protect the safety and well-being of the children in their care as the parent might.

Negligence: Failure to use reasonable care, resulting in damage or injury to another or another's property.

Malfeasance: Serious wrongdoing, often illegal. Malfeasance is an act with malicious intent to hurt, cause harm, or otherwise injure or cause injury to another party through misconduct or an abuse of power. Malfeasance is the worst kind of negligence and is also called gross negligence.

Policies: Give direction to how an Agency operates and are an integral part of the risk management process. Policies are published guidelines that govern the behaviour and actions of employees and volunteers so that they are consistent with the philosophy, values, goals and objectives of the Agency.

Procedures: Specific actions or approved steps required to carry out Agency policies. While policies tend to be broad in scope, procedures are more specific.

8.5 Key Takeaways

STEP 8: Key Takeaways

- In recreation, the ability to effectively manage the inherent risks in every program or event is an essential skill for all programmers and program-leaders;
- Risk Management begins with the identification of inherent risks, followed by an assessment of the magnitude of each risk, followed by an analysis that will determine the most effective way to manage each risk (accept, reduce, transfer or eliminate), and ends with a review of how well the risks were managed once the program is completed;
- Risk Management does not have to cost a lot of money, but does require careful pre-planning, and the successful execution of a Risk-Management Plan.

STEP 9: MARKETING AND PROMOTION

Chapter Outline

9.0 Learning Objectives

Learning Objectives

By the end of STEP 9, the student will be able to:

- *Differentiate* the terms Marketing, Publicity, Promotion, and Public Relations
- *List* ways in which programmers can get the word out to the public about a program or event
- *Discuss* trends in Marketing and Promotion as they relate to digital and social media
- *Identify* the components of a quality registration form
- *Explain* when it is appropriate to gather sensitive personal client data
- *Explain* the rationale supporting program pre-registration
- *Differentiate* between a Program Schedule versus a Program Agenda

Imagine…you're a recreation leader who has secured funds to create a new program. You've spent weeks designing the program and developing the lesson plans. You've booked the space, organized the equipment, and bought the supplies. And now, it's showtime! The doors open, and…no one's there. Disappointed, you ask yourself, *"What happened??"*

You didn't promote the program. The lack of participants proves one simple truth: *People don't attend events or programs they don't know about*. This chapter is all about marketing, publicity, promotion, and public relations, which are key elements in ensuring the success of any recreation program or event. Here we go!

Marketing: Any activity a business, organization or agency engages in to promote the buying or selling of its services, products or programs; a broad, umbrella term referring to all aspects of publicity, promotion, public relations, or advertising.

Publicity: Any form of unpaid communication that promotes programs, events, goods, services, organizations, and/or ideas

Promotion: A multi-pronged means of attracting public interest for a product, service or program; any activities undertaken by an individual, organization or agency to increase or amplify the visibility of information to the general public; any intentional actions taken by an individual, organization or agency aimed at raising awareness of a product, service, cause or event.

Public Relations: A strategic communication process and practice from an individual, organization or agency designed to favourably influence public opinion about a product, program or event; a way of managing and maintaining the public image of an organization or agency.

9.1 Marketing

> **Q:** *"Hey, how do you plan to get the word out about the launch of your new program next month?"*
>
> **A:** *"We're going to market it by creating a Facebook event page, record a 30-second radio spot, run a banner along the top of our webpage, hang up posters in key areas and include information and registration information about it in the next email blast to the members."*

In the context of recreation programs and events, marketing plays a pivotal role in raising awareness, generating interest, and ultimately driving participation. It encompasses various activities aimed at understanding consumer needs, creating value propositions, and communicating these effectively to target audiences. Kevin Costner's famous line from the film *Field of Dreams* was, "If you build it, they will come".
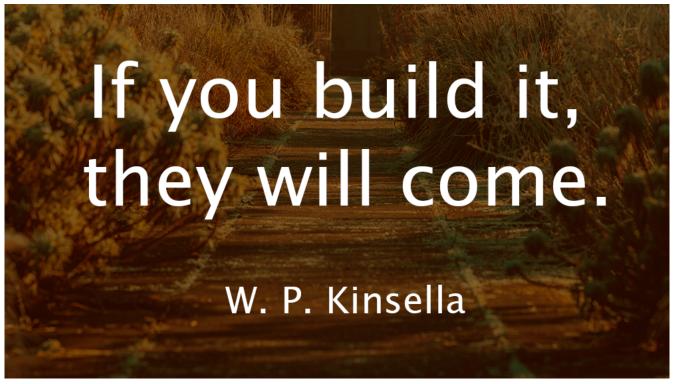
Image by Annie Spratt, Unsplash License. Mods. Recoloured image, added quotation.

Alas, the same cannot be said of recreation programs! A programmer might design the most incredible program on the planet. However, if no one knows about it, they will NOT come.

In the field of recreation, having the ability to effectively market programs and events is crucial. It's a great way of highlighting the benefits and unique features of programs or events, making them enticing to individuals and increasing the likelihood of engagement. Marketing raises public awareness, attracts participants, and enhances brand perception. It can take various forms, both traditional and digital, each offering unique

advantages in reaching and engaging target audiences. There are some great reasons to market programs and events:

- Marketing helps reach potential participants who may not otherwise be aware of the offerings
- Marketing helps build a positive brand image (for example, the City of London's Parks and Recreation department, the Boys and Girls Club or Budweiser Gardens) and fosters trust among participants, leading to loyalty and repeat attendance
- Marketing can help in differentiating the programs or events from competitors, showcasing their unique value proposition and relevance to the target audience.
- Marketing can fit every budget – some marketing methods are low-cost or no-cost

Marketing is an umbrella term that refers to all aspects of promotion, advertising and publicity in many diverse forms, ranging from traditional methods to modern digital strategies. Traditional marketing channels include print media, such as flyers, brochures and newspaper advertisements, as well as radio and television commercials. In today's digital age, online marketing has become increasingly prominent. This includes social media marketing, email campaigns, and content marketing – the creation and sharing of online material (such as videos, blogs, and social media posts) (Oxford Languages, n.d.). These digital platforms offer vast reach, precise targeting, and measurable results, making them highly effective for promoting recreation programs and events.

OpenAI. (2024, April 29). *ChatGPT*. [Large language model]. https://chat.openai.com/chat

ChatGPT used with the prompt "Create a 250 word summary explaining what marketing is, why marketing recreation programs and events is important and the different forms marketing can take." Content has been heavily edited – words have been replaced/removed/added, phrases have been changed, etc.

9.2 Promotion

Whenever we design a program or event, to get people to attend or engage in it, we need to attract their interest. When an organization or agency engages in organized publicity activities, they increase the visibility of information to the general public, thereby peaking interest and enticing, encouraging or even *persuading* people to attend. There are four main ways in which programmers can promote recreation programs and events: advertising, publicity, personal sales, and promotion.

1. Advertising

Advertising is any form of paid communication used to call the attention of the public to a program, event, product, service or organization. Advertising can take many forms, such as:

Dedicated space in a newspaper or flier

Example: Canada Day party ad

An ad in a print magazine or Ezine

Example: Advertisement for McConks inflatable kayaks and SUPs (Stand Up Paddleboards)

"Let's talk about sustainability" McConks *advertisement p.27 in* The Paddler, Issue 54, Summer 2020 *by* The Paddler ezine*. Used under fair dealing for educational purposes.*

Flyers

Example: A flyer advertising the availability of financial assistance for the Y of Southwestern Ontario's Youth Recreation and Sports program, as found in the Zurich Minor Hockey Association's website:

Youth Recreation & Sports Program

A financial aid program assisting children in need with registration costs for sports and recreation.

YMCAs across Southwestern Ontario currently serve over 600 kids through YRASP. Let's do the same in Huron County!

Partnership Opportunities

This is a youth program facilitated by the YMCA with the assistance of community partners to deliver sport, recreation and arts programs throughout Huron County to families experiencing financial barriers. Your partnership will join a growing network of assisted opportunities for children and youth in Huron County.

Did you know?

One in three Canadian children do not participate in sports and recreation due to family financial barriers.

Benefits of becoming a partner:
- Extend reach to program participation
- A chance to make a difference by allowing every child access to recreational activities, regardless of their ability to pay
- Easy application/implementation process
- Opportunities for all kids to participate in multiple programs all year
- Increased privacy for families when reviewing financial circumstances
- Consistent, user-friendly application process
- Simplified funding access for families and reduced time spent to manage and negotiate assistance for families

For more information or to apply email: huronYRASP@ymcaswo.ca.

"Youth Recreation & Sports Program" from Zurich Thunder Minor Hockey website. Used under fair dealing for educational purposes.

Posters

Example: A poster that was put up at local libraries, businesses and Senior's homes promoting a special event:

Poster by Fanshawe College.

Outdoor Media Advertising

Example: Bus signage advertising Whitman Park.

"[Bus Wrap Vehicle Signage](#)" by [Signs & Lines](#). Used under fair dealing for educational purposes.

Other types of outdoor media advertising include billboards, park benches, etc.

Instagram Reel

Example: A sampling of Instagram posts and reels promoting different events from the 2021 'Fit-For-Care Wellness Week' fundraiser for McCormick Care Group.

> ### Food for Thought...
>
> In this quickly evolving digital age, many of the print ads historically seen in industry journals, magazines and newspapers, and those received through the postal system, have now made way for digital mobile ads in the form of short-form video content, such as Instagram reels and YouTube shorts.

2. Publicity

Publicity usually comprises just a small piece of an agency or organization's overall marketing plan for a program or event. Publicity is any form of unpaid communication that influences an impression held by others, shaped by the media or public in some way. Examples of publicity can include:

- ***Word of mouth/ Customer Referrals:*** One person telling another they should sign up for a program, catch that play, enroll in this program, etc. based on their personal experience.
- ***Personal Social Media:*** Posting an unpaid like, comment, review, reel or other type of post on social media is a form of publicity. Example: Someone might respond to an advertised event on Facebook, saying, *"Ooo! Got my tickets today! Can't wait!",* then share the event to their personal page or account. This is a form of publicity. Note: As the message hasn't been specifically designed by a professional agency or business, it is often controlled by the public and the media rather than the agency itself.
- ***Press Release: A press release is an official statement delivered specifically to the media for the purpose of providing information or making an announcement.*** For example, this press release announcing the grand opening of a new Community Recreation Centre in Toronto:

City of Toronto celebrates the grand opening of the Ethennonnhawahstihnen' Community Recreation Centre and Library

News Release   March 23, 2024

Today, Mayor Olivia Chow was joined by Councillor Shelley Carroll (Don Valley North), Chief William Romain from the Huron-Wendat Nation, Elder Valarie King from the Mississaugas of the Credit First Nation, Chief Sherri-Lyn Hill from the Six Nations of the Grand River and other distinguished guests to officially open the Ethennonnhawahstihnen' Community Recreation Centre and Library.

A significant name and location

The name Ethennonnhawahstihnen' (pronounced Etta-nonna wasti-nuh), meaning "where they had a good, beautiful life" was a gift from the Huron-Wendat Nation to the City of Toronto.

The community centre is located near Bayview and Sheppard Avenues in North York and is within 800 metres of a significant Huron-Wendat archaeological site, the Moatfield Ossuary and village where findings show that inhabitants lived long and healthy lives in relative peace.

News Release by the City of Toronto, used under Fair Dealing for Educational Purposes (Canada).

Image Description

The City of Toronto celebrates the grand opening of the Ethennonnhawahstihnen Community Recreation Centre and Library.

News Release, March 23, 2024

Today, Mayor Olivia Chow was joined by Councillor Shelley Carroll (Don Valley North), Cheif William Romain from the Huron-Wendat Nation, Elder Valarie King from the Mississaugas of the Credit First Nation, Cheif Sherri-Lyn Hill from the Six Nations of the Grand River and other distinguished guests to officially open the Ethennonnhawahstihnen' Community Recreation Centre and Library.

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The community centre is located near Bayview and Sheppard Avenues in North York and is within 800 metres of a significant Huron-Wendat archaeological site, the Moatfield Ossuary and village, where findings show that inhabitants lived long and healthy lives in relative peace.

3. Sales Promotions

A sales promotion is a marketing activity designed by an agency with the intention of stimulating interest and engagement in their organization, brand, a specific activity, or a program. In recreation, promotions often come in the form of incentives – something that encourages someone to do something – like rebates, discounts, coupons, contests, samples, free merchandise, and 2-for-1 memberships. More often than not, promotions are offered for a limited time only, effectively creating a sense of urgency for the consumer to get on board!

Example

To celebrate Canada's 150th anniversary, Parks Canada offered a special promotion. The organization granted free access for every citizen to every one of its 38 National Parks through a "Discover Pass", available free of charge through the Parks Canada website, for all of 2017. The promotional campaign was designed to promote increased interest and engagement in Canada's Parks, and it worked! According to Parks Canada, their website was almost overwhelmed when more than 900,000 people ordered a free Discovery Pass in the first two weeks after it became available (Canadian Press, 2017). "On Dec. 1, so many people jumped online to get a free annual pass that the department's computer system slowed to a crawl" (Canadian Press, 2017).

Photo by *Camera Eye Photography*, *CC BY 2.0*.

Digital and Social Media

In recent years, the marketing and promotion of recreation programs have undergone a significant transformation due to the rise of social media. Traditional methods like flyers and newspaper ads have taken a backseat to digital strategies leveraging platforms such as Facebook, Instagram, and TikTok. These platforms offer unparalleled reach and targeting options, allowing recreation programs to engage directly with their target demographics. One notable trend is the emphasis on user-generated content. Recreation programs encourage participants to share their experiences on social media, effectively turning them into brand ambassadors. This word-of-mouth marketing can be incredibly powerful in building trust and credibility. In the age of social media, when Likes, Follows, and positive Google ratings and reviews are of paramount importance, potential recreation participants are just a simple Internet search away from hearing and reading what others have to say about a given recreation program or agency. To this end, the recreation and leisure industry has been quick to adapt, leveraging positive participant experiences into sound bites, reels and videos designed to entice non-participants to sign up and join in.

Storytelling has become a cornerstone of marketing strategies for recreation programs. Recreation organizations across sectors use social media to tell compelling stories about their activities and the impact they have on participants' lives, creating emotional connections that resonate with their audience. In the

video below, Outward Bound Canada expedition participant Isabelle shares her 3-week experience traversing Algonquin Park by canoe, a powerful promotional testimonial that urges people considering registering from an Outward Bound program to "Go for it!"

Video: "Algonquin Summer: Isabelle's Story" by Outward Bound Canada [3:51]. *Transcript and closed captions available on YouTube.*

Issues with Digital and Social Media Promotion Strategies

The evolution of marketing and promotion strategies in recreation programs underscores the importance of embracing social media as a powerful tool for reaching and engaging with audiences in today's digital landscape. However, marketing recreation programs and events in a digital age is not without its challenges. Scianas (n.d.) indicates there is a "digital divide" in Canada, separating those with access to technology from those who do not. According to Sciandas (n.d.), contributing factors to the "haves" and "have-nots" (p.2) include differing literacy levels, incomes, education and financial resources (pp.2-3). Additionally, members of certain populations, like the elderly or those with specific cognitive disabilities, for example, may have limited access to or understanding of digital technologies. Thus, if only digital tools are used in the marketing and promotion of a program, agencies run the real risk of excluding some populations and their efforts not reaching their target audience.

Another drawback to advertising or promoting on digital- and social media-based channels is the general lack of control an organization has over the content of online responses in the form of program or agency reviews, videos, photos and comments. It doesn't take many 1-star reviews and critical comments to diminish the appeal of a recreation-based program or agency to the public. The right to freedom of expression is alive and well in Canada, but as It is not always possible to control what others post on social media, if the material posted casts a recreation program, event or agency in a negative light, the organization may find it hard to attract future participants or customers.

4. Public Relations (PR)

Public Relations (PR) refers to strategic ways in which an organization shares information with the public in order to keep the organization in a positive light. The goal of PR is to positively influence public perception toward the organization, its programs, and the people who work there.

PR is highly relationship-focused. "Good PR" (positive public perception) is based on trust and can take time to develop. Good PR tends to be built on relationships with the agency's stakeholders and constituents in ways that create win-wins. Organizations concerned with generating Good PR take care to communicate and share specific stories about the people of the organization or the organization itself in ways that uphold a favourable public image.

Recreation organizations across all sectors know that maintaining a healthy image and state of the relationship between themselves and the public is vital to retaining clients (and attracting new ones!). Therefore, staff and personnel – from unpaid volunteers to senior management – are often highly intentional and careful about

creating narratives and spinning stories about their organization or a specific program to ensure the agency is cast in a positive light in the eyes of the public.

"Good PR": Any messaging or information about an organization communicated to the public that casts the organization in a positive light or promotes goodwill with the public, helping them build their reputation and image. For example, photo opportunities with influencers or community leaders, publicly making a donation to a charity, and having a team from the organization participate in a fundraiser for a good cause.

"Bad PR": Any messaging or information about an organization communicated to the public that reflects poorly on the organization, with the potential of having a negative impact on reputation and image. Examples include a Senior Manager being charged with a crime, bad reviews on social media, the public discovering a controversial comment or post from an agency representative on social media, and a clumsy response to a crisis.

Section Summary

Marketing is a broad umbrella term that encompasses any activities aimed at positively promoting products or services to the public, like Publicity, Promotion, and Public Relations.

Publicity focuses on generating media attention and coverage for an organization or its goods and services through unpaid channels like news stories, interviews, or reviews.

Promotion involves the use of various tactics to entice and encourage public participation, such as discounts, contests, coupons or samples.

Public relations (PR) is the art of managing the reputation of an organization or individual through its communications and relationships with the public. While each element serves distinct purposes, they often intersect, overlap, and work together collaboratively to achieve an agency's program marketing goals while maintaining an agency or organization's positive image.

Before diving into promotional activities, program-planners need to consider their program or event's goals & objectives, their target audience (who they are trying to reach), their budget (how much promotion can you afford?), and ultimately the nature of the program or event they are planning to promote, as not all marketing strategies are suitable for all programs.

OpenAI. (2024, April 29). *ChatGPT*. [Large language model]. https://chat.openai.com/chat

Some sections (First six sentences of *Digital and Social Media* and first sentence of Issues with *Digital and Social Media Promotion Strategies*) were created with ChatGPT using the prompt "Discuss trends in the marketing and promotion of recreation programs as they relate to the rise of social media and how marketing and promotion techniques have evolved over the past few years."

9.3 Registration Processes

Recreation programs and events sometimes require registration (formally enrolling or signing up). Registration processes fall under STEP 9: Marketing and Promotion, as attracting and engaging participants can rely on a quick and easy registration process.

Participant registration is necessary:

- Whenever there are fees or payments associated with a program or event
- When space in a program/event is limited (e.g., it's not drop-in)
- When the program has a prerequisite or some kind of qualifying criteria (e.g., needing to provide proof of a Beginner Level I flatwater canoe certificate before being eligible for the Intermediate Level II course)
- When the agency wishes to track participant numbers or statistics for their records
- When participant information will impact an Instructor's program or activity choices or approaches (e.g., dietary restrictions, disabilities)
- When the program's direct costs for supplies and/or equipment will be based on the number of participants enrolled
- For legal reasons (liability insurance)

Registration processes have become more streamlined and convenient for clients and customers than ever before. Many recreation-based organizations have shifted their registration process from paper to digital formats (online), thus making the registration process painless and quite straightforward. However, other methods of registering for programs, such as in person at a reception desk, over the phone or, more rarely, by mail-in (e.g., Canada Post), do still occur. Depending on the nature of the program, information collected during the registration process may typically include:

- The date (of registration)
- The client's full name, preferred name, preferred pronouns, mailing address, phone number and email
- Name of the program or event the client is registering for
- The client's emergency contact name, phone number and relationship to the client
- Amount and method of payment (if applicable)
- Additional registrant information as required: age, gender, t-shirt size, required or desired accommodations (inclusion needs)
- Liability waiver/Assumption of Risk form
- Code of Conduct Agreement
- Photo/media release form

As personal information has become such a precious commodity, programmers should avoid asking for any unnecessary personal information upon registration. Unless a participant's enjoyment or safety in the program depends on how they answer certain questions, leave those questions out and collect only what you need to know. For example, for the programmer running a 1-night watercolour painting workshop, it would be invasive and inappropriate to ask the participant to disclose their medical history on the registration form. Keep it simple and on a need-to-know basis.

Examples

- [Enrolment form for Extended Recreation and Culture Programs (Ottawa, Ontario)](#) [PDF]
- [Canada Day Parade Registration Form (Waskesiu, Saskatchewan)](#) [PDF]
- [Recreation Program Registration with Waiver (Inissfill, Ontario)](#) [PDF]

9.4 Program Schedules

A program schedule is a document designed to draw in and inform participants while presenting the various aspects of a program or special event in an organized, chronological timeline. Program schedules are helpful in keeping staff and volunteers on track and are also shared with participants in order that they know what is happening, when, and where they need to be.

Program schedules can be shared with participants prior to the date of the program or event or on the day of. For recreation-based events, conferences and retreats where programmatic choices can be made by the participant, the program schedule can be sent out ahead of time. Program schedules can be shared with participants electronically, posted in hard copy in high visibility areas at the program/event venue, or given to each participant in hard copy – what is commonly referred to as a "pocket program".

Program Schedules present the big picture: Specific times and locations for various program features, such as guest speakers, activities, workshops, meetings, classes, breaks, etc., will occur. Program schedules are required at large events like conferences and trade shows due to multiple programmatic components occurring, sometimes concurrently, and multiple people playing multiple roles at various times throughout. Having a firm program schedule ensures that recreation professionals have the right people in the right places at the right times.

Example 1: Conference Schedule

Sometimes, program schedules are very simple and straightforward, delivering the timeline and rollout of the program or event with very few frills:

(CanFASD, 2023)

Tuesday, November 7, 2023		Wednesday, November 8, 2023		Thursday, November 9, 2023	
Morning		Morning		Morning	
7:30-8:30	Light Breakfast	7:30-8:30	Light Breakfast	7:30-8:30	Light Breakfast
8:30-10:00	Opening Remarks & Plenary	8:30-10:00	Morning Meeting & Plenary	8:30-10:00	Concurrent Session G
10:00-10:30	Break & Poster Vieweing	10:00-10:30	Break & Poster Vieweing	10:00-10:30	Break & Poster Vieweing
10:30-12:00	Concurrent Session A	10:30-12:00	Concurrent Session D	10:30-12:00	Plenary & Closing Remarks
Afternoon		Afternoon			
12:00-13:15	Lunch	12:00-13:15	Lunch		
13:15-14:45	Concurrent Session B	13:15-14:45	Concurrent Session E		
14:45-15:15	Break & Poster Judging	14:45-15:15	Break & Poster Judging		
15:15-16:45	Concurrent Session C	15:15-16:45	Concurrent Session F		
		Evening			
		17:00-19:00	Mocktail Networking Event		

Example 2: Winter Carnival Poster

Other times, the program schedule can be decorative, playful and eye-catching, like this program schedule for a winter carnival shopping event hosted by the Fanshawe (College) Student Union (FSU):

Fanshawe Student Union, Fanshawe College.

Example 3: Adventure Poster

Sometimes, the program schedule is not the highlight of the document. Sometimes it's the aesthetic like this:

Created by Allison Menegoni, 2024.

9.5 Key Takeaways

STEP 9: Key Takeaways

A Final Word...

Program-planners should be careful not to mix up the **Program Schedule** with the **Program Session Plan** (STEP 5) and/or **The Walkthrough Agenda** (STEP 10). Session Plans and the Walkthrough Agenda are for the instructors' and leaders' eyes only. Program Session Plans and the Walkthrough Agendas are far too detailed for participants.

Unlike Program Schedules, which deliver key *need-to-know* information, Session Plans contain excessive amounts of information, such as the gear, equipment and supplies required for the program, security logistics, personnel information, and sometimes even notes on participant health concerns (Jackie has an insulin pump, Dean is recovering from recent knee surgery) that should be kept confidential.

Similarly, STEP 10 – The Walkthrough Agenda is so highly detailed it would dazzle a participant entirely. Less is more: Program and Event participants need only have access to the Program Schedule!

STEP 10: THE WALKTHROUGH

Chapter Outline

10.0 Learning Objectives

Learning Objectives

By the end of STEP 10, the student shall be able to:

- *Describe* the purpose of a step-by-step physical Site Visit and Walkthrough
- *List* the various criteria areas of a quality Walkthrough document (Time, Activity, Personnel & Responsibilities, Materials/Equipment Needed)
- *Prepare* a highly detailed written Walkthrough for an existing event or program

10.1 Walkthrough 1: The Site Visit

Whether you've booked a gym in a Community Centre for drop-in basketball, a breakout room in a non-profit agency for the teen homework club, or a picnic shelter and surrounding field space for a corporate team-building event, you need to physically check the venue out before you begin to design your program or event to ensure that the venue is suitable for what you've got in mind.

The **site visit** should happen before or immediately after booking or reserving a facility, venue, or space. It will help you envision the participant experience from the moment they arrive until the time they leave. Conducting a thorough site visit ensures the space has the amenities, aesthetics and assets you desire and require for your program or event. Performing an early site visit allows you to effectively scout the place with enough time to change venues if needed. It will also afford you some peace of mind!

Helpful Tip

Have a clipboard, paper, pen, phone camera, and flexible tape measure ready. Take photos and measurements (how will the location of the windows impact where we set up the stage? How many meters from the stage area to the closest power outlet?) and jot down important information like the space's proximity to washrooms, the supply cupboard, etc.

Initial Considerations

Venue Size and Suitability

- Is the space you plan to hold your program suitable for the nature of the program or event planned?
- Does the space exude the correct ambience or aesthetic for your program?
- Is the space easily accessible to those with mobility issues?
- Is there parking on site?
- Is the space in good condition or in disrepair?

Capacity

- Given the number of participants you expect, does the venue have adequate capacity? Note: Room capacities can change based on whether participants will be seated at chairs and tables or standing and moving around
- Can the space accommodate the required number of chairs and tables (if applicable)?

Activity Spacing & Sequencing

- Considering the type of activities you plan to offer, does the space lend itself well to the safe running of these activities?

- Does the venue allow for an easy flow of participants from activity to activity, or do you see areas where crowds or bottlenecking could occur?

Access to Amenities and Special Supports

- Does the venue have the various amenities required, for example, a sprung wooden floor, a stage, stationary bicycles, a built-in A/V system, gradient pool entry, wheelchair ramps for stairs, a built-in FM system available for hearing impaired guests, reliable Wifi, etc?
- Are there washrooms nearby? Elevators (if required), is there easy access to a registration or reception area?

Equipment and Gear

- Is the equipment and gear you need for your program or event readily available at the venue, or will you need to rent it/bring it in?
- Is the equipment in good repair? Are there sufficient quantities of XYZ on hand?
- If using specialized equipment, do you or the other activity leaders have the required knowledge and training to use it and/or access to personnel who do?

As you work through the **initial considerations** (above), engage in some visualization. Visualize how you plan to facilitate the activity/s. Will everyone be able to hear instructions or your speakers? Visualize how participants will experience the space. What will they see when they first enter the space? Does the venue make sense for the group formations you have in mind? Visualize the seating arrangements and the spacing out of equipment – does the venue allow for the safe placement of tables, chairs, a podium, exercise equipment, or the floor mats you require? Visualize your participants moving through the space. Now that you are looking at the space critically, will foot traffic flow easily between the various activity areas? Can you identify areas in which there may be potential bottlenecks?

As you complete this initial walkthrough, check your **technical requirements**. Does the venue have sufficient lighting, and do all the lights work? Is there an integrated A/V system, and is it functional? Are the requisite cables, patch cords, inputs/outputs and extension cords provided by the venue, or must you jot down a note to bring your own? Are there sufficient places to hang signage? Finally, in terms of **risk management** (see STEP 8: Risk Management), complete a 360-degree visual inspection of the space/s, noting any hazards or problem areas that require attention. Are there tall stacks of chairs that should be removed? Divots in the floor that need to be repaired, loose ceiling tiles, or exposed wires that require attention from the facility maintenance team? Are there sufficient emergency exits? Have you noted the location of the fire extinguishers, the First Aid Kit, and the AED device?

10.2 Walkthrough 2: Site Visit and Tech Check

Just as stage actors and technicians dress-rehearse a play to an empty house in full costume with sound and lighting cues, think of Walkthrough 2: Site Visit and Tech Check as a dress rehearsal for your program or event. It should happen no more than a week prior to your program or event date, ideally at the same time of day as your program or event is set to occur, (in order to check out lighting, traffic, and other details), and involve the key staff or personnel playing a significant role in the program. It's a last-minute wander through the site to ensure everything is sound, as well as an opportunity to *check the tech* – ensure that everything is functional and ready to go!

The program-planner will once again be armed with a clipboard, pen and paper, but this time also has a detailed written "**Walkthrough Agenda: Event Timeline**" to refer to. The goal of Walkthrough 2: Site Visit and Tech Check is to ensure the space has not changed, everything is still in good working order, the technology works, and the sequence and flow of activities make sense. Paired with active visualization, working through the detailed Walkthrough Agenda: Event Timeline from start to finish allows more or less a dry run of your program or event, paying close attention to the minutiae. It also allows you to solidify the fine points of your risk management plan (see STEP 8: Risk Management).

Walkthrough Checklist

The following are things to consider before you run your program or event. *Note*: Not all items will be applicable to every lesson, session, workshop, program or event.

Event Logistics

☐ How have you ensured that people will actually show up to your program/event?

☐ Through which door(s) will participants enter?

☐ Who will create and post signage (for booths, entrances, exits, washrooms, etc.)

☐ Do you know where the washrooms are? Do the guests? Are washrooms accessible?

☐ Where will participants put coats, bags, wet/dirty boots, umbrellas, etc.? Will there be a coat-check?

☐ If you are providing transportation for your guests (bus, or shuttle, for example), have you booked and confirmed the vehicles?

☐ Do participants need supervision to go to the washroom? If so, how will this happen, and who is responsible?

☐ Where are the first aid kits, AEDs, fire extinguishers, flashlights etc?

☐ How will you manage overcrowding, and crowd flow?

Staff and Volunteer Management

☐ Who will greet the participants as they arrive?

☐ Who will emcee/introduce the activities, and how long will this take? How will everyone hear? If amplification will be used, has it been checked that it works?

☐ Has the emcee's Script been shared with at least one other person working the event, in case the emcee is unable to fulfill their role?

☐ Who has the key to the Agency/room/space/facility? How will it be opened, and by whom? At what time? By what time must the space/building be empty? Who is responsible for locking up when the event is over?

☐ Who is your designated First Aider?

☐ How will the program personnel communicate with one another during the program or event? Text? Walkie-Talkies?

Facilities and Equipment

☐ Has the childcare area been booked? Safety-checked? Who is responsible for this?

☐ Do you need chairs/tables? Who is responsible for reserving, setting up/tearing down?

☐ Are the activities developmentally appropriate for the age(s) and abilities you are serving, and inclusive for the participants?

☐ Where will the equipment/props be stored until needed, and when will the equipment/ props be distributed?

☐ How will cash be handled and accounted for? Do you have a cash box? If money is to be changing hands, do you have a float? Who is providing this?

☐ What will you do if you run out of a certain supply or material?

☐ Do you have sufficient supplies, materials and equipment for your event, and do you know how to use them?

☐ Have you got a plan in place to collect tickets/waivers/assumption of risk forms?

☐ Have you identified all potential inherent risks, and have you established strategies for managing and/or reducing these risks? How have you made your staff and volunteers aware of these plans?

Catering and Alcohol

☐ Have you applied for, and obtained, your liquor license?

☐ If food is served, how will storage, handling and refrigeration occur?

☐ If alcohol is being served, do you have Smart Serve-certified people on your team?

☐ Have you confirmed with catering/ food delivery the location, time and quantity of what you need?

☐ Are washrooms fully stocked with TP, paper towels, hand soap, and clean sanitary disposal systems?

☐ Do you have backup $ for an emergency grocery run?

☐ Do the people handling the food have their Safe Food Handling certificate?

Program Management

☐ How will the people attending your event get divided into teams/groups?

☐ How will you manage transitions between activities?

☐ What is planned for closing? What will signal the end of the event? How will people know it's over?

☐ Are there closing communications to attendees that will need to be made? Who will make these? How? When?

☐ Will name tags be used? How, when, etc.? Do you have enough name tags and markers for everyone?

☐ If people are going to sit at tables, how will they know where to sit, or which table?

☐ For participants with special needs, have you adapted/modified activities/ equipment appropriately and safely?

Administrative and Financial Considerations

☐ Who will be doing the purchasing for your event (décor items, materials, supplies, food)? Have you developed a system for handling reimbursements and receipts?

☐ Have you got a plan in place on when, how and where you will distribute door-prizes/draw prizes, and auction items that have been won?

☐ Have you confirmed the names of prize and sponsorship donors, and figured out a way to acknowledge them during your event?

☐ Will you be taking guest attendance? If so, how and when will this occur?

Emergency and Security

☐ Do you and your event team know the facility's emergency procedures?

☐ Is security needed? When? Why? Who will take on this role?

☐ If you are holding your event outdoors, have you checked the weather report, so you know what to expect?

☐ Have you cued up any videos or media you plan to use, and have you checked before the guests arrive that the media works on your AV system?

☐ Do you have the required permits required to meet existing standards?

☐ What happens in case of a lost person?

☐ What else haven't you thought of/considered?

☐ Will personnel involved with operations and logistics have a copy of the STEP 10 Walkthrough to reference during the event in order to stay on time? Who will be responsible for printing and distributing these?

☐ Are there any off-site equipment, prize or food/drink pick-ups that will be happening during the event? If yes, who will be going to get these things, and when?

☐ Do you have garbage & recycling bins set out?

10.3 Walkthrough Agenda - Event Timeline

Below is a sample Walkthrough Agenda for a 2-hr special event, with a 2-hr set-up and 1-hr teardown. Note how the timeline reflects the Activities, Persons Responsible and Materials and Equipment required for each part of the event plan. The walkthrough should be so detailed that someone off the street could pick it up, step in, and run your program, knowing exactly what activity was happening, what was needed, who was involved, and what materials/equipment were needed at each instance.

Programmers, Activity Leaders, Event Project Managers and other key persons should each have a copy of the Walkthrough Agenda on hand at both *Walkthrough 2: Site Visit and Tech Check* and at the time of event/ program rollout. Following the detailed Walkthrough Agenda while maintaining synchronized time-keeping and fluid communication with all key personnel during event roll out is essential to ensuring everyone is on the same page at the same time while maximizing participant enjoyment.

Sample: Walkthrough Agenda – Event Timeline

Time	Activity	Person Responsible	Materials/Equipment
1:00 P.M.	Arrival of event team and volunteers at venue Project Managers (PMs) facilitate group huddle to go over housekeeping, set-up duties, personnel responsibilities, set-up time frame	All	All props, supplies, equipment checklists (from Supplies, Equipment & Gear list/s) on hand List of leadership and personnel designations on hand, pens, clipboards
1:10 P.M.	Set-up underway – booths, stage, A/V, lights, décor, gear & equipment, etc.	All responsible for own stations; help others where required	Reference specific Supplies, Equipment & Gear checklists for each themed area, stage Runners designated to locate/purchase anything missing or needed
2:00 P.M.	Set up complete Tech dry run; sound check Is all going to plan? Gaps? Needs? Plot twists? Risk Management check: Booths, stage area, hazard sweep of program space including washrooms, hallways, breakout rooms, parking lot	PMs, Emcee, Operations and Programming personnel, Groundskeeper, maintenance personnel, First Aider	Checklist(s) for dry-run, pens, highlighters Tech Check: mics, amps, audio good? Music playlists ready? Wi-Fi working? Bluetooth enabled? Batteries charged? Risk Management Check: Tape for cables on hand; Signage is up and clearly visible

Time	Activity	Person Responsible	Materials/Equipment
2:30 P.M.	Team huddle: Final questions or concerns; confirm time folks should be in position (PMs run this) Arrival of musical performers, speakers, special guests; greeted by PMs Parking attendants in assigned spots Personnel at assigned stations; double-checking they have all required materials	All Event Team personnel, all volunteers	Copies of Leadership designations for PMs Script for the Emcee & Hosts confirmed; copies for PMs in hand Folder/Binder for the consent forms, waivers, assumption of risk, contracts, invoices (as required) Pens Safety vest given to all parking lot volunteers Background/ambient music started Ensure First Aider is ready; at station
3:00 P.M.	**Event start!** Event team active in all designated positions Guest arrival Emcee greeting; welcome spiel, intro of ED ED welcome/spiel Musical Guest 1 on standby to perform Stage: Emcee ready	PMs, Emcee, Executive Director, Tech personnel, Musical Guest 1 ready on standby	Registration Booth: Guest lists ready, pens, highlighters SWAG Bags ready to give out Ambient music ready to turn off Mics, mic stands Emcee script on hand (multiple copies) List of booths and personnel on hand Copies of Walkthrough, pens
3:10 P.M.	Musical Guest 1; performs 30 minutes (8 songs) Guests interacting with booths and activities Musical Guest 2 on standby	Emcee, Musical Guest 1, Musical Guest 2, Tech personnel	Emcee script Mics, mic stands (for remainder of event) Sheet music (Provided by Musical Guest 2) Tech personnel coordinate tech transitions
3:40 P.M.	Musical Guest 1 ends Emcee transitions to Musical Guest 2: 10 mins (3 songs) Washroom checks – PMs	Emcee, Musical Guest 2, Tech personnel, PMs	Emcee Script Keyboard stand, keyboard stool, clothespins for music Tech personnel coordinate tech transitions
3:50 P.M.	VIP Guest "surprise" entrance Announce arrival of VIP guest; introduction	VIP Guest, Emcee, Tech personnel	Emcee Script VIP guest script/talk jot-notes Tech personnel coordinate tech transitions

Time	Activity	Person Responsible	Materials/Equipment
4:00 P.M.	VIP Guest ends talk Guests back to enjoying activities, booths	Emcee, Tech personnel	Emcee Script Ambient music provided by Musical Guest 2 Tech personnel coordinate musical transitions
4:20 P.M.	Emcee gives warning: '10 minutes to closing ceremony' Guests back to enjoying activities, booths	Emcee, Tech personnel	Emcee Script Ambient music provided by Musical Guest 2 Tech personnel coordinate musical transitions
4:30 P.M.	Closing ceremony starts PMs on standby for thanks and closing remarks Emcee and ED: Prize winners announced; closing remarks PMs: Thanks to sponsors, donors all attendees Musical Guest 2 on standby	All, Musical Guest 2	Supplies, Equipment & Gear checklist for closing ceremony on hand List of prize winners Prizes on hand, organized Mag light (to read by) Scripts: Emcee, ED, PMs (include list of sponsors to thank) Ambient music provided by Musical Guest 2 (quiet) after remarks end
5:00 P.M.	Official end of event Guests depart Parking attendants in assist mode; ensure safe, orderly departure of guests Tear down and clean up begins in all areas	Parking attendants, All event team members and volunteers	Once guests have departed… All materials, supplies, and equipment inventoried, packed up, removed from space, stored/returned Trash and recycling receptacles emptied
6:00 P.M.	Final huddle (PMs facilitate) First Aider report – incidents needing follow-up reported Date, time and location of debrief, final financials confirmed Final thanks & next steps (if any)	All, First Aider report	Incident reports collected (if applicable) Washroom check – empty? All spaces – empty? Loose ends tied up Venue locked, secured
6:05 P.M.	All Depart		

10.4 Key Takeaways

STEP 10: Key Takeaways

- The Walkthrough Checklist contains far too much detail for program participants. Save these details for the Program or Event leaders' eyes only;
- An initial Site Visit to scout out the program space, facility or venue, followed by a second Site Visit to complete a tech check and 'dress rehearsal' are essential parts of the STEP 10 Walkthrough;
- The Walkthrough allows key players on the program- or event-planning team to examine the minutiae and ensure that everything is set to run smoothly;
- The Walkthrough Checklist should be so thoroughly detailed that a person off the street could step in and know exactly what to do and when!

STEP 11: PROGRAM EVALUATION

Chapter Outline

11.0 Learning Objectives

Learning Objectives

By the end of STEP 11, the student shall be able to:

- Explain the importance of post-program debriefing and evaluation processes
- Relate program debriefing to the future of programmatic successes and improvements
- Differentiate between qualitative and quantitative data and name several ways it can be collected
- Demonstrate the ability to identify success based on articulated programmatic goals

11.1 Program Evaluation

Evaluation is a key component of the program-planning process. Evaluating provides an opportunity for reflection, discussion, and improvement and is a manifestation of servant leadership – maximizing benefit to the people you are serving.

When a recreation program or event has ended, it may be tempting to clean up and move on to the next program or event. However, in order to ensure the success of a similar program or event the next time it is run, it's vital to examine what went well and what could have gone better by collecting information about what happened – the high points and the low points. This is easily achieved through a formal program evaluation process.

Evaluation is:

- Judging the worth or value of something – a program, an event, a member of the recreation staff, or the components of a program, like activities, entertainment, meetings, etc.
- A way to determine if the programmer or agency met their program or event goals
- A systematic process of collecting data and information

Why Evaluate?

- To learn from successes & failures
- To comply with existing standards
- To demonstrate professionalism
- To improve programs for the future
- To justify expenses (ie; an ice sculpture that was a big hit, the dunk tank was a flop, the cost of the keynote speaker was worth every penny)
- To improve recreation programs and events for the future by identifying the positives and the minuses of the program or event: What went well? What did not?
- For safety and risk management purposes

  ◦ Were there any incidents, accidents or near-misses?
  ◦ If so, were these professionally and correctly handled? Was the appropriate paperwork completed, as required?
  ◦ Is follow-up needed for any of the incidents?
- To determine if the program's goals were met
- To improve decision-making in the future

As soon as your program comes to a finish or your event ends, you will compile information ("data") for evaluation. Your data can include "finals": Final participant numbers, the final bill for the jazz trio, the final amount of money raised through the auction, or the final amount of money owed to the volunteer who ran out to buy more craft supplies when you ran out halfway through your activity!

Part of the evaluation process is examining whether your program or event goals, articulated in <u>STEP 4: Purpose, Goals, and Objectives</u>, were met. Gathering and compiling this information allows the program-planner to get a snapshot of the overall "ROI" (Return on Investment) generated by the program or event. In other words...was it worth it?

Return on Investment (ROI)

The term "Return on Investment" (ROI) is a performance measure that gauges whether a program or activity was ultimately worth the money and labour invested in its creation and delivery. In business, ROI tends to be largely monetary in nature, gauging the success of a venture based on a ratio of profits against losses. In recreation, programmers don't look at dollars alone. There are a number of other elements that are factored into determining the ROI of a specific program or event.

ROIs can cover a number of criteria:

- **Money Invested:** Was the amount of money invested in the program/event for the purchase of supplies, equipment, SWAG, equipment rentals, etc., worth it? Did the program/event make a profit, break even, or, at least ideally, create a budget deficit?
- **Time Invested:** Was the time invested in the pre-program/event planning phase and eventual rollout worth it? Did the time required – hours, days, months – pay dividends in the end, or was it excessive, taking away time that could have been better invested elsewhere?
- **Energy Invested:** Was the energy, labour and 'person-power' invested by the staff and volunteers a good use of their time?

11.2 Types of Evaluation

There are two categories of evaluation used In recreation and leisure programming: Formative Evaluation and Summative Evaluation.

Formative Evaluation

Formative evaluation occurs continuously, in an ongoing fashion, while a program or event is happening. Through participant interactions, conversations and direct observation, recreation professionals respond to what they see and hear and make adjustments to the program itinerary (timing) or activities according to this feedback. Ongoing formative evaluation is responsive in nature. It can be used to nip potential problems in the bud and enhance participant enjoyment by making immediate programmatic improvements and changes.

🔍 **Examples of Formative Evaluation**

Photo by Province of British Columbia, CC BY-NC-ND 2.0.

Touching Base: The lead programmer at an outdoor education centre periodically touches base (checks in) with the teacher of a 4th-grade class to see whether they are satisfied with the environmental education activities taking place. The conversation allows the programmer to ascertain whether there is more they could be doing to meet the teacher's curricular goals and learning objectives for the day. The check-in can be as simple as

asking the question, "How are things going?" or "Is the day meeting your expectations?" Depending on the teacher's responses, the programmer can add or take away activities, change the length or breadth of an activity, or reformat an activity to make it more appropriate or inclusive.

Photo by Allison Menegoni. Used with permission.

Direct Observation: During a physical team building activity, one of the activity leaders observes two youth participants standing off away from their group, looking disengaged and anxious. This observation requires the programmer to get to the heart of the problem and fast! Perhaps the level of participant-to-participant touch required in this activity is too intense and is making these participants uncomfortable. Could it be these participants are standing off as this activity might be too physically demanding for them? After making these determinations, the skilled programmer can subtly implement activity modifications that might foster renewed enthusiasm in the participants and encourage them to re-engage.

Learning about "Plot Twists": *The term 'plot twist' refers to any unexpected or unanticipated thing that may require action to be taken and/or pose a potential disruption to the program schedule.* For example, the event leader is informed by one of their event staff that the entertainment is going to be 15 minutes late arriving at the venue. This information constitutes a type of formative evaluation and requires a hasty response. Acknowledging news of the delay, the leader quickly and quietly shares this information with each activity leader, asking them to tack on a few extra minutes to their activity to accommodate this unforeseen timing issue.

Ultimately, formative evaluation is a manifestation of Servant Leadership. Bearing in mind that a Servant Leader's mandate is to *serve others*, skilled programmers must respond to what they see, hear, learn or perceive – whether through direct observation or participant interactions – and make whatever programmatic adjustments are necessary to ensure the continued enjoyment by each participant, of what is happening around them.

Summative Evaluation

Unlike formative evaluation, which takes place on the fly while a program or event is happening, summative evaluation occurs only after the program or event has ended. Summative evaluation offers programmers an opportunity to get together, sit around a table, and debrief the highlights and lowlights of a given program based on information collected and analyzed after the program has concluded. More often than not, the

collected data will provide valuable, crystal clear data and metrics on a program's successes and failures, strengths and weaknesses, based on a specific set of questions and criteria.

Summative Evaluation Tools

A number of different summative evaluation tools can be used to formally gather data and evaluate recreation-based programs and events. Some tools are qualitative in nature – framing feedback in words instead of numbers – while others are quantitative in nature – looking at numbers and other hard metrics. Some evaluation tools can be a combination of both qualitative and quantitative. Before we dive into a few summative evaluation tools, let's look at the types of data they collect.

11.3 Data Types - Qualitative v. Quantitative

Qualitative Data – Any descriptive data that used words (not numbers), to capture feelings and experiences, like the aspect(s) of a program/event a participant enjoyed (or did not enjoy), how the program made them feel, their favourite part of a program, etc. Qualitative data measures the success or failure of a program by capturing participant feelings, thoughts and opinions through written words. As qualitative data measures feelings and opinions, it is regarded as subjective and biased. Qualitative data answers questions like, "Who...?", "What happened?", "So what?" and "Now what?".

Quantitative Data – Any data or information that can be captured, counted or measured in numbers. Quantitative data measures the success or failure of a program by speaking to quantities, numbers, dollars, ratios and scales. As quantitative data measures numbers, it is regarded as objective and unbiased. Quantitative data answers questions like, "When?", "Where?", "How much..?" and "How many..?".

Qualitative Data Collection Tools

1. Narrative Surveys/Questionnaires

- One of the most commonly used methods of collecting summative data for recreation-based programs and events.
- Allow for greater personal expression than quantitative data collection methods, as participants are asked to explain their experiences using descriptive language.
- Ask all participants the same standardized set of questions.
- Are generally more time-consuming to complete than quantitative (numeric) surveys
- Produce rich data as participants are allowed to express their thoughts, feelings, and experiences in their own words.
- Can be administered in different ways: recording answers to the questions verbally (over the phone or through a personal interview), handing a paper copy (and pencil) to each participant to fill out before leaving the program, or linking the participant to an online survey via email.
- Easy to create through platforms like Google Forms or Jotform.

Examples of Qualitative Survey Questions

- What was your favourite activity? Why?
- What was the most fun part of today?
- Tell us about something amazing you learned today:
- What was the highlight of the day?
- What was the lowlight of the day?

- Tell us about our program staff. How did they do?
- If this type of program were offered again, would you attend? Why or why not?
- Tell us how you got to the event today (personal vehicle, taxi, public transit, other):
- If you could add anything to this program, what would it be?
- Did the program meet your expectations? Why or why not?
- What could have been added to the program to make it even more enjoyable?
- Tell us about an aspect of the program that could be improved:
- Would you like your email address added to our mailing list so we can inform you about future programs, promotions and events?
- What else would you like us to know?

**NOTICE how the majority of questions above are "open-ended," meaning they cannot be answered with a simple YES or NO.

2. Interviews

- Conducting one-on-one or group interviews with program participants after a program has ended can provide rich qualitative feedback and insights.
- Any questions asked in a survey can likely be asked during the interviews, exploring participants' lived experiences, perceptions, and suggestions for improvement.
- Interviews should be conducted immediately after the end of a program while the information is still fresh.

3. Direct Observation

- Professional direct observation of the program participants can offer valuable qualitative data to discuss after the program has ended.
- Observers (recreation professionals who are NOT the instructors or facilitators) do not participate directly in the program but rather watch and listen. Observers take detailed notes on participant behaviours, interactions, and reactions throughout the program duration, then share their notes and insights into the participant experiences and program dynamics with the instructors after the program has ended

4. Participant Journals

- This form of qualitative data collection asks participants to keep journals or diaries before, during, and/or after a program or event.
- This form of data collection is best suited to programs that run over multiple days, weeks or months.
- Highly reflective in nature, participant journals provide detailed qualitative data about their experiences, emotions, and reflections over time. Data collected in this way offers a longitudinal and deeply personal perspective on a participant's skill development, personal growth and development and can capture nuances that may be missed with other methods.

Quantitative Data Collection Tools

1. Head Counts (attendance)

- The process of simply counting participant numbers
- Fast and easy way to gather data on engagement
- As a stand-alone method of data collection, this method is weak. Head counts provide no information about participant enjoyment, program impact, hits or misses.
- Head counts can be misleading: big-numbers of participants does not necessarily mean the program was of high quality, and low-numbers of participants is not necessarily an indicator of low quality.

2. Quantitative Surveys

- One of the most commonly used methods of collecting summative data for recreation-based programs and events.
- Participants are asked to rank, rate or grade their experiences using numbers, scales and continuums.
- Ask all participants the same standardized set of questions.
- Are generally less time-consuming to complete than qualitative (word-based) surveys
- Once analyzed, the data produces precise statistics and metrics.
- Can be administered in different ways: handing each participant a paper copy (and pencil) to fill out before leaving the program or linking the participant to an online survey via email.
- Easy to create through platforms like [Google Forms](#) or [Jotform](#).

Examples of Quantitative Survey Topics/Data

- Participant age
- Years of experience
- Years of post-secondary education
- Total number of program participants under the age of X years
- Number of people on a waiting list
- Number of dollars generated (program revenue)
- Numeric ratings of various components of a program/event using Likert-type (numeric or ranking) scales

What is a Likert-type scale?

A Likert-type scale is a rating scale used to measure participant satisfaction, dissatisfaction, opinions, likes and dislikes. It consists of a statement or question, followed by a numeric scale (0-5 points, 0-7 points, 0-10 points, etc.) in which a participant can record their answer. Typical 5-point Likert-style scales in recreation-based surveys can ask questions on a variety of criteria, including satisfaction, quality and agreement:

Satisfaction	Quality	Agreement
1. Very dissatisfied 2. Dissatisfied 3. Neither dissatisfied or satisfied 4. Satisfied 5. Very Satisfied	1. Very poor 2. Poor 3. Acceptable 4. Good 5. Very Good	1. Strongly disagree 2. Disagree 3. Neither disagree or agree 4. Agree 5. Strongly agree

Example of a Likert-type scale on a participant survey:

Using the scale below, please answer the following questions:

1 – Very poor   2 – Poor   3 – Acceptable   4 – Good   5 – Very good

1. Please rate the overall quality of the XYZ Program.

1   2   3   4   5

2. How did you enjoy the evening's entertainment (jazz trio, DJ)?

1   2   3   4   5

3. How do you rate the suitability of the venue for the XYZ Program?

1   2   3   4   5

Example: Quantitative Feedback Questionnaire

Link to Google Form.

Other Forms of Quantitative Questions

Not all quantitative questions need to appear in a Likert-type scale format. Other formats include presenting the answer as a binary YES-NO or as an image or emoticon. For example:

1. This event was worth the ticket price (circle one):

Yes   No

2. I am leaving today's program feeling: (circle one):

"Emoji face rating scale" by Arkirkland, CC BY-SA 4.0.
Mods. Changed eyebrows and added colour.

Tips and Tricks on Collecting Data through Surveys/Questionnaires

- **_Do_** ask only relevant questions that you want (or need) answered and avoid unnecessary questions that provide little feedback on the quality of your program.
- **_Do_** keep program and event surveys short and sweet – aim for 8-10 questions maximum. Few people have the time or desire to fill out a massive survey of 20+ questions.
- **_Do_** ensure the wording of your questions is simple and straightforward.
- **_Do_** ensure the questions you are asking are suitable to your audience (child, adult).
- **_Do_** try for a mix of qualitative and quantitative questions wherever possible.
- **_Don't_** ask biased questions, like "We are known for providing only the most skilled artisans at our craft shows. On the following scale, rate the excellence of the vendors you interacted with today".
- **_Don't_** use slang, jargon or complex terms that might be lost on your participants.
- **_Don't_** delay getting your survey into the hands of your participants. Each day that passes without surveying the participants = the less they will be willing to fill out a survey, and the more the memory of your program or event will fade.
- **FINALLY...** aim to collect the data from as many participants as possible within 7-10 days.

The questionnaire evaluation tool does not have to be solely qualitative or quantitative. It can be a mixture of both!

Example: Mixed Method Questionnaire

Thank you for participating in today's recreation program. Your thoughts, suggestions help us make future programs even better. Your time is appreciated. Thank you!

Aspenworks Unlimited

Program Name: _____ **Date:** _____

Did the program meet your expectations? Please explain:

What did you learn? List a few of the new skills you are leaving with:

What was your favourite parts of this program? Why?

What was your least favourite part of this program? Why?

Using a scale of 1 = Dissatisfied to 10 = Extremely Satisfied, please rate the following aspects of our service:

1. *The way the information and activities were presented was organized and enjoyable*

    1   2   3   4   5   6   7   8   9   10

2. *The facilitators were well-prepared, friendly and knowledgeable*

    1   2   3   4   5   6   7   8   9   10

3. *The content of the program was what exactly what I expected*

    1   2   3   4   5   6   7   8   9   10

4. *The location of this session was convenient and easy for me to get to*

    1   2   3   4   5   6   7   8   9   10

5. *I would recommend this recreation program to others*

    1   2   3   4   5   6   7   8   9   10

In the box below, please share anything else you want us to know about your experience:

Created by Allison Menegoni, 2024.

Image Description

Apsenworks Unlimited over logo.

Thank you for participating in today's recreation program. Your thoughts, suggestions help us make future programs even better. Your time is appreciated. Thank you!

Space to fill in Program Name and Date.

3 sections of questions

1. 4 open questions:

   ◦ Did the program meet your expectations? Please explain:
   ◦ What did you learn? List a few of the new skills you are leaving with:
   ◦ What was your favourite part of this program? Why?
   ◦ What was your least favourite part of this program? Why?

2. 5 Likert scale questions

   ◦ Using a scale of 1 = Dissatisfied to 10 = Extremely Satisfied, please rate the following aspects of our service:

      ▪ The way the information and activities were presented was organized and enjoyable
      ▪ The facilitators were well-prepared, friendly and knowledge
      ▪ The content of the program was what exactly what I expected
      ▪ The location of this session was convenient and easy for me to get to
      ▪ I would recommend this recreation program to others

3. A space for final thoughts:

   ◦ In the box below, please share anything else you want us to know about your experience.

OpenAI. (2024, April 26). *ChatGPT*. [Large language model]. https://chat.openai.com/chat

Methods of collecting qualitative data section was created with ChatGPT using the prompt "List 5 methods of collecting qualitative data after a recreation event."

11.4 The Debrief

Photo by *Ben Duchac, Unsplash Licence.*

Now that the participant feedback has been collected, it is time to hold a team debrief!

Debrief: What, When, Where, Why, How and Who?

What:

A debrief is a structured, experiential, reflective practice that involves bringing together relevant staff/event personnel for a discussion about the program or event. Debriefs tend to occur soon after the end of a program or event with the purpose of processing – making sense of – the data collected through the formative and summative evaluations. Not only does the debrief allow participant data to be shared, it also provides an opportunity for staff and stakeholders to make programmatic improvements for the future. Usually, the debrief is structured with specific questions and facilitated or guided by one person or a small group. Someone should be assigned the job of taking Minutes (debrief notes) in order to have a record of the feedback. This individual will compile the rough notes into a tidy document and distribute them to debrief members a short while after the debrief has ended. A copy will be put on file for reference for the next time the program or event is run.

When:

Team debriefs should take place no more than 7-10 days after a program or event has come to an end while the data and the memories are still fresh and have not started to fade.

Where:

A debrief should be held in an accessible space, free from noise and distractions, that can comfortably accommodate all those attending. Depending on the nature of the program, the best debriefs are often held in the exact space in which the program or event occurred. Our ability to recall details is stronger when we are in the place where the program or event happened.

Why:

Debriefing is GREAT professional practice. A well-run debrief gives programmers and other stakeholders the opportunity to make sense of participant data, determine the final budget financials, list follow-ups that need to be made in response to outstanding complaints, unusual incidents or invoices, formulate a plan on how data insights will be incorporated into the next program/event, and to congratulate each other on a job well done.

How:

Debriefs can look very different, depending on the nature of the program being discussed and the people involved. Generally speaking, shorter programs warrant shorter debriefs, and longer programs warrant longer debriefs. While there is no hard and fast rule, a 3-hour recreation event should take roughly 60-90 minutes to debrief.

Who:

Terminal debriefs (debriefs that occur post-program) usually involve only those key players who helped create and run the program or event. This often includes the program-planners, activity leaders, facilitators, and key volunteers. Occasionally, debriefs will involve other staff members or personnel, such as an Agency's Executive Director, Chief Financial Officer, Chief Operating Officer, or Risk Manager. Sometimes, other stakeholders, like community partners or sponsors, are invited to sit around the table as well. The debrief does not (usually) involve event participants, security, external First Aiders, keynote speakers, or VIP guests.

What Gets Discussed

To maximize everyone's time and for the sake of quality control, the terminal debriefs should be chaired or facilitated by one individual OR a small team of individuals. Those at the helm will drive a debrief agenda forward with a view to obtaining key pieces of information and insights that will be compiled into meeting "minutes" (notes recorded during the debrief), OR, a formal report, then forwarded to the correct parties in a professional and succinct format.

Debrief topics can vary wildly from program to program, group to group, but the following items are a good jumping-off point for most:

Participant Satisfaction

- ◦ **Quantitative Feedback**:
  - ▪ (*Based on head counts*) How many people attended the program/event?
  - ▪ (*Based on numerical survey results and averages*) What was the participant satisfaction rate for each of the various criteria presented in each of the quantitative survey questions? (Statistics, averages) *Example: "87% said they enjoyed the activities, 71% said they enjoyed the variety of our food offerings.."*
  - ▪ How many dollars did we raise?
  - ▪ How many participants were under the age of 12 years?

- ◦ **Qualitative Feedback:**
  - ▪ (*Based on anecdotal survey results and average*s): What was the reported participant satisfaction for each of the various criteria presented for each survey question? *"For activity A, the majority of participants said XYZ... "...when asked about their impressions of the quality of the recreation staff leaders, the majority responded saying..."*
  - ▪ *Interview Questions:* What were the questions asked? When were the interviews held? What was the generalized feedback to each specific question?
  - ▪ *Direct Observation:* What did the programmers/activity leaders observe with X activity? Y activity? What broad and specific observations were made about this group? The flow of these activities...?
  - ▪ *Participant Journals:* Based on the responses in the then participants' journal entries for Day 4 of the program, what was the overwhelming mood or reflection? What happened that day to elicit such a response?

Additional Questions to Ask at the Terminal Debrief

Any additional questions asked at a terminal debrief should encompass the "Head, Heart and Hands" aspects of the program, incorporated back in [STEP 5: Program Design](#).

"What Happened?" Questions (Hands)

- Did the participants enjoy themselves?
- As a team, how was the set-up/preparation process on the day of?
- How was communication among the team?
- What were the participants like? (mostly teens, lots of families, etc)
- What went well?
- What could have gone even better?
- How did logistics go? Were there hiccups?
- Did we stay within our budget, or were there unexpected expenses?
- What were our total donations? Ticket sales? Merch sales? Profit? (Revenue – expenses = profit)
- How many participants came through the door?
- Were there any incidents, accidents, slips, trips, falls or near misses we should discuss?
- Were there any other risk management issues that popped up?
- What happened that was unexpected? How were plot twists handled?

"So What" Questions (Heart)

- Is there anything we need to address immediately?

- What is the significance of "this incident"/"that occurrence?"
- What does _____ consistent piece of feedback tell us about _____ activity?
- Is this going to be an issue next time?
- What was the impression left by participants when _____ happened?
- ***Did we meet our program/event goals? If so, how? What does this mean for us? If not, what could we have done better to reach them?***

  - *****Of the topics discussed at a debrief, those pertaining to whether a program or event reached its established goals is often considered the most important. If the answer to whether each goal was achieved is a resounding "Yes!" debrief, participants should pinpoint (and record) which specific objectives for each goal were satisfied and allowed each goal to be met. If a goal (or multiple goals) were not met, debrief participants should discuss reasons* why*. Were specific goal objectives weak or poorly articulated? Was an objective overlooked or not effectively acted upon? What should emerge from the discussion is an awareness of what could have/should have happened differently that would have allowed the goals to be met. This will be valuable information to include in the Final Report the next time the program or event is to be run.***

"Now What" Questions (Head)

- What have we learned?
- What should we keep doing for the future?
- What should we change for next time?
- How will we distribute the final tasks on the task list among us so that the final work is fair and equitable?
- When do we anticipate running this event/program again?
- Who is responsible for thanking and congratulating the various parties/stakeholders? (Writing and mailing thank-you cards, sending thank-you emails, sending gifts)
- For events: Who will compile the Final Event Report that includes an event summary, the final financials, the amalgamated participant feedback, and a recap of the team debrief (the questions asked and the group's responses)?

11.5 Key Takeaways

STEP 11: Key Takeaways

- Recreation programs need to be formally evaluated for impact and effectiveness;
- There are many ways program planners can collect meaningful qualitative and quantitative data from participants, both during and after a program or event;
- Holding a structured debrief with a program's 'key players' (program staff, event coordinator) is essential to identify successes, shortcomings, and whether the program achieved its articulated programmatic goals.

STEP 12: CELEBRATING SUCCESS

Chapter Outline

Chapter Outline

12.0 Learning Objectives

> ### 💡 Learning Objectives
>
> By the end of STEP 12, the student shall be able to:
>
> - *Provide examples* of effective ways professional recreation programmers can 'brag' about the success of a given program or event and why bragging is important
> - *Describe* what a client testimonial is and how it can be used to leverage future program success
> - *Explain* how formal acknowledgements, celebrations and timely thank-yous can impact donors, sponsors, staff, volunteers and program participants

This image was created in Adobe Firefly (2024, May 5) with the text-to-image prompt: "Colourful fireworks being set off in a park next to a natural pond with people looking up in joy and wonder."

12.1 Congratulations

Congratulations!

You've worked hard, and now that your event or program has ended, it's time to celebrate your success!

Thanks and Acknowledgements

In your event or program debrief (Chapter 11 – Evaluation), you and your team will likely generate a list of people to thank. Thanks should be given to anyone who had a role in the success of your program and event, including sponsors, donors, volunteers, VIP guests, external collaborators, and, of course, the program participants.

Programmers who skip the acknowledgements and thank-yous risk leaving sponsors and donors feeling snubbed or undervalued. Expressing gratitude is essential for maintaining positive relationships and encouraging continued support (and its just good manners!).

Ways to Say Thanks

The bigger or more complex your program or event, the greater the need to show gratitude! Here are a few ways to show appreciation:

1. ***Personalized Thank-You Notes: Take the time to write personalized thank-you notes to each sponsor, donor, key staff member, VIP or volunteer.*** Mention specific contributions or actions they took at your program or event that made a difference and contributed to your success.
2. ***Recognition Ceremony or Event***: Host a special recognition ceremony or event where you publicly acknowledge the contributions of sponsors, donors, key staff members, VIPs or volunteers. This can be done during or after the event.
3. ***Social Media Shoutouts***: Use the organization's social media platforms to publicly thank sponsors, donors, staff, volunteers, and participants. Tagging individuals in posts, sharing photos or videos of the program or event (signed photo/video release forms may need to be obtained prior) and highlighting their presence and contributions amplifies their impact and is a great way to show appreciation.
4. ***Acknowledgment in Promotional Materials***: This is a way of showing thanks in advance. Include the names or logos of sponsors and donors in promotional materials for your recreation program or event, such as flyers, posters, and event programs. This not only shows gratitude but also provides these individuals and organizations with visibility and recognition.
5. ***Exclusive Perks or Discounts:*** Offer sponsors, donors, staff, volunteers, participants, and attendees exclusive perks or discounts for future events or programs as a token of appreciation for their support and participation.
6. ***Volunteer Appreciation Events***: Organize a special event or gathering to specifically celebrate and thank volunteers for their time, effort, and dedication. This could be a casual get-together, a volunteer appreciation lunch, or an afternoon of fun activities.
7. ***Certificates of Appreciation***: Present certificates of appreciation to sponsors, donors, staff and volunteers,

recognizing their contributions and expressing sincere gratitude for their involvement.

8. ***Feedback and Impact Reports*:** Provide sponsors, donors and staff with the post-event feedback report generated from the debrief detailing how their contribution(s) made a difference. Be sure to cite feedback metrics, statistics, anecdotes and testimonials to illustrate the impact of their support. *Note: In some instances, when a program or event has only been made possible due to a grant, sharing feedback or impact report isn't just a courtesy but a requirement of the granting body.*

Implementing the above strategies allows recreation professionals to do some appropriate post-program bragging! Sending thanks and showing gratitude strengthens the recreation programmer's relationships with sponsors, donors, staff, volunteers, participants, and attendees. It also fosters a deeper sense of community belonging and community identity among the participants, non-participants and other stakeholders.

12.2 Testimonials

One of the most powerful ways for clients, program participants or event attendees to show support for your program or organization is through the writing or verbalization of a testimonial.

A testimonial is a formal statement shared with the public that recommends, pays tribute to, or expresses gratitude for a program, a service, or an event. Sometimes testimonials come to the programmer or agency unexpectedly in the form of a thank-you card, an appreciative email, or a written letter. Testimonials are fantastic, deeply personal ways for individuals to lend credibility to a recreation program or agency and are a terrific way to encourage others to participate in the future.

If a particular recreation program or event has been a resounding success, it is quite appropriate to respectfully ask a couple of the program or event participants to write a testimonial. Individuals who don't know how to begin writing one can follow these guidelines:

Testimonial-Writing Guidelines

- Before the writer begins creating their testimonial, let them know how you, as a recreation professional, plan to share their story. Will it be shared in a closed-door meeting? In writing on your agency website? As a video testimonial on social media channels? Other?
- If the writer is comfortable, have them attach their full name to the testimonial, as this lends credibility to the testimonial and has more impact than one that is written anonymously
- Have the writer begin by explaining their relationship to the program or event (participant, family member, volunteer…)
- Encourage the writer to then paint a picture detailing what specifically happened during the program or event that was particularly meaningful, special or significant to them and the positive impact it had
- However long or short, testimonials should be personal and heartfelt
- Control the narrative: Wherever possible, in the interest of quality control, have the writer send you their testimonial *before it goes public*. Seeing it ahead of time allows you to detect and correct issues, such as cleaning up spelling errors, correcting the name of the program or event, or adjusting someone's personal pronouns. It allows you to (tactfully) detect and correct grammar errors/ typos, remove the names of participants who have not expressly granted permission for their names to be used, etc.

Example Testimonial

Hi Jack,

I had to write to let you know what a difference Camp Aspenside has made to our son and to our family.

Before attending camp this past summer, our son was bullying kids at school. After the summer at camp, he is no longer doing this.

The July Leader-in-Training program gave him the responsibility of helping support another LIT in his

group who had disabilities. For the first time, our son was forced to think about someone other than himself. At first, he was uncomfortable (and his Dad and I were frankly quite worried!), but he quickly learned kindness.

Our son's attitude has changed because of the positive influence and leadership of the LIT program. Glenn and I are grateful for the patience your leadership team demonstrated when our boy was not at his best. You had faith he would become a good leader (more faith than Glenn and me if I'm being honest!), and because you had faith in him, our son now has faith in himself. We'll be back next year for the Counsellor-in-Training program! Thank you for everything.

– Renata Andersen, 2023

12.3 Key Takeaways

STEP 12: Key Takeaways

- Giving thanks and showing gratitude is an integral part of the Program-Planning process;
- Whether the thanks are given in private or publicly, acknowledging and thanking others elicits feelings of warmth, goodwill and appreciation and helps ensure future support and engagement from those being thanked.

Conclusions: Wrapping Up and Moving On

"Recreation Collage" by Freddy Vale and Sanaz Habibi, CC BY-NC-SA 4.0.

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L-R top: Photo by Neora Aylon, Unsplash License, Photo by Lukasz Szmigiel, Unsplash License, Photo by Marcelo Uva, Unsplash License, Photo by Yassine Khalfalli, Unsplash License, Photo by Jeffrey F Lin, Unsplash License, Photo by Gerhard Crous, Unsplash License; L-R bottom: Photo by Unsplash+ in collaboration with Getty Images, Unsplash+ License, Photo by Haniel Espinal, Unsplash License, Photo by Fabian Kühne, Unsplash License, Photo by Caught in Joy, Unsplash License, Photo by Anderson Schmig, Unsplash License, Photo by Dylan Gillis, Unsplash License.

You have reached the end of *Program-Planning in Recreation: A 12-STEP Guide*. You have learned that program planning is an art, a step-by-step process that requires considerable thought, attention, care and creativity.

In the field of parks, recreation, and leisure services, everybody programs! Across sectors, areas, and sub-fields… recreation programming is everywhere. Program-Planning in Recreation: A 12-STEP Guide was written with the intention of supporting professional program-planners as they figure out who they are programming for, their group's programmatic needs, and how to create meaningful programmatic goals. This book gives you the tools necessary to design and deliver dynamite programs that will be of great value to those who participate.

As you move on in your recreation program-planning adventures, let the principles of Servant Leadership guide your programming head, heart and hands. Be mindful of keeping your programs participant-centered and aligned with your Agency's Mission, Vision and Core Values. Keep everybody safe. Feed your participants' senses with meaningful and memorable activities. Have fun! Ensure no one is left out. Keep everyone safe. Innovate, evaluate and innovate again.

Do these things, and you will have a positive impact on the lives of others and the communities in which they reside. Here's to you and your future successes as a professional recreation program-planner!

Video Transcripts

2.1 How Agencies are Meeting Needs

"City of London – Dearness Home Adult Day Program and Wellness Centre – London, Ontario"

[Video Title Card]: City of London – Dearness Home Adult Day Program and Wellness Centre – London, Ontario. Presented by its staff and volunteers. South West Community Care Access Center (CCAC) and thehealthline.ca

[Voiceover]: Welcome to the Dearness Adult Day Program and Wellness Center, located in our modern facility at 710 Southdale Road in London. Our program gives caregivers a break while enriching the lives of our clients with fun and friendship.

[Hans – Caregiver]: *"Well, I would highly recommend it. Well, they come and pick her up in the morning and bring her back in the afternoon, so that gives me some free time to do different things."*

[Voiceover]: Caregivers can relax knowing their loved one is in the safe and accepting environment of the Dearness Adult Day Program. While with us, clients will be involved in failure-free activities such as exercise baking, crafts, horticulture, music therapy, aromatherapy, bingo, games and art therapy. Our qualified staff assists with spa baths, foot care, health monitoring, toileting, and medication supervision. The program also includes healthy snacks and a tasty and nutritious three-course lunch.

[Jennie – client]: *"Well, I think it's good because it keeps you active. As you get older, you feel kind of isolated, and, this is, I think, it's a great program because you meet a lot of friends."*

[Voiceover]: Find out what a difference a client-centered day program can make for your loved one and you. Call and arrange a visit to the Dearness Adult Day Program.

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Version History

This page provides a record of changes made to the open textbook since its initial publication. If the change is minor, the version number increases by 0.1. If the change involves substantial updates, the version number increases to the next full number.

Version	Date	Change	Affected Web Rage
1.0	May 31 , 2024	Publication	N/A