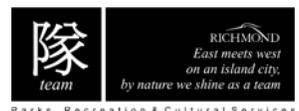


*Proposed*  
**Service Delivery**  
**for**  
**Richmond**

September, 2004

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**DRAFT**



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## 1. Introduction

At the May 20, 2004 meeting of the CWG, a number of presentations were made regarding how services could be delivered. This was followed by a round-table discussion and identification of common ground (Appendix 1). The CWG requested staff to:

- Clearly define the City's Core Services
- Define decision making
- Work on blending the concepts brought forward from CWG members, City staff and ensure the "common ground" from the CWG discussion is considered.

## 2. Background

Through the Master Plan Process, the Community Working Group has adopted the following:

- **The Well-Being Framework** (Appendix 2) has defined Community Values and Vision; clarifies who will benefit from programs and services; and begins to define the "Outcomes" that should be achieved in order to live a good quality of life. It is recognized that "recreation" fits within the broader "Quality of Life" sector and plays a key role in creating a strong, healthy and connected community. The outcomes for PRCS have been broken into 3 key areas:
  - **"To Live"** refers to the physical, psychological and emotional needs that individuals can benefit from through participation in parks, recreation and cultural services. It also refers to the importance of a healthy environment.
  - **"To Connect and Build Community"** refers to the importance of building a strong, connected community that involves all sectors in the community and where there is a sense of belonging for all.
  - **"To Grow"** refers to the need to help individuals and the community enrich their quality of life – going beyond the basics and reaching their full potential.

At the January 24, 2004 meeting of the CWG, the process for addressing community needs was adopted (Appendix 3). The 12-step process defines how the City will take leadership to ensure needs are identified and analyzed in terms of demand and gaps and that standards are set. The City will work with the community to identify the best way to address the need and identify what (if any) City involvement or contribution will be.

On February 19, 2004, the CWG adopted the Relationship Model (Appendix 4), which describes the types of relationships the City may develop in order to achieve the desired outcomes. It is recognized that the City will develop different types of relationships, depending on the specific situation. At this meeting, the City's responsibilities and leadership role were also endorsed. The City is committed to working with "community" and ensuring grassroots involvement in planning and delivery of services.

At the March 18, 2004 CWG meeting, the Sustainability discussion paper was endorsed. At the April 15, 2004 meeting, the "Role of Community Based Organizations" was presented. The CWG identified 5 key components of a Delivery System: Governance; Management; Operations; Service Planning & Customer Service; and, Service & Program Delivery.

This paper presents a proposed Service Delivery approach that integrates all of the above information and is brought forward to the CWG for consideration.

### **3. How do we Deliver the Desired Outcomes in Richmond?**

Now that we have developed a framework, looked at how the community will be involved and what role the City will play, it is important to define how the actual “delivery” of services happens.

In looking at the “services” or “products” that are required to achieve the outcomes, it must be understood that there are a number of views that must be taken:

1. There are a number of “target audiences” with different needs that must be understood in planning the “services” or “opportunities” to help them achieve the benefits or outcomes:
  - Preschoolers
  - School-aged children (elementary)
  - Youth
  - Young Adults
  - Adults
  - Older Adults
  - Seniors
  - Families
  - Community Groups
  - Neighbourhoods
  - People with Disabilities
  - Cultural Groups
  - People living in Poverty
  
2. There are many “vehicles” or “types of activities” that can help achieve these outcomes:
  - Sports
  - Arts
  - Heritage
  - Active Living & Fitness
  - Childcare
  - General Recreation
  - Special Events & Festivals
  - Neighbourhood & Community Building initiatives  
(ie. Adopt-A-Programs)
  - Environmental and Nature
  - Volunteers
  - Local Programs specific to a geographic area of the community
  - Self directed and passive recreation

#### 4. Developing Service Plans

System-wide policies need to be developed in key areas such as: accessibility; equity/access; facility use guidelines and funding or pricing of services. These policies will provide a foundation for decision-making.

It is recommended that Service Plans be developed within the well-being framework and policy framework

Service Plans will define:

- What are the needs in this specific service area? (Using 12-Step Process for Addressing Community Needs).
- What programs and services are most important to deliver the outcomes: “to live”, “to connect and build community”, and “to grow”.
- What programs and services require City support? What level of City support is required?
- What programs and/or services need to be coordinated and possibly managed on a citywide basis? For those that do need coordination, who should be involved in the actual delivery of services?
- What programs and/or services are unique to a specific geographic or service area and do not need to be coordinated?

Service Planning Groups will be made up of representatives from existing partners, as well as others appointed by the City. The City will be responsible to facilitate the process and bring forward market and trends information, to be supplemented by information brought forward by the members of the Service Planning Groups. Through the Service Planning process, a collaborative approach will be used to determine the priority services that require City support. Ultimately, it is the City’s responsibility to ensure that the Service Plans are developed and implemented.

This approach recommends moving from a “facility-based” programming approach to a “service –based approach”, with the facilities, parks or amenities being a place for the activity or opportunity to take place.

Initially, it is proposed that 3-year service plans be developed, with annual updates. Evaluations and reports will be utilized to determine what has worked well and what adjustments need to be made. It will be important that members of the Service Planning Groups come with input and feedback from their organization in order to ensure appropriate input into decisions.

It is recommended that Service Plans be developed in the following areas:

Highest Priority Areas:

- Childcare
- Youth Services
- Neighbourhood & Community Building (ie Adopt-A-Programs)
- Active Living & Fitness
- Sports (indoor & outdoor)
- Seniors

Other Priority Areas:

- Heritage
- Arts (has been started through Art Strategy)
- Environmental & Nature
- General Recreation
- Special Events & Festivals
- Volunteer Programs

An important component of the delivery system is the services unique to specific geographic areas. It is suggested that Service Plans for specific geographic areas of the City (eg. City Centre, East Richmond) need to be developed and be complimentary to the above Service Plans.

**Recommendation 1:**

That the City develop system-wide policies as a foundation for Service Planning.

**Recommendation 2:**

That the City facilitate the development of 3-year Service Plans in key product / service areas.

- A collaborative approach to be used
- Existing Partners be invited to participate in the development of Service Plans
- City to invite others, as appropriate to participate in the development of Service Plans
- City to ensure that Service Plans are developed and implemented

## 5. Delivery of Services to the Public

Delivery of services may happen in a variety of ways:

- Delivery by a community organization or agency or private sector independently (not requiring City support or use of City facilities or spaces). In this case it is important to be aware of the service so it is not duplicated.
- Delivery by a community organization or agency with City support. In this case, a Service Agreement will be developed by the City to define clearly what outcomes are expected, what reporting is required, what the community organization will provide and what the City will provide.
- Delivery by the City.

At the “Delivery” level, it is important to understand who is accountable for what and who has authority for what decisions:

- If the service is being delivered by a community organization/agency or private sector independently, they are fully accountable and have authority over all decisions. The City has no say in how services are delivered, what is charged, etc.; however, it will be beneficial to develop good communication with these service providers.
- If the service is being delivered by a community organization/agency, in City facilities or with City support, the following guidelines would apply:
  - The City is responsible to coordinate bookings and use of City facilities.
  - City staff may be assigned to assist the organization by facilitating planning (if required). This would be negotiated with the specific group.
  - The City may provide marketing and customer service (front counter service, registration, and bookings ). This ensures broader awareness of the opportunity, access and customer service for registration.
  - The community organization is responsible for their own staff and volunteer supervision and financial commitments.
  - The community organization is responsible for reporting to the City on an annual or seasonal basis.
  - Details of who does what, pays for what, receives what revenue, and what the reporting requirements are will be laid out in a Service Agreement or Facility Use contract.
- If the City is delivering the service, they are fully accountable and responsible for all decisions.

### **Recommendation 3:**

Where a service is provided by others on behalf of the City, Service Agreements will be established.

- Service Agreements to clearly define expected outcomes, and reporting requirements.

**6. City Responsibility and Accountability within the Service Delivery System is:**

**Governance, Management, Planning & Operations:**

- The City is accountable to the taxpayer to ensure City resources are allocated to areas of greatest need and impact; and that resources are well-managed
- To establish overall vision and govern
- To ensure appropriate public involvement in determining vision and needs
- To establish policies and set standards based on vision, other government policies, and regulations
- To set City budgets (operating and capital)
- To ensure service across the City where tax resources are involved
- To provide system-wide leadership, strategic planning and research to achieve the vision
- To coordinate with other City Divisions on corporate issues and goals
- To evaluate and measure performance
- For Operational Planning based on vision, goals, policies and standards
- To manage and develop its parks, facilities and amenities (space allocation, maintenance, lifecycle, capital)
- To manage its human and financial resources
- To ensure excellent customer service to the public

**Coordination and Service Delivery:**

Within the set Vision, goals and adopted policy framework:

- To involve the community in the coordination and service delivery
- To oversee planning for specific service areas, anticipate market needs, demand and trends, and coordinate services where required
- To ensure standards and policies are implemented
- To allocate City resources within specific service areas to maximize impact
- To evaluate how well service area needs have been met and make adjustments
- To ensure where programs and services are provided by others (where City resources are involved) that clear expectations and accountabilities are laid out in Service Agreements
- To deliver programs and services as required

**Recommendation 4:**

City role as outlined be endorsed.

## **7. Financial Model**

One of the Guiding Principles for the future Service Delivery System is Financial Sustainability. The City needs the ability to recover some of its costs through revenues; the ability to shift those revenues to areas of highest priority; and the ability to ensure that resources are shared across the community. Community Organizations also need to ensure their long-term financial sustainability.

One of the challenges in developing a system that benefits all and ensures that the combined resources (City and community) are being used as effectively and efficiently as possible, is to define who pays for what and how the revenues are shared.

Generally, the funding of public PRC services is made up of a combination of:

- User Pay (where appropriate)
- Tax Support
- Volunteer contribution (fundraising and/or volunteer services)

### **7.1 Fees and Charges**

Determining the most appropriate way of allocating who pays for what is always challenging. A Fees and Charges Policy must be established that lays out how tax support will be allocated.

A Fees and Charges Policy will also address common pricing for common programs and services.

### **7.2 Cost Factors and Revenues**

It is important to look at both the expense and revenue sides of the ledger to determine who should pay for what.

Generally, in planning a specific program or service, the following kinds of expenditures are involved:

- Instructor
- Supplies and Equipment
- Facility / Amenity Cost
- Staff Supervision / Program Planning Staff
- Volunteer Contribution
- Customer Services / Registration
- Marketing and Promotion
- Administrative Overhead

Revenues are generated from a variety of sources, with the majority received in the form of admission fees, program registration fees and facility / amenity rental fees.

In special situations, there may also be some grant or sponsorship monies available.

Although revenues often offset the direct costs associated with program delivery (e.g. instructor wages, program materials, promotional costs), total revenues collected seldom fully cover the indirect costs, especially those associated with facility operation (e.g. support staff wages, building janitorial and maintenance, heat and electricity, phones, computer and POS systems).

In order to ensure financial sustainability, revenues need to be applied against both direct and indirect expenditures in a fiscally sound manner. In situations where the City offers tax support to a partner to assist in the delivery of services, agreements will need to be in place that clearly outline how revenues are to be allocated.

### **7.3 Funding available for Community Initiatives**

Traditionally in Richmond, surplus revenues from programs and services at individual facilities have been used by community organizations to undertake community projects and initiatives. While there has been an inequity due to the size of various facilities and the level of City support; it is recognized that there is a benefit in having some resources available to be matched by volunteer contributions to accomplish community-based initiatives.

There is benefit in developing a system where a portion of revenues can be placed into a Community Initiatives Fund. These funds can be leveraged by volunteer contributions through fundraising and volunteer efforts.

**Recommendation 5:**

City to develop a Fees and Charges (or pricing) Policy and City Funding Policy that defines subsidies based on accessibility, equity, serving targeted needs, ability to pay and the purpose (priority) of the program or service.

**Recommendation 6:**

The City will receive a portion of revenues to offset operating costs. The determination of revenue split for programs or services provided by others on behalf of the City will be made at the planning stage, outlining all expenses and the revenue split.

**Recommendation 7:**

That a Community Initiatives Fund be developed with a portion of revenue from programs and services being allocated to this fund.

**Recommendation 8:**

That community organizations be encouraged to develop other sources of revenue through grants and fundraising to support community projects.

**Service Delivery “Common Ground” from May CWG Meeting**

Designing an Accountable Service Delivery System  
Flip Chart Notes  
Community Working Group  
May 20, 2004

**Common Ground**

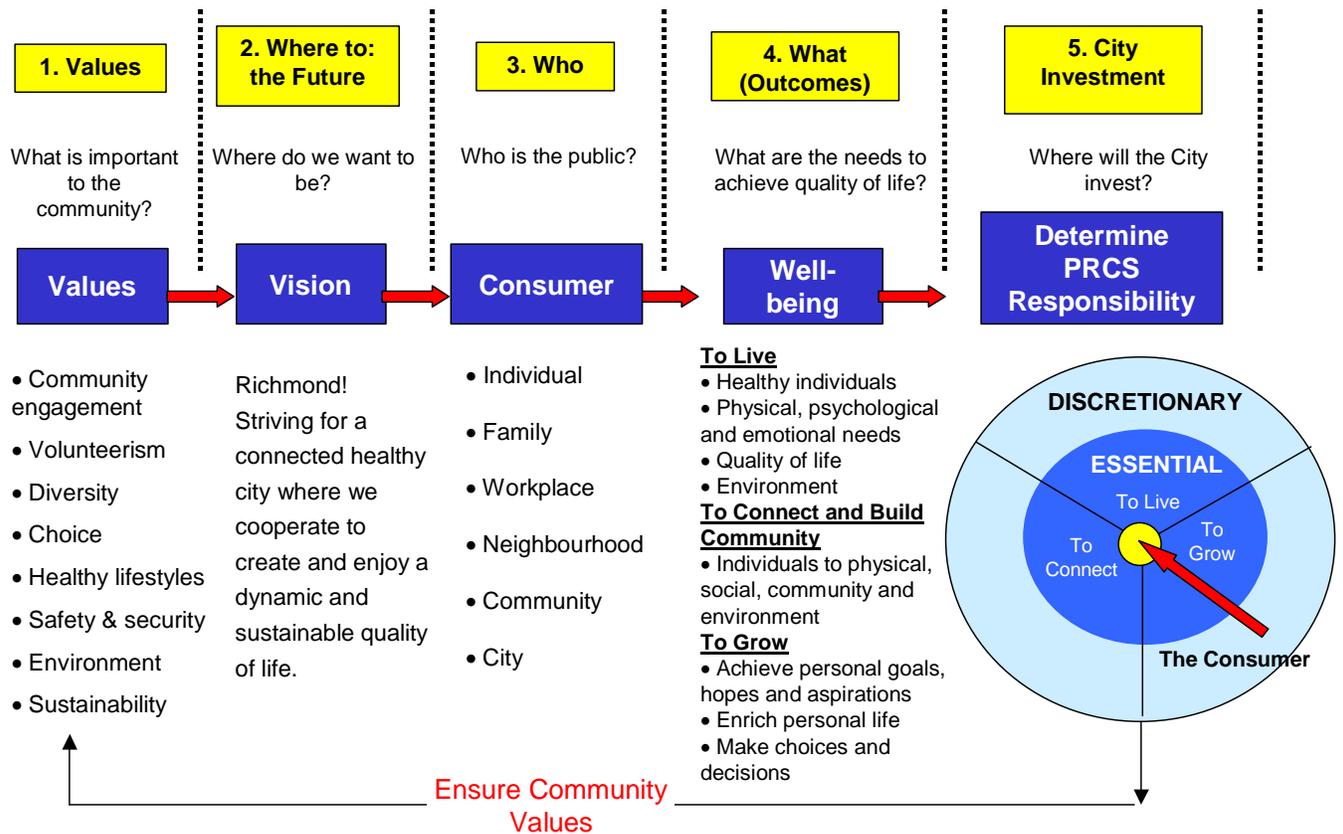
- Community building
- Customer satisfaction
- Livability
- Accountability
- Change
- Community involvement
- Public satisfaction
- Values
- Commitment
- Business-like practices
- Flexibility
- Personal responsibility
- Include “me” in it
- Upward driven customer
- We’re a City!
- Unified services
- Need for new players

## Well-Being Model

(Adopted by the Community Working Group January 24, 2004)

### Foundation Framework for Determining Needs

Shared Responsibility for Healthy Individuals and Community

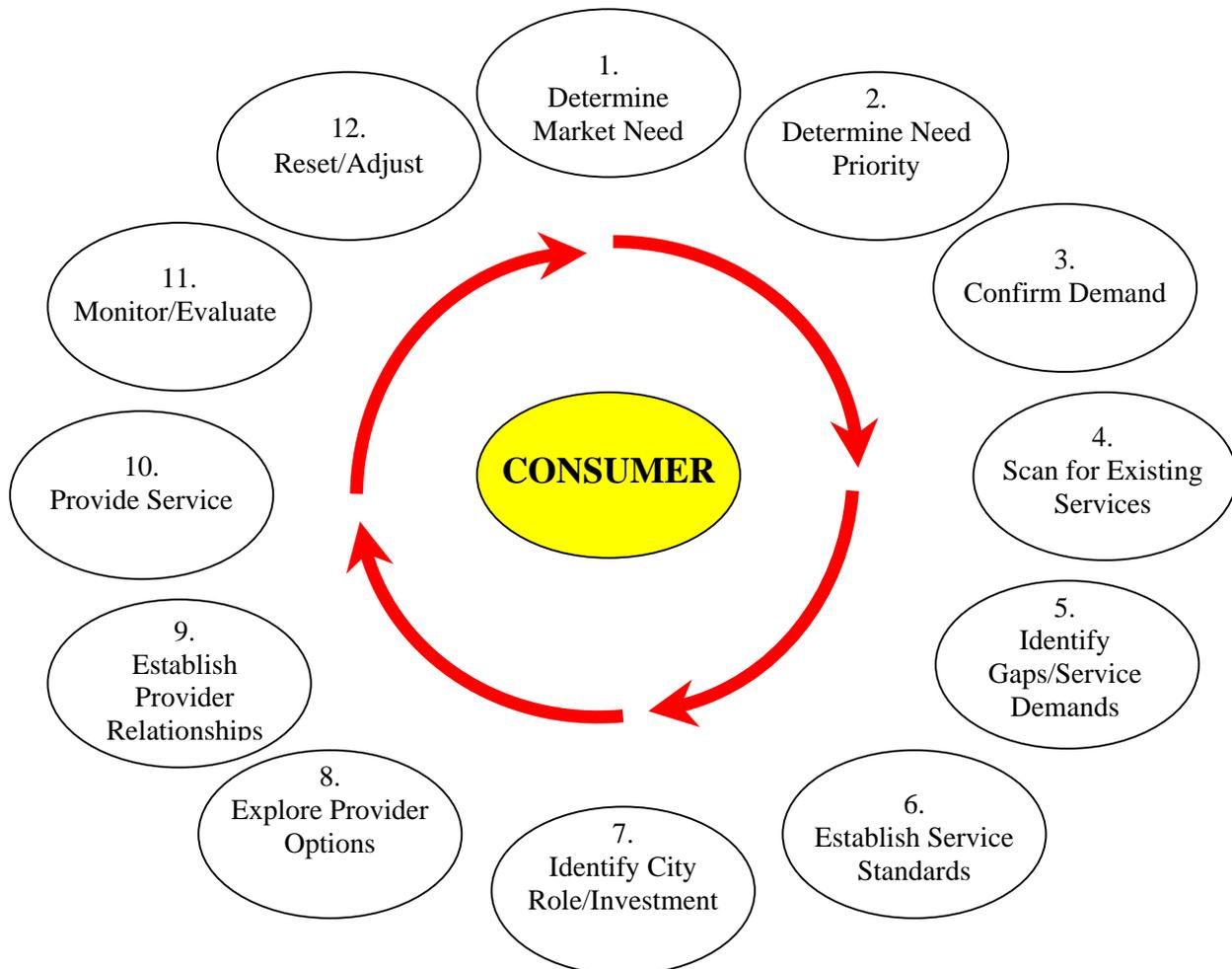


## Addressing Community Needs Process

*(Adopted by the Community Working Group January 24, 2004)*

This process must identify how needs will be addressed and delivered by the City of Richmond. PRCS will take the lead role and collaborate with others in working through these steps. Other organizations may also use this model independently.

The following diagram illustrates the progression:



### Description of the Addressing Community Needs Process

#### 1. Determine the Need

Need is established from a variety of sources including community leaders, businesses, staff, community groups, government leaders, trends, demographics or other relevant areas. When there is a gap between maintaining well-being or basic quality of life and reality, there is a need to be addressed.

**2. Establish whether Essential / Important or Discretionary Need**

Determine the importance and whether PRCS must address. PRCS may ensure or not, depending on a variety of factors including: whether it fits into those met by other providers; or if it is not a need. Essential needs must be of benefit to the greatest number of people, for example, a beginner swimming lesson as opposed to advanced diving lessons.

**3. Establish Demand**

The demand for programs and services must be established and confirmed. Prioritization occurs at this phase.

**4. Scan for Existing Service**

What else is currently being offered in the market?

**5. Identify Gaps / Service Demands**

The gap between the demand and the existing service must be examined. This may be done through the development of a “Greenlight Committee,” an ad hoc think tank to generate creative solutions to address the gap.

**6. Establish Service Standards**

Define the standards that must be met to ensure quality programs and services are provided to consumers. This will include customer service standards (Appendix 4), outcomes for programs and services, quality, targets for consumer participation, accessibility, risk management and liability, business practice, human resource management and financial management.

PRCS will set the outcomes but will not necessarily control the process for achieving those outcomes.

**7. Identify City Role or Investment**

Determine what role the City will play in the provision of programs and services and determine what investment it will make to ensure needs are met.

**8. Investigate Provider Alternatives**

Investigate delivery options depending upon what is best suited for the situation. These might include a joint venture, sponsorship (facility rental and advisory role), direct delivery or other relationships.

A case study, business plan and/or feasibility study may be involved to ensure best practices and most effective use of resources.

**9. Establish Provider Relationship (as required)**

Recruit and solicit to find the right service provider match for the situation, negotiate and formalize an agreement.

**10. Provide the Service**

This includes delivery of programs and services, as well as accompanying advertising, marketing and promotion.

**11. Monitor / Evaluate**

Manage and monitor the implementation of contract agreements where applicable and evaluate the achievement of the desired outcomes to meet the determined need.

**12. Reset**

This is the final step to complete the cycle. It takes the evaluation results and ties them back to ensure the need determined in the first step is still valid.

These steps work as a system once the essential needs and the outcomes for the three core areas are identified.

# Relationship Model

(Adopted by Community Working Group February 19, 2004)

## Relationship Formulation Process Model

