

FACILITY MANAGEMENT MANUAL

9 Monitoring



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Authors: Robyn Cockburn, Trish Amos, Lucy Atkinson, Esther Bukholt and Marilyn Northcote, Lumin

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The Facility Management Manual has been developed for managers of any recreation, sport or leisure facility. It provides detailed information covering the management and operation of a recreation, sport or leisure facility.

This document is a companion document to the Aquatic Facility Guideline, which can be found on the Sport NZ website and the NZRA website:

<http://nzrecreation.co.nz/index.php/facilities-home/facilities-guidelines>

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1 Introduction

This chapter introduces monitoring and evaluation processes, discusses the use of key performance indicators in monitoring and how insight gained from these processes can be incorporated into the planning process. Also discussed in this chapter are the purposes of evaluation and the evaluation process.

Monitoring and evaluation involves the systematic collection, analysis and feedback of data about a facility, programme or event. It is a key component of any activity and should feed into the planning cycle.

This section links with the following Facility Management Manual chapters:

Chapter 1 – Community Engagement

Chapter 4 – Strategy and Planning

Chapter 5 – Marketing

Chapter 6 – Programming

Chapter 7 – Financial Management

1.1 Legal and statutory requirements

The following laws and standards are relevant to the responsibilities and accountabilities of facility managers in monitoring and evaluation:

- Local Government Act 2002
- Incorporated Societies Act 1902
- Companies Act 1993
- Relevant legislation for taxation

Further information

<http://legislation.govt.nz/>

1.2 Policies

All facilities should have policies relating to the monitoring and evaluation processes. These could include but are not limited to:

- Complaints policy
- Financial policy
- Food hygiene policy
- Human resource policy
- Risk management policy
- Standards of all kinds e.g. water quality, cleaning, food quality
- Business case policy.

2 Reviewing Performance

2.1 Self-review

Prior to using this chapter, do a quick check on how the facility is performing in monitoring and evaluation using the following table.

Monitoring and evaluation self-review

Description	Self assessment
<i>Programmes and services</i> <ul style="list-style-type: none">• <i>Service quality and effectiveness are maintained.</i>	
<i>Monitoring approaches</i> <ul style="list-style-type: none">• <i>Facility performance is measured against efficiency indicators.</i>	
<i>Planning</i> <ul style="list-style-type: none">• <i>The facility has a monitoring and evaluation framework that captures key matrix and data inputs.</i>	
<i>Systems</i> <ul style="list-style-type: none">• All critical business systems are monitored and evaluated, and the results are the basis of system improvements.	
<i>Staff</i> <ul style="list-style-type: none">• Staff are trained in use of all monitoring and evaluation systems that relate to their work.• Staff are highly engaged in the facility monitoring and evaluation processes.	
<i>Follow-up</i> <ul style="list-style-type: none">• The monitoring and evaluation framework is reviewed and used for planning purposes.	

2.2 Key performance indicators

Frequency	KPIs and measures	✓
Annual	<p>Financial indicators are reviewed against the annual plan.</p> <p>Marketing plans are implemented, reviewed and updated.</p> <p>Staff performances reviewed.</p> <p>Demonstrate strategic partnerships have been formed.</p>	
Quarterly	<p>Customer satisfaction surveys are undertaken, reviewed and issues acted on.</p> <p>Programmes are reviewed in terms of attendance and appropriateness.</p> <p>Customers are aware of the services offered by the facility.</p>	
Monthly	<p>Comparison of water usage on a monthly basis to previous years usage.</p> <p>Energy audit is undertaken and compared to previous year.</p> <p>Financial targets are monitored and reported on.</p> <p>Staff training is undertaken and qualifications are current.</p>	
Weekly	<p>Water testing is undertaken as per NZ Standards.</p> <p>Customer attendance rates are reviewed against targets.</p>	
Daily	<p>Till reconciliations undertaken daily.</p> <p>Appropriate water tests are undertaken.</p>	

3 Monitoring and Evaluation

Monitoring is the regular collection and analysis of information to provide insights about service effectiveness or efficiency. Performance monitoring uses standards, such as targets or benchmarks to assess service impact.

The primary purpose of monitoring is to assist managers assess current functioning and to support decision-making. Monitoring data is also useful for accountability, organisational learning and conducting an evaluation.

Evaluation is an assessment that aims to answer specific questions, reviewing the merit, effectiveness and impact of a service. The purpose is to reflect on the business planning and the objectives and key performance indicators of the facility.

In facility management, monitoring focuses on procedures and performance standards that run alongside all aspects of the facility and its operation. In developing monitoring systems, measures that are 'indicators' of success or failure need to be identified.

Indicators help monitor and measure change and can be quantitative or qualitative. Quantitative indicators are factors that can be expressed as quantities and measures things e.g. numbers through the doors. Efficiency and effectiveness indicators are good examples of quantitative indicators. Qualitative indicators are descriptive. They are used to capture changes that cannot be counted e.g. opinions and perceptions of behaviour and how people relate to each other and the facility.

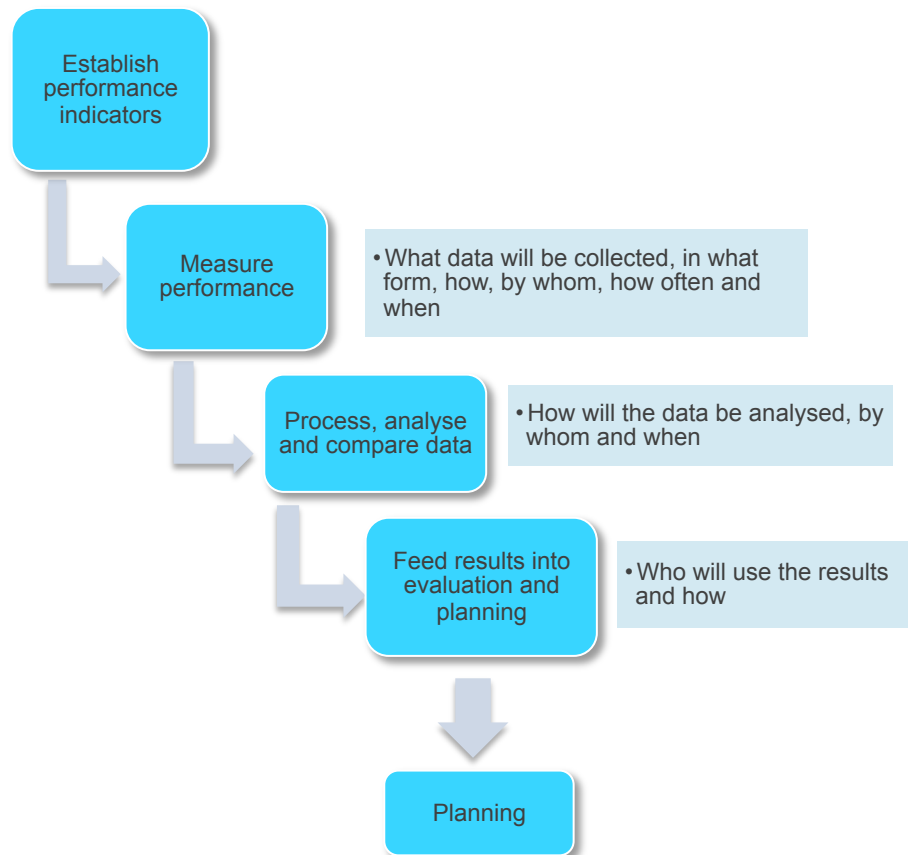
3.1 Why monitor?

Reasons for monitoring include:

- Early detection of potential 'problem' areas and variations from agreed targets
- To compare what is happening with what is desired or what was intended to happen
- To support staff motivation by measuring, rewarding and acting on monitoring and evaluations
- To support a culture of continuous improvement
- To provide useful information for planning and evaluations processes.¹

¹Adapted from *Performance Indicators: A guide for local authorities*. Hillary Commission (1995).

3.2 The monitoring process



3.3 What should be monitored?

Critical success areas identified in each area of the facility should be monitored. Facilities also have some areas of financial risk (theft, equipment damage, slow payers, etc) which will need careful monitoring to ensure that the costs to the business are minimised. While the steps in the monitoring process will be similar for each activity, the monitoring tools used and the frequency at which data is collected will vary according to what is being monitored e.g. staff performance may be formally monitored twice per year, while critical pool plant may be monitored daily.

When developing monitoring systems, it is important that:

- Systems are in place across all of the facility's programmes, services, plant and equipment
- Staff understand the monitoring process and are trained in data collection
- The information gathered through the process is useful and is used.

3.4 Establish performance indicators

For many facility managers, the requirement to use performance indicators will be a clear expectation of the planning and reporting process. The use of performance indicators meets both internal and external (key stakeholders, customers and the general public) expectations of accountability and complies with accepted business practice.

The performance indicators used should relate directly to the purpose and values of the facility (see FMM Chapter 4: Strategy and Planning). Establishing clear objectives prior to setting performance indicators is vital as objectives should dictate what is to be measured. Using indicators without considering how the results will be utilised is a waste of resources.

Some factors to consider:

- Train all staff in using performance indicators and ensure that they understand why they are using them and the possible benefits
- Include quality as well as efficiency indicators that are relevant and understandable indicators
- Use indicators for identified critical areas. If too much information is collected, it will only create confusion
- Be aware of the costs involved, and that they are not excessive in relation to the desired outcomes of the monitoring process
- Make use of primary and secondary data where possible.

3.5 Measuring performance (data gathering)

The following steps need to be taken to effectively monitor and measure performance:

- Establish criteria (what is to be monitored)
- Determine time period (depending on data collected, may be daily, weekly, monthly, or annually)
- Establish clear lines of responsibility (who is collecting data and who is overseeing the process?)
- Determine data collection methods.

Template: End of day checklist
Customer satisfaction survey

4 Indicators

Indicators are necessary to help determine what data needs to be collected. Three useful indicators in facility management are:

- Efficiency indicators
- Effectiveness indicators
- Qualitative indicators.

4.1 Efficiency indicators

Efficiency indicators measure productivity in relation to the output per unit of input and can be particularly useful in making decisions about facility use e.g. the amount of energy it takes to heat or cool a facility.

Examples of efficiency indicators²

Indicator	Explanation	Notes and limitations	Possible expression
<i>Subsidy per visit</i>	Operational expenditure – income/number of visits Useful to compare over a period of time	Ensure consistency in defining operational expenditure	\$X per visit
<i>Cost per opening hours</i>	Hourly cost of running a facility		\$X per hour
<i>Staff per visit</i>	Total visits/number of full-time equivalent (FTE) staff	Variations can occur due to nature of use e.g. the proportion of use by groups vs. individuals	No. of visits per staff member
<i>Cost per visit</i>	Identifies the cost to the facility relative to the number of visits	Be aware of visits not recorded, e.g. use of season ticket or leisure card holders	\$X per visit
<i>Staff costs as percent of operating costs</i>	Identifies what proportion of operating expenditure is spent on employees Assists with management of staff costs	Beware of non-uniform accounting systems in respect of staffing on costs	X%
<i>Income per staff dollar</i>	Compares income with each dollar of expenditure on employee costs	Only relevant for assessing direct income	\$X income per \$1.00 of employee expenditure

² From Performance Indicators: A guide for local authorities, Hillary Commission (1995)

<i>Income per visit</i>	Compares income against number of visits	Be aware of visits not recorded, e.g. use of season tickets	\$X per visit
<i>Percent occupancy (facility capacity)</i>	Number of hours that a facility is used as a percentage of capacity	Be aware of variations in opening and closing times and the effect of programming on the capacity of different periods	X% occupancy
<i>Income/ marketing expenditure</i>	Marketing expenditure expressed as a percentage of income		X%
<i>Admissions per area</i>	No of visits per metre of space	Be aware of visits not recorded, e.g. use of season ticket or leisure card holders	Number

4.2 Effectiveness indicators

Effectiveness indicators measure the extent to which the objectives of the service have been met, for example usage per head of population, or numbers of complaints. Effectiveness indicators can be split into three categories:

- 'Pure' effectiveness indicators (number of new people attending)
- Excellence indicators (the best service, outstanding cleanliness, unblemished safety record)
- Equity indicators (proportions of target groups using the facility).

Examples of effectiveness indicators³

Indicator	Explanation	Notes and limitations	Possible expression
Total visits	Total numbers using a facility or service Needed to calculate several efficiency measures	Exclude non-payers, e.g. infants, spectators, if relating to financial measure	No. of visits in year
Visits over time	Total visits and specific time period (hour, day, week, month, etc.)	Beware of seasonal and other major fluctuations and accuracy of usage figures	No. of visits in month/week/day
Visits per head of population	Total number of visits and population	Clearly define population, i.e. district, city	No. of visits per head
Percentage of visits by target groups	Proportion of visits made up by specific groups, i.e. over 50s, Maori, disabled people	Relating to overall proportion in the community can be difficult	X% over 50 X% Maori X% disabled persons

³From *Performance Indicators: A guide for local authorities*, Hillary Commission (1995).

Indicator	Explanation	Notes and limitations	Possible expression
Standards	Performance measure against a recognised or published standard	Standards only exist for some specific aspects of facility design and management	Can be expressed as met or exceeded
Catchment	The number of people from the catchment using the facility	Can be hard to track who is using facility	% of catchment using facility

4.3 Qualitative indicators

These measure performance through the customers' eyes, for example user perceptions of the quality of service, or value for money.

Examples of qualitative indicators⁴

Indicator	Explanation	Notes/limitations	Possible expression
Overall level of satisfaction	Users' satisfaction with the overall level of service	Be aware of different levels of expectation	85% satisfied with service
User perceptions of value for money	Users' perceptions of quality experience versus amount actually paid	Extent of subsidy and social policies of authority (facility) will influence perception	80% of customers indicate value for money is good or very good
User perception of staff attitude and ability	Users' perception of quality of staff they come into contact with	Different interpretations of ability can apply	80% indicate staff are helpful or very helpful
User perception of the facility and equipment	Users' perception of aspects of facility provision	Need to define different aspects, e.g. cleanliness, safety, availability	80% indicate cleanliness is good or very good
User perception of programmes offered	Users' views of the activities available	Need to distinguish between programmes offered versus programmes experienced Useful indicator of awareness and effectiveness of marketing	80% indicate that the range of programmes is good or very good

⁴From *Auckland City Recreation Programme Evaluation Framework May 2010*

5 Evaluation

Evaluation is a one-off event which focuses on results. Were the intended outcomes achieved and to what degree were they achieved?

Designing and conducting an evaluation that is going to serve a purpose and yield useful information may be time consuming and expensive. If this is a new activity for the facility, consider accessing a local university or research company to provide assistance with the process, especially research design. Another option to consider is making use of an evaluation process used by another similar facility, but this only makes sense if the purpose of the planned evaluation is similar to theirs, or if the evaluation process can be adapted to suit another purpose.

5.1 Why evaluate?

There are several good reasons to evaluate:

- Programme development: how can the programme be improved or modified to better meet the needs of participants
- Organisational management: how can the administrative, health and safety or other systems be improved
- Establish accountability: to what degree are we achieving what we set out to achieve (in the planning process)
- Monitor trends and needs: what are customers (and others) looking for that we may be able to provide?

5.2 How to evaluate a programme

Evaluation guide

Purpose	Identify a single purpose or focus for the evaluation (if there is more than one focus, it is likely to 'dilute' the impact of the research and make the results less useful). Focus on the critical information needed rather than trying to gather a wide range of information.
Audience data	Who will use the information resulting from this evaluation and how will it be used? This helps to determine what information to focus on and how to present the results.
Process	There are many techniques available. The technique chosen should fit the focus of the evaluation. Data gathering techniques include questionnaires, surveys, interviews, focus groups and conversations, observation, anecdotal data, standardised tests, checklists and rating scales.
Issues	What questions should the evaluation address? Focus on the aspects of the programme that are most critical in terms of the purpose.
Resources (budget and timeline)	The resources available in terms of time and money will dictate the nature of the evaluation process. Rather than conducting a large-scale evaluation poorly, an effectively managed small-scale evaluation will yield better results. Consider if the information is worth the cost of obtaining it?
Evidence	What evidence is needed and what are the best sources for this evidence. Ensure it is 'good quality' evidence, and that it is valid

and reliable in terms of how it is collected and what is collected. Data collection methods can be improved through staff training.

Analysis Analysis can be statistical or qualitative. Choose a method of analysis that is appropriate for the type of evidence gathered and the audience of the evaluation report.

Reporting Produce an evaluation report based on good data, insightful analysis and includes recommendations for action.

Template: Evaluation planner

5.3 The five Ps of facility and programme evaluation

Five areas that can be evaluated either individually or collectively are.⁵

- 1 Participants
- 2 Programmes and services
- 3 Place
- 4 Policies/administration
- 5 Personnel

The following list outlines possible elements to evaluate for each of the possible evaluation areas:

Area to be evaluated	Elements to evaluate
Participants/users	<ul style="list-style-type: none"> Motivations and satisfaction Changes in attitude Changes in knowledge Changes in skills and abilities How individuals interact
Programmes and facilities	<ul style="list-style-type: none"> Effective leadership Promotion of programme and services What did participants gain Risk management Equipment Scheduling Competing user groups
Place	<ul style="list-style-type: none"> Safety concerns (physical and cultural safety) Adequate facilities (could include availability/quality of childcare) Security of belongings and people Cleanliness and facility presentation Car-parking Accessibility

⁵Adapted from Henderson KA and Bialeschki MD (1995) *Evaluating Leisure Services*. PA: State College. In Rossman JR and Schlatter BE (2000) *Recreation Programming: Designing leisure experiences*. USA: Sagamore.

Area to be evaluated	Elements to evaluate
Policies	<ul style="list-style-type: none"> • Accountability of budget • Cost-effectiveness analysis • Equitable provision of services • Pricing (discounts, loyalty systems)
Personnel	<ul style="list-style-type: none"> • Performance appraisal • Training needs • Feedback for improvement

Case study: The Mount Action Centre, Tauranga

The Mount Action Centre in Tauranga is closely linked to feedback received from its customers and the immediate community. The management keeps in touch with its customers in several ways.

Reports and statistics

- Collation of daily user numbers and cash register receipts
- Analysis of monthly reports
- Estimation of user group numbers as they come through the door.

Networking

- There is a User Group Forum of about 20 organisations who meet with MAC management on a regular basis. This group receives circulars as required.

Suggestions and evaluations

- Resources have been specifically targeted to effective evaluation forms for customer feedback e.g. programme evaluation forms and sport league evaluation forms
- Letters of thanks or complaint are collated and responded to.

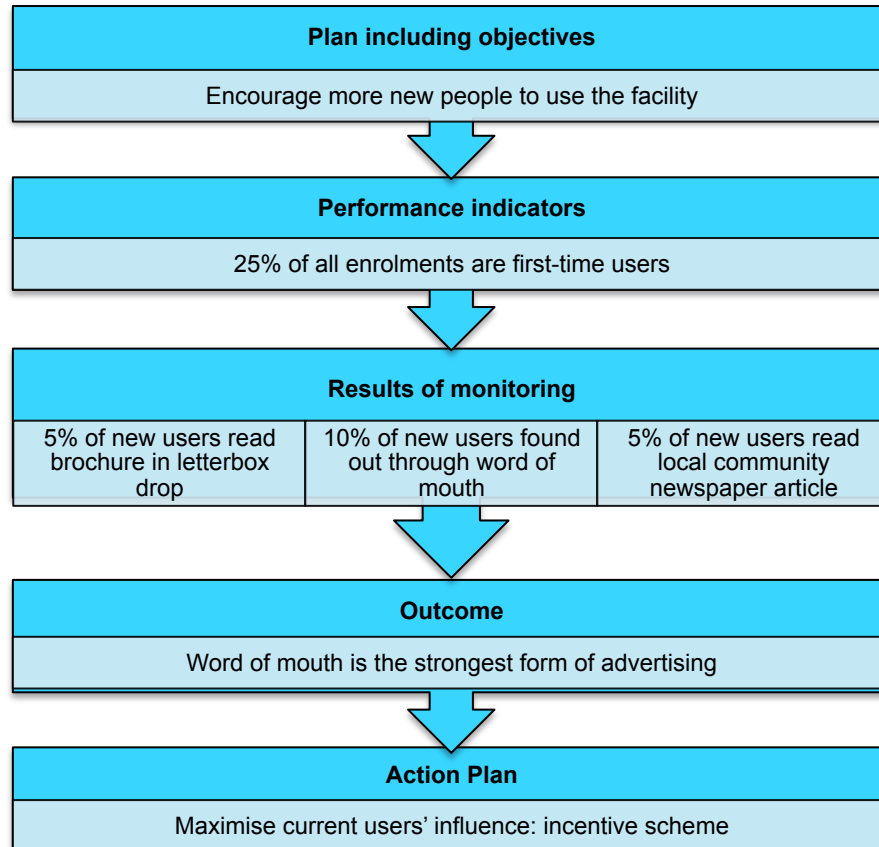
Surveys

- User group surveys are held six-monthly to ensure a cross-section of representation amongst users of the centre. An external interviewer conducts these surveys randomly.
- User group surveys exist for groups who use the centre.

5.4 Analysing data

Collating and analysing data is a critical part of the process, particularly where it leads into new action plans for the future.

Example of analysis⁶



5.5 Using evaluation results

Understanding the use of evaluation information determines the process and content of reporting. This is dependent on a number of factors such as the reporting requirements and how stakeholders want to receive the end results.

Information gathered during the monitoring and review process will be used in different ways depending on its level and type, for example, financial information is generally reported on monthly at management or board level whereas information about front-of-house services is part of a facility's ongoing management review process and may be used to make immediate changes such as increased staff training.

Evaluation provides opportunities to make improvements by identifying gaps, issues and opportunities. Deciding to address these gaps and opportunities is a strong catalyst for beginning any planning process.

⁶From *Performance Indicators: A guide for local authorities*, Hillary Commission (1995).

6 Writing reports

Facility managers are required to write regular reports and plans. When writing formal documents it is important to take time and think about the report in terms of its purpose, audience, key messages, sources of information and format.

Some facilities and organisations will have standard formats for regular reports such as monthly or incident reports. If there is not a standard report format, the following information can be used to develop a report structure.

Report format

Heading	What it should contain
<i>Executive summary</i>	The report in a nutshell
<i>Introduction</i>	The who, why and what of the report
<i>Background and context</i>	The history and reasons for this report
<i>Methodology, process or approach</i>	Description of the process used
<i>Results, findings and discussion</i>	What was discovered
<i>Conclusion</i>	Decision reached
<i>Recommendations</i>	Actions to be taken
<i>Appendices</i>	Further information or useful data
<i>Reference</i>	Information sources used

Remember to always get reports reviewed for:

- Grammar and spelling
- Evidence - is it based on fact?
- Analysis - does it make sense?
- Recommendations – are they consistent with the analysis?
- Flow - does the whole document 'hang together'?
- Format – is it easy to read?

7 FAQs

Q: How do I know that what we are measuring is what's really important?

A: The first step is to determine what your top business priorities are e.g. it could be delivering services to budget or safety with excellent customer care. Your business priorities will guide you to what and how you should monitor and evaluate.

Q: We have so many checklists, monitoring systems and evaluations that staff aren't taking them seriously. How can I increase commitment to these?

A: Once you have chosen to evaluate the key facility priorities, remember the old maxim, which should tell you most of what you need to know: "What gets measured gets done. What gets measured and fed back gets done well. What gets rewarded gets repeated." John E. Jones

Q: We have so many complex evaluation systems that I have to regularly monitor, analyse and report on. None of the information goes anywhere or gets used. What's the point?

A: This issue can be especially true for larger facilities or if you have a funder with a completely different set of values or systems. Before you embark on reporting, ask yourself (better still discuss this with the person/group you are reporting to):

- *What is this purpose of this evaluation/report?*
- *Who will see it?*
- *How will it be used?*
- *How does this information help our business priorities and the running of the facility?*
- *How could we do this more efficiently and effectively?*

8 Templates

8.1 End of day checklist

8.2 Customer satisfaction survey

8.3 Evaluation planner

8.1 End of day checklist

End of day checklist⁷

Week beginning: Monday - __/__/__

Week ending: Sunday - __/__/__

Please tick the appropriate box once you have completed the following and initial and date at the bottom.

Tasks	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Tidied up reception and kiosk area for the next day							
Reception float put in the safe and reception float book signed and dated							
Kiosk float put in the safe, and the kiosk float book signed and dated							
Printed off an X and Z reading from kiosk terminal							
Printed off an X and Z reading from reception cash register							
Counted up all money and put in a bag in the safe							
Locked safe by spinning dial							
Completed the cash up sheet and put in yellow folder for the appropriate person to check the next day							
Appropriate courts are set up for the next day							
Enough stationery for the front desk							
Kiosk is fully stocked up (stock up if necessary)							
All rubbish bins are empty and relined							

⁷ From Stadium Southland

Tasks	Mon	Tues	Wed	Thur	Fri	Sat	Sun
Answer phone checked							
Cleaned the pie warmer if it has been used during the day							
Floors are clean (vacuum and mop if necessary)							
Cleaned all dishes in the staff room							
Kitchen in the corporate area is tidy and dishes are done							
Tidied foyer area and wiped all tables							
Turned off all appropriate lights							
Turned off the radio							
Turned off the hot water system							

8.2 Customer satisfaction survey

Customer satisfaction survey⁸

Hello, my name is.... Today we are conducting a brief survey of facility users.

General Questions	
Q1. How often do you visit _____?	
Q2. How long did/are you stay(ing) in this facility today?	
Q3. What part of the facility did (are) you use(ing)?	
Q4. What have you done in the POOLS today?	
Q5. What have you done in this FACILITY today? <i>(if only a pool facility don't ask)</i>	
Q6. How do you usually get to this facility?	

When answering the next set of questions please think about *your* use of this facility.

Facility (All)	Importance <i>(Circle one)</i>	Satisfaction <i>(Circle one)</i>
Q7. Adequate car parking	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q8. Programmes (to meet your needs)	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q9. Security - personal safety in facility/car park	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q10. Good Customer service <i>(all staff) just satisfaction</i>	1 2 3 4 5 N/A	
Food and Beverage Service / Cafe (if present) <i>(don't ask if just vending machines)</i>		
Q11. Customer service	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q12. Quality and selection of food	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q13. Cleanliness	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q14. Value for money	1 2 3 4 5 N/A	1 2 3 4 5 N/A

⁸ Xyst customer survey

Swimming Pool Facility	Importance <i>(Circle one)</i>	Satisfaction <i>(Circle one)</i>
Q15. Is environment safe - lifeguard numbers and visibility	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q16. Water temperature	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q17. Water quality - clear, clean and no smell	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q18. Shade adequate for your needs <i>(only ask if outdoor areas exist)</i>	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q19. Environment - air quality / temperature <i>(not asked for outdoor pools)</i>	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q20. Pool activities - slides, water play features etc.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Dry Facility (non-aquatic)		
Q21. Age and quality of equipment	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q22. Staff supervision and competence	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q23. Environment - air quality / temperature	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Other Questions		
Q24.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q25.	1 2 3 4 5 N/A	1 2 3 4 5 N/A
Q26. OVERALL , how satisfied are you with the cleanliness of this facility? <i>(Circle one)</i>		1 2 3 4 5 N/A
Q27. OVERALL , how satisfied are you with the provision of toilets and showers at this facility? <i>(Circle one)</i>		1 2 3 4 5 N/A
Q28. OVERALL , how satisfied are you with the whole facility? <i>(Circle one)</i>		1 2 3 4 5 N/A
Q29. IN GENERAL , if there was one change you could make to this facility what would it be?		

Q30. OVERALL , have you ever reported a problem to staff at this facility? (<i>Circle one</i>)	Yes No	Q31. If "yes to Q30" was it resolved to your satisfaction? (<i>Circle one</i>)	Yes	No
Q32. OVERALL , what do you enjoy most about this facility?				
Q33. If we want to inform you of events and activities at this facility which media would be best for you?				
Q34. Where are you from?				
Q35. Why did you select this facility over others you could have chosen?				
Q36. Are there any services/facilities you would like available in this facility?				

We're almost at the end of the survey; I need some information about you...			
Q37. Name:	Q38. Gender (<i>circle one</i>) Male Female		
Q39. Contact information:			
Q40. What age group are you?			
Q41. Which ethnic group best describes you?			
Q42. For quality control purposes, my supervisor may phone to check some of my work, could you please provide us with your name and contact phone number? (<i>Circle one</i>)	Yes	No	

That completes the survey, thank you for your time

Researcher to complete		
Q43. Date / /	Q44. Time of completion	Q45. Weather (<i>describe briefly</i>)

8.3 Evaluation planner

Evaluation planner⁹

Area	Comments
Purpose <ul style="list-style-type: none"> Identify a single purpose or focus for the evaluation 	
Audience <ul style="list-style-type: none"> Who will use the information resulting from this evaluation and how will it be used? 	
Process <ul style="list-style-type: none"> Identify techniques 	
Issues <ul style="list-style-type: none"> What questions should the evaluation address? 	
Validity and values <ul style="list-style-type: none"> Are the questions true indicators for the programme? 	
Five Ps <ul style="list-style-type: none"> Which of these are to be evaluated (participants, programme, place, policies, personnel)? 	
Resources <ul style="list-style-type: none"> Identify budget and timeline 	
Evidence <ul style="list-style-type: none"> What is required Where will it come from Is it valid? 	
Analysis <ul style="list-style-type: none"> Statistical or quantitative 	
Reporting <ul style="list-style-type: none"> Is the report clear Does it contain conclusions and recommendations for action? 	

⁹From Rossman JR and Schlatter B. 2003. *Designing Leisure Experiences*.

9 Questions for Educational Context

Monitoring and evaluation

Briefly describe:

- The main reason for monitoring programmes and events
- Three tasks in the monitoring process
- The main purpose for evaluating events
- Three tasks in the evaluation process.

Performance indicators

Describe three different kinds of performance indicators that might be used in evaluating processes and programmes within a facility.

- For each indicator, provide an example e.g. user satisfaction is an example of a 'qualitative indicator'
- For each example, suggest a survey question that might be used to measure that indicator e.g. "on a scale of 1-5 how satisfied were you with the CONTENT of the programme (or event)?"

Evaluation

You have outlined three key tasks in the evaluation process. Now thinking about programme evaluation, describe the five P's of good service evaluation and give an example for each one.

Once a comprehensive evaluation has taken place, describe how the results might be used to give direction to future service development.

10 References and Further Information

10.1 Further information

Community Tool Box, Developing an evaluation plan accessed from <http://ctb.ku.edu/en/table-of-contents/evaluate/evaluation/evaluation-plan/main>

New Zealand Legislation accessed from <http://legislation.govt.nz/>

Sport NZ accessed from www.sportnz.org.nz

10.2 References

Henderson, K. A. and Bialeschki, M. D. (1995). *Evaluating Leisure Services*. PA: State College.

Hillary Commission, (1995) *Performance Indicators: A guide for local authorities*

Rossmann, J. R. and Schlatter, B. E. (2003). *Recreation Programming: Designing Leisure Experiences*. USA: Sagamore

