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Signature: [Handwritten Signature]

PARKS & RECREATION

Date: 06/30/2019 Updated: 06/30/2022 Date To Be Reviewed: Three Years – 06/30/2025

Title of Document: 3.5.1 LOPR_Management Information Systems

Lake Oswego Parks & Recreation (LOPR) utilizes the Tyler Technologies Financial System, Active Network Registration-Membership-Facility Reservation-Communications System and other captured metrics to create reliable statistical and summary data reports that are used for performance measurement and decision making.

Tyler Technologies Financial System: Tyler provides access to accurate and actual Department financial data to make budgetary decisions for operations. Tyler counts revenue as it is received, refunds and credits as they occur, and expenses (actual and encumbered by contract) when paid. Tyler is used to track budget creation and management and to ensure revenues and expenses are accounted for in the correct funds. In some programs and activities, revenue for given activities occurs prior to the expenses incurred for the activities due to pre-registration timeframes. Incoming revenues and outgoing expenses can fall in different fiscal years. An example of this is summer camp activities. Registration for summer camps begins in mid-April for camps that begin in June and run throughout the summer months. While LOPR divisions can determine the Expense to Revenue (E:R) ratio for specific activities or groups of activities, the formal revenue and expense reporting is based on Tyler reporting.

Active Network Registration-Membership-Facility Reservation-Communications System: LOPR utilizes the Active Network System for data and reports related to activity and event registrations, facility reservations and permitting, memberships for various activities, and to send communications to the customer base. Reports are run quarterly and the results are placed into the Divisions' Excel Spreadsheets. Any manual activity tracking is entered by the Division to ensure all data is captured. The primary metrics reported are Offers/Held, Participants, and Participant Hours. Seasonal registration activity data is also captured and reported to the Department. Facility reservations are captured, monitored and reported to enable the Parks Division to ensure customer satisfaction with picnic and premier park reservations.

The reports created from both the Tyler and Active systems include:

NRPA Parks Metrics (Agency Performance Survey) – LOPR participates in providing information into the NRPA Parks Metrics database. The resulting information is helpful to LOPR leadership to compare LOPR performance against the performance of other agencies.



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Annual Fact Book – Myriad metrics across the Department are tracked and reported. The Fact Book is shared internally and externally and represents the broad array of activities and services offered and performed by LOPR.

Quarterly/Annual Reports – The quarterly reports are rolled into the annual report at the end of the fiscal year. The primary metrics in the quarterly reports are Offers/Held, Participants, and Participant Hours (activity data.) For the annual report, revenues, direct and indirect expenses, cost recovery percentages, and volunteer hours are captured in addition to activity data.

Deep Dive – An annual view of total E:R by Division and the cost to an average taxpayer. This report is presented to the Parks Board by the Parks Director to lead a discussion about the previous fiscal year’s E:R performance. This report is indicative of how well revenue producing Divisions are managing resources. The Deep Dive report is populated from the Annual Report with additional input from the Finance Department.

Recreation Performance Metrics – Financial year over year growth, expense reduction, activity metrics, and customer satisfaction results are tracked and reported by Division. The Recreation Deputy Director uses this report when meeting with Divisions to assess overall performance.

Customer Excellence Surveys & Reports - LOPR sends participants (payers) emails with links to a Survey Monkey survey two times per month based on class ending dates. At the end of each seasonal registration period and at the end of each fiscal year, results reports are created and shared internally. Division supervisors utilize the feedback to gauge the success of offerings and operations and to obtain customer desired program requests. The Recreation Deputy Director also reviews the reports and discusses results and feedback with the supervisors for commendations and coaching opportunities.

Parks and Facility Projects Tracking System - Capital Improvement Projects start with a CIP number assigned by Finance and a funding source and budget decided by the Project Manager and the Director. A Capital Improvement form is completed and approved by the Project Manager, Parks & Recreation Director and Finance Director. The Parks projects financial data is tracked using Excel spreadsheets. Each project is broken down and tracked at the contractor/consultant level. Information includes budget, costs, and contract specifics including change orders and PO’s. A summary sheet that collects all this information is created to give the overall project details. This assists the Project Manager in making financial decisions when managing the budget and seeing where the escalated costs may occur. The project tracking sheets are referenced when payment requests are made to the Finance Department for payments from the project account. Approximately at each of the fiscal quarters, the project spreadsheets are compared with reporting from the Tyler Technologies Financial System to ensure balances, payments and budgets concur.



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Additionally, Excel spreadsheets are used to individually track change orders for a contractor and sent to the Project Manager and Design Consultant in a weekly report.

At the end of the fiscal year, the CIP form is reconciled and either closed if the project is completed, or if the project is still open, rolled into the next fiscal year's budget.

MaintainX – The Parks Division implemented Maintain X (a new maintenance tracking and reporting system). Maintain X is an asset, inventory, work order management software program and mobile application that digitizes the paper-based procedures, work orders, inspection logs, and audit checklists used in parks and facility operations and maintenance. The application tracks reactive and preventive maintenance, quality and safety inspections, inventory and operating checklists. Work orders are created, approved, assigned and monitored with clear information to explain what needs to be done and completion dates and times. The software also tracks and has reporting capabilities. Currently Parks utilizes Maintain X software for work orders as the primary use of the software. Staff creates work orders for themselves or for others which allow for up to date information to be shared by descriptions and photos of the tasks. All staff can view the work orders and their status by mobile phone, tablet or desktop.

Parks Division Time and Tasks Reporting System – The Parks Division utilizes the ADP Timekeeping System for coding staff time to tasks within each work group: Parks Maintenance & Parks Security, Athletic Fields, Natural Areas, Facility Maintenance and Golf.

The Parks Team meets weekly to discuss and identify current, upcoming and completed tasks. Each Parks employee is assigned tasks according to the list of duties determined by leadership teams in each area such as community stewardship education, caring for fields, trail maintenance, mowing, landscape maintenance, facility and park amenity reservations and maintenance, equipment repair and maintenance, small repair projects, safety inspections, safety patrol and enforcement, and garbage removal. Certain tasks, such as preventative and reactive maintenance is also assigned according to dedicated staff positions, and time is charged to the respective work groups for those tasks. Time tracking provides data for the Parks Deputy Director to make decisions on work detail, task assignments, performance levels, coaching opportunities and project prioritization.

Responsibility/Contacts: Director, Deputy Directors, Administrative Assistants