



# **Comox Recreation Commission**

## **Systems Review, Registration**

**July 2007**

# Comox Recreation Commission Systems Review, Registration

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## 1. Introduction

This study was undertaken on behalf of the Director of Recreation of the Comox Recreation Commission to answer the question, "How can we make our operational processes more effective and efficient?" Because this question was too broad for the scope of the project, the focus was limited to the registration process, the primary activity of the office staff.

The mission and vision of the organization refer to providing recreational services to the people of Comox. Both staff and management clearly express their belief that ultimately, office staff's roles are about customer service.

This study, therefore, examines how to increase the efficiency and effectiveness of the registration system, with a focus on customer service.

Recommendations are provided throughout the Findings section, and also provided in a summary listing for easy reference.

## 2. Background and Overview

The Comox Recreation Commission operates the Comox Community Centre and manages other recreational resources throughout the community.

Registration happens in waves, with four major registrations during the year. In addition, there are on-going program activities, with one-night programs and continuous programs such as fitness and racquetball, and special events.

Some programs are offered by independent contractors, who pay a fee to the Commission for the use of their facility and the services of registration staff. Other programs are offered by employees of the Commission.

A software program for registration (Class) was implemented in September 2006. It was difficult to switch from the processes they had developed to Class, and there are still areas where the software cannot meet their needs, so parallel or alternate systems have been developed.

The staff have many years of experience, and have developed or modified many of their operational systems themselves.

### 3. Methodology

Information about the registration process was gathered through one-on-one interviews with office staff, facility staff and programmers. Where necessary, follow-up discussions and demonstrations were held.

The technical support staff of the registration software program, Class, were questioned about some specific aspects of the registration process.

The Comox Recreation Commission's website was referred to for general information.

The Help feature of Microsoft Outlook software was consulted.

### 4. Findings

#### A. IN-PERSON REGISTRATION

Staff feel that they have a well-organized registration process, with each person playing a role and helping as needed. They are proud of handling fluctuating demands with poise and professionalism.

The Class software registration system continues to frustrate staff. It was implemented about 18 months ago, and it was a difficult transition. The staff agree that the Commission gets better information, but have found that their jobs are more difficult in some ways. There are lingering problems, in spite of many hours spent with Class technical support and the best efforts of staff.

#### **Staff Training**

Many staff felt that the two days of training they had on the Class system was not enough, and many of the implementation difficulties only surfaced after some time. Some feel that more training may help them to use the software more effectively.

#### **Recommendation**

*Class offers frequent Webinars, web-based training seminars, on a variety of topics. There is no separate listing of those on offer, but they are announced in the "Connections" newsletter that is e-mailed to subscribers. Staff should monitor these offerings to determine whether any would be useful for them.*

#### **After-School Care Programs**

Class has a special module designed to handle programs with non-standard attendance, called Flex Reg. However, it cannot deal with the after-school care program as it is delivered at the Comox Community Centre. The system is supposed to be able to both print accurate class lists and track revenues from the program.

If a child is withdrawn from a day's programming, it is critical that the class list be updated because otherwise it would appear that a child has gone missing. If the withdrawal of the child happens after the date when a refund for the program would be given, the charges to the parent should not be adjusted, but the program does this automatically. After working extensively with the software technical support team to solve this problem, the staff have reverted to creating attendance lists manually. The sheets that children sign in on are generated from Flex Reg, but any children not attending that day are simply crossed off the sheet by hand. This seems to be fairly efficient, and the staff have no enthusiasm for spending more time on the issue.

The screen to input attendance in the after-school care program is very clumsy. It consists of a table with a list of Mondays, with Monday's date, down the left of the screen. The rest of the table consists of columns headed "Mon, Tue, Wed, Thu, Fri, Sat, Sun" but without dates. These cells are to be highlighted to enter the dates the child will attend.

The lack of dates becomes frustrating when a child's attendance pattern is inconsistent. It often means that the person inputting the schedule has to count off the dates, starting from Monday, to ensure that no mistakes are made. This is particularly awkward where a week straddles months.

Parents complete a form where they check off the days that they want to book after-school care for their children, similar to what the Flex Reg screen calls for, but with dates in the cells. The parents' form is very different looking from the screen, making inputting the information even more clumsy.

### **Recommendation**

*Revise the form completed by parents so that it resembles the screen in Flex Reg. This may make it easier and faster to enter the information, and would be no more difficult for parents. (A sample form is included as Appendix A.)*

### **Income Tax Receipts**

Class is supposed to be able to generate income tax receipts that conform to the federal government requirements to claim costs of children's activity programs. Registration staff were uncertain about whether all the detail necessary was there, and anticipated that it would be a fairly large time demand to generate the receipts manually. When asked whether the program has been set up to include all the requirements, the technical help desk staff at Class said that it had.

### **Recommendation**

*Confirm with Class that the receipts it generates include all the necessary information for income tax purposes. If it does not, it is their obligation to make changes necessary to ensure that it does. It is not reasonable that a software program would generate receipts that do not meet legal requirements.*

## **Comprehensive Program Manual**

Information about programs has been published in a variety of formats. Staff have used these publications as information sources as they serve customers. There is also information available on their computers, but it is more time-consuming to find it. The staff have developed a “bible” but it is no longer current.

The Director of Recreation plans to go to a more comprehensive publication in a square newsprint format. This will gather the information in one place, but a newsprint format can be clumsy at a desk, and is not durable.

### **Recommendation**

*Using the program information that will be submitted for the comprehensive program publication, create a version for letter-size paper and make hard-copy manuals in binders for staff to use at their desks, to give them complete program information at their fingertips. Other than formatting for page breaks, there should be little word processing required once the content is ready for the publisher.*

## **Facility Booking**

Having a facility for programs is a key part of planning, and each day, various rooms in the Comox Community Centre need to be configured for the group that is booked into them. Information about rooms booked consists of a master copy for a program period, showing all the areas scheduled on a recurring basis for the coming months. It is a legal-sized grid with rooms down the left and time of day across the top. For each day, this information is rewritten by hand on a working copy of the same grid, with other short-term uses penciled in; 365 copies of this grid are written out by programming staff.

This written information is used by the janitorial staff to determine the room set-ups required, and it works well for them.

While Class has a module available for facility booking, a simpler and less expensive alternative to keeping these records by hand is to use the “scheduling resources” function of Microsoft Outlook. It allows recurring events to be booked with a few simple keystrokes, allows for exceptions and is easily modified as plans change.

Microsoft Outlook is already used at the Comox Community Centre for e-mail. This would make the facility booking information available to everyone from their computer.

### **Recommendation**

*Using Microsoft Outlook, set up the rooms in the Comox Community Centre as resources and use the resource scheduling function to manage bookings. Print off the information as necessary for janitorial staff. (Instructions from the Outlook Help menu about how to set this up are included as Appendix B.)*

## **B. ON-LINE REGISTRATION**

During discussions with individual staff about on-line registration, two areas of concern were voiced by every person: their relationship with the public and implications for staff.

The Comox Community Centre is a busy hub of members coming and going, most of whom interact with the office staff in some way. This results in almost constant interruptions for the staff, but they all see this as a reality of their jobs. As much as some uninterrupted time would be welcome, serving the public is their priority.

In fact, the office staff at the Comox Community Centre have very social jobs, which many described as one of the things they really like about their work. Both within their team and with the public, positive relationships are important to them. This is the source of some of their reluctance to move toward on-line registration.

### **Public Reaction**

The staff are proud of the feedback they receive from the public. They are often told that they are very pleasant to deal with, especially compared to the staff in the Lewis Centre in Courtenay, and they have gone to a lot of effort to earn that reputation. Staff feel that this positive relationship may be at risk from on-line registration.

The staff agree that on-line registration would be a convenience for many people. They are concerned, however, that if people come to the Community Centre to register, they could be told that space is available in a program, only to find that between giving that information to a customer and actually registering them, the space could be taken by someone completing an on-line registration. The staff would then be left to deal with the customer's frustration.

This could indeed be the case, but it would not likely happen often. And in fact, first come, first served is a principle that most organizations embrace without question.

### **Conclusion**

*People being able to register without the assistance of staff means that staff would no longer be completely in control of the process, but this is not a reason to delay. Increasing the convenience for the public by being able to register on-line from their home rather than go the Community Centre in person is an improvement that would bring the Centre's programming into the 21<sup>st</sup> century.*

### **Recommendation**

*When investigating on-line registration software, review whether there is a capability to put a hold on a place in a program while registration is completed. While this should not be the deciding factor, the staff will want to know.*

### **Implications for Staff**

The staff have a very strong team identification. It is remarkable that every person interviewed voiced the same concerns about the possibility of losing staff and

public frustration when people registering in-person lose a place to those registering on-line. This suggests that the staff have discussed these issues extensively, to the point that they have agreed on the message.

It is equally remarkable that the same people didn't have a ready answer when asked if they thought that the public would generally appreciate being able to register on-line. This suggests that the positive aspects have not been as extensively discussed by the group. After some discussion, everyone interviewed agreed that the option would be a convenience for many people. In spite of the fact that staff say that they focus on customer service, they appear to think of service narrowly, in terms of what they do, rather than what the organization as a whole can do for customers.

### **Job Security**

Job security was expressed as a major concern from staff, although it was personal for only one casual employee, who expected that on-line registration would mean that she would be called in for fewer hours.

All but one staff person interviewed said that they knew people who worked at banks, and when on-line services were instituted at banks, people lost their jobs and customers had to put up with a lower level of service. This is not a valid comparison. The level of technology used by banks is far beyond what Comox Recreation is considering.

The flip-side of this issue is that most of the staff people complained about an excessive workload. It would seem that the staff should welcome measures to reduce the demands on their time, rather than resisting them. It appears that the union plays a role here. The shop steward said that they would like to see more people hired to alleviate the workload around registration, rather than using technology. She did agree, however, that some members of the public would appreciate being able to register on-line.

Other organizations that have gone to client self-service through technology have found that the very straight-forward services tend to be done on-line, but those which are more complex, requiring clarification or assistance, are handled by staff. The reduction in routine work is off-set by being able to spend more time doing complex work.

No workload analysis was carried out as part of this analysis.

### **Recommendation**

*If no changes will be made to staffing levels for permanent staff as a result of on-line registration, that commitment should be explicitly made to staff. Regarding casual staff hours, there is no commitment implied in the employer-employee relationship, so there is no need to discuss expectations until on-line registration is in place and staff workload demands can be determined.*

## **Change Fatigue**

The staff are still dealing with the frustration of the Class system implementation. They recognize that there have been some benefits to the system, but the stress of the change has been significant.

Some of the resistance to on-line registration by staff is due to the reluctance to go through a similar experience. Basically, they anticipate that it will be more trouble than help.

### **Recommendation**

*If possible, ask the software vendor for references of other organizations who went to on-line registration some time ago. Contact them to ask what their experience has been. Share the feedback with staff as a way to prepare them for both the positive and negative aspects of the new system.*

## **C. ON-LINE ENHANCEMENTS**

A few simple measures using the website and on-line registration features could increase staff efficiency.

### **Frequently Asked Questions**

Staff spend considerable time responding to telephone enquiries. There may be ways to decrease this time demand by making better use of the website.

The website has no Frequently Asked Questions (FAQ) pages. This may be a useful resource for a number of areas: special events, facility rentals and programs. Although not directly tied to on-line registration, once people go to the website to register, it is easy to direct them to more information, and they are more likely to go to website if on-line registration is available.

FAQ sheets are usually written based on the staff's experience about what people want to know, as well as the key information they need to pass along.

### **Recommendation**

*Add Frequently Asked Questions (FAQ) links to appropriate pages on the website, to reduce routine questions from the public.*

### **Instructor Inquiries**

Some staff mentioned that instructors often ask staff how registration is going for their programs. Staff have to consult Class to determine how many spaces are left. With on-line registration, instructors may be able to determine how full their classes are by simply going to the site and seeing how many spaces are left.

### **Recommendation**

*Once on-line registration is implemented, ask instructors to check on registration levels themselves. This is particularly appropriate for contract staff.*

## Website Errors

There are a few very minor errors on the website, listed below.

### Home page

- invites readers to “View our Vision and Mission statements below” but they are not on the page.

### Front Desk page

- refers to Board members’ names listed above: they are actually listed to the left.
- is Pat Lewis still Chair, and has David been there 19 years or 20 years?
- is the list of Board members current?

### Mission and Vision statement page

- in the middle of the Mission statement, the And is capitalized

### **Recommendation**

*Correct the minor errors on the website prior to the increased website traffic that will come with on-line registration.*

## D. EXPENSE TRACKING

One of the key deficits of the Class system is that it does not link with Simply Accounting, the software program used for financial management. This means that programming staff cannot track revenues against expenses of a program. A great deal of effort has been put into this problem, but no resolution has been found.

Information about program expenses is only available from the accountant, about two weeks after the end of a program. Using their experience, programming staff can estimate what costs will be, but they can only determine the amount of profit a program will make after the fact. This is a significant issue if staff are expected to achieve specific levels of profit on programs.

In addition, expenses incurred by program instructors, which can be through purchase order or petty cash, are sent directly to the accountant for payment. This means, in essence, that the accountant is responsible for approving expenditures for programs that she knows nothing about. It also means that the programming staff are uninformed about what is being spent on programs.

This arrangement results in misplaced accountability and authority.

### **Recommendations**

*Have program staff submit all expenses to programmers for approval before they are paid.*

*Have the accountant set up read-only access to Simply Accounting so that the programmers can monitor program expenses and make informed decisions about approving program expenses.*

## 5. Summary Listing of Recommendations

### Page

- 2 Class offers frequent Webinars, web-based training seminars, on a variety of topics. There is no separate listing of those on offer, but they are announced in the “Connections” newsletter that is e-mailed to subscribers. Staff should monitor these offerings to determine whether any would be useful for them.
- 3 Revise the form completed by parents so that it resembles the screen in Flex Reg. This may make it easier and faster to enter the information, and would be no more difficult for parents. (A sample form is included as Appendix A.)
- 3 Confirm with Class that the receipts it generates include all the necessary information for income tax purposes. If it does not, it is their obligation to make changes necessary to ensure that it does. It is not reasonable that a software program would generate receipts that do not meet legal requirements.
- 4 Using the program information that will be submitted for the comprehensive program publication, create a version for letter-size paper and make hard-copy manuals in binders for staff to use at their desks, to give them complete program information at their fingertips. Other than formatting for page breaks, there should be little word processing required once the content is ready for the publisher.
- 4 Using Microsoft Outlook, set up the rooms in the Comox Community Centre as resources and use the resource scheduling function to manage bookings. Print off the information as necessary for janitorial staff. (Instructions from the Outlook Help menu about how to set this up are included as Appendix B.)
- 5 When investigating on-line registration software, review whether there is a capability to put a hold on a place in a program while registration is completed. While this should not be the deciding factor, the staff will want to know.
- 6 If no changes will be made to staffing levels for permanent staff as a result of on-line registration, that commitment should be explicitly made to staff. Regarding casual staff hours, there is no commitment implied in the employer-employee relationship, so there is no need to discuss expectations until on-line registration is in place and staff workload demands can be determined.
- 7 Add Frequently Asked Questions (FAQ) links to appropriate pages on the website, to reduce routine questions from the public.
- 7 Once on-line registration is implemented, ask instructors to check on registration levels themselves. This is particularly appropriate for contract staff.

Page

- 8 Correct the minor errors on the website prior to the increased website traffic that will come with on-line registration.
  
- 8 Have program staff submit all expenses to programmers for approval before they are paid.
  
- 8 Have the accountant set up read-only access to Simply Accounting so that the programmers can monitor program expenses and make informed decisions about approving program expenses.

## **6. Appendices**

### **A. After-School Care Registration Form, Revised**

See next page for the complete form.

**Comox Recreation Commission**  
**After-School Care Registration Form**    Sept 2007 - Dec 2007

Child's Name \_\_\_\_\_  
 Parent/Guardian Name \_\_\_\_\_  
 Home Phone \_\_\_\_\_ Work/cell Phone \_\_\_\_\_  
 Codeword on file? \_\_\_\_\_ E-mail Address \_\_\_\_\_

Please check off the boxes on the days you want after-school care. No care available on shaded days.

Week	Mon	Tues	Wed	Thurs	Fri	Cost is \$11.00/day.	
03 Sep 2007	3	4	5	6	7	Total	
10 Sep 2007	10	11	12	13	14	Owing	Receipt
17 Sep 2007	17	18	19	20	21		
24 Sep 2007	24	25	26	27	28		
01 Oct 2007	1	2	3	4	5	Total	
08 Oct 2007	8	9	10	11	12	Owing	Receipt
15 Oct 2007	15	16	17	18	19		
22 Oct 2007	22	23	24	25	26		
29 Oct 2007	29	30	31	1	2		
05 Nov 2007	5	6	7	8	9	Total	
12 Nov 2007	12	13	14	15	16	Owing	Receipt
19 Nov 2007	19	20	21	22	23		
26 Nov 2007	26	27	28	29	30		
03 Dec 2007	3	4	5	6	7	Total	
10 Dec 2007	10	11	12	13	14	Owing	Receipt
17 Dec 2007	17	18	19	20	21		
24 Dec 2007							
31 Dec 2007							

## B. Microsoft Outlook Help Guidelines for Scheduling Rooms

### About scheduling resources

This feature requires you to be using a Microsoft Exchange Server e-mail account.

In addition to inviting people to attend meetings, you can also schedule resources, such as the conference room where you plan to hold the meeting, or the slide projector you plan to use for a presentation.

In order to schedule a resource, the resource must have its own mailbox on your server. An individual in the organization sets up the mailbox and gives permission to others to schedule the resource. Aside from that, the resource is self-sufficient, accepting and rejecting invitations automatically. When you want to schedule the resource, you can invite it to a meeting. The invitation is accepted if the resource is free, and the meeting is automatically entered in the resource's calendar.

The administrator for the resource can restrict the ability to schedule the resource. For example, if only managers are allowed to schedule certain conference rooms, the administrator can set permissions so that requests from managers are accepted and requests from non-managers are declined.

### About group schedules

The **Calendar** group schedule makes it easy for you to see the combined schedules of a number of people or [resources](#) at a glance.

You can create and save multiple group schedules, each showing a group of people or resources. For example, one group schedule might contain all employees in a department. Another group schedule might contain all conference rooms in a building. A group schedule can include all of the contacts or resources from a public folder.

In addition to inviting people to attend meetings, you can also schedule resources, such as the conference room where you plan to hold the meeting, or the slide projector you plan to use for a presentation. In order for you to be able to schedule a resource, it must first have been set up by an individual in the organization to have its own mailbox on your server, and you must have been given permission to schedule resources that includes this resource.

While viewing a group schedule, you can quickly schedule a meeting with or send e-mail to some or all of the group members. You can get the latest free/busy information for each group member before you schedule a meeting, and you can use AutoPick to find a time that's free for all group members.

The group calendar will by default contain details of all items shown, unless the owner of an item has marked it as private.

### Set up a resource so that it can be scheduled

This feature requires you to be using a Microsoft Exchange Server e-mail account.

This procedure works only if you are the resource administrator or you've been given owner permissions.

1. On the **Tools** menu, click **Options**, and then click **Calendar Options**.
2. Click **Resource Scheduling**.
3. Click the options you want.
4. Click **Set Permissions**.
5. Click the **Permissions** tab, and then click **Add**.
6. In the **Type name or select from list** box, enter the name of each person you want to grant permissions to, clicking **Add** after each name.
7. Click **OK**.
8. In the **Permission Level** list, click **Author**.

### Schedule a resource

This feature requires you to be using a Microsoft Exchange Server e-mail account.

This procedure works only if you have been given permission to schedule this resource.

1. In **Calendar**, on the **Actions** menu, click **Plan a Meeting**.
2. Click **Add Others**, and then click **Add from Address Book**.
3. In the **Type name or select from list** box, enter the name of a resource you want at the meeting.
4. After you enter each resource, click **Resources**.
5. Click **OK**, and then use the scroll bars to view the [free/busy time](#) for invitees.