

# **Managing the Planning & Provision of Leisure and Recreation Opportunities in Australia**

**Course text  
for  
Unit AHS3502: Recreation Planning and Policy  
College of Sport and Exercise Science  
Victoria University  
Melbourne**

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## **An Introduction to the Course**

This text has been prepared to provide a range of resources for students studying Unit AHS3502, Recreation Planning and Policy, in the College of Sport and Exercise Science at Victoria University, Melbourne, Victoria.

The course is designed for those working in, or wishing to work in government or private industry and who seek to develop or enhance their professional skills and capacities in the field of recreation planning.

The objectives of the text are to:

1. Provide guidance and resources which will help students to better understand the importance and scope of leisure and recreation planning at the strategic level, and
2. Provide a detailed explanation of the steps involved in the preparation of leisure and recreation plans so that when planning is carried out, it is undertaken in a way which achieves the most effective outcomes and the optimal benefits for all sectors of the community.



## Leisure and Recreation in Australia

At one time or another throughout an average year, all but a tiny minority of Australians go swimming, or walking, or travelling, or read a book, or go hang gliding. Or they might play a sport, do some gardening, write a poem, or visit a theatre, a museum, a library, or a national park. Alternately, they might dine out, visit wineries, go sailing, paint a picture, fix up an old car, collect bottles, play and “chat” on their computers, watch television, or simply sit and contemplate life, seemingly doing nothing.

All these are leisure and recreation activities: and leisure, recreation and a broad range of cultural pursuits have always been a major part of Australian life. They are a core element of our way of living, of our culture and of the way we express ourselves. More recently, research has shown that recreational, cultural and leisure activities have a major positive influence on personal health and on community wellbeing. Improving the health of the community, overcoming obesity, reducing heart disease and, more recently, reducing our reliance on fossil fuels, has seen planners and researchers from all walks of life turn to recreation and leisure as a major solution. More recently still, involvement in leisure and recreation pursuits have been found to contribute to *community strengthening* and to the development of *social capital*, two community development concepts which are considered more fully in the later discussion of definitions of recreation planning. Hence, leisure and recreation are increasingly being seen as being central to not only to our personal happiness and enjoyment, but also as being central to our personal, community, social and national health and wellbeing.

Not surprisingly, recreational, leisure and cultural activity and involvement do not happen by accident. Individuals, families and groups plan, even if haphazardly, what they are going to do in their leisure time. Councils and governments carefully assess what types of leisure, recreation and cultural opportunities they might provide in the best interests of the community; commercial providers calculate how they can create viable, attractive businesses and a multitude of other attractions which people will enjoy during their leisure time. Increasingly too, governments, town planners and transport providers are focusing on how they can provide attractive, accessible residential estates and community activity hubs which offer a mix of educational, retail, social, recreational and cultural environments. All of these activities entail *planning* of one form or another.

Looked at from another perspective, planning covering all aspects of recreation is important in Australia because the importance which is attached to sport and elite achievements in sporting events, has an impact on decision-making which is often detrimental to other recreational endeavours. Hence, planning which can achieve the recognition of other leisurely and cultural endeavours and which can ensure an equitable allocation of resources is particularly from a democratic and community rights perspective.

The planning resource materials contained in this text provide a guide to the processes of recreation and leisure planning. The materials are accompanied by a range of case materials to illustrate the processes used by planners and to answer questions on common problems and issues.

There is no mandatory, legislated approach to the planning of recreation facilities, activities, programs and services in Australia, although most States have legislative processes to guide the acquisition of open space to be *used* for recreation provision. A number of states also have guidelines to assist in the development of recreation infrastructure and facilities. For example, NSW has long had a section of the Local Government Act (Section 94) which requires Council's to assess the extent to which residents moving into new developments will increase the demand for community services. In the light of these assessments, Councils have been required to determine the financial “contribution” which the property developers will be required to pay to cover the cost of a range of additional community services, generally including recreation.

Given the lack of a firm legislative framework –which is both a difficulty and a blessing-- the methods outlined in this text are not necessarily the only methods to plan for leisure, recreation or cultural opportunities. Other methods are available and a number of these are briefly reviewed in Chapter 4. That said, the methods detailed here have been tested over the past 20 or 30 and have been found to be sound.

The order in which the tasks are tackled and the extent of attention given to each is frequently adjusted depending on the particular circumstances at hand and this is discussed further in the following materials.

## 2

### What is planning?

#### 2.1 Introduction

Planning is a process of research and evaluation which is used to allocate physical, human and financial resources in a manner which most effectively and efficiently delivers positive outcomes in the community. Ideally, the resource allocation process should reflect the goals and aspirations of the community for which the planning is undertaken. The planning process guides the types and amount of resources which are applied, where and how they are distributed, and the timing of the allocations.

Here are some definitions of planning from well-known overseas and Australian researchers and planners from the past 50 years. Planning is:

“...orderly development”. Beyer, 1957

“The self-conscious attempt by man to order his environment so as to realise common goals and values” Weaver, 1963

“...a means for systematically anticipating and achieving adjustment in the physical environment of a city consistent with social and economic trends and sound principles of civic design”. Chapin, 1965

“...the systematic collection, analysis, organisation and processing of technical information to facilitate decision-making”. Driver, 1973

“...some commitment to bring into being a state of affairs which does not presently exist and which is not expected to occur naturally within the desired time”. Emery, 1976

“...the idea of strategic planning (as compared with management planning or other planning ideas) is that it is concerned with preparing an organisation to respond positively to changes in the social, political and economic environment. This means it must be on-going, simply because social, economic and political change is continuous... rather than going from step to step in a linear way, with a clearly defined beginning and end to the planning process, strategic planning proceeds in a more or less circular way”. (Hamilton-Smith, 1993)

The first four definitions see planning as a fairly straight forward set of steps which lead to a number of logical outcomes and action. By comparison, Emery's definition is somewhat more complex: it implies that a planner and society has definable values and opinions about where they are at present and where we want to get to. It also implies that *commitment* to change may be just as important as technical information, systematic assessment and potentially, *imposed* change.

Hamilton-Smith<sup>1</sup> makes a strong distinction between short term *managerial* (or operational) plans which focus on “means” and strategic plans which focus on long term *outcomes*. He argues that strategic planning should reject a step-by-step linear collection of information to create a one-off planning process and instead, use the skills of an organisation to *continually* adjust to change. This is achieved by starting a planning process at any point and continually revisiting, reassessing and revising the responses which are made. Hamilton-Smith argues that this approach builds stronger, more adaptive organisations, and focuses on long term goals and “ends” rather than short term *managerial* (or operational) “means”. Hamilton-Smith also argues that strategic planning should be “transactive” in that it “uses processes which involve people, not to gain some sort of superficial appearance of consensus, but rather to negotiate or transact with each other in sorting out how to accommodate the various viewpoints which are inherent in community-level planning”.

In a modern society such as Australia's, planning is undertaken on a daily basis by a wide range of organisations in relation to transport, urban development, the provision of schools and educational services, manufacturing, retail services, health services, water and power... and recreation.

Planning is an “interventionist” process as it is action which is consciously taken in order to *hasten* the achievement of the desired outcomes, or to *ensure* the desired outcomes are achieved (as they might not otherwise be achieved at all), or to *avoid undesirable outcomes*. Over recent years, however, planning has tended to become less interventionist in deference to the role of market forces and planners have put a greater focus on facilitating and assisting others in the development of resources. This change has also paralleled the growth of provision partnerships between a range of agencies. At one extreme along this continuum is the concept of Public-private partnerships wherein governments set the broad parameters of various projects which are deemed to be needed and private companies own and operate these for the government. Depending on the

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<sup>1</sup> For full reference, see Hamilton-Smith, 1993, in bibliography

partnership agreement, the assets may remain private or they may be handed back to the government after say 30 or 40 years.

Planning can be *remedial* --where it seeks to overcome problems caused by a lack of or inappropriate planning in the past— *reactive*, where it has a focus on “fixing up” and improving existing conditions, or *proactive* the process is used to create a new, different and better future for the target groups or assets for which it is undertaken.

Remedial and reactive planning are quite conservative in that they essentially seek to maintain and strengthen the status quo. However, taking a proactive approach to planning is more difficult and can be far more contentious. As a consequence, those initiating a planning process need to consider whether they are more likely to achieve success by taking a reactive approach and if they are too proactive, whether they will gain the essential support of senior officers and elected members, and whether there is a danger of the whole process failing in the face of community opposition to what might be quite radical change.

## 2.2 What is *recreation* planning?

In keeping with the above discussion of planning in general, *recreation* planning can be defined as a process through which information, attitudes, values and needs are reviewed and evaluated by and with the community in an on-going fashion in order to identify a range of actions which, if implemented, will achieve a better outcome for the community than would otherwise have been achieved if things had been left to take their natural course. Further, effective recreation planning will provide a range of personal, social, economic and environmental benefits to the community with these being delivered in a sustainable manner.

## 2.3 Planning for recreation facilities, activities, programs and services

Recreation planning –or as it is frequently referred to, *leisure* planning, or *leisure and recreation* planning-- can cover a wide range of topics. For instance, it can be concerned with the planning of:

- Recreation *facilities* and/or
- Recreation *activities* or *programs*, and/or
- Recreation *support services*...

or all three of these.

### Recreation Facilities

Recreation facilities are the physical assets which accommodate recreation activities. They can be natural or built assets which are specifically provided and managed for recreational purposes or they may be assets which fulfil some other primary role and which are occasionally used for recreation. Often, facilities are designed to fulfil several roles. Here is a listing of examples of recreation facilities: a review of the list indicates that while some are solely or predominantly recreational, others serve quite different purposes as well as a recreational role:

- Sports halls
- School halls
- Football ovals
- Bushland reserves
- Playgrounds
- Libraries
- Trails
- Wetlands
- Lakes
- Neighbourhood houses, and
- Galleries.

While the planning of *facilities* is an important part of recreation planning, it is critical to recognise that they are only physical entities *used for* recreational activities. They are one of the *means* to a recreational outcome, and should not be seen as an outcome in themselves. The actual facilities which are considered for provision are likely to be very wide-ranging and should include facilities which are traditionally used for other purposes as well eg: schools, health centres, bushland reserves, churches.

In many areas, the focus of recreation planning is on changing and enhancing existing provision rather than providing totally new facilities. This is particularly the case in existing urban areas where there is little or no land to acquire to provide new facilities. As a result, the outcomes of the planning process often focus on identifying:

How existing facilities can be renewed, enhanced or, in the New South Wales terminology, “embellished”, so they better serve the community. This might mean providing new play equipment; redesigning and enlarging existing halls; providing internal toilets, kitchens and updated electronic services; installing walking tracks and safety lighting in association with sports grounds and along creeks and drainage lines; installing access ramps to buildings; providing shade and shelter; and renewing or revising garden plantings

How existing facilities can be turned over to totally new uses, such as redeveloping a former playground in an area with an ageing population into a community garden with quiet seating and shade areas; or converting single, under-sized sports ovals into informal parkland... or into two or more soccer grounds, or using a former small reserve as the site for a community house, an arts workshop or a men’s shed

How existing programs may be upgraded and modernised, or replaced by *new* programs targeted at new and different groups in the community

New ways by which venues can be managed and scheduled so that a wider range of groups and individuals can gain access to them

Service improvements which ensure that individuals and groups which have missed out on recreation opportunities in the past can begin to access them and reap the benefits and enjoyment of participation. These might include community transport; community contact, liaison and support staff; signposting to destinations a round the Council; a grants scheme, and a Mayoral awards scheme.

Such changes can radically change the mix, attractiveness and accessibility of the recreation opportunities available to the community although care must be taken to ensure that the traditional strengths of a community are not lost and that longer term residents are not disenfranchised.

At the same time as the reorientation of the existing provision is occurring, the planning process may continue to seek new venue provision opportunities. These might include former industrial land which can be cleared and used for new recreation venues or perhaps, gutted and turned into art studios, community centres or indoor sports facilities. Increasingly, Councils are turning to local schools and State government agencies with local land holdings to seek new opportunities for sharing and joint development. Underdeveloped school playing fields, drainage lines, pipeline and highway easements, former rail yards, industrial buffer zones, cemeteries and flood basins can all offer invaluable recreation opportunities if developed and managed effectively.

## **Recreation Activities and Programs**

By comparison with facilities, recreation *activities* or *programs* are the pursuits people take part in to gain the leisure benefits they are seeking. Recreation activities and programs can be highly structured in terms of their timing, duration and location –such as a football match; they can be organised *for* people –such as watching a movie or going to a concert, or they can be quite flexible and “self-programmed” –such as people going for a walk, doing gardening or travelling overseas.

The provision of opportunities for the community to take part in a wide mix of recreation activities and programs should be a central goal of good recreation planning. In fact, in many instances the provision of opportunities for people to take part in activities and programs should be given priority ahead of the provision of facilities – unless there are simply no venues of any form available. Increasingly, government-generated recreation planning and provision is focusing on the provision of activities and programs which have a health and wellbeing focus and which focus on targeted needs groups in the community (eg: the aged, obese, disadvantaged, cultural groups) *as well as* the more traditional provision of informal parklands and sporting opportunities.

## **Recreation Services**

Finally, recreation *services* are those things which help people find out about, get to, and take part in recreation activities. Recreation services include:

Information–brochures, websites, signposts, newsletters, maps

Transport–whether private services, public and community buses or bike paths

Recreation leadership –including management, planning officers, programmers, leaders, and trainers, and

Support services –such as club grants, discounted fees, leadership training.

Research has shown that the absence of recreation services can mean that many people in the community do

not take part the recreational facilities and programs they would otherwise use. As a result, the assessment of recreation service needs should be an integral part of any recreation planning process.

## 2.4 The scale of recreation plans

The planning of recreation *facilities, programs* and *support services* can be undertaken at a variety of scales. For example, recreation plans can be prepared for:

Individual parks or buildings through to broader districts, whole municipalities, regions or a whole State

Sets of particular types of recreation opportunities eg: indoor sports facilities, indoor community facilities, libraries, race tracks, all forms of open space

Particular types of recreation activity such as team sports (which might cover establishing competition leagues, competition schedules and the development of suitable venues); walking; conservation studies

Natural areas or *particular types of natural areas*, and

*Particular groups in the community* eg: older residents, youth, people with disabilities, culturally and linguistically diverse communities, sports people.

The scope of the recreation planning processes which are applied to all these topics and at all these scales are essentially the same.

Finally, it is important to highlight the fact that recreation planning can cover either or both of planning which is designed to:

Improve or add to the recreation opportunities available in an existing community, and

Establish a set of recreation opportunities for people moving into a totally new community.

## 2.5 Recreation plans and recreation *feasibility* studies

Recreation planning studies and recreation *feasibility* studies are very similar. As the term implies, *feasibility* studies go beyond a planning study in that they set out to determine whether a specific initiative or group of initiatives is feasible: that is, whether it will be viable from a financial, operational and use point of view. Quite often, recreation planning studies will recommend that more detailed feasibility studies are carried out on some of the specific conclusions and recommendations.

Feasibility studies generally involve adding a few steps to the planning process. These additional steps are:

Determining the scale and nature of the specific markets which a particular initiative will meet

Determining the optimal mix of facilities, programs and services which ought to be provided to meet the market needs which have been identified

If the planning outcome demonstrates that something needs to be built, preparing a series of conceptual designs

Determining the capital, staffing, programming and operational costs of implementing the plans or particular parts of them

Identifying funding sources and strategies

Analysing the projected financial performance of the initiative

Recommending the scope, staging and timing of action

Recommending how the recommended provision should be managed and marketed, and

Recommending how the performance of the provision can be monitored and evaluated.

## 2.6 Why is recreation planning needed?

As indicated in the introduction to this text, recreation is an important part of the lives of the Australian community. State and national governments, local Councils, commercial recreation providers and members of the community spend billions of dollars each year buying, maintaining or pursuing recreation activities.

To achieve the most efficient, effective, equitable and *beneficial* outcomes from this expenditure, every agency and every person plans to a lesser or greater extent. If someone is just going for a swim or to see a movie, they think about *where* they will go, *what time* will best suit them, *what type of experience* they are looking for, what

they can *afford*, how they will *get there* and how much *time* they have available. The greater the time or monetary expenditure, generally the greater and more detailed is the planning process.

Government agencies and businesses which spend taxes, rates, shareholder monies or bank borrowings, are required by law to account for how they spend the money. To ensure they spend it in the best way, most now undertake a planning process before they spend. In many government instances in fact, planning and feasibility studies are mandatory before funding will be allocated.

Planning is also often needed to ensure that new government or agency policies achieve the desired outcomes; to ensure that principles and objectives will be effectively addressed, and to ensure that where past failures and mistakes are being rectified, the most appropriate new set of initiatives is pursued.

Ultimately, recreation planning is undertaken as a means of identifying the most effective, efficient, equitable path of action to take to meet the long term recreation needs and interests of the community and target groups within it through the provision of facilities, and/or programs, and/or services, within the context of cultural preferences and values, and political objectives and priorities. Because compromises sometimes have to be made along the way, recreation planning or any other form of planning does not always achieve the optimal outcomes. Yet, where planning has occurred the outcomes are, in general, better than when it has not occurred.

Looked at from another perspective, recreation planning is important because of the far-reaching benefits which recreational involvement provides to the community. There is now extensive research to demonstrate that while recreation participation is a valid end in its own right, it is also a means to benefits which reach far beyond the individual activities being pursued. These include:

- Improved personal and community health and wellbeing
- Social and community cohesion
- Economic wellbeing and development, and
- Environmental protection and enhancement. <sup>(2)</sup>

Recreation and leisure are recognised by the United Nations as human rights and there is extensive evidence to show that societies which have limited or poor access to recreation opportunities suffer as a consequence. A recent Australian book by Gaté and Moodie, *Recipes For a Great Life*, is an excellent introduction to some lighthearted and serious ideas on recreation benefits <sup>3</sup>. It combines healthy food recipes and tips for healthy eating, with practical steps for getting more out of life (by improve your relationships, being physically active, being intellectually curious, culturally active, seeking spiritually enrichment and being happy in your workplace.

Another major benefit of recreation planning is that it builds *social capital*. Social capital can be defined as the value of social networks in a community as opposed to *physical, financial and human capital*. A good overview of the concept can be found at [http://en.wikipedia.org/wiki/Social\\_capital](http://en.wikipedia.org/wiki/Social_capital)

Research shows that participating in recreation activities and in particular, being a member of a recreation group, builds social capital. Social capital builds things such as trust, reciprocity, acceptance, good behaviour, tolerance, responsibility, trust of others, personal capacities, diversion from negative activities, empowerment, new abilities, community understanding, community health and wellbeing, an entry to participation, skills, friendships, belonging, career development, fun, fitness, purposeful use of time, sociability, commonality of interest, cohesion, learning, self-efficacy, and optimisation of performance. As such, the planning and provision of recreation opportunities is a major tool in enhancing the quality of life of a community.

In initiating a recreation planning process, it is critical that those promoting the process are clear as to why it is needed and being undertaken. If there is not clarity on this issue –and widespread support for it– in all probability the process will fail and the desired outcomes will not only not be achieved but will almost always take *longer* to achieve.

## 2.7 The quality of recreation planning in Australia

Although some form of recreation planning has been carried out in Australia for many years, and while the application of professional approaches has grown dramatically over the past 30 years, the processes which have been used have a number of significant weaknesses. Some of these are outlined below.

There is a lack of professional consensus as to what recreation planning means, why it is undertaken, what the process encompasses and what the desired outcomes are. As a result, what is often referred to as recreation planning does not address many of the

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<sup>2</sup> For a broad review of the benefits of recreation see the following texts listed in the bibliography: Australian Bureau of Statistics, 2001; Canadian Parks/Recreation Association, 1997; Driver, and B. L., Brown, Perry J., Peterson, George L., 1991, and Parks and Leisure Australia and Sport and Recreation Victoria, 2002

<sup>3</sup> Gaté, G and Moodie, R., 2008

issues covered by the present text and thus suffers from shortcomings which mean that the optimal benefits are delivered to the community

There is a lack of government consensus as to the role of recreation planning. As a consequence, the approaches to planning and provision vary substantially between the federal government and the States, between the States and between local government authorities. Various State governments around the country have legislative processes to guide certain aspects of recreation provision, or the acquisition of funds or physical resources to be used for the provision of recreation opportunities. Some states have more than one legislative process, a situation which only serves to confuse the situation more

Many of the approaches to recreation planning are simplistic and outdated. Several of the worst are the open space standards and developer contributions discussed in Chapters 4 and 10. Open space standards have no clear or valid research basis. They make the assumption that by acquiring and developing a specified amount of *land* for every 1,000 residents, the recreational needs of the community will be met. Such standards are generally applied with no regard for the myriad of variations in the characteristics of the communities to be served, location, existing opportunities or history of recreational engagement. Developer contribution schemes take the form of land or financial contributions. The land allocation process makes the assumption that by a developer giving a local Council say 5, 7 or 10 percent (depending on what State you are in) of a residential subdivision (and sometimes, industrial subdivisions as well), the land which is acquired will be sufficient to meet the recreation needs of the community in the area regardless of the shape, location, size or other characteristics of the land or again, of the cultural back-ground, education, age distribution or other attributes of the community. Financial contribution schemes are based on an essentially hypothetical assessment of the cost of providing new or upgraded recreation infrastructure for new residents. This cost is then distributed across the projected number of new residents on a pro rata basis or on occasions, on the basis of the number of new bedrooms being created! In both instances, the contribution assessment process is based on tenuous links between the provision of physical facilities and the creation of recreation opportunities and experiences and usually, on a lack of assessment of the nature and needs of the community to be served

Sport is viewed in an unquestioning way as being “good” for the community. As a consequence, there is an overemphasis on sports provision. While such provision is not necessarily bad, some sports actually generate significant *dis*benefits. Further, excessive provision for *sport* can be detrimental to other often more beneficial recreation provision for individuals and groups who cannot play sport, cannot play the particular types of sport for which provision is made, or who do not *want* to play sport

Recreation and leisure, while recognised as key elements of the national economy, are not viewed “seriously” by politicians or policy makers. As a consequence, they have not been given the attention they deserve and recreation planning is not given the resources needed to ensure that the processes pursued are appropriate and effective

There is a continuing and excessive focus on the planning and provision of physical resources to the detriment of what are considered to be the “soft” areas of programming and servicing. Yet, physical resources are simply the *means* to a recreational outcome, and should not be seen as the outcome themselves

There are deficiencies in the professional training and skills of many recreation planners. Many of those charged with preparing recreation plans have limited or no training or professional experience in planning or do not have qualifications which give them the breadth of understanding needed to prepare comprehensive plans. In many instances, the planning of recreation opportunities is dominated by town planners, civil engineers and landscape architects, all of whom have a land resources rather than a community development focus, and

There is a strong view that recreation planning is different from, for example, social, community, health, youth, aged, tourism, open space, transport, urban or disability services planning. This appears to stem, at least partially, from the very different academic and educational origins of sport and recreation professionals when compared to social planners, town planners and the like. As a consequence, recreation planning is frequently treated quite separately from planning on these topics rather than all being seen as an integral part of them.

## 2.8 Conclusions

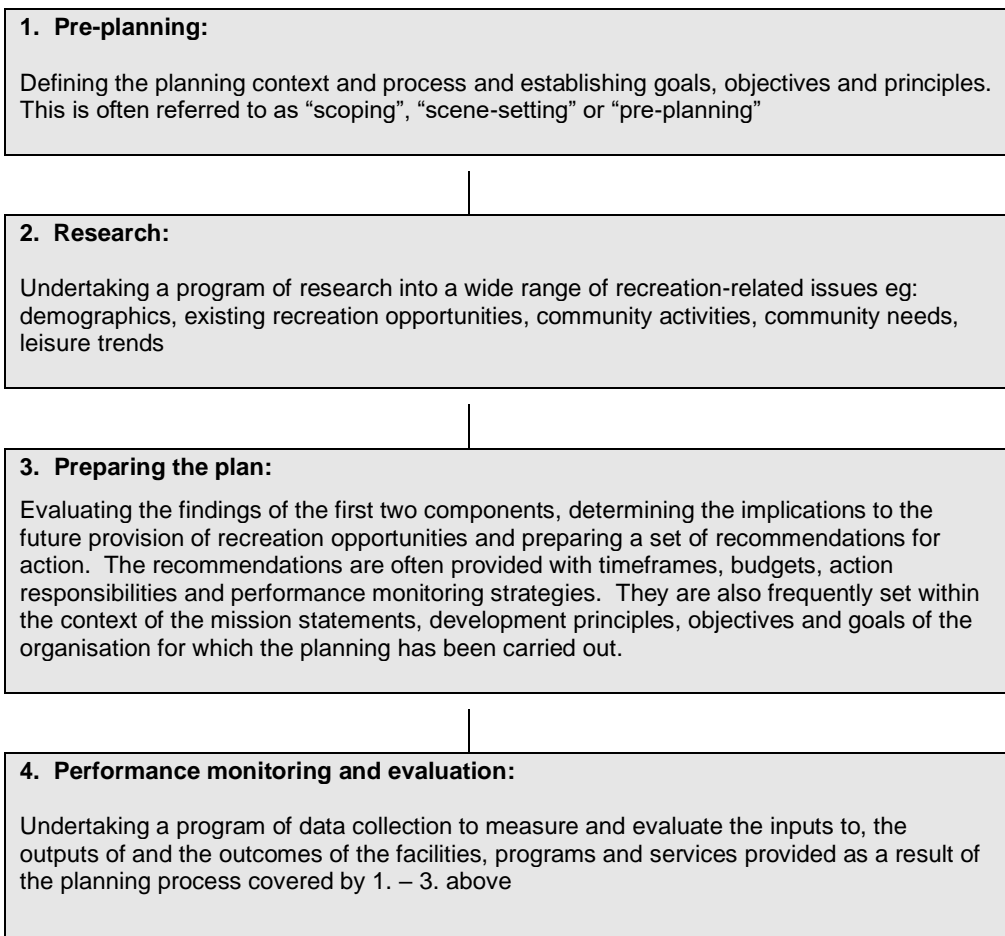
Recreation and leisure are central to Australian culture and some form of recreational activity is pursued by most Australians on a very regular basis. The importance of sport to Australian culture has long been recognised and emphasised. However, recent years have seen the far greater recognition of arts and cultural pursuits, non-competitive social and recreational activities and most importantly, the critical contribution which

leisure and recreation make to the health and wellbeing in the community. In the light of this importance, improvements to the processes and outcomes of recreation planning can only benefit the community further. *This provides a strong justification for all levels of government and all agencies concerned with community health and wellbeing to accept a greater leadership role in leisure and recreation planning and to be more committed, supportive and proactive –rather than reactive or remedial-- in their approach. This will ensure that the piecemeal, ad hoc and often quite discriminatory approaches of the past which led to the neglect of key groups in the community are avoided.*

### 3 The scope of recreation planning

#### 3.1 Introduction

The recreation planning process can be divided into four components. These are:



As indicated, it is only the third of the above components which constitutes the *recreation plan* while the first two are the mechanisms used to determine what should go into the plan. The fourth step, performance monitoring and evaluation, is in some ways the start of a new planning process, or if viewed in terms of the Hamilton-Smith definition of planning in section 2.1, part of a continuing process of performance review, evaluation and adjustment. The key point about this fourth element is that if it is not undertaken, there is essentially no way of knowing whether the previous three stages have achieved the desired outcomes or achieved them in the most effective and beneficial manner.

The scope of these four components is explained in far more detail in the remainder of this text. It warrants noting that while the components are set out as a series of steps, their sequencing can be changed quite extensively, particularly during the third research phase, depending on needs, existing information, and the time and resources which are available. If Hamilton-Smith’s earlier definition of strategic recreation planning is adopted – “...it (planning) must be on-going, simply because social, economic and political change is continuous... rather than going from step to step in a linear way, with a clearly defined beginning and end...”— then the process becomes one of a continuous cycle, with the collection, evaluation and updating of information occurring in an on-going manner. This has been referred to as “evaluation in the planning process” as opposed to “evaluation of the planning process”, with the latter implying an external and post-planning review mechanism. While a post-planning review and evaluation should be carried out, implementation of a continuing review and evaluation process while the planning is being done can help avoid long term problems.

#### 3.2 “Pre-planning”

This first component of the recreation planning process -- defining the planning context and process— is critical to the success of the whole program. The following quite extensive list of issues needs to be addressed and resolved at this point:

### 3.2.1 Gain approval to prepare a plan

It is generally essential that approval is given by senior officers of the organisation a planner is working for before a planning project is initiated. In fact, approval is often needed to commence the pre-planning phase because of the resourcing that even this stage needs. Gaining approval can be assisted by a well-prepared briefing paper that outlines the issues that have led to the decision that planning is needed; that explains the benefits which will accrue from the planning if it is undertaken; that indicates the likely cost of conducting the planning *and* the possible longer term positive and negative financial implications to the organisation; that indicates the projected timelines, and that outlines the types of outcomes that are being sought. It is also quite possible that approval may need to be gained from other organisations –such as sporting or other bodies that have long term leases on Council venues; from State bodies that might be approached for part funding of the planning study, and from adjoining Councils where resources are shared.

### 3.2.2 Define why planning needs to be undertaken

Recreation plans are a key part of the process of improving the leisure opportunities available in the community and through this, the health and wellbeing of the community. Planning is undertaken to help ensure that action occurs in an efficient and timely manner and to ensure that the optimal benefits are delivered to the community.

Improving the quality of people's leisure opportunities improves their quality of life, their health, and through this, the social and economic wellbeing of a community.

There is now extensive research which demonstrates the *beneficial outcomes* which flow from participation in recreation activities. These can be categorised into *personal* benefits, *social and community* benefits, *environmental* benefits and *economic* benefits. Further details on these benefits are provided in Appendix 1. (see also Beverley L. Driver and Donald H. Bruns, 1999, in the bibliography). A number of planning agencies have recently begun to use the benefits listing as a basis for the planning objectives they want to achieve.

Unfortunately, some recreation plans are consciously or unconsciously commissioned because someone has thought that "it would be a good idea to have one" or, as discussed in the next section, for even more dubious reasons. There are however, important reasons for preparing a recreation plan. They include:

- Overcoming provision and use problems which have resulted from a past lack of or inadequate planning

- Addressing issues and needs which have emerged as a result of demographic, urban growth, social and economic changes or through the ageing and declining capacity of existing resources, and

- Taking the community in a new direction.

### 3.2.3 Set goals, objectives and principles

Draft goals, objectives and principles should be established at an early stage so they can be used to guide the scope and direction of the planning process, to test the relevance and appropriateness of the research findings, and to guide decisions on what the key priorities for action ought to be.

The recreation *goal* (or "aims", "vision" or "mission") is essentially a statement of what the planning agency aspires to achieve through the planning process. It is a statement of the desired long term outcomes. In some instances, goal statements may exist from previous studies and these may be usefully reviewed and revised in the light of changed conditions and circumstances. In other instances, there may be no such statements and they will have to be developed from "scratch". They can often be developed by putting a *recreational* interpretation on the goals or mission of the wider organisation. (This is quite a critical point: many recreation planning studies have not been adopted or implemented as comprehensively as they should be because they have not been "grounded" in the wider policies and objectives of the Council or other organisation within which they have been undertaken. As a result, they have tended to stand in isolation from broader policy initiatives – or not get subsumed into them—and are thus not given the recognition or attention they warrant).

By comparison with goals, *objectives* are more specific statements which detail the *types* of actions to be taken in order to achieve the goal, mission or vision. Later in the planning process, each objective will have a number of *strategic actions* attached to it, these being the specific initiatives which are to be taken.

*Principles* are a statement of the value systems, the philosophical aspirations and the ideals of the organisation commissioning the planning and ideally, of the "community" it represents. These are particularly important in that they provide an understanding of what an organisation will and will not do and can therefore be important in guiding decisions about the specific actions which are to be taken.

Almost universally, recreation plans are prepared *without* the preparation of goals, objectives and principles as part of the pre-planning process. Rather, these are seen as one of the *outcomes* of the planning process. Although this is understandable, it is unfortunate in that it implies a lack of thought as to the philosophical stance of the planning organisation, the desired outcomes and the underlying principles and values of the commissioning organisation. In leaving the task to the planner (and especially, an external, commissioned planner), it opens the door for the planner's views and philosophies to determine where the client agency heads,

rather than those of the agency itself.

As such, it would be beneficial for an agency commissioning a recreation plan to run a workshop with senior officers and appropriate elected members to review and discuss the following questions and to agree on a set of summary statements on each one:

What are the major outcomes the plan should achieve?

How should the corporate goals/vision/mission, objectives and value systems be reflected in the outcomes?

Are there priority outcomes which are sought?

Alternately, the workshop could be run by the recreation planner commissioned by the agency at a very early stage of the process.

This process will lead to a set of agreed outcomes (ie: draft goals/ vision/ mission; objectives, and principles/values) which then constitute a draft recreation plan policy framework. This framework can then be reviewed and refined as the rest of the planning process proceeds until it is adopted in a final form at the end of the plan preparation process.

As an illustration of a recreation plan policy framework, the author of this text and other colleagues prepared a recreation plan for the Ballarat City Council in 2003<sup>4</sup>. For the study, Council's Municipal Strategic Statement, which outlined the strategic direction for *all* aspects of the Council's work (*except* recreation), was reviewed. It contained the following vision statement:

'By 2022 Ballarat will be a Municipality where:

- Lifelong learning, improved community health and cultural enrichment creates well-being;
- The natural environment is valued and managed for current and future generations;
- Cultural heritage and character are enhanced through conservation and innovative design;
- Quality infrastructure and a skilled workforce enable a prosperous economy creating meaningful jobs, and
- Community infrastructure meets changing community needs with high quality accessible social services for all stages of life.

This vision statement was used to create a *recreation* vision for the City as none existed. This was:

"Sustainable and life-long participation in recreation on the part of all members of the Ballarat community so as to deliver the optimum array of personal, social, economic and environmental benefits and the optimal level of community building and social capital development" (Ballarat City Council: Recreation Study and Strategy, 2003: Part 3: The Recreation Strategy, p. 9)

Just as there was no recreation vision, neither were there formal recreation objectives in the existing Ballarat City Council documents. As a result, the following were devised:

1. Building operational structures and capacities in Council
2. Building operational processes and policies in Council and in the wider community
3. Maintaining, upgrading and redeveloping existing recreation facilities
4. Maintaining and upgrading existing, and developing new recreation programs
5. Upgrading the existing, and developing new recreation services
6. Developing new recreation facilities.

Objectives 1 and 2 focused on developing the capacity of Council to address recreation issues in a directed, comprehensive and integrated manner; objectives 3. – 5. focused on maintaining, enhancing and optimising the use of and the benefits delivered by *existing* recreation opportunities in the City, while the focus of objective 6 was the provision of *new* recreation resources FOR the community. Although objectives 1 and 2 were not specifically about a plan of action designed to enhance the wellbeing of the community, Council had sought recommendations on these issues as the view had been formed that without action on them, it would not have the capacity to address the issues identified under objectives 3. to 6.

Combined, the six objectives were invaluable in guiding various aspects of the planning research and eventually, in ensuring a balanced mix of recommendations.

In the final recreation strategy prepared for the City of Ballarat, indicative action strategies were listed for each objective in the policy section of the plan and concrete research-based recommendations for action were also provided.

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<sup>4</sup> HM Leisure Planning, C Leisure Pty Ltd., Conceptz Pty Ltd., 2003: Ballarat City Council Recreation Study and Strategy.

As with the recreation vision and objectives, Ballarat City Council had no philosophical framework to guide recreation development and provision decisions. As a consequence, the following set of principles were developed. As with the objectives, these were critical in guiding decisions as to what initiatives should be or *should not* be supported and in ensuring that the outcomes of the planning study achieved a balance of actions which would ultimately improve the quality of life of all residents in the City.

**1. Access for All:**

Council will take action to ensure equitable access to sport, leisure and recreation opportunities regardless of the age, gender, sexual preference, mobility, ethnicity or economic capacity of the community.

**2. Fairness, Equality and Balance:**

Council will seek to ensure that there is fairness, equality and balance in the provision of recreation facilities, programs and services.

**3. Beneficial Outcomes:**

Council will give preference to supporting those facilities, programs and services which deliver the widest range of beneficial outcomes to the widest cross-section of the community and that measures of the beneficial outcomes achieved will be used to evaluate the extent of success in the provision of recreation opportunities.

**4. Quality and Safety:**

Council will seek to ensure that the Ballarat community has access to a high standard of recreation opportunities which are provided in accordance with contemporary standards and practices for health, risk management and public safety.

**5. Continual Improvement:**

Council will commit the resources needed to continually upgrade its provision of recreational facilities, programs and services; to improving its operational capacity to provide these, and to facilitating initiatives in the community and commercial sectors which improve recreation opportunities.

**6. Sustainability:**

Council will work to ensure the sustainability of recreation opportunities.

**7. Multi-use and Efficiency:**

Council will work to achieve multi-use and efficiency in the provision of recreation opportunities. Efficiency is measured in terms of the costs incurred in the running of programs, maintenance, improvement or replacement of facilities against the benefits to the whole community in terms of recreation opportunity.

**8. Community Building and Social Capital:**

Council will use recreation as one means of contributing to the strengthening of community and the development of social capital in Ballarat and that measures of community development and social capital building will be used to evaluate the extent of success in the provision of recreation opportunities.

**9. Community Health:**

Council will pro-actively pursue opportunities which support the objectives of the Municipal Health Plan and which enhance the health and well-being of residents and visitors to the City. Measures of community health and well-being will be used to evaluate the extent of success in the provision of recreation opportunities.

**10. Partnerships and Shared Responsibility:**

Council will actively pursue opportunities for the joint development of facilities, programs and services with other providers. It will seek opportunities with others for the shared funding, management and programming of any facilities that are developed.

**11. Organisational Capacity:**

Council will develop its organisational and financial capacities to actively plan, manage and assist with the delivery of facilities, programs and services that enhance opportunities for all members of the Ballarat community to benefit from pursuing recreation activities.

In summary, the "policy framework" developed for the Ballarat City Council Recreation Strategy and Plan consisted of a *vision* statement, a set of *objectives* and a set of *principles* or *value* statements. A summary of past recreation planning decisions that were still in force added a fourth element, described in the Plan as "policy positions". Together, these provided guidance as to the scope of the final recommendations for action.

### 3.2.4 Understand the political context

The political context is perhaps the single most important element which will affect the success or failure of a planning study. Both "office politics" and the political position of elected members, Board or committee members, shareholders and the like need to be understood. A good argument can be put that if there is not majority support for a planning study across these key "stakeholders", then it should not proceed.

There are not infrequent instances where junior officers have pursued a project to an advanced stage or even

through to its completion only to have no action taken on it because it had insufficient political support or momentum.

A useful technique for helping to address this problem is to conduct informal interviews with elected members and other key decision makers in order to:

- “Test the waters” regarding support or opposition to a proposal to carry out a planning project
- Evaluate their responses to potential solutions to key issues
- Identify issues and topics they would like to see addressed by a study if it were to proceed, and
- Identify the principles and values they would want to see incorporated into the study if it was to gain their support.

Such a process helps to identify supporters and opponents, helps to clarify what the study might need to cover to gain approval, identifies the value systems of the decision makers, helps to educate decision makers on issues they may not have previously given much thought to, and can help build support amongst them.

In another context, it should be recognised that on occasions, recreation (and other) planning studies are commissioned for reasons which have nothing to do with planning. These include a desire on the part of senior officers or politicians to put off making a decision on a major project –so a planning study is commissioned to “assess the needs”; a desire to “kill off” a proposal by bringing into question its cost and viability through a planning study; buying off a pressure group, or promoting a politician’s “pet” project.

As a consequence, the originals of a planning proposal, the scope of what is to be covered, and the expected outcomes and outputs must be identified and evaluated before a project is started. It might even be appropriate to seek a commitment from the (private or government) body which is supporting the planning process to provide funding for both the implementation of the study outcomes and the staff needed to carry the project through.

Finally, it is important that action is taken to keep key stakeholders, senior officers, bureaucrats and elected members informed about the progress of a planning study and about the research findings as they emerge. Efforts should be made to ensure that these people are happy with the processes being used, that they are regularly briefed on the progressive outcomes, that there are no surprises that will “pop up to bite them”, that decision-making is shared, that ideas and solutions are tested before they are committed to and ideally, that the key stakeholders feel they own and can endorse the findings. Achieving this is likely to require regular briefings and meetings and a willingness to change tack if the emerging findings warrant it.

### 3.2.5 Define the scope of the planning to be carried out

In the light of decisions on the *purpose* of undertaking a planning study and the *objectives* to be achieved, decisions need to be made on the *scope* of the work. These include for instance, whether the planning is to cover:

a whole State

a region

a Council, or part of a Council

particular *types* of facilities, programs or services

a particular section of the community, as defined for example, by age, gender, locality, cultural background, socio-economic status, or

a single venue.

While the skills needed to address the issues at each of these levels are essentially the same, the complexity of the issues and the range of people to be consulted is likely to be greater the higher the level of the planning. That said, planning for a whole Council, where the issues facing all forms of recreation and leisure need to be addressed and ideally, *resolved*, can also be very complex and may require a wider range of skills and more personnel than if only one activity or site is being planned for.

At this stage, agreement should also be reached on the definitions of leisure and recreation and what this means to the issues to be researched and the amount of attention which any particular issue can be given. For many local government Councils and some State agencies, recreation is synonymous with *sport* and leisure is “non-sports”. In other situations, leisure and recreation are seen as being quite distinct from culture, the arts and tourism. Similarly, although many forms of “open space” have no obvious link to recreation, “open space” planning is often seen as planning for the *recreational* use of open space.

Each of the above sub-sets of recreation has different features, problems and solutions. Yet all can be researched using a similar set of skills and planning tools. Hence, the definition of the scope of a study must consider what is “in” and what is “out” and *why*, and whether leaving some things out will produce an artificial

outcome.

In the City of Ballarat planning study quoted above, recreation was defined as:

*Any activity which is pursued without compulsion by an individual, group or community, which delivers net beneficial outcomes in one or more of the personal, social, economic and environmental contexts, and which does not impact unduly on other people or the environment.*

The following explanatory text was then provided:

“For the purpose of the present text, recreation and leisure are taken as being synonymous. Recreation includes playing sport; active non-competitive pursuits such as walking and swimming; intellectual activities including reading, writing, painting and the like; family outings and picnics, and tourist activities.

In terms of the above definition, 'activity' is defined as a passive or active pursuit; a pursuit which is sporting or non-sporting in nature and a pursuit which may be but does not need to be governed by rules or regulations.

... the words 'which does not impact unduly on people or the environment' indicates that activities which are considered by the community or persons in a position of authority or responsibility to be unduly detrimental in their impacts will not be supported and may, in fact, have sanctions imposed on them.”

### **3.2.6 Co-ordinate with other studies and projects**

Efforts should be made to identify whether there are other related studies or other groups/units/specialists in the planning organisation which may be relevant to the proposed study. For instance, community services staff, youth workers, aged care program providers, disability support staff, sports development officers, parks development staff, school liaison officers, welfare staff, and migrant support workers are all likely to have some form of involvement with the planning and provision of leisure and recreation opportunities in the community. Similarly, town planners, transport planners and a number of other specialists are likely to be carrying out work that will impact on recreation provision, access and quality. Overlooking the work of these specialist staff and any current research they may be undertaking can be detrimental to a project while losing opportunities for enhancing the quality and relevance of the outputs, engendering mutual support and gaining wider organisational acceptance of the outcomes.

### **3.2.7 Define the research methods to be used**

Decisions have to be made on what research needs to be carried out to effectively complete the planning process and on how detailed the research needs to be to resolve the issue or issues under review.

To a degree, these decisions need to be made in the light of a range of other factors including, the budget which is available, the groups or individuals in the community being covered by the study, the desired timelines for the study, staff capacities and the like. To illustrate, if a particular age group is being covered, conducting an analysis of the demographics of the whole community may be unnecessary. If the budget is very limited or the study area is small, the scope and methods used in the consultations program can be reduced; and if a particular type of recreation venue is being planned, the assessment of existing provision might be restricted to other similar facilities.

### **3.2.8 Decide who will do the planning**

On this issue, an assessment needs to be made as to whether there are staff in the organisation with the necessary skills and time to carry out a recreation planning program, whether external advice and guidance can be tapped (such as from the State Department of Sport and Recreation and/or other agencies), or whether consultant planners who have appropriate expertise should be appointed. Even where there are competent staff in-house, external planners are often contracted to undertake planning work as existing staff cannot be spared from their day-to-day responsibilities. If internal staff are freed up from those responsibilities, someone else is likely to have to pick them up –thereby interrupting that person's work regime. Difficulties can also arise when a project has been finished and staff have to go back to their former positions as they have to pick up the thread of decisions made in their absence and maybe supplant someone else who has perhaps, built up a new rapport with the community or others and who has come to enjoy their new responsibilities.

In some instances, where there is no one in the organisation with the available skills, external project *managers* have been appointed. If a decision is made to seek the services of contract or external planners, it will still be essential to have someone in the organisation who is able to work with, supervise and monitor the work of these people.

If contract staff are employed, the project manager should check with other officers as to whether strategies are in place that ensure that employees are recruited and/or inducted within the organisation's human resources management policies and practices. If these processes do not exist, wider action may be needed to address

the issue. Similarly, if any physical resources need to be acquired for a planning study (such as computers for inventories, projectors for public meeting presentations), this should be done in accordance with the organisation's policies, practices and procedures.

The following chart is a "SWOT" analysis of the Strengths, Weaknesses, Opportunities and Threats associated with using internal or external staff to undertake a planning project. This should be used as a basis for a more detailed in-house review before final decisions are made as to which strategy to apply.

Strengths		Weaknesses	
In-house Planning	Contract Planning	In-house Planning	Contract Planning
<p>In-house staff can develop new skills</p> <p>The planning may be able to be conducted within existing budgets</p> <p>Staff with skills get the opportunity to apply them</p> <p>Local issues are well understood</p> <p>The planning authority is not seen to be extravagant</p>	<p>New skills and a potentially wide experience base is brought into the organisation</p> <p>In house staff work responsibilities are not disrupted</p> <p>Independent opinions and assessments are made of the issues at hand</p>	<p>Staff may not have the required skills such that the planning is poorly carried out</p> <p>Other staff responsibilities may be neglected</p> <p>Staff can be too close to local issues and may defend past decisions</p> <p>Staff seconded for planning work may have difficulties in moving back into their previous role once the planning is complete</p>	<p>Contractors will need time to understand local issues</p> <p>New budgets will need to be sourced to pay for the work</p> <p>Staff will need to be allocated to support and supervise the external contractors</p> <p>The planning authority may be seen as being extravagant with taxpayers money</p>
Opportunities		Threats	
In-house Planning	Contract Planning	In-house Planning	Contract Planning
<p>Staff skills can be strengthened and developed</p> <p>Community awareness of staff skills and responsibilities is strengthened</p>	<p>Staff skills can be strengthened and developed through engagement with the contract planner</p> <p>New innovative solutions may be brought in and advocated in an unbiased manner</p>	<p>Staff may not due the planning effectively due to a lack of experience</p> <p>Action proposals can be seen as self-serving by more senior staff and elected members</p>	<p>An insufficient depth of knowledge of local issues is developed</p> <p>Outside solutions may be brought in that are not relevant to the local situation</p>

For both internal and external employees/contractors, the responsible/supervising officer should (1) allocate responsibilities and roles to each person and (2) develop and/or implement systems to ensure that procedures and records associated with documenting performance are managed in accordance with organisational requirements. Most governmental organisations now have listings of workplace performance standards and codes of conduct along with standard documents for these purposes. Many have protocols for continuous performance monitoring. Where these do not exist, a proforma and assessment/ review timetable may need to be developed. This could cover, for instance, performance assessments in terms of punctuality in attending meetings; behavioural guidelines; complying with set dates for completion of particular tasks; quality of presentations in public and professional meetings; quality of written materials; practicality of proposed planning solutions; effective use of officer time etc. These performance statements should be completed with in-house staff or external contractors or should be reviewed with those undertaking the planning as part of an on-going process so that any areas of under-performance can be reviewed and responded to before they impact detrimentally on the project.

Where measures of performance identify staff weaknesses or even, misconduct, processes need to be in place to provide feedback, to identify strategies for overcoming the problems or shortcomings that have been identified and if needed, for counselling, coaching, implementing improvement activities and strategies, for reallocating, or ultimately, terminating the employment of those staff who are not performing to the agreed standards. The steps to be followed in implementing these processes need to be in writing. Similarly, processes for recognising excellence in work habits and performance should be in place or should be established, as should a program of appropriate rewards.

Further to the above, any issues of risk should be identified as part of this process and strategies should be identified for addressing them. For instance, if staff have to visit rural or remote areas as part of creating an inventory of community resources or to undertake the consultations program, it might be decided that two staff

should always work together to do this work. If development sites or former industrial land have to be visited for evaluation purposes, details on safe behaviour and activities should be obtained from the relevant occupational health and safety personnel before visits are made.

Before *commencing* a planning study, and on a regular basis *during* the course of the study, it is appropriate, if not wise, polite and politic for the planning manager to report on and confirm progress on the project with (a) an appropriate more senior officer and (b) the organisation/body which has delegated the authority to the manager to conduct the study. Similarly, if issues of concern, difficulties of management and processes or contentious issues arise, it is important that these are *recorded* and reported as soon as they are identified. This will help to ensure that the project does not get “off the rails”. It will also ensure that senior officers and potentially, elected members are not “ambushed” by eg: sectional interest groups or those with a grievance.

In keeping with the above, a planning project manager should record and have his/her senior officer sign off the limits of his/her responsibilities and his/her reporting requirements for each planning project.

### 3.2.9 Oversee the planning process

In any planning study, whether conducted in-house or through a contractor, it is important to appoint a project manager with responsibility for day to day liaison, staff and community contact, approvals and the like. It is probable that as much as 1-2 days of equivalent time per week will be needed to effectively undertake this role and this will balloon at times of public meetings, draft materials reviews and reporting. Efforts should be made to ensure that this person is on duty throughout the duration of the planning study. Instances where the project manager has gone on leave on the day a project brief was issued, at the start of a planning study or at some other time, are not uncommon. Apart from not creating a good impression all round, they can hold up key stages of the planning research.

In addition to nominating a project manager, many agencies establish officer committees made up of officers from the planning body and, as appropriate, representatives from other planning bodies and State government agencies. These can ensure that all regulatory, engineering, consultative, funding and reporting issues and responsibilities are effectively addressed. Many authorities responsible for planning studies—especially those at the local government level—also establish advisory committees with members from key stakeholders and the community. These committees are sometimes known as *reference* rather than *steering* groups in that they are given an informing and advisory role but have no authority to either make decisions or to direct the planning process. Quite frequently officer committees *and* advisory committees or reference groups are established and elected members may sit on both.

Officer committees generally oversee a planning project and seek to ensure that the skills and knowledge of different areas of the agency commissioning the planning and other relevant bodies are tapped and considered and that important information is not overlooked.

By comparison, a reference group is more of a sounding board and is often used as a means of keeping a community informed and on-side during the planning process. Few planning agencies now establish *steering* groups as they can force through recommendations which are contrary to wider planning needs and objectives or they can seek to usurp the authority of elected members.

Other important elements of overseeing a planning project are those associated with the *operational* components of the process: managing staff workloads, allocating responsibilities, ensuring any resources that are used are used effectively, and managing budgets. On occasions these tasks can mean changing the use of staff in order to optimise the time they allocate to a project, seeking revisions to work before a budget allocation is approved, and checking that professional and technical opinions that are put forward are based on sound and carefully evaluated information.

In keeping with the above, it is important for a project manager (both in an in-house context and in a consultant team context) to regularly liaise with other members planning team to ensure that they understand the team purpose and project objectives; to allow them to put forward their views as to processes, strategies and findings; to allocate and/or check on roles, responsibilities and accountabilities, and to make sure that their work is in keeping with organisational goals, plans and objectives. A project manager should establish a regular meeting time to undertake this on-going review process and if felt appropriate, a mechanism for approving the structure, format, time allocation and content of key elements of work before they are under-taken. Where this does not occur the potential for inappropriate action and the waste of time and budget resources can occur.

Where a project is complex, where a number of different staff are involved or where less experienced staff are involved, it can be useful, as suggested earlier, to develop performance plans for each team member. These establish the expected outcomes, outputs, key performance indicators and goals for their work. Performance plans are a modern management tool which helps to ensure that staff at all levels can better understand their jobs, what is expected of them and how they can get the best and deliver the best outcomes through their work (see as an example, <http://education.qld.gov.au/staff/development/performance/>) devlyourperplan.doc

In association with performance plans, mechanisms should be devised to ensure that team members can input to planning, decision making and as appropriate, operational aspects of the project team. Similarly, they should be given the opportunity to a) raise issues, concerns and problems, b) to contribute to discussions on how these might be addressed and c) identify and resolve work performance problems. Action on these items helps to develop team cohesion, builds self respect amongst team members and ensures that what may be

unrecognised skills amongst team members are tapped. It also gives team members a sense of responsibility, engenders a greater commitment to the project they are working on and leads to openness regarding work processes and difficulties. The methods to be used here are varied and can include ensuring all team members have a say on at least one or two issues in team meetings; asking team members to draft initial surveys, contact letters, press releases or meeting agendas (or asking *two* members to do this and then to compare and combine their efforts); giving team members responsibility for running some team and potentially, wider meetings; having team members review sections of report material and as appropriate, draft some of the material.

Team members can be encouraged to accept responsibility for their work and to provide assistance to other team members by the team leader (or someone external to the project) reviewing what they have prepared and seeking revisions to it; by asking them to present and explain their work to a team meeting; by asking them to work with others in developing joint work components, and by asking other team members to review and critique their work. Where the team members have limited previous experience, provision of adequate lead time and review time is important if this process is going to be of value.

All team members have something valuable to contribute to a study and strategies should be developed to recognise and acknowledge this. Both serious and light-hearted feedback should be provided and this can be done on both an individual and group basis. Tools include verbal feedback and encouragement; written "progress" reports; "team member of the month" awards, and "bright spark", "zany ideas" and other similar awards which while lighthearted in nature can be important in encouraging and creating new thinking and a positive approach to the work environment.

The success of any action to enhance team member skills, to make them more responsible and to effective team members, will be more successful when a team leader leads by example and serves as a role model for team members and others. A strong, positive team leader will always be important in enhancing an organisation's image for all stakeholders whereas one who shirks responsibility and pushes work onto others will generate disdain and potentially, a slack attitude amongst the wider team.

### **3.2.10 Develop a liaison and consultative process**

To be effective, the recreation planning process should involve both the community being planned for and a range of professionals who have roles and responsibilities which impact on or have relevance to delivering positive recreation opportunities to the community.

The number and mix of community members who are brought into the planning process will naturally vary depending on the focus of the study. However, general experience suggests that the wider the cross-section of the community involved, the better and more acceptable will be the outcomes.

Professionals who warrant an invitation to be involved include a range of recreation-related professions (such as management groups, sporting association officers etc) land use planners, community services staff, traffic and transport planners, conservation planners, migrant resource staff, and educators. Depending on the scale of the project, these professions may be drawn from within the organisation conducting the planning study or may ideally, include state or regional government representatives and representatives from other Councils and professional associations.

The liaison and consultative processes that are used may be via a series of formal briefing meetings at key stages of the planning process, membership of a consultative group which operates during the preparation of the plan, public meetings, interviews, calls for submissions or via less formal interviews. When other professionals are involved, a more formal process is to be preferred as it builds an understanding of the objectives of recreation and leisure provision amongst others, engenders a degree of ownership of and commitment to the outcomes of the planning process, and puts the process and the outcomes into a broader planning context.

For consultative processes to be effective, it is important to develop a mechanism which ensures that the process is seen as open and as one that allows all interested parties to input to the planning process and the outputs as they evolve. Providing community members, key stakeholders and other professionals with plans wherein the key decisions have already been made all too often engenders opposition and suspicion rather than support. A contentious trend that warrants comment is where a Council establishes a "consultative" group of selected members of the community (and professionals) and uses that group as a sounding board while providing no opportunity for wider public comment. Cases have been reported where the names and contact details of "community representatives" have not been released to the wider community on the grounds of personal confidentiality. Such an approach is a sham and is almost certain to bring the sponsoring agency and the project into disrepute.

A valuable part of any consultative and liaison process is the preparation of a communications plan. This helps to ensure that information is effectively disseminated to senior staff, to other professionals, to team members and to the community.

Numerous outlines for communications plans can be googled on the web with that at the following address being useful as it provides a chart identifying the scope and purpose of a plan:

<http://rapidbi.com/created/howtowriteaninternalcommunicationsplanandstrategy.html>

As equally as important as having a formal communications plan is putting in place a schedule of regular meetings with the project manager so that any unresolved issues, concerns and problems raised by team members can be followed up with management and other relevant stakeholders. Depending on the timeframe for the project, meetings might be held on a fortnightly or monthly basis and might alternate between meetings involving the whole planning team and just the team leader –so that team members do not feel that issues are being discussed behind their back but so personnel issues *can* be discussed if there *are* problems.

### 3.2.11 Define key performance indicators

Key performance indicators (often referred to as KPIs or KPOs -key performance *objectives*) are statements used to *measure* the extent of success of the actions which have been planned.

Key performance indicators should ideally be written to cover all stages of *planning* and *undertaking* a recreation planning program or project, through to the outputs and outcomes of that process. To illustrate, an early *inputs*-focused KPI might be “To devise a brief which reflects the needs and interests of all potential users”. Another may be “To devise a research and planning program which can be afforded by Council” while a third *inputs*-focused KPI could be “To gain the financial budget required to undertake the planning study”. A KPI relating to the consultative stage of the planning process might be “To develop strategies of sufficient breadth to ensure that all relevant agencies and individuals are consulted”. An *outputs*-focused KPI developed in relation to later stages of the planning process might be “To develop a program of action that can be achieved within Council’s budget capacities within 5 years” while an *outcomes*-focused KPI might be “To achieve a 5 percent increase in participation in active pursuits by residents over 55 years of age by 2015”, with the 5 percent figure being derived from research which has, for example, demonstrated the relationship between a certain type of program or facility provision and recreational participation by older adults. Ultimately, outcomes measures are the most important in that they measure the success of what is gained by the community as a result of the planning and provision program. These may need to cover a monitoring program that stretches well into the future. A very “successful” planning process is not successful at all if it does not deliver measurable positive, beneficial outcomes in the community. Similarly though, a program or project which gains excellent “results” for the first six months and then sees participation fade away cannot be deemed to be effective either. It may, in fact, be concluded that it was detrimental in that it used resources which might have been better put to some other use.

### 3.2.12 Create a project brief

Once the scope of the desired planning study has been agreed on, a brief should be prepared. Even if a project is to be managed in-house, a brief should be prepared to ensure that all the appropriate issues have been addressed. A brief should provide:

Background information on the study area or topic

Who is going to manage the study and how and whether there will be for instance, steering and/or reference groups and if so, who the members will be

The aims and objectives of the planning study

The desired or suggested scope of the research work to be undertaken –including details on any specific issues which need to be addressed, people to be contacted, past reports to be reviewed, venues to be visited, problems to be resolved-- and most importantly, the desired outputs

The available budget. If a study is to be undertaken in-house, an indicative budget should be prepared so that expenditures and commitments are able to be accounted for. With regard to employing external consultants, some Councils do not provide budget information with the (misguided) intent of generating “realistic” responses. This is shortsighted and too often reflects a failure to analyse internally what the real cost is likely to be. In this context, a figure of \$1,500 - \$2,500 or even \$3,000/day) will allow an indicative cost estimate to be made.

There have been instances where a local government Council has had to cancel a project because the gap between their inadequate assessment of the budget required vs the budgets submitted by applicants has meant they have not had sufficient funds to proceed. There are other instances where applicants have submitted low budgets –to undercut competitors—only to then claim extensive and costly variations after being appointed and being well into the project. Publishing the budget that is available allows the body undertaking the planning study to realistically compare and evaluate what they will get for their dollar from one applicant to another. And where costings are sought for different sections of the work (as they should be), the extent of work on each of those parts by different applicants can also be compared. Importantly, publishing budget data allows applicants to tailor their work proposals to what is available: some projects could readily be undertaken in an “overview” format for say \$20,000. Yet, if detailed primary research was needed, the cost could be \$100,000 or even \$200,000.

The required timelines for the study, and

The desired reporting formats. Is one report required? Is a research report and a summary or “executive” report required? Is a promotional “prospectus” required? All will take differing amounts of time and have associated costs

If a brief is being issued to external applicants, it should also request information on:

Who will be undertaking the work, their qualifications and their experience with similar work

Details of the stages of work which it is proposed to undertake and the allocation of time, specific staff and budgets for each work component. Budgets should include details on any disbursements such as travel and accommodation

The criteria to be used in assessing submissions eg: understanding of the issues to be addressed and resolved; proposed research program; staff qualifications, skills and past experience; budgets; insurances, and innovation in the proposal. These are generally weighted percent-wise

Details of past similar projects

Referees from past projects

Details of insurances (these generally being professional indemnity, public liability and relevant work cover policies)

Any potential conflicts of interest

Contact details for questions, and

The closing date for submissions.

The Brief should indicate to applicants how and on what criteria submissions will be assessed.

If a planning agency has no one who can prepare a brief it may decide to seek the help of other agencies which have done similar studies and use their briefs as a template for developing its own. Where briefs are prepared in-house, those who will benefit from the planning—whether it be a local sporting club, a regional recreation association or a particular community interest group—should be given the opportunity to contribute to their development as they will often identify issues that someone not as close to the issues could otherwise overlook.

Alternately, if the planning agency has worked with a particular recreation planner before, it may work with that planner to prepare a brief. This could be paid for on a fee for service basis or it might be provided at no cost on the understanding that the planner will be commissioned to undertake the work if it is funded.

Briefs are generally advertised in the relevant section of a local, regional, State or national newspaper, or through the journals or websites of professional associations. There are also commercial agencies that operate tender-distribution and management websites. Most website briefs can be downloaded although some agencies impose a fee, an action which is generally poorly regarded by contractors as fees are not paid to those who go to the trouble of preparing submissions. Increasingly, only hard copies of briefs require payment.

In some States, local government bodies are required by law to advertise briefs which are over a certain value (eg: \$50,000). Some agencies issuing a brief often do not want to have to assess say, a dozen or more submissions and instead use a selective tender whereby known consulting companies or organisations recommended from a State government list are invited to tender. Usually, at least three tenders are sought or are required by State legislation. Some Councils establish panels of vetted tenderers for future projects. This has generally been a waste of time and resources as officers, Councillors and contractors change quite regularly such that a register established in say, 2015, could be out of date by 2017. It may also exclude new, more appropriate companies or those who have either not applied or, for some unknown quirk, have not been listed.

Many Councils leave it up to those preparing submissions to determine the form and scope of what they present. However, an increasing number are also using quite extensive proformas that include tables and charts to be filled in with details on methodologies, staff, time and budget allocations, referees, past projects and details of insurances. This approach certainly keeps the responsible Council officer employed, but tends to sanitise the product received, work counter to creative submissions, and take a lot of effort on the part of applicants.

Intending contractors are generally required to submit their work proposals to the client by a set time on a set date. Some Councils insist on hard copies of submissions being lodged while others accept electronic submissions. In several states in fact, State government policy directs that electronic submissions can be made. If a Council is concerned about having to print off say 6-10 copies of large electronic submissions, a restriction on the size of submissions can easily be (and is increasingly) applied.

Once submissions have been received, they are reviewed and evaluated by the individual or group managing the planning study. A decision can then be made to directly appoint a particular individual or firm to undertake the work; to interview several or all of the applicants or, if the tenders are found to be inadequate, to readvertise or to invite revisions or responses from other applicants. Interviews allow questions to be asked from both sides and issues to be clarified. They also give the managing team the opportunity to assess the personalities of the applicants and to decide if they would enjoy working with them.

### 3.2.13 Confirm the available budget

Conducting a recreation planning study is not a cheap task. The fees for external planners can range from \$20,000 to \$30,000 for local projects such as a master plan for a park, through over \$150,000 for major projects.

A municipal recreation plan will generally cost \$50,000 to \$100,000 at current day prices –depending on the scope of research desired, the location of the Council and the mix of facilities and localities to be covered— while State-wide plans can cost upward of \$250,000. Consultant rates can be expected to vary from \$1,000 to as much as \$2,400 per day –depending on the expertise required and on the policies of consulting firms. Some, for instance, vary their rates depending on where the potential client is –for example, Sydney Councils expect to (and are *able to*) pay far more than rural Tasmanian Councils.

In-house staff time needed to support external planners must not be overlooked and can vary from 1-2 days a month or per *week*, again depending on the scale of the project. The view that appointing a consultant means that no internal staff time will be needed is a fallacy and can cost a Council a great deal in terms of the final product. If a consultant planner has to collect information that a Council officer could easily have provided, less time will be left for other more important tasks.

Making contact with other similar agencies is often a good way to determine what level of funds might be needed for a particular planning study. Alternately, recreation planners can be contacted and asked to provide an estimate as a guide.

Undertaking a recreation planning study in-house may seem cheaper than employing external planners, but the true cost in terms of staff time and on-costs is unlikely to be very different. If the process is interrupted because an in-house person has other commitments, the cost can be substantially more from a dollar perspective while continuity and public acceptance of the process can be lost.

Given the scale of the above costs, it is wise to ensure that there is a sufficient budget available before a study is commissioned or that there is a willingness to modify the scale of the project if insufficient funds are available.

In the interest of achieving good planning, some State governments award grants to not-for-profit organisations and local government bodies to pay for planning studies.

As noted previously, consulting planners prefer to know what budget is available as they are then able to tailor their work programs to that amount. This also means that when assessing several proposals, Council officers are able to compare what they will get from different providers for the budget which is available. Where no budgets are stated, it is often very difficult for an applicant to determine what degree of detail is desired and it is even more difficult to compare the proposals from different planners.

When the agency commissioning a planning study finds that the funds it has available are not sufficient to effectively undertake the study, it is better to not start at all than to cut corners, to leave out important stages or to hope that additional resources can be found “at a later date”. This generally leads to poor planning and even poorer outcomes which in turn makes it even more difficult to get effective planning off the ground in the future.

In light of the above, a key management role is to research, analyse and document the resources that will be required to conduct a planning study. The project brief should be used to determine:

- The length of time required for each task will take and what this adds up to in terms of days and dollars

- Any specialist services that need to be contracted such as land surveys and technical reviews of assets

- On-costs such as travel, accommodation, materials, surveys and the like

- Building hire for meetings etc

- Data processing,

- Report writing and printing.

Budget estimates should be reviewed with colleagues to ensure that a meaningful budget estimate is prepared. This will require, of course, a draft project outline or “brief” (as discussed in 3.2.14), so the various elements of the proposed planning study can be costed. Contact with other government agencies, colleagues, professional associations, Councils and with planners can be a useful strategy for helping to identify these costs. It is not uncommon for some agencies to contact several planners and to seek their advice regarding likely budget requirements. Alternately, where an agency commissioning a planning study has identified the extent of the financial resources it has available to it, it can seek advice as to what can be achieved with such a budget.

Where a Council knows of a planning issue that needs resolution but has no idea as to either of the work needed to resolve it or the budget requirements, it could again seek advice from other Councils, professional bodies and State government officers, or it could approach one or more planners and request an indication of both a scope of works and a budget. In this context it should be made clear that the project may not go ahead and that requesting advice does not constitute a commitment to employ those who have been approached.

Some Councils offer payment for this advice.

When seeking a commitment from Council to fund a planning project, the project manager should develop a presentation to go to senior officers or Council which details the scope of works to be undertaken and the reason they need to be undertaken, and the projected resource requirement, (whether this is staff, a budget allocation to employ contract staff, professional staff time to assist and supervise the project, rental of rooms, production of promotional materials and surveys etc. It should also demonstrate how the estimates were derived. This step allows the scope of the planning process to be adjusted if lesser or more funding can be obtained although of course, if the funding resources are so limited that they would compromise the whole planning process, a decision to not proceed might be necessary. Alternately, the planning team may prepare contingency plans that indicate the specific works that would be undertaken under various funding levels and the additional works that would be of merit to pursue if additional funds could be obtained. This strategy can be helpful in putting a case for staged funding or for the contribution of funds from other areas –such as user clubs, government development grants, trusts and the like. Detailed records should be kept of each of the above steps so that the decisions that are made and the reasons for them are available for review.

Once a planning project is funded, a financial reporting template should be developed so that day to day control of expenditures is clear. This should include a variance to budget column and make provision for explanatory notes regarding any variations. Such a financial reporting document should be circulated within a planning team and to senior staff so that there is a full knowledge and awareness of where money is being spent and when it is being spent. If grants have been received from outside agencies, all reporting requirements should be met.

At the completion of a planning study there should be a full reconciliation of all budget elements. There should also be a review of the planning processes and the expenditures incurred and documentation should be prepared that identifies areas of improvement to both the work program and the budget planning, implementation, monitoring, reviewing and implementation processes.

A different aspect of budget management is determining the financial plan for any new development that is being considered by a planning agency. Such a plan is usually prepared when the planning process goes beyond the preparation of a plan and on to a feasibility analysis of the development proposal. Then, it is critical to determine not only the capital cost of the proposal but also the on-going operational costs. The determination of both these costs allow a Council or other provider to determine first, whether it can afford to proceed to development (or when or whether it needs to modify the scale of the proposal). It also allows the determination of whether the development will be financially self-sustainable or will need financial subsidies in its early years or during its entire life time –as is often the case with many large public leisure venues and programs.

In preparing budget plans, it is often useful to commission the support of specialist planner/ managers who have done this work in the past, although it may be possible to develop an operational budget from an existing venue. With regard to determining capital costs, specialist quantity surveyors need to be employed to ensure that accurate assessments, reflecting current market costs and conditions, are determined.

### **3.2.14 Define the desired time line**

The time needed to complete a recreation planning study varies according to the scope and detail required.

Even the smallest study will take several months if clubs, residents and other specialists are to be effectively consulted, if the demographics of the community are to be evaluated and if draft action strategies are to be put on display for review and comment. Just setting up and running several rounds of public meetings for different stakeholders and community groups and across a Council area or other region can take six weeks as letters have to be designed, approved and posted; monthly club meetings have to be given the time to decide who will attend; venues have to be booked, and the findings have to be collated and evaluated.

Large planning studies may need to be spread over as much as 6 months or a year and in these cases, additional time may need to be allowed because of Easter and Christmas holidays. So long as momentum does not get lost, the longer the time allocated to a planning study the generally the better is the outcome as more time is available to consider and evaluate the research findings and the alternate strategies for action.

From another perspective, understanding the timelines of a planning study is important in terms of the implementation body's wider budget timetable as it may mean that the cost of the work can be spread over several financial years. It is also important in that if the outcomes of the planning work are to be implemented, they will need to be ready by a certain date to fit into the annual budget cycle. In this context the planning timeline can become somewhat political as a study that was completed 10-11 months ago may well have slipped from attention by the time the next budget cycle comes around.

### **3.2.15 Develop a project plan**

For any project it is important to create a project plan and it should be a mandatory part of any submission from an external planner. A project plan includes timelines, work breakdown, details on the role and responsibilities of staff, and other details on how the project will be managed in relation to the project parameters.

The following chart shows the first 3 of 8 stages of a project plan for a recent recreation planning project.

Column 1 “numbers” each element of the work; column 2 records what will be done in each stage and column 3 indicates which member of the planning team will do the work –so everyone is clear as to what their responsibilities are-- and how many days will be allocated to each component. The numbers in brackets in column 2 indicate which part of the original brief the work relates to.

Such a plan is usually accompanied by a time chart to illustrate how the stages of work will be sequenced and how the desired timeline will be achieved. The chart for the project is shown on the following page.

<p><b>Stage 1</b></p>	<p><b>Analyse and Review the Current Condition of each Pool</b></p> <p>This initial Stage of the Study will assess the condition of the pool assets of the Shire. We will:</p> <p>1.1 Review all existing technical, site information (S4.7) and other reports on each pool</p> <p>1.2 Conduct a physical assessment of the condition of the assets to check and update information not available under 1.1 (S1.3)</p> <p>1.3 Compile a written and photographic record of each venue's assets with urgent/<i>immediate</i> works needs, remedial <i>medium</i> term needs and desirable <i>long term</i> actions being indicated (S1.3, 4.11)</p> <p>1.4 Identify where new plant, pool or equipment technologies can be introduced to enhance the condition of the assets and/or the opportunities which can be offered to the community (S4.8)</p> <p>1.5 Review and report on Council expenditure on the pools over the period 2000/01 to 2007/08 and compared this will expenditures by other like Councils (S1.2)</p> <p>Review the capital project identification and prioritisation process used by Council and the criteria used (S1.5)</p> <p>1.6 Meet with and interview pool committees and or management to confirm technical needs and to collect information on <i>current use levels, service areas and trends in the demand</i> for the facilities (S4.5, 4.6)</p> <p>1.7 Review past reports as cited in the Brief (S5) to evaluate past aquatic recommendations</p> <p><b>Outputs:</b> This initial Stage of the Study will provide Council with a detailed assessment of the technical attributes of each pool and an initial works program which it would need to undertake to ensure the continued safe and effective operation of each venue.</p> <p>The Stage will also provide initial management/committee assessments of demand issues and development opportunities.</p>	<p>Person A 5 days</p> <p>Person B 1 day</p>
<p><b>Stage 2</b></p>	<p><b>Demographic &amp; Aquatic Trends Analysis</b></p> <p>This stage of the study will provide:</p> <p>2.1 An analysis of the characteristics of the current and projected population across the Shire as a whole (S1.1)</p> <p>2.2 An analysis of the characteristics of the current and projected population in each town which presently has a pool and in the towns where it may be appropriate to consider longer term provision of a pool ie: Golden Beach and Loch Sport (S1.1)</p> <p>2.3 A review and discussion of trends in aquatic use and provision including provision of smaller venues for health, therapeutic, wellbeing and other needs (S4.6), and</p> <p>2.4 An evaluation of the implications of 2.1 – 2.3 to future provision models and opportunities in each town and across the Shire.</p> <p>As part of this Stage we will run a discussion session with Councillors to review case study data relating to 2.3 and 2.4 early in the Study process as a means of alerting them to development possibilities in the Shire</p> <p><b>Outputs:</b> This Stage will provide an understanding of the population of the Shire which could be served by each venue, of trends in aquatic use and provision and of the implications of both to possible provision needs and opportunities at each venue.</p> <p>The demographic and trends analyses will be used in conjunction with the assets review in Stage 1 to identify any currently unfulfilled infrastructure needs/opportunities in the Shire and in specific towns. (S1.7)</p>	<p>Person B 2 days</p>

<b>Stage 3</b>	<p><b>Competitor Analysis</b></p> <p>This stage of the study will evaluate information on other private and public pools which might compete with or draw custom from venues in the Shire (S1.4)</p> <p>Data on these venues will be tabulated by their facility components and mapped. Where available, information will be collected on the catchments served by the various components of each of these venues as a guide to what might be appropriate and what might not be appropriate to provide at the Shire venues</p> <p>In looking at the opportunities in each town and across the Shire as a whole, we will to develop a Shire-wide strategic plan which creates an effective system of resources which provides optimum access to appropriate facilities for all residents.</p> <p>Outputs: This Stage will provide an understanding of any potential competitor venues and how provision at the Shire sites may be configured so as to complement or counter that competition.</p>	<p>Person C 2 days</p>
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Stage	Work/Week	1	2	3	4	5	6	7	8	9	10	11	12	13
1	Analyse and Review the Current Condition of each Pool				*	*								
2	Demographic & Aquatic Trends Analysis	*	*											
3	Competitor Analysis				*					*				
4	Provision Bench-marking					*								
5	Management and Funding Review						*							
6	Assessing Community Needs	*			*			*	*	*			*	
7	Concept Master plans & Designs										*	*		
8	Preparation of a Strategic Plan												*	*
	Meeting / Reporting dates	*				*			*		*		*	*

### 3.2.16 Create contingency plans

It is not uncommon for situations to arise during either of the pre-planning or research phases of the planning process that mean that the program of action has to be stopped or modified. From an operational perspective, these situations can include changes of staff within the planning organisation; illness on the part of key personnel; changed budget capacities; the emergence of other more critical issues, and new or changed organisational or government policies. From the research perspective, the identification of new issues that need to be included in the study or of data or other information that means the original work program and time and /or budget estimates need to be revised. In rare instances, conflict or professional disagreements can mean that a Council or contractor decides to terminate the project. In each of these circumstances, contingency plans need to be put in place and ideally, these should be considered as part of the pre-planning process.

In the earlier of the instances listed above, the planning process may need to be postponed, in which case a variation to the funds that have been allocated may need to be sought. If the situation that arises is serious enough, it may be that the project has to be cancelled --in which case funding grants may need to be returned and any externally contracted staff may need to be paid some form of compensation. In the latter circumstances, such as identifying new issues or needs, timelines may need to be extended, the research stages may need to be changed and additional funding may need to be sought. If additional funding is needed, the project manager may need to negotiate with any external staff undertaking the planning to identify if additional or changed budget circumstances will apply and then take the outcomes of these negotiations to senior officers and others for review and approval of the variations which are sought. They may also need to await approval from key individuals and or groups eg: a Council's general manager or chief executive officer, Councillors or a state government funding agency. Finally, in the situation staff conflicts or professional disagreements lead to the decision to terminate a project, a process of mediation prior to any termination decision and guidelines for an amicable cessation need to be in place. Human resources officers in most Councils now have written guidelines for these processes and these should be included in any agreement with external contractors.

### 3.2.17 Develop a reporting process

An important tool in managing any planning study is establishing the details of the schedule and form for reporting the progress of and the outcomes of the study. Doing this at the beginning ensures that when a project is coming to a conclusion it is easy to identify whether the project deliverables have been achieved.

Indicative schedules for meetings, what is to be presented at the meetings and the format of the final study outputs should be specified in the project brief. These should then be reviewed in an inception meeting and any changes should be recorded in writing. Some Councils require regular (say monthly) meetings while others prefer reporting at "milestones" or key information or decision points during a study. Some require the presentation of *written* progress reports at each meeting while others are happy with a verbal report. At the end of a project, some (but increasingly fewer) Councils require presentation of 10, 15 or 20 hard copies of the project report as well as electronic copies. Although no one method is better than another, reporting and meetings for their own sake—rather than for progressing the project—are really of little value.

### 3.2.18 Prepare a contract

Where an external planner is to be employed, it is useful to prepare a contract of employment. This should stipulate the roles and responsibilities of each party, reporting methods and dates, budgets, required insurances and a method for terminating the project if this becomes necessary. There are now standard contracts available which many Councils and other similar organisations use. Generally two copies are prepared and signed so that one can be retained by the organisation/ employers and the other by the contractor. To save the time and cost associated with preparing contracts, some Councils still create a contract by simply combining the brief and submission (with any agreed amendments) and appending these to a letter stating that the attached brief and submission constitute the contract.

### 3.2.19 Support team members

The coordinator of a recreation planning project has an important role to play in supporting the work of planning team members, whether they are in-house staff or external contractors. Support should cover several key areas these being first, the provision of resources and materials; second, the checking and reviewing of work that has been undertaken, and third, promoting the work of the planner in the wider organisation. If a planner is not provided with the right resources in a timely manner, a project will not flow smoothly and it could that key information or situations are overlooked.

Resources should include background reports, maps and plans of any recreation venues to be considered during the planning process, and lists of contacts to talk to.

Checking and reviewing the work undertaken by planning team members is important for several reasons: to ensure it of an appropriate standard before too much is written; to check for factual accuracy; to learn from the research that has been undertaken; to assure those undertaking the work that it has value to the organisation, and to ensure that the work has addressed the requirements of the brief. Importantly, checking and reviewing work must be done in a timely manner otherwise the researcher could be forced to go back and rework material, thereby taking time away from other important tasks.

Promoting the work of a planner in the wider organisation is important to ensuring organisational awareness of a project and to gaining a broad endorsement of the findings and outcomes.

### 3.2.20 Review project planning processes

This element of the planning process must occur both *during* a planning study and *after* it has been completed. Reviewing and evaluating the planning project processes, outputs and outcomes must be considered as being of equal importance as any other element of the planning process because *if a review and evaluation is not carried out, there is no way of telling how successful the whole process was or whether it was warranted at all.*

A project should be reviewed against the project scope and plan as it evolves to ensure it is on track and ideally, at various points after it has been completed to ensure the desired *outputs* and *outcomes* have been achieved.

As has been stressed elsewhere in this text, *outputs* and *outcomes* are quite different. To illustrate, a particular planning project may have as its objective the enhancement of the quality of life of residents with a particular focus on aged and disabled members of the community. Research into the nature and needs of these groups might well identify the fact that the provision of warm water therapy and indoor social water facilities is an excellent way of helping to achieve the objective. Yet, if the facilities are built and programs are provided but few people make use of them, the output objective would have been achieved (ie: provision of the opportunity) but the outcome objective -- enhancement of the quality of life of the target residents-- is unlikely to have been. Achieving measurable outcomes can take some time (often years) and unfortunately, accurate and continuing performance monitoring is not always undertaken to determine what the actual outcomes are. There are instances where negative long term outcomes have occurred.

Ideally, the staff who have been involved in preparing a planning study should also be involved in some elements of a review. This ensures that they can comment in detail on what they did and how well or poorly they felt it worked; so they can gain “on the job” feedback, and so they can learn how to improve or change what they did when involved in future projects. It also gives them confidence in undergoing professional and peer reviews of their work. That said, there are also instances where an external review and evaluation process is valuable because it allows someone with a fresh set of eyes and ideas to look at the successes (or weaknesses) of a project so that mistakes are avoided in future.

### **3.2.21 Collect Relevant Data and Background Reports**

All background reports, data, surveys etc that are likely to be of value to a planning study must be collected prior to the commencement. These documents could be expected to include Council or other (State, Federal, professional association) policy statements; a Council's (or regional authorities) recreation, arts, youth, land use, town planning, economic development, health and tourism plans; past reports on the same or related topics; past, recent or special topic demographic data; recent or past club survey data; state or national reports of relevance to the issues under study, and other similar materials. The failure to collect this information prior to a study commencing can seriously delay it or may mean that important issues and past learning has to be overlooked. Many planning studies are delayed for months and have important information gaps due to the planning authority overlooking this issue. This can lead to a range of problems including a loss of momentum on an issue and community cynicism, missing budget cycles, requests for amended budgets by those undertaking the research, and the emergence of other issues which come to take precedence.

### **3.3 Recreation planning research**

The second phase of the recreation planning process detailed in this text is the research phase. A range of issues need to be researched if an effective, defensible and useful plan is to be achieved. Those which are generally considered by recreation planners, and which are the subject of much of the remainder of this text, are:

1. Preparing a review of a range of previous studies and reports to identify and evaluate their findings and recommendations and the implications to future provision initiatives and priorities
2. Assessing the determinants of leisure and recreation in the area under study and in the wider context; reviewing and evaluating trends in these determinants, and determining the implications to future need and provision
3. Evaluating the existing provision of recreation facilities, programs and services to identify opportunities for improvement and upgrading, for expanding the provision or developing totally new opportunities
4. Review current and projected participation data and assessing the possible implications to future need
5. Determining the leisure and recreation interests of the general community or a specific target group and the priorities for upgraded, additional or new provision, and
6. Identifying the most appropriate actions to take in the light of 1. – 5. and the priority which should be given to them.

A recreation plan may also address a number of additional issues, with these including:

1. How an inventory of recreation provision might be created and kept up to date (some planning briefs specify the establishing of inventories as part of the work)
2. The pricing of the use of recreation facilities
3. A review of and development of strategies for improving the management of recreation facilities, programs and services
4. Which organisations might be the most appropriate to implement the various elements of the plan
5. How the plan will be paid for and the funding opportunities which can be tapped
6. How the organisation might need to be changed, restructured or augmented from the staffing and operational perspectives so the recommendations can be acted on
7. Whether particular sections of the recommendations should proceed to a feasibility study
8. How the outcomes of any new provision might be evaluated, and

## 9. A review methodology and timeframe.

Items 1. – 9. above are not covered by this text but any agency preparing a recreation plan should use the two lists above as a checklist to assess whether each of the research components needs to be addressed and how. The means by which each of the issues 1. to 6. in the first list is researched is detailed in Chapters 4 –11. Chapter 12 discusses how the information collected is used to prepare a recreation plan.

### 3.4 Preparing the plan

This is the third and final element of the preparation of a recreation plan. At this stage of the work, the planner must evaluate the research findings, determine the implications to the future provision of recreation opportunities and prepare a set of recommendations for action.

The recommendations should give direction as to what the priorities for action are and how they will be implemented. They should be framed within the recreational and wider policies and objectives of the agency commissioning the planning and where appropriate, should provide indicative budgets and implementation responsibilities.

The priorities and the associated budgets should reflect the financial commitments and capacities of the agency or groups who will implement the plan. This allows the responsible agency(ies) to integrate the recommendations with wider policies, development programs and budget cycles. A plan which is beyond the financial resources of the relevant agency or group is rarely able to be implemented in full and can be subject to what is generally quite detrimental “cherry picking” by elected members, individuals, senior officers or special interest groups in the community, wherein the most attractive, least controversial or cheapest initiatives are implemented and what are often the more important elements are overlooked.

Experience suggests that the longer the list of recommendations, the less likely they are to be implemented in a consistent, logical fashion. A long list is also likely to be prone to the “cherry picking” noted above.

It is often useful for a recreation *plan* to be a concise, clear document which is separate from a second research findings document. The research findings document is used as a backup resource to justify and support the recommendations of the plan. When this approach is taken, the plan can be succinct and to the point and be written and presented in a style which can be read and understood by all members of the community.

It is particularly useful for the recommendations of a recreation plan to provide timeframes, budgets, action responsibilities and performance monitoring strategies.

Further details on these processes and example recreation plans are provided in the web site resource materials.

### 3.5 What skills does a recreation planner need?

Recreation planners need a variety of skills to successfully carry out their responsibilities. Most important amongst these are:

The ability to listen to people, to encourage them to express their views, and to accurately record these without making value judgements about either the people or their views. In this context, an external consultant planner has an advantage as they are not part of the planning body and have “no axes to grind” on its behalf or on behalf of strong interest groups in the community. This warrants stating in interviews as it helps to free up discussion

An ability to identify a variety of good, practical solutions to resolve the issues identified. The more studies undertaken, the greater the experience to be drawn on

The ability to “stand back” from the issues under review and to use one’s professional skills and wider experience while withholding personal opinions and preferences

The ability to work with elected members at all levels of government

The ability to work with other professionals such as architects, landscape architects, social workers and planners, youth workers, aged services support staff and planners, health planners, cultural groups and their support agencies, police, educators, engineers, landscape architects, and quantity surveyors to help determine the best course of action and provision of recreation opportunities for the whole community or targeted groups within it. Increasingly, it is being recognised that the critical links between recreation, health and wellbeing mean that recreation planners cannot work in isolation and must tap into the skills, knowledge and development and provision priorities of other professions if their work is to be effective

The ability to identify new solutions to old problems and a willingness to test these against the wider research findings...and to back away from the solutions

The ability to review, evaluate and assess determinants of recreation behaviour, of trends in recreation activities and the implications of both to future needs

The ability to evaluate the effectiveness of what has been provided in the past and recommend changes to it as deemed appropriate

A good knowledge of recreation activities and trends

A good knowledge of how to conduct interviews, prepare inventories, undertake surveys, conduct demographic reviews, and assess existing provision

The ability to prepare recreation policies which reflect current political, social and cultural conditions, and

The ability to clearly understand, explain and advocate the views of the community and key stakeholders in writing and other media. Some guidelines for report writing are provided in the Appendices.

Some comment is warranted regarding one of the items listed above, that being “the ability to identify new solutions to old problems and a willingness to test these against the wider research findings”. As a recreation planner becomes more experienced, he or she will or *should* seek to develop the skill of identifying “new solutions to old problems”. Often, these solutions will come from wider reading, from other research studies or simply from a good understanding of the situation and a bit of lateral thinking. There is nothing to stop a recreation planner putting forward new ideas that they have come up with as often, they can solve a problem or break an impasse between competing community interests —provided it is made clear where the idea(s) came from and provided that they are as rigorously tested as any other proposals that are put forward.

The above point highlights the fact that there is rarely if ever a “perfect” or predictable outcome from the recreation planning process and from assessing the findings of the research stage: different planners may well come up with different solutions to the same problem with these different solutions being happily accepted by the community. As an example, research may show that a community is lacking social opportunities for older residents, good playgrounds for children and youth spaces. A planner might thus decide to convert an empty school hall into a seniors activities centre offering carpet bowls, communal dining, cards, singing and the like. The needs of children could be met by redesigning an old play facility, while youth opportunities might be expanded by running after-school activities and by building a skate park at the local school. Alternately, the old school hall might be bulldozed to provide room for a modern, attractive youth cafe, and music performance space, while seniors might be given buses and concert vouchers so they can get out of their local community and experience events and performances that are never available locally. The children might be provided with a trailer of portable equipment that is taken from park to park on weekends so that every locality of the Council gets to experience totally new play opportunities.

In each of the above instances, the communities involved are likely to be pleased with the outcomes even though each solution is totally different. The planner has applied his or her skills to identify a set of solutions that are beneficial to all involved even although those solutions are very different. Another planner might well come up with still different solutions. Provided they do not contradict or subvert the broad policies that have been adopted and the principles that underpin them, all of the solutions are likely to be quite valid.

A final invaluable skill for a recreation planner is the ability to “read” or interpret how a community is thinking and how it will react to an idea or proposal, rather than basing recommendations on *the planner’s own* preferences and conclusions. Recreation planners should be *the professional advocate of the interests and needs of the community*, with the skill to evaluate ideas and *educate the community and planning authorities* as to the best and most effective course(s) of action to take to enhance the quality of life of all residents. “Advocacy planning” in fact, was the name given to a particular approach to recreation planning in the 1960s and 1970s wherein planners acted directly on behalf of the community and, as with an advocate on a tribunal or court of law, took the side of the community and put a forceful case in support of their needs. Unfortunately, few communities have the resources to employ their own advocates. As such, government agencies should play this role on behalf of the residents whose taxes and rates are paying their salaries.

### 3.6 What follows...

Having discussed the critically important but all-too-frequently overlooked elements of the *pre-planning* phase of recreation planning, the following Chapters provide details on how the research and plan preparation elements of a recreation planning study can be addressed.

## 4

# Alternate recreation planning approaches

## 4.1 Introduction

The recreation planning methodologies detailed in this text are those which have been used extensively over the years by the author and many other recreation planners. Yet, they are not the only methods which are available or are used. A number of other planning strategies exist which at least warrant a review: perhaps to demonstrate why they should *not* be used or why they might be considered as a useful addition to or alternative to the methods outlined in detail in this volume.<sup>12</sup>

## 4.2 Standards

Provision standards have been used for many years as a recreation planning strategy. The most widely used standards, open space standards, grew out of 1920s efforts by North American and British agencies to provide recreation opportunities for children in poorer residential areas. From an initial estimate that every child should have an area of 8-10 square yards to enable him or her to exercise, a calculation of 7.5 acres –3 hectares—per 1,000 residents emerged. Revision reviews in the 1940s, 60s and 70s raised the 3 hectares to 4 hectares on the basis that modern recreation activities and needs were greater than those of the past.

Despite being based on questionable research, the standard of 4 hectares –or variations on it as low as 2 hectares and as high as 10-- was widely adopted throughout the English-speaking world. Many Australian local government authorities adopted it as a basis for their recreation provision programs and established goals of continuing to acquire land until they had reached the agreed standard.

Some of the key failings of the standards approach to recreation “planning” are<sup>5</sup>:

They do not constitute *planned* provision at all: rather, they constitute the acquisition of a fixed amount of land regardless of the nature and needs of the community

They ignore the nature of the land resources, local and regional climates, the nature of the communities to be served and any changes occurring in those communities

They ignore indoor provision

It is unclear as to whether the standards are a *minimum* provision need, a *guide* to the amount of land needed, or the *maximum* amount needed. Most users apply them as both a minimum *and* maximum simultaneously

They ignore the opportunities provided by all commercial or private recreation provision

They assume uniformity of need across political boundaries regardless of where it is applied. To illustrate, Victorian Councils have commonly used 4 hectares per 1,000 residents regardless of where in the State they were; NSW has used 2.83 ha., and South Australia has used as much as 10 ha., and

The standards generally run contrary to the findings of extensive research into the recreation needs and interests of different communities and different types of communities.

Despite these weaknesses, many planners and agencies responsible for recreation planning still use a standards approach. This is partially because they have been embodied into or auspiced by various State government planning acts or provision guidelines and have been upheld by planning appeals tribunals. They have also been used by some who claim there is a need for “a starting point” in terms of provision. The point to be made here is that they are such a bad and misleading starting point, *they should not be used*. Past research has actually shown that a provision rate of 4 hectares per 1,000 residents is probably in excess of community needs –but this will clearly vary depending on the culture, location, recreational interests, climate, history of provision and many other factors. A wide variety of anecdotal evidence also suggests that where other types of recreation opportunities are available –libraries, theatres, restaurants, neighbourhood houses and indoor aquatic and leisure centres—less use is made of open space and less open space is needed. Finally, there is again a wide range of anecdotal evidence to indicate that people adjust their recreational activities to what is available within their area and if there is insufficient open space provision, they go elsewhere to recreate or take up other types of activities.

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<sup>5</sup> See Marriott, 1980a for a full assessment of standards and other traditional recreation planning approaches. Doctoral research by Marriott in 1979 provided clear evidence that recreation provision in keeping with open space standards failed to meet the recreational needs of the community. See Marriott 1979. See, also Veal, A. J. (2008). This is a fascinating exploration of how standards came into use in Australian recreation planning. *Open Place Planning Standards in Australia: in Search of Origins*. School of Leisure, Sport and Tourism Working Paper 5, Lindfield, NSW: University of Technology, Sydney : [www.business.uts.edu.au/ist/downloads/open\\_space\\_standards\\_2008.pdf](http://www.business.uts.edu.au/ist/downloads/open_space_standards_2008.pdf) or via: <http://www.business.uts.edu.au/ist/research/bibliographies.html>

Thus, rather than using open space standards to guide provision, a far more effective starting point is to undertake a number of or all of the research elements outlined in this text. This point has been strongly endorsed by recent internal research undertaken by several State government Sport and Recreation and planning departments in Australia.

A different set of standards emerged in the 1970s, '80s and '90s when social planners sought to extend the open space standards concept to other forms of community provision. For instance, a report prepared for the Municipal Association of Victoria in 1989 ( ) detailed the recommended levels of provision for eight different types of services, these being family and children, young people, older people, people with disabilities, libraries, community information, health and leisure. The "standards" were developed for five levels population size across the State, ranging from "local" areas with up to 5-6,000 people to "supra-regions" with 300,000 plus residents. For each service category the report detailed the specific services to be provided, the goals they would meet, any existing standards, the community population sizes for which they would be provided and the related population ratios, the targeted age range and the catchment distances to be served.

While these guidelines may have been useful to local Councils, their danger lies in the adoption of the key word in the report title –"standards"- and the assumption that achieving the suggested levels of provision will meet community needs at an acceptable and documented level. For this reason, they have not been reproduced here. Yet, the report itself notes that:

*"...standards should always be thought of as guides and reflections of a particular social, economic and political environment. Standards will not be useful if they become entrenched, inflexible and unchangeable. The appropriateness of particular standards should be constantly monitored and evaluated to ensure that they are influencing positive outcomes ... and are not ...acting as obstacles to innovation and the development of locally appropriate, cost effective and efficient services and facilities". (McVicar and Reynolds, 1989, p. 17)*

Given this warning, it could well be argued that the report would have been more useful had it presented a methodology for developing what might be usefully described as "community specific standards" or "community specific provision goals", rather than detailing a set of standards which were then considered to be appropriate across the State.

More recently, the December 2005 edition of *Urbecon*, published by the planning and consulting firm, SGS Economics and Planning, contained an article, "Establishing desired standards of service –the role of benchmarking". The article noted that there was wide use of benchmarks (or "standards") but acknowledged that "there is no universally agreed set of benchmarks for the provision of community facilities and services...".

The SGS Economics and Planning report proceeded to state that

*"...appropriately considered benchmarks are often the best indicator for assessing comparative needs..."* and that "benchmarks are even more effective where adapted to local circumstances, or where consultation is undertaken with a range of government agencies to determine the level at which facilities are currently or desirably provided. Coupling benchmarks with empirical evidence of needs not being met, or over supplied, is essential to ensure the level of provision of facilities and services is adequate This 'local' knowledge' is one of the most reliable sources of information about current and likely future needs and service standards."

The emphasis on the need for detailed local research and the assertion that such knowledge is both 'essential' and the 'most reliable' negates the need for the use of any benchmarks or standards.

The SGS Economics and Planning article presented a list of benchmarks to guide provision. However, it did not provide a researched basis for them, stating only that they "are considered the best and most recent guide to social infrastructure provision". As the report argued an effective case against the need for standards or benchmarks, they are not reported here.

### 4.3 Ad hoc planning

The Macquarie Dictionary defines *ad hoc* as the Latin of "for this special purpose", "impromptu" and "with respect to this subject". *Adhockery* is defined as "behaviour influenced by prevailing exigencies without regard for effects over a longer term". From a planning perspective, *ad hoc* planning is a process which is followed to resolve a particular problem, without concerning oneself with the broader and longer term issues or consequences.

Ad hoc planning or ad hoc action is occasionally necessary in any organisation when a situation arises for which there is no precedent and which needs to be resolved. As a result, ad hoc action is taken and the issue or problem is addressed. However, many agencies use this as their usual approach rather than having an action framework in place as a means of guiding a planning review process when emergency or unforeseen needs arise.

The problems associated with an ad hoc planning approach include:

Many of the assessment processes recommended in this text are overlooked and as a result, decisions are made on the basis of incomplete information

Issues or fads of the moment take precedence over potentially more important longer term issues and needs

Groups which are able to demand action can attract attention whereas potentially more important and needy groups are overlooked: the squeaky wheel gets the oil

Resources can readily be misdirected

Frequent changes of direction in terms of provision processes and policies as different elected members, officers or favoured groups gain the upper hand, and

A neglect of the wider context, related issues and, as the dictionary definitions indicate, of the longer term consequences of the actions which are taken.

The ad hoc approach to planning should be avoided wherever possible as it does not achieve effective and efficient provision outcomes. Communities which have had years of ad hoc planning frequently suffer from the duplication of provision for the most “popular” sports; *under*-provision of cultural and special needs group opportunities; generally lower than average provision quality; facilities which have become outdated; a lack of recreation programs and services (or, worse still, a belief that it is up to sporting and recreation groups to organise these), and high levels of community need, especially amongst non-mainstream residents and groups.

The application of even some of the research methods detailed in the present report will ensure something better than ad hoc outcomes can be achieved from a recreation planning process. The application of the overall “package” of processes will mean that ad hoc planning can become a thing of the past.

#### 4.4 Developer contribution schemes

As noted previously, developer contribution schemes operate in a number of States and provide for the transfer of either or both land and money to a State or local government body. These resources can then be used for the provision of recreation opportunities. In reality, a developer contribution does not constitute planning at all but many of those receiving the contributions see these as the extent of their capacity to provide for recreation in the community. As such, they are seen as a major, if not *the* resourcing, input.

The philosophical and planning basis of most developer contribution schemes is weak as they have a poor relationship to the nature of the community or communities being planned for and as such, they make major assumptions about what needs are to be met through the use of the contributions. As an example, the New South Wales Section 94 scheme (of the Local Government Act) which seeks to determine the “nexus” between new residential development and the demand for recreation (and several other services) and allows the setting of charges to meet the cost of the assessed new demands, has no information about who the new residents are –although it does have estimates of how many there will be; it assumes a linear relationship between population size and demand; it assumes that the new residents come from outside the local area or the municipality –when this is often not the case—and it makes gross assumptions about what the needs of the new residents will be and what the cost of meeting those needs will be.

Developer contribution schemes which require the transfer of land resources are no better than the standards approach as they assume that the land acquired will meet the needs of the communities in the area. Rarely do authorities which have received the land allocations go out and acquire additional land or other recreation resources. Often however, they are left with inappropriately sized, poorly located and excess resources.

As with standards, the argument has been put that developer contributions give the planning and/or provision authority “something to start with”. The weakness of this argument is the same as with standards: it is all too often the wrong starting point. Were a provision authority to have carried out a detailed planning process it would *know* what and *how much* it needed to start with. It could then apply a meaningful contribution scheme to *all* residents and ratepayers and it would have the evidence to justify the demands it made.

It can be expected, however, that so long as developer contributions are endorsed by legislation and various planning appeals decisions they will go on being sought. Changes to legislation are needed to overcome these shortcomings. Even if those changes do not occur, however, planning authorities still have the capacity to carry out proper planning and needs studies. They will at least then know how to most effectively to use the resources they acquire through the flawed contributions process.

#### 4.5 Benchmarking

Benchmarking has emerged over recent years as a means of assisting the planning process by reviewing what *other* agencies are providing for their clients. Amounts and types of provision are compared as are the quality and staffing of the provision. Some benchmarking goes as far as to determine provision ratios eg: number of halls or athletics tracks or swimming pools per 100,000 residents. In this form they are little different to provision standards. Some government agencies have used benchmark data as a guide to when new schools, hospitals and other community services can be viably supported.

Some of the jargon associated with recent benchmarking exercises includes “best practice” and even “*world’s* best practice”. Best practice is really a *management* rather than a *planning* issue while aspiring to *world’s* best

practice can set performance levels which are unrealistic, unnecessary and unachievable. One has to question how any organisation which claims it operates, plans or provides in keeping with world's best practice can actually measure what world's best practice is and how its services match up.

Further, it needs to be noted that while the "best" examples of provision might be able to be identified, they may in fact be quite poor when considered against an as-yet unachieved ideal. To illustrate, several years back a Victorian Council required part of a recreation planning study to benchmark its services against those of other similar-sized Councils in the State. A review of those Councils quickly found that their recreation provision standards were quite poor. As a result, the initiating Council's standards could have been deemed to be quite good, even though they were actually also poor. Fortunately, the initiating Council accepted that there were no good examples against which it could benchmark itself and it went on to develop its own performance measures.

A more useful *initial* approach to benchmarking –if it is to be used at all-- is to benchmark against the best practice or best quality provision which has been achieved *by the same provision agency* elsewhere within its area of jurisdiction. This ensures that the benchmark being used is something which can be achieved by the provision agency and possibly, something which reflects the standards and expectations of the community. Once other provision begins to achieve *this* benchmark then higher standards can be aspired to.

Benchmarking can be an informative exercise as it gives an idea of what other communities have had made available to them and what the standards of provision are. However, it is not a planning method *per se*, but rather, one tool which can assist the planning and decision-making process. It needs to be used with caution too, as what is appropriate to one community may not be appropriate to another: differences of climate, location, socio-economics, settlement history and politics can all impact on what a community wants and needs.

#### 4.6 Advocacy planning

Advocacy planning is not so much a different approach to planning as a different *application* of sound planning processes. As briefly noted at the end of the previous chapter, advocacy planning first emerged in the US in the late 1960s and 1970s. Using much the same model as community legal services or *pro bono* (or more correctly, *pro bono publico*) legal services, planners were paid no fees or low fees to act directly on behalf of communities seeking equity of opportunity or enhanced levels of recreation and other community services provision. The planners took the side of the community, conducted detailed research on their *its* behalf and often, in the face of outdated and ineffectual planning by the provision agency, were able to put a forceful case in support of the community's needs.

There has been very limited advocacy planning in Australia because few communities have the resources to employ their own advocates. However, the actions of many conservation groups are very similar to advocacy planning as the groups are able to draw on a range of specialist skills from amongst their own ranks. Further, some planners have indicated that on occasion they have assisted community groups to develop a case against particular provision proposals so that some sense of equity is achieved.

Many planning and provision agencies do not like an advocacy planning approach as it is seen as threatening or usurping their authority. However, the approach warrants consideration because provided good research is undertaken, it almost invariably leads to better outcomes. This is because different views and perspectives are canvassed and provision proposals and decisions have to be more effectively justified.

Advocacy planning also has the benefits of putting some distance between the planning authority and the planning process and outcomes, of being able to ensure a greater independence of the processes and of having the advocate educate the client community or communities as to what is and what is not appropriate or achievable.

#### 4.7 Charrettes, and Searching

Charrettes and "Searching" have a number of similarities in that they involve intensive short-term programs of well-resourced workshopping and planning activity. Charrettes generally involve experts in the field who make prognostications regarding future needs and priorities. Both seek representation from the main "players" or stakeholders: planners, elected members, experts, residents.

Charrettes and Searching generally use many of the same planning resources outlined elsewhere in this text (demographic data, existing provision reviews etc), but these are used as an information input to intensive, small group think tank sessions which report back on their findings and conclusions. Extensive debate between participants regarding different solutions to the issues and problems which have been identified is common in both approaches.

A strength of the two processes is that they can be carried through in a very short time frame, although a lot of "homework" may be needed in the preparation of background materials. There is a certainty in the mix of participants and there is certainty in the sense that differing views and strategies are debated and put under scrutiny. There is uncertainty at times, however, because the process seems to happen too quickly and because there can be questions about who was involved and about the fact that the vast majority of the community is not given the opportunity to be involved.

In the vast majority of instances, both charrettes and searching produce well-informed and well-considered outcomes. They can be used as a total planning process or as a key input to the wider, longer term processes outlined in this book. Both warrant serious consideration as planning tools and have been used in a number of recreation planning projects in Australia in the past.

#### **4.8 Delphi Planning**

Delphi Planning draws its name from the oracles of Delphi in ancient Greek who foretold the future. In its modern planning form, the approach was developed by the RAND Corporation during the Cold War years to help predict the development of warfare technologies.

The approach uses a panel of experts to identify a range of key trends and projected futures. These are then independently reviewed and evaluated by the same experts who make an assessment of when the trends and/or events are likely to occur, what may inhibit them and what actions might be needed to achieve them –or avoid them. These views are summarised, circulated, reviewed and revised through a series of rounds until a consensus is reached.

The Delphi method has strengths and weaknesses. Amongst the strengths are the focusing on complex issues by a panel of experts working both independently and eventually, as a team. The weaknesses include the exclusion of the general public –which may better know what its needs, interests and priorities are-- the critical role of the facilitator of the process in ensuring that the expert panel has sufficient information on which to base its assessments, the fact that the complexity of social processes may defy easy evaluation, and the fact that in the social sciences, multiple influences can generate outcomes which are quite different to those which are predicted..

There has been very little use of the Delphi method in recreation planning in Australia. Yet, it can be a useful tool for adding to or testing the outcomes of other recreation planning processes. It thus warrants consideration as an alternate way of identifying critical issues and future strategies for action.

#### **4.9 Conclusion**

It is evident from the foregoing that recreation planners have used a variety of approaches which are somewhat different to those detailed in this text.

As indicated in the review, several of the methods –such as charrettes and the Delphi method-- can be used as useful additions to the methods provided in this text. However, care should be taken in using them alone as they do have some weaknesses and they tend to exclude significant groups in the community and to rely rather heavily on one set of research strategies rather than a mix of methods. The same comment applies to benchmarking: it is a useful comparative tool but should not be used as a definitive provision guide.

Several other of the alternate planning approaches should be avoided whenever possible and in particular, standards and developer contributions. Looked at from the perspective of the definition of planning introduced at the beginning of this text, they are not really planning approaches at all as they do not involve a sound process of data collection, review and evaluation along the way to drawing conclusions as to needs and priorities for action. Rather, they are somewhat mechanistic processes for reaching a solution in a straightforward manner which is most probably worse than the outcome which would have been achieved had matters been left to evolve in a way which reflected the nature and needs of the community.

Some aspects of developer contributions cannot be avoided at present because, as was noted, they have a degree of legislative endorsement. However, moves are afoot in several States to provide a better basis for future recreation planning processes. The use of more research-based, and more effective and productive strategies by recreation and other community planners will help achieve this change.

## 5 Report reviews: scope and purpose

### 5.1 The value of a review

A review of background reports and previous recreation planning studies is an invaluable element in the recreation planning process. Such a review:

Ensures that the findings of past planning studies for the same agency are evaluated and that any recommendations which have been overlooked and which are still relevant can be carried forward to the new plan

Allows longer term trends to be identified and current day findings to be put into a broader time context. As a consequence, the influence of "hot" or "fad" issues is reduced, and

Allows the inclusion of new and exciting ideas from other agencies, from academic and planning research, or from research carried out in other parts of the country or overseas to be identified and tested

Allows the final planning report to reflect a wider time span of need than that which might otherwise be identified during the 6-12 month period of the planning study.

The review of other reports does not need to be confined to issues or topics specific to the agency, area or topic for which the recreation planning is being carried out. In fact, reports, studies, articles and books which tackle different topics in related ways may be just as useful if not more so as they can generate new thinking, new ideas and new solutions.

### 5.2 The types of reports to review

The types of reports and studies which are most commonly reviewed and evaluated are:

Policy documents prepared by the agency for whom the recreation planning is being carried out. These frequently establish the philosophical framework for a recreation plan

Past planning studies by the same Council or adjoining Councils. These might cover recreation, open space, recreation facility feasibility studies, economic development, transport, and urban planning issues and strategies

Academic studies and reports on a wide range of relevant topics

Professional studies and reports on a wide range of relevant topics. Web-based sites are increasingly available while even googling a topic can often identify a wide range of valuable resources. National and international leisure research associations such as ANZALS (Australian-New Zealand Association for Leisure Studies), Parks and Leisure Australia etc. One of the most valuable websites to review and register for is the Canadian National Benefits Hub which has a long history of collecting, collating and evaluating research into the benefits of leisure. Readers can register to receive regular newsletters and other information through Leisure Information Network <[kkelly@lin.ca](mailto:kkelly@lin.ca)>

Government enquiries and research reports, also covering a wide range of relevant topics

Government policy statements on recreation, health, community wellbeing and so forth. These can be particularly important in that they may establish new provision models and directions and create funding opportunities for new provision initiatives

Australian Bureau of Statistics reports. The ABS now regularly publishes a range of data and written reviews on recreation topics. The annual report, Australian Social Trends (ABS Catalogue No. 4102.0), frequently has feature articles on recreation and related topics. Further, the Bureau has a National Centre for Culture and Recreation Statistics which researches and publishes data on a variety of recreation topics and which can be contacted for special advice: [nccrs@abs.gov.au](mailto:nccrs@abs.gov.au) or GPO Box 2272, Adelaide, SA 5001 or (08) 8237 7555

Professional review papers and reports. Professional state-of-the-art reviews can be particularly useful in providing clarity of direction on an issue or in providing professional support for a new course of action. A recent publication by *World Leisure*, an international association of leisure professionals, is listed in the bibliography under Jackson

Newspaper and news web reports. Rarely a day goes by without some news report citing something of relevance to recreation planning and provision, be it a health report, urban planning study, sports participation report or something else on a related topic. These reports often refer to the fuller documents and research which can then be followed up, accessed and evaluated

The first of the above list of documents should generally be given priority attention in the preparation of a recreation plan. Many agencies such as Councils, State and federal governments, private providers and investment bodies have a range of policies which spell out their organisational vision or mission statement, their values and principles, their organisational objectives and their priorities for action. These may cover recreation, health, community wellbeing, economic development, transport and the like. Many larger sporting and recreation associations have similar documents.

These documents should, theoretically, provide a philosophical framework for the planning study. They may well also provide a structural framework into which the recreation plan conclusions can be slotted. Ideally, the findings and recommendations of a recreation planning study should further the recreational well-being of a community as well as achieving positive outcomes in other areas of endeavour of the sponsoring agency or group. Where there are gaps in relevant *local* past research, wider material is invaluable in assuring a Council or other planning body that the issues they face are not unique and that useful, guiding solutions to them have been found elsewhere. Where there are no known research resources, googling a variety of key words can identify a wealth of information. Engaging in leisure pursuits is a universal experience of human beings. As such, and especially given the cultural diversity of Australians, drawing on the experience and learnings of a range of other cultures and communities, can make a valuable input to a recreation planning study.

### 5.3 Using the findings of a reports review

The information to be gleaned from past reports will vary depending on their nature and source. In general however, in using the material, planners should:

1. Prepare a brief written review of the report methodology and scope, and if appropriate, identify any gaps in coverage
2. Prepare a list of any new provision or activity ideas, provision or participation trends, or other issues, conclusions and recommendations which may be of value to the planning study being undertaken. The list could then be reviewed with officers of the organisation for which the planning is being conducted and with steering and reference groups to determine which items might be relevant to the present study. The list could also be taken to meetings with community members and other relevant bodies as a means of checking their wider relevance.

Where the past reports have been prepared for the organisation *which has commissioned the planning study*, similar lists would be prepared and the officer review process might seek to identify:

- (a) The recommendations which were implemented and whether they effectively achieved the desired outcome, and if not, what alternate action might be appropriate, and
- (b) The recommendations which were *not* implemented, *why* they were not implemented, whether they are considered to still be relevant to the organisation and its community and if so, how action on them might be advanced by the present study

Again, the lists might be taken to public meetings to assess whether there is continuing public support for them.

Once the ideas and issues identified through the review process have been reviewed and assessed and found to be of continuing value, they can be carried forward into the final report stages and as deemed appropriate, into the recommendations for action.

#### Appendix 5.1: Undertaking a literature review

Select 4 differing sources of information from local, national and overseas publications (eg: newspapers, library research, professional association web sites/journal/special publication, googling etc) and follow the steps in 5.3 to prepare a review and assessment of the possible implications to leisure provision in your community.

## 6

# Assessing the existing provision of recreation facilities, programs and services

## 6.1 The scope of existing provision

The existing mix of recreation opportunities in any community or region can often be quite extensive. It will generally include:

Indoor and outdoor recreation, sporting, leisure cultural, educational, casual/informal, and bushland/forest facilities and programs

Recreation programs using public, private association, commercial, school and resident venues

Play opportunities<sup>6</sup>, and

Club and community venues and programs.

Mention should also be made of recreation *support services*—such as information booklets and signs, community transport, program support staff, development grants, and management. The distinction between recreation *facilities*, *programs* and *services* is important: *programs* and *services* are often overlooked with an almost sole emphasis being placed on facilities. Facilities are simply the physical resources used for recreation activities—and many activities need little by way of facilities. By comparison, *programs* are the structured or self-created recreational activities which people do. It is programs which deliver recreation benefits. Finally, *services* are important because without them, many recreation activities could not be accessed: as noted above, services include information about what is available, where, when and for how much; community transport which ensures people can reach recreation venues; disability services, so people can get *to* or get *into* venues; subsidies and grants, so people and clubs can afford to pursue the activities they desire; equipment pools; program leaders; venue managers, and recreation planners. Without these services many recreation activities would not occur and many people in the community would be disadvantaged in terms of access to opportunities. It is the lack of services and programs which leaves many facilities locked up and under-used.

Understanding and evaluating both the provision and effectiveness of the mix of existing provision is a very important element of any recreation plan. It informs planners as to what is already available (and how useful it is), it helps to identify gaps, and it guides decisions about new or additional provision. *It also often provides a useful initial understanding of the nature of a community and its interests as much of what exists reflects the needs and interests of a community.*

All too often, new provision is made when the opportunities offered by what already exists have not been fully exploited appropriate standards of maintenance, structured programming (as opposed to groups using a venue if they know how to) an good management and promotion. Under-use of existing provision also frequently occurs because strategies for overcoming barriers to the wider use of what exists are not pursued so that wasteful duplication and under-use occurs. A good saying to keep in mind here is “Don’t create new mistakes before past ones have been overcome”.

The existing provision of recreation opportunities needs to be assessed in terms of:

What *types* of opportunities exist

*How much* provision there is of each type of opportunity

The *size* of the resources which are provided

*Where* the opportunities are geographically

*Who* the opportunities serve and *do not* serve in terms of the programs that use them

*Who* runs the use programs, *when*, *who* are they available to and *at what cost*

What *standards of use* are supported

What the *condition* of the opportunities is, and

How the opportunities can be *improved*.

Depending on the nature of the planning study being carried out, the scope of an existing recreation facilities, programs, services review can vary significantly. For instance, if a regional or municipal recreation plan is being prepared, *all* existing opportunities might need to be assessed—although even then, questions might need to be asked as to whether, for instance, commercial opportunities are included or whether restaurants and motels are included. By comparison, if a recreation plan for aged residents, for youth, for a suburb, or for a particular type of activity is being prepared, only facilities, programs and services which *are* or *might be* relevant to those groups or topics would be assessed.

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<sup>6</sup> An excellent guide to the planning of play facilities has been prepared by the Playground and Recreation Association of Victoria and Sport and Recreation Victoria. See Sport and Recreation Victoria, 2007 in bibliography

The assessment of existing recreation provision is often referred to as a “gap analysis”. However, it must be noted that provision *gaps* can really only be identified if the review findings are looked at in the context of the characteristics of the population, the assessed needs of the community being planned for and the objectives of the planning study. What might otherwise appear to be a gap may, in fact, not be a deficiency at all. Further, it warrants highlighting that people participate in recreation activities because of the beneficial outcomes they gain and enjoy. *Many different types of recreational activities can give similar—and often identical—benefits.* As such, no individual or specific activity is actually essential as there is always likely to be an alternative—or, it might be cheaper or better to provide an alternative. Thus apparent gaps may not be gaps at all.

Sometimes an analysis of the existing provision of recreation opportunities is more useful in helping planners understanding the extent and types of excessive or duplicated provision—which opens up opportunities for reassigning uses—or for identifying *competitor* providers, than in understanding gaps. It may also identify weakness in the distribution of provision as a result of for example, urban growth, suburb aging and demographic change. With regard to what might be seen as provision competitors, it is often important to identify and consider the strengths and weaknesses of existing and potential competitors and allies. If other providers exist, the decision needs to be made as to whether these will be treated as competitors or alternately as provision partners and allies. Where they are deemed to be competitors (for political or other reasons), this may mean that greater effort will be needed in terms of facility or programming quality, in marketing, staffing or hours of opening if the planning organisation’s own provision is to be viable. By comparison, seeing other providers as partners and allies can mean that competing provision is not made (with subsequent substantial cost savings), or that if provision is made, it is made at a different standard or is targeted at different market sectors.

There is often a tendency to see another Council’s facilities as competitors when coordinated provision would be of greater benefit to each Council’s community. Similarly, private providers are often seen as competitors when coordinated provision can again be advantageous. Private providers frequently provide facilities and programs that a Council would have difficulty contemplating (and sometimes, at a Council venue), so that the community gains a wider diversity of opportunities and Council money can be spent on more targeted needs or groups. Prior to contracting such provision, however, a due diligence assessment of the provider is advisable.

There are several tools which can be used to assist with the process of assessing the existing provision of recreation opportunities. These are discussed in the following sections. Managing the development and use of an information or knowledge system relating to recreation facilities, programs and services is a core competency which this course seeks to develop and the elements and performance criteria are detailed in Appendix 4.

## 6.2 Inventories of provision

An inventory is simply a list: a list of what exists and of the various features of it. A well-prepared recreation inventory is an invaluable tool for recreation planning purposes as it will help answer the questions of *what exists, where it is, how much* provision there is, *how accessible* it is and *how good* it is in terms of recreation opportunities. As such, to create a resources data base is to create an important information management system which contributes to the knowledge of users: be they planners, programmers or members of the community being served.

An important part of creating an inventory and resources data base is ensuring that useful, appropriate data is collected, that the data is recorded in a form which is accessible and useful and that it is updated accurately and on a regular basis.

The scope of information to be collected must be carefully thought through. This ensures that time and resources are not wasted in collecting so much information that it cannot be used, that there is sufficient time and resources to process the data, and so it is not too costly to keep up to date.

## 6.3 The scope of recreation inventories

An inventory can cover each or all of facilities, programs and activities, clubs, groups and other agencies which provide opportunities, or services which support and facilitate the use of leisure opportunities. Inventories are also particularly useful as a community information resource regarding what is available in the community, as an information resource when preparing budgets, or when applying for grants. As such, careful thought needs to be given to how inventory data is recorded and how and where it is made available. Systems can be readily devised for blocking confidential information included in an inventory when that information does not need to be or should not be made available.

While inventories are an invaluable tool for use in planning studies, it should be stressed that *creating an inventory of recreation opportunities is not really the role of a recreation planning study.* Creating an inventory from scratch is an onerous task and can use up scarce planning time if it has to be undertaken as part of the planning process. If it is to be prepared, a special budget allocation will be needed as experience shows that in creating a detailed inventory, no more than 6-10 venues can be covered in one day. If a Council has 400 venues, this could amount to a very costly task.

In light of the above, efforts should be made by all agencies concerned with recreation provision and recreation planning to create inventories which can be used as part of a number of studies, rather than expecting each new study to create or update an inventory as part of the planning process. Inventories need to be regularly,

consistently and accurately updated if they are to be useful and it is generally best if one officer is given overall this task so that accuracy is maintained.

The following is a list of information which might be included in an inventory of recreation *facilities*.

### **1. Background**

- 1.1 Council/agency
- 1.2 Venue name
- 1.3 Address and map reference
- 1.4 Contact person
- 1.5 Phone number
- 1.6 Postal address
- 1.7 Planning scheme zoning
- 1.8 Dates inventory recorded and updated
- 1.9 Name of person(s) recording/updating the inventory. Historic data on this item should be retained

### **2. Facility Description**

- 2.1 Venue number
- 2.2 Council property number(s)
- 2.3 Size/ area
- 2.4 Description
- 2.5 Components: eg: rooms, playing fields, change rooms, stores, play equipment, kitchens, plus size, number and condition of all the above
- 2.6 Services: parking, disabled access, toilets (type, number), bike parking, pathways, signage, plus size, number and condition of all the above
- 2.7 Venue classification
- 2.8 Venue hierarchy
- 2.9 Assessments of condition and quality
- 2.10 Photographs/ aerial photographs: current and historic if possible

### **3. Use**

- 3.1 User group names
- 3.2 Contact name/phone/email/postal addresses
- 3.3 Use times/seasons
- 3.4 Use levels/standards/ conditions
- 3.5 Use numbers
- 3.6 Fees

### **4 Upgrading/additions**

- 4.1 Needs: as identified through a professional inspection and/or user input
- 4.2 Site capacity to accommodate additions or availability of adjoining land
- 4.3 Priorities for action and recommended responsibility

Most government and commercial recreation provision agencies now have detailed asset data bases with Geographic Information System links, and inventory information can be readily added to these, even if some data has to be recorded or classified/categorised in several different ways for different users of the one data base. Alternately, simple but powerful personal computer programs are now available which can be used to create comprehensive inventories.

It may be that not all of the items in the list above are needed, or needed immediately. Creating an inventory can be made far easier by committing to its *progressive* development so that only key items are initially recorded. If an effort is made to record everything about a venue it may take up so much time the process is never completed—or the data is never used and goes out of date-- or it may discourage efforts to keep the information up to date. Thus, if no inventory is available, one can be usefully started by only collecting the data needed for the planning study with additions being made later on. A key question to ask when collecting inventory data is "How useful will this data be?"

A number of examples of facility inventories are included in the appendices to this text. It is evident that there are variations in the range and detail of the information to be collected and in the layout of the forms. These reflect the different needs of the organisations they were created for.

The list of inventory components provided above includes some details on the use and *users* of each recreation facility and the *programs* and *activities* which are offered. Depending on the purpose of the planning study being undertaken, it may be useful to create a separate programs and activities inventory rather than recording this information as a dependent sub-set of a facilities inventory. This separation is important as quite a few recreation activities are not facility-based and many people using an inventory are initially seeking information on specific activities rather than where they take place. Modern technology will allow cross-referencing of different inventories.

A third and separate inventory component which warrants creating is that relating to recreation *services*. These are discussed further in section 6.8.

Several elements of a recreation inventory included in the list above but which have not been discussed are facility *classifications* and facility *hierarchies*. These are discussed in section 6.7 and 6.11 respectively.

## 6.4 Inventory data sources

As a collection of information about specific venues, groups and services, inventories draw their data from a variety of sources. These include:

- Title records of the organisations which own the facilities
- Development and maintenance records of the owning or any leasing body
- State government agency records: eg: land management, water, town planning authorities
- Interviews with relevant officers/members
- Surveys of user groups and user group records
- Historic records, and
- Site visits.

From a recreation planning perspective, site visits backed by good inventory data should be viewed as almost being mandatory. Visits allow the planners to assess conditions and needs first hand. As discussed in the later chapter on consultations with the community, site visits with local residents and with user and special interest groups are also invaluable as they can reveal needs, opportunities and priorities that might otherwise not be identified.

## 6.5 Maintaining an inventory

Several points were raised above regarding the cost of creating an inventory and ensuring it is useful once it has been created. To achieve the most effective outcomes, one person or a small group of staff should be given responsibility for developing and maintaining the inventory and, through consultation with users, for developing the output formats. Having one or few people responsible for the data base helps achieve consistency in the description of assets and programs and in the interpretation of the data collected. Careful training is needed if a team of people is to be used in collecting the initial data and as more people become involved in the data collection and interpretation processes. All records which entail some degree of rating, ranking and subjectivity in assessments should be tested to gain a high level of consistency and the ratings etc that are recorded should be attributed to the people responsible so follow up checks can be made if needed.

Recreation inventories can be included as part of an organisation's assets register and computer-based Geographic Information System (GIS). Again, the individual responsible for this system needs to have the appropriate skills and training and provision should be made for these skills, hardware and software to be updated on a regular basis. Efforts must be made to ensure that those who need to use an inventory of provision can readily access it while at the same time taking care to ensure that changes to the content of an inventory are managed so as to ensure that inaccurate or incorrect data is not added.

## 6.6 Using an inventory for planning purposes

The creation of an inventory does not in itself constitute recreation planning. To be useful, the raw *data* contained in an inventory has to be turned into *information* that then needs to be summarised, described, interpreted and evaluated from the perspective of the different users. Thus, in using inventories, recreation planners should consider undertaking the following:

- Devising the means by which inventory data can be most affectively accessed, produced and disseminated
- Promoting the existence and availability of the inventory and the information derived from it to potential users and the community
- Identifying the forms in which potential users would like information provided and presented
- Preparing the data and information which has been identified as being needed, monitoring its use and usefulness and responding to the findings, and
- Monitoring the cost of collecting and preparing and disseminating the inventory and responding to the findings as deemed appropriate.

From a recreation planning perspective, some of the most useful information could be expected to include:

- Tables and maps recording the *number*, *sizes* and *distribution* of all and each different type of recreation facility

A review and discussion of the tables and maps and the identification of any apparent gaps, with this to be used to help understand where additional or alternate provision might be needed

An assessment of the possible deficiencies of provision, against the population characteristics and trends, and the findings of community consultations and needs assessments

Tables showing the *hierarchical distribution* of each type of recreation facility as a guide to which activities can be pursued at a range of levels from local to elite and which cannot. Again, any conclusions should be tested against the population characteristics and the community consultations /needs findings

Tables of the *area of land* allocated to each type of recreation facility, and

Benchmarking the above data against other similar Councils or study areas –especially if some can be found that are considered to be “well serviced” or which have similar socio-economic characteristics-- in order to identify significant differences of provision and the implications. “Internal” benchmarking may also be considered. In this context, the “best” of the venues, programs or services in the study area can be used as a guide to what might or should be achieved elsewhere in the same area.

## 6.7 A classification of recreation facilities

Because there are so many different types of recreation facilities, it is useful to categorise them. This groups like facilities together –such as outdoor sports or informal parks or indoor cultural venues—and thereby allows more sense to be made of the provision which has already been made. It also helps to avoid the danger of looking too closely at individual types of facilities or individual activities.

Legislation in several Australian states provides a classification of recreation facilities but these are not particularly useful from a detailed planning perspective. As such, Councils and other planning agencies often develop their own. These will be found in the various planning reports prepared by Councils.

The following is a classification of recreation facilities which has been used in more than a dozen Councils and with several other agencies in New South Wales, Tasmania, Victoria and Queensland. The classification has 16 categories, but this could be reduced for example, by deleting those types of provision which it is decided will not be included (such as commercial venues and programs) or that are known to *not* exist in the area being planned for eg: rivers, lakes, bays, oceans.

It is of interest that quite a few of the categories are not primarily *recreational* facilities but rather, facilities and venues reserved for *other* purposes which also have recreational value. For instance, the “Linear and linkage” category could readily include road reserves and lanes –as these are widely used for recreational activities. Some Councils classify these separately as “public domain” areas. Similarly, car parks could be included in the “Utilities and services” category and shopping malls in the “Multi-use community” venues. The point being made here is that a broad view needs to be taken as to what is a recreation facility, program or service – because the community takes a very broad view-- as the traditional view has often been quite narrow.

It also warrants noting that it is not essential that an area or region for which the planning is being carried out has examples of *every* type of recreation venue. Some areas excel in their capacity to support certain types of venues (such as golf courses in sand belt areas and ski resorts in high mountains) and not others. This often means that fewer of the other types of venues are deemed to be needed or are able to be provided. However, it is almost certain that *the wider the mix of facility types able to support recreation and the more accurately the distribution of provision reflects the distribution of users, the greater will the recreation opportunities be for the community or communities being served.*

In applying the classification of recreation venues, each asset should be allocated to a category on the basis of its predominant *current* use. This data can then be tabulated and mapped. If more detail is required, an asset could (also) be subdivided into 3 or 4 categories if it has a mix of uses. This subdivision could also be tabulated and mapped. Further, from a recreation planning perspective, the assets should *also* be tabulated and mapped according to their *recommended future use*.

Once tabulated and mapped, the existing (and the *proposed*) provision of recreation assets can be described and evaluated in terms of:

1. How many venues there are of each type, and how the numbers compare
2. What the size range and average size of each venue type is
3. How the different types of venues are distributed across the study area
4. A SWOT (“Strengths, Weaknesses, Opportunities, Threats”) analysis of the findings

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## Facility Category and Description

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### 1. Parks

These are informal sites which have had their physical character and/or vegetation modified to a lesser or greater extent in order to support community recreation, community development and well-being uses. They provide ornamental gardens, play facilities, community gardens, informal lawns for picnics and relaxing and other similar unstructured activities

### 2. Landscape and Amenity

These resources are reserved primarily because of their attractiveness, to protect the character of an area and to provide a buffer between different types of land use. They include eg: irregularly shaped, wooded sites adjoining residential and industrial areas, ridge lines, river flats and planted section of road reserves. From a recreation perspective, depending on size, they support walking, conservation and educational activities, and creative arts

### 3. Conservation

Such sites serve to protect and enhance natural resources. These resources can support a wide diversity of non-competitive, active or intellectually-focused leisure pursuits *Examples:* National /State /local conservation parks; wetlands; coastal reserves.

### 4. Heritage

Such sites serve to protect and enhance Aboriginal and Torres Strait Islander and post-European settlement resources. They include camp sites, artefact fields, fishing structures, buildings, fences, bridges, historic gardens, botanic gardens, streetscapes, townscapes, and building curtilages. These resources can support a wide diversity of non-competitive, social, active or intellectually-focused leisure pursuits

### 5. Linear and Linkage

These venues range from small pathways linking residential streets in urban areas through to municipal and regional trails. They include court head path links, urban and bushland trails, State and national walks, water and fauna/flora corridors. They are used for walking, cycling and nature study activities as well as serving as drainage serves and corridors for animal and bird movement

### 6. Outdoor Sport

These venues usually support team sports. They are also used for sports practice, carnivals and fairs, and emergency meeting points. They frequently have indoor halls, club and social facilities, play equipment, BMX, skate and walking/cycle tracks associated with them

### 7. River, Lakes and Bays/Oceans

These venues support a range of recreational activities including swimming, fishing, a variety of boating activities, and conservation/nature study activities. Many rivers, lakes, bays and oceans also support other important activities such as flood management, aquaculture and transport

### 8. Indoor Sport

These are built facilities which cater for indoor sporting competition and include stadia, halls, ice rinks, bowling alleys

### 9. Indoor Cultural

Indoor cultural venues include galleries, libraries, educational, and heritage buildings

### 10. Outdoor Cultural

Outdoor cultural venues include sound shells, town squares, showgrounds, community gardens,

### 11. Entertainment

These spaces include indoor and outdoor picture and live theatres, performance spaces, halls, restaurants, casinos, nightclubs, hotels

### 12. Indoor Health and Fitness

Indoor health and fitness venues provide gymnasium and spaces for a range of activities including aerobics, fitness testing, health programs, squash, aquatics. They also generally provide meeting, social, creche and cafe facilities

### 13. Multi-use Community

Multi-use community venues offer indoor spaces for learning programs, health and awareness activities, crafts, computer skill development and other activities which reflect the assessed needs of the local and district communities. Community centres and neighbourhood houses are typical multi-use community venues

### 14. Utilities and Services

These sites include water and irrigation reservoirs; road, pipe-and powerline reserves; Council depots; sewerage treatment pondages, airports and flight lines for airports. The recreational uses made of these sites include linear trails, model or full size aircraft flying areas, bird observing/conservation and boating

### 15. Undeveloped

These sites are zoned for recreation to protect their assets or to meet future community needs. Undeveloped land may include greenfield sites in rural areas, in proposed/new residential areas, abandoned sites (eg: former industrial/mining land) or land in urban renewal areas. Research will be required to determine the most appropriate future use(s) of these sites

### 16. Proposed

This is land which it is *proposed* be zoned or acquired for recreation purposes to protect it or adjoining uses or to meet assessed community needs once development of an area proceeds

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Table 6.1: A classification of recreation facilities

5. What obvious gaps in provision are evident overall and on a locality basis, and
6. What the possible implications of 1. – 5. might be to future needs and provision.

A SWOT analysis proceeds by listing down all of the **strengths, weaknesses, opportunities, threats** which can be identified from the data which has been collected and the conclusions may then be added to the research findings or tested through the consultations process before some elements are included.

Some of the issues which might be considered in the strengths *and* weaknesses sections of a SWOT analysis of a recreation venue are:

SWOT analyses are an old but still valuable review tool. These can be usefully carried out on a site-by-site, district or whole planning area basis. SWOT analyses can be somewhat subjective but are still useful and are most productive when carried out by a group.

**Size:** whether the facility or site is big...or too small to support effective use or allow expansion

**Location:** whether a facility is or is not readily accessible

**Ownership:** if a venue is owned by a body other than Council, this could create an immediate constraint on a Council's ability to manage or program its use

**Facilities provided:** if a venue has only playing fields but no facilities to service them or no facilities to attract visits by friends or supporters, this will clearly be a weakness re that venue

**Utilities available:** are there toilets, disabled change facilities, drinking taps, bins, security or flood lighting. The presence or absence of these support facilities can be major strengths or weaknesses

**Use diversity:** a venue that only supports one form of use has a considerable weakness compared with one that supports activities across a wide range of age group and activity types

**Management:** is there a good and effective management structure in place? If so, that is a strength. If there is no management process for a venue it is a weakness as this means there is no one there to promote or program it effectively

**The quality/skills /resources of the users/ clubs/ competition.** If user clubs are struggling to get members or to pay for lease fees and equipment this could be seen as a significant weakness as it a threat to the continuing contribution of the resources being used to community recreation opportunities

**Standards of maintenance:** highly developed, quality venues will attract more use

**Fees for use:** venues with comparatively low fees will be more accessible than those with high fees or exclusive memberships

**Safety:** tree roots, broken glass, a lack of fencing in key areas are weaknesses as they all reduce safety. By comparison, warning signs, high maintenance standards and good fencing are strengths as they enhance safety, and

**Lighting:** good lighting and floodlighting will allow safe use over long hours compared to venues with little or no lighting.

With regard to *opportunities*, every *weakness* should be used as a guide to an *opportunity* in order to overcome or negate the weakness—as should every *threat*. As a simple example, if there are management and quality/skill/resources weaknesses (from the strengths and weaknesses listing), there is clearly an opportunity to take action to upgrade these areas. Similarly, a lack of taps and toilets creates an opportunity to enhance the venue through their provision.

Common *threats* identified at recreation venues include:

- Loss of users due to poor maintenance
- Competitors, especially if they have newer, more attractive facilities
- Changing community interests
- A lack of funds to undertake the works needed to overcome weaknesses or take action on important opportunities, and
- Impacts of surrounding land uses which might, for instance, lead to restricted use hours.

As with all stages of the recreation planning process where complex data are being reviewed and evaluated, care must be taken with the evaluation of inventory data. A high level of provision for one group of activities might mean that those activities are very popular: but it might equally mean that a few influential people were

able to push provision for them to the detriment of other activities. In the past, the mistake was often made of providing "more of the same" for what appeared to be most popular activities. This may be needed but equally, it can generate inequity rather than improved opportunities. Care must be taken to ensure that what is provided reflects community interests and needs, can be sustained from an operational perspective (ie: that it does not unduly stretch the provider's resources), and should add to the diversity of opportunities without "overdoing" it.

In some instances, a set of inventory data can be interpreted several ways. Where this arises it is best initially to outline the alternatives. These can then be tested and a course of action can be agreed on which will best meet community needs, be viable and achieve the philosophical goals and objectives of the providing agency.

## 6.8 Program and service inventories

Inventories of leisure and recreation programs and services are often equally if not more important than facilities inventories. This is particularly so if a data base is to be used by the community to find out about for example, what activities are available, when and where they are available and at what cost.

The types of information to be included in an inventory of leisure and recreation programs and services are:

- The activity or service eg: basketball, youth groups, theatre programs, community transport, support grants
- Who/which organisations the activity or service is provided by and what their contact details are
- The address(es) at which the activity/service is provided
- The specific times of the day, week, year when the activity/service is provided
- The standard of the activity or service and any preconditions or requirements for participation eg: medical certificates, affiliations
- Fees, if any, for use and fee schedules, concessions
- Whether the activity/service or provider is accredited
- Any equipment needs, and
- Other information which may be of use or interest to those using the data base.

## 6.9 Preparing an inventory

A number of steps need to be followed in preparing an inventory. These can be expected to include at least the following steps and require the number of days indicated to implement:

1. Define the uses to which the inventory will be put and the form(s) in which it needs to be produced by liaising within the initiating department/agency and with other relevant departments and agencies. Allow 5 days
2. Define the scope that the inventory needs to cover in the light of 1. ie: whether it will cover facilities alone, programs/ activities and/or services and whether it will include non-Council/agency provision. Allow 4 days
3. Define the array of information to be collected on each item to be covered in the light of 1. Allow 2 days
4. Liaise with other officers/agencies to determine what data covering 1. – 3. already exist; if data does exist, what form it is in; if it is an inappropriate form, if and to what extent it can be modified, and if it is in an *appropriate* form, if and how it can be added to and how it can be accessed. Allow 2 days
5. If no existing data or data base exists, determine the capacity of the organisation to acquire the software, hardware and professional expertise needed to create a data base or to employ an external agency that has these skills. Allow 4 days
5. Devise a proforma or other strategy for collecting the required information, field test it and refine it as needed. Allow 3 days
6. Employ and/or train staff to collect the required data in an accurate, consistent form. Allow 2 days
7. Devise and disseminate a mechanism and responsibilities for accurately updating the data base. 1 day
8. Prepare initial products from the data base and circulate these to all relevant parties/ agencies/others for review and comment regarding usefulness, changes needed to enhance usefulness. 3 days

9. Devise a mechanism for monitoring the collection and compilation of inventory data, its updating and the way(s) in which it is released and used. Respond to the findings with revised training and guidance as needed. 3 days
10. Monitor the use which is made of the inventory products by those in 1. for whom it was devised; as appropriate, modify the products in the light of the findings or in the light of identifying additional users. On-going
11. Develop a format for reporting on the findings of the inventory and for highlighting the implications of the findings to on-going recreation and leisure planning and other forms of planning as deemed appropriate. On-going

## 6.10 Types of data bases

With the advent of computers, the data bases used for recreation and leisure inventories have become far more sophisticated and far more powerful. Modern geographic information systems (GIS) now allow a vast array of data to be recorded about each site and activity and for that information to be linked to a range of mapping and other analytical tools. Modern data bases are relational in that a number of different data base components can be linked to one another. For example, a data base of facilities can be linked to the programs data base so users of one or the other can review the attributes and /or location of various program and service providers before selecting the venue and group which best meets their needs.

That said, in smaller organisations a complex GIS may be both beyond the financial capacity of the body in terms of each of the hardware, the software and the skilled technicians needed to operate these. Instead, these organisations may need to resort to a simple card system or preferably a system which uses a straight-forward lap top program –which can still be quite powerful and meet all the needs of the organisation. Excel and Filemaker are two such systems.

## 6.11 Hierarchies of facilities

The hierarchical position of a recreation venue is often overlooked as a planning issue and planning tool. However, allocating each asset to a position in a hierarchy is an important planning strategy because, as with the *classification* of assets, it helps with the assessment of what already exists and particularly, of its capacity to meet various types of need in the community. For instance, if the majority of sporting venues were classified as *local*, this could well mean that clubs would have difficulty competing at higher standards and/or that they may have to travel away to gain higher standards of competition.

As with the *classification* of recreation venues, a variety of hierarchical classifications have been developed by different agencies. There are no agreed or mandatory categories and many of the terms used –such as “local”, “neighbourhood”, “district” and “regional”—do not have universally agreed definitions of the areas covered and frequently overlap each other.

Further, different agencies may use the same words to mean different things and it is not uncommon for different officers in different organisations to make different interpretations of the terms in the one study. As such, it is essential that the categories used are clearly defined and agreed on and that the categories which individual sites are allocated to are also agreed on.

The following categorisation has been used in a variety of recreation planning studies over recent years and seeks to provide readily understood categories:

1. Local
2. Sub-municipal
3. Municipal
4. Regional
5. State, and
6. National/international.

Each level is defined in the following paragraphs and has been derived from the hierarchy developed by the author of this text and Inspiring Place Pty Ltd. and presented in the City of Greater Bendigo study, *Open Space Strategy, 2004 Volume 2*.

### **Local recreation venues**

Local recreation venues predominantly or totally serve small rural localities, small townships, and neighbourhoods or suburbs within the urban areas of one Council. They are classified as local because:

They are generally small in size and thus have little or no capacity to serve a large section of a Council area, a whole Council or a region

They provide opportunities which are similar to those available at a number of other locations and thus do not attract people from far away *and do not need to serve people from far away*

Their natural or built features are unremarkable and as a result, they do not draw users from a wide area, and

They have been designed and sited in a way which ensures good access from nearby areas and possibly, *discourages* access and use from more distant areas.

Playgrounds, ball sport kick about areas, small ornamental reserves of less than 1 ha., neighbourhood pathways and local halls are common local recreation venues.

### **Sub-municipal recreation venues**

Sub-municipal recreation venues serve substantial and often geographically-defined sections of, but not the whole of, a Council community. They usually have one or more of the following features:

They are generally larger than local venues, but are usually too small to meet all the needs of the community living in one Council

They provide more specialised uses and therefore need to serve larger areas to be viable

Their natural or built features are unremarkable and as a result, they do not draw users from a wide area

They are relatively isolated from other similar venues, and

They are less frequently provided due, generally, to greater land requirements to achieve viability, higher provision costs and for some types of opportunity, the size of catchment needed to ensure viability.

Single or dual field sports grounds, larger playgrounds, linear trails, community halls, neighbourhood houses, branch libraries, swimming pools, informal parks and bushland reserves are common *sub-municipal* recreation venues.

### **Council-wide recreation venues**

Council-wide recreation venues are designed to serve the total community living in a Council area. They are classified as *Council-wide* because:

They are used by individuals, groups or teams which are drawn from across the whole municipality

They are provided by a Council or other bodies for the residents of one Council. Other Councils provide their own venues for their residents

They are often the only venue of their type in the municipality

Their natural or built features are sufficiently significant or unique to draw users from across a whole Council

The size of the land requirements, the higher cost of provision and, for some types of use, the size of catchment needed to ensure viability, mean that no more than one or two of these venues can be provided by a Council, and

They have been sited so as to be accessible to the whole Council community.

Council-wide recreation venues may include sports more elite grounds, City/town centre reserves, botanic gardens, walking/cycling trails, indoor aquatic leisure centres, galleries, land which is also used for airport and sewerage works, and undeveloped reserves retained to meet future Council-wide needs.

### **Regional recreation venues**

Regional recreation venues serve the needs of the residents of a number of Councils. They are classified as regional for one or more of the following reasons:

They are larger than other facilities of the same type and can accommodate a far larger number of visitors than Council-only venues

They need a substantial market population or service area to remain viable and they need to draw that market from the Council in which they are located *and* its surrounding region

The Council in which they are based generally has greater drawing power or is more centrally located/ accessible than other Councils in the area

Their natural or built features are so outstanding, they draw users from a wide area

They support either a wide mix of uses or high specialisation of use or attract use through both specialisation *and* a mix of support venues

They are generally of higher quality than venues which are lower in the hierarchy

They are generally costly to provide and/or maintain

They are often unique to a region

They may have environmental, heritage, amenity or other special significance, and

There is a low frequency of provision or natural occurrence.

Regional recreation venues frequently include elite level golf courses, major sports grounds, major indoor aquatic leisure venues, libraries, galleries, performance centres, long distance trails, and various types of heritage and nature reserves eg: historic buildings and/or archaeological sites, forests, lakes, rivers, wetlands, and waterfalls.

### **State recreation venues**

*State* recreation venues have characteristics similar to regional venues but serve a whole State because their characteristics are generally considered to be even more marked or significant than those of the regional venues. State level recreation venues generally occur in a particular part of the State because:

A Council, the government or some other body has determined that that is the best or politically most astute location

That location has the largest population and the venue needs this and the wider markets it attracts to be viable

The natural or built features and quality of the venue are of such a high standard that they are seen as the best in the State, and

The type of venue is rare and one particular site is one of the few occurrences or the best of that type of resource in the State.

State level recreation venues include major galleries and theatres, museums, major sports grounds/complexes, significant protected forests, sporting venues, and heritage sites.

### **National and international recreation venues**

*National* and *international* recreation venues have characteristics similar to State and regional venues but serve the whole country and often attract interstate and overseas visitors and or uses. This is because they are unique or because their quality and other characteristics are generally considered to be more marked or significant than those of State and regional venues.

*National* and *international* recreation venues include major sporting venues, theatres, casinos, features such as Victoria's National Gallery and Great Ocean Road, the Adelaide Festival Centre, Wet n' Wild on the Gold Coast, Hobart's MONA gallery, Sydney's Harbour Bridge, and natural features such as Kakadu National Park, the Great Barrier Reef, Uluru, Kangaroo Island, Sydney Harbour, Lake Eyre and Mt Kosciusko.

Several further important points warrant noting in relation to hierarchies of recreation venues:

1. Sites should be classified by both their *existing* and their *intended* position in the hierarchy, not by their present position alone. Recording the current classification (if there is one) helps to identify any *existing* provision shortfalls or inequities. However, determining the *intended* hierarchical position provides the basis for planning and development initiatives which generate changes in management, resourcing, use or other processes at venues which presently do not match their intended position
2. It is not essential that each local area, Council or region has venues at each hierarchical category for each type of facility. That said, a good mix of each type at a range of hierarchical level means that there will be greater diversity and greater equity of opportunity across the community. The wider the mix, the greater the opportunities provided. Seeking to achieve this diversity offers the planner the opportunity to be more creative and innovative
3. Provision of a 'nested' hierarchy of recreation venues warrants consideration. This is where facilities at several different hierarchical levels are provided on the one site. This is often an appropriate way of meeting a range of recreation needs and can help to ensure that local needs are not swamped by regional demands and users. Examples include be a small informal kickabout area in a reserve which also offers a formal sports oval, a small local playground in a corner of a larger reserve which also has a regional, access for all playground, a small parkland cafe adjoining a street strip of restaurants, and an internal local bike trail connected to a regional trail passing through a district park

4. A recreation venue should not be given a higher hierarchical position than is justified as a result of user pressure or the desire to be seen as having, for example, "regional" facilities for a particular activity. This can lead to over-development/ investment at an inappropriate site and a demand for maintenance expenditures beyond those which are can be justified or sustained
5. In keeping with 4., agencies which own and/or manage recreation venues *should not allow users* to determine where each venue fits into the hierarchy as this can lead to overdevelopment or inappropriate use and the misuse of resources. Adopting a hierarchical framework allows planning and management bodies to "direct" or specify the outcomes they want to achieve for particular sites and for the region as a whole *within the context of wider needs and issues*. It also allows them to develop a balanced diversity of opportunity types and to achieve a balanced spatial distribution of different types of venues
6. Designating where in a hierarchy each resource fits allows planners and managers to counter demands for action at venues which it is known are not appropriate for development (due eg: to size, location, number already available) and to encourage and support action at other more appropriate sites
7. By being clear as to the purpose of each recreation venue, a managing agency can more carefully "target" how it allocates support resources and can more efficiently and effectively direct, control and schedule use. This allows works to better reflect assessed community needs, delivers certainty to users, and enhances the capacity to attract funding and support from external agencies
8. All recreation venues should be classified, not just those which are considered to be 'higher' order assets
9. If the recreation venues being included in a planning study are the responsibility of a number of different agencies, efforts should be made to have all parties agree to the hierarchical classification to be used. If the classification is not intended to be used by all agencies, efforts should be made to include it on all data bases so that comparable data can be drawn from them and so that each agency understands the role designated for the various resources which are available, and
10. Every effort must be made to avoid the influence of political processes on provision or provision made as a result of pressure from narrow interest groups. Unfortunately, there are numerous facilities around Australia which have come into being through the will and push of one or two people, through the decision of a particular political group, or as the result of a particular financial commitment. These facilities are frequently not in the best location to ensure viability and only survive where there is a continuing political will and financial support which is often to the detriment of other more important priorities.

As with the classification of recreation venues by type, once a hierarchy has been tabulated and mapped, the existing provision of recreation assets can be described and evaluated in terms of:

1. How many venues there are of each hierarchical level *and by type*, and how the numbers compare
2. How the different hierarchies of each type of venue are distributed across the study area, and
3. What the possible implications of 1. – 2. might be to future needs, redevelopment and provision.

Comparisons (or "benchmarking") of the classification and hierarchical data for one Council versus others (and especially those with a good reputation for what has been achieved) or sections of the one Council can be informative and is worthy of consideration.

## 6.12 Other recreation facility classifications

The classification and hierarchy of recreation venues outlined above is only one of a number of classifications currently in use both across Australia and internationally. In some instances, alternate classifications can be just as useful or, if they are written into legislative planning documents, may *need* to be used. Several alternatives are reviewed below.

### 6.12.1 The Recreation Opportunity Spectrum

The Recreation Opportunity Spectrum is a classification which was developed in the US during the 1970s but which has been widely used in Australia, especially in the planning of natural areas<sup>7</sup>. Rather than being a

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<sup>7</sup> For a comprehensive review of recreation planning frameworks for natural areas see Stephen F. McCool, Roger N. Clark and George H. Stankey, 2007: *An Assessment of Frameworks Useful for Public Land recreation Planning*, General Technical

classification of different *types* of recreation facilities, the Recreation Opportunity Spectrum grew out of an initial desire on the part of North American wilderness managers to protect the natural environment from development and focused on providing *opportunities* for a variety of positive, beneficial recreation experiences. This was done by identifying and planning for an array of different “settings” or environments which have differing levels of management and of social interaction. The philosophical basis of the Recreation Opportunity Spectrum is that the wider the array of settings, management inputs and opportunities for social interaction, the greater will be the opportunities for people to meet their recreational needs and to gain positive experiences.

The spectrum of settings defined by the Recreation Opportunity Spectrum ranged from “Primitive” to “Semi-primitive”, “Semi-modern” and “Modern”. In the “Primitive” setting, natural conditions dominate and there are for instance, no roads, huts, toilets, camps or trails. There are also low or no management inputs *on-site*, although there were to be strong management controls over the number of users and the activities pursued. Use is controlled so that there is low or no social contact. By comparison, the “Modern” setting consisted of human-made, built facilities with strong on-site management inputs and high levels of social interaction with others.

The Recreation Opportunity Spectrum has been widely used in Australia and almost exclusively for the planning of natural areas. There has been little if any application to “Modern”, urban settings. In applying the Recreation Opportunity Spectrum, the land for which a plan is being prepared is divided into zones to create areas with different levels of access, isolation and servicing, the intent being to deliver a range of wilderness and semi-wilderness experiences. Detailed site and locality management plans were then prepared for each zone.

The value of the Recreation Opportunity Spectrum lies in its focus on creating the conditions which generate recreation experiences and provide recreation benefits rather than just being a classification of different types of physical facilities. As such, it can be a useful tool in the planning and management of natural areas (for further details, see Stankey, George H., McCool, Stephen F., Clark, Roger N. and Brown, Perry J., 1999 in bibliography). That said, a weakness with the classification process is that it assumes that different settings will deliver different types of experiences. While this will be partially true, the experience which one person gains from a particular setting may be quite different to that of another person, simply because of, for example, their differing personal make-ups, differences in their past experiences and differences of education. As such, the allocation of Recreation Opportunity Spectrum categories to recreation resources should not be used in isolation and should be backed by information on the needs, interests and aspirations of the community.

The Recreation Opportunity Spectrum and other natural area planning strategies are discussed in further detail in Chapter 11.

### 6.12.2 Primary function, catchments, settings and settlements

Melbourne-based recreation planning company, @leisure, has developed an approach to the assessment and planning of recreation resources which combines elements of the classification and hierarchy outlined in sections 6.5 and 6.6 and the Recreation Opportunity Spectrum. This entails classifying open space and its facilities by, and identifying provision needs on the basis of, four characteristics. These are *primary function*, *catchment*, *setting*, and *settlement type*.<sup>8</sup> The model does not include built recreation facilities.

A comparison of the following list with Table 6.6 shows that the *primary function* category for a recreation venue as used by @leisure and the *venue* types in the Table (as detailed in section 6.5) are very similar, albeit with a few variations. However, the philosophy behind the primary function categories is somewhat different in that they aim to encapsulate the major benefits sought by people from open space, these being child development, physical exercise, contact with nature, social engagement or belonging, as well as utilitarian functions of spaces such as drainage and buffers. The *primary function* categories are:

- Play
- Social/family recreation
- Community horticulture (community garden or farm)
- Cemetery/memorial
- Ornamental/botanic garden
- Access way/trail
- Sport
- Flora/fauna conservation
- Conservation of cultural heritage
- Drainage
- Visual amenity

Relaxation/contemplation/escape

Buffer eg: around industry, or environmental hazard

Lookout/ridgeline

Water based recreation

Community centre/ forecourt, and

Wayside stop (generally in regional townships or along a highway).

In keeping with the methodology recommended in section 6.5, @leisure recommend that recreation providers seek to provide a good mix of these different *primary function* categories. @leisure also recommends that where numerous spaces in one area are found to be much the same, a conscious decision can be made to change the function of some so as to extend the range of opportunities available. Each type of space will have some essential characteristics. Some types, for example, should be provided in or in close proximity to new residential areas (eg social/family recreation), whilst others do not need to be (eg: cemetery or way side stop). Still others will only be provided if the physical features are present (lookout/ ridgeline reserve). Further, the classification recognises that some spaces are needed for non-leisure purposes, such as drainage, power easements, but that they can be used for leisure purposes as well.

By determining what spaces are needed to meet “primary” recreational needs in new residential areas and by defining the physical locational and other criteria essential for their success, it is possible to identify where there are gaps in provision and where, as a result, a case can be put for more or different provision.

The @leisure approach also identifies which of the categories can be funded from different sources. For instance, local play facilities might be funded from developer contributions, district sports grounds from Council resources, and conservation and heritage, drainage reserves and water-based recreation from State government or other agency programs. This information is designed to assist Councils in achieving a higher diversity of opportunities than might otherwise have been possible.

The concept of *catchments* used by @leisure is essentially the same concept as the *hierarchies* of provision discussed in 6.6. In fact, the categories recommended are very similar: *Local, Township or District and Regional*. As discussed in 6.5 and 6.6, the @leisure approach recommends that providers seek to offer a variety of primary function recreation resources at each catchment level.

*Landscape setting types* make up the third component of the @leisure categorisation. These reflect the experiential focus of the Recreation Opportunity Spectrum or the “form”, rather than the function of the space. Common setting types used are:

Bushland/forest

Ornamental or specimen plantings

Open grassy area

Native grassland/wetland

Lawn or managed sports turf

Open parkland

Specialist sports structures

Waterway corridor

Fore dune/beach

Rough natural area

Paved area

Tree plantation, and

Vegetable garden/pasture/agriculture.

These settings are used as a guide to different ways of enhancing the leisure experience and of achieving greater diversity in the mix of opportunities offered to the community. For example, when recommending Play venues, @leisure will recommend that different play venues be provided in different landscape setting types to strengthen the diversity of experiences offered. Different scales of play provision may also be offered at the different catchment levels to again ensure diversity of user experiences.

In their planning study reports, @leisure use the three-part classification outlined above as a basis for recommendations for the provision and upgrading of “core service levels” at each catchment level. To illustrate, at the *Local* level, @leisure may recommend a focus on Social/family recreation, Access way trails and Play. These venues will be on sites which are relatively small but *which have specified minimum sizes*, and they will be provided in different types of settings. At the *Township or District* level, the “core service levels” may well include some of the Local facilities (although at a larger scale *and with recommended support services which*

would not be provided at the local level) as well as sports grounds, water-based facilities and community horticulture facilities, again at specified service or provision levels (eg: for sports, land sufficient to accommodate two sports grounds). These service provision levels are very similar to those detailed in Chapter 9 of this report.

The fourth element of @leisure's typology is the consideration of *settlement* type or scale. This refers to the nature of the residential area to be serviced. Settlement types are largely based on the size of private space and the density of urban settlement ie: whether it is a rural area, a small village or hamlet, a small town or a dense metropolitan area. The rationale for this element is that the model for the provision of open space and venues needs to be different in each. In a rural hamlet, for example, open space venues would generally be clustered in one hub, rather than being dispersed as local open spaces may be in an urban area. Also, the range of functions and settings needed and provided in public space in a rural hamlet is likely to be less extensive than in an urban area, as more opportunities are likely to be available in private spaces and facilities – particularly where there are large private, farm areas and the more rural the context. This aspect of the typology embraces another principle of the Recreation Opportunity Spectrum.

The @leisure approach to the classification of recreation venues and their development brings together a number of useful elements and provides a strong foundation for decisions on future and additional provision. In particular, the experiential concepts embodied in the Recreation Opportunity Spectrum are brought into the process in a far more detailed way while the planning and future provision implications of the analysis are also highlighted. Looked at from another perspective, it is quite complex, has a somewhat odd mix of *primary function* categories, generates a classification with literally dozens and dozens of different open space types and overlooks built facilities. These shortcomings have led to some difficulties for inexperienced users in applying the model.

### 6.13 Conclusions

Inventories of recreation assets and the various classifications of the venues and data on programs, activities and services and their providers are invaluable planning tools. They provide an understanding of the mix of existing opportunities, the levels of use they do or can support and their distribution. They also provide a basis for decisions on changed or additional provision and for changes in the role the facilities and venues fulfil. By benchmarking the provision either against another provider or within the area being planned for, guidance is provided as to the extent of changes that might be needed.

It should be remembered that the findings of an inventory of provision must be assessed against the characteristics of the population to be served by the plan and against the needs of that population. *It must be remembered that inventories can be a summary of inappropriate and outdated provision and not a guide to what the community likes to use.* Even inappropriate recreation facilities can attract some use if there are no alternatives. As such, while they constitute an important input to a recreation planning study, inventories should not be used in isolation from other planning tools, and especially, community consultations.

Finally, it warrants noting that *creating an inventory of recreation opportunities does not create a recreation plan.* although it will clearly provide some invaluable information about what exists and possible gaps if the inventory data is tabulated, described and evaluated. Inventories are just one of the data sources or tools used in the preparation of a plan. They can be costly and very time consuming to prepare and planners must avoid spending too much time on them if the data that exists is poor or lacking. When preparing an inventory as part of a planning process, a useful question to ask of the inventory as a whole and of each inventory item being considered is "How will this information help advance the planning process and outcomes?". If a clear answer is not forthcoming, review the need for the information or exclude the item: it can always be added later. More critical than having a rigorous complete inventory is a *useful* analysis of the *implications* of the information, as has been demonstrated in this Chapter.

### Appendix:

#### Doing It: Devising and Applying an Inventory

Use the material in this chapter to devise an inventory form/format that can be applied to urban parks and sporting fields. Ensure that provision is made for information on both a venue *hierarchy* and *classification*.

Visit three different sites and conduct an inventory of those sites, preparing detailed record sheets for each one.

Prepare a brief discussion paper that explains what was included and left out of the inventory and why, and what could be changed or added in future to improve the inventory format in the light of the site assessments.

Prepare a brief discussion of how the implementation of a recreation venues inventory in a Council with 300 sites might be managed and how the data that is collected might be stored and made available. Outline who the inventory data could or should be made available to and how the format of the material might be varied as a result.

## Factors impacting on leisure interests & trends

### 7.1 Introduction

Many things impact on the recreation and leisure interests, activities and needs of a community. These need to be understood if the planning process is to lead to the most effective provision of recreation opportunities. In essence, there are four broad categories of factors, these being:

1. The environment and natural resources of the area being planned
2. The demographic characteristics of the society being planned for
3. Social, community and economic trends in the community, and
4. The development of professional skills in the leisure and recreation industries.

In preparing a recreation plan, the planner must collect, summarise and evaluate the possible influences of each of these sets of factors on the demand for particular types of recreation. The planner should also use the information to make a preliminary assessment of issues such as the likely viability of any provision that is made, the scale of provision and the provision location. This analysis may also provide a valuable insight on issues such as funding, pricing, programming and management.

This Chapter reviews each of the influences listed above before some of the changes in recreation and leisure activity they have generated are outlined.

### 7.2 The environment

The natural environment provides a resource base or “setting” for many recreation activities. Its influence on the activities that are pursued must not be under-estimated. Environmental conditions may suit one group of activities and not another and thus, recreational activities that might be considered appropriate for provision in one region may not be suitable in another. Conversely, an historic pattern of participation due to advantageous environment conditions may encourage provision levels well beyond what would otherwise be expected. This in turn may mean that other, wider provision is not needed.

Whether a region has rugged or flat terrain; a hot or cold climate, or a wet or dry climate has an impact on the types of activities that can and cannot be pursued. It also impacts on the types of facilities, programs and services that might need to be provided.

There are many recreation activities that require particular combinations of natural features if they are to be pursued: some of these include sailing (water bodies and wind); rockclimbing (rugged vertical relief); snow skiing (very cold weather and variable terrain); surfing; bird observing/nature study; fishing, and hang gliding.

There are still other activities that have grown and prospered because technology has been developed to overcome environmental adversity and thereby given those pursuits an advantage: competitive swimming – which at the elite level now always occurs indoors— musical performances, skiing, boating activities using man-made lakes, and ice skating are some examples.

In the light of the above, it is often useful to give consideration to the barriers or opportunities posed by environmental conditions as part of the recreation planning process. The following checklist should be reviewed at the macro scale to ensure important issues or influences are not overlooked:

- Terrain/ relief
- Lakes and rivers: storage/flows
- Winter/summer weather
- Wind
- Precipitation: form (eg: rain, snow), amount and seasonality
- Hours of daylight and seasonal variations
- Location: whether the study area is far from other providers/resources.

Other factors related to the natural environment may also warrant consideration. For instance, in some rural areas, certain times of the year are devoted to critical stages of the farming cycle –such as shearing, fruit picking, tree and vine pruning— so that participation in either recreational activities or recreation planning studies is not possible.

At the micro level a further set of environmental conditions may warrant consideration particularly if the planning is being undertaken at a level relating to the development of individual facilities and programs. Here, the issues to be considered might include some or all of:

- Geology and geological stability
- Soil types and depth
- Slope and direction of slope
- Prevailing weather
- Micro-climatic conditions eg: fog
- Flora and fauna and ecological significance, and
- Drainage and propensity to flooding.

Also at the micro planning level, consideration might need to be given to a range of other issues including the size of the site(s) being assessed (and the capacity to acquire additional land if needed); adjoining land uses (and issues such as traffic, noise, lighting at night); past land uses and land remediation; and the availability of utilities and services such as gas, water, power, and public transport. On occasions, difficulties with some of these elements have led to the abandonment of “preferred” sites and to a renewed program of research and analysis.

In preparing a recreation plan, research may need to collect a range of external materials relating to environmental conditions in the area being planned. A separate paper or report section should be written summarising what are considered to be the relevant issues and evaluating their implications to recreation provision needs and opportunities. Some elements of this assessment may usefully be cross checked through the review of existing recreation opportunities.

### 7.3 The demographic characteristics of the community

The history of a people and its cultural origins, religion, value systems and traditions is critical to understanding the social context in that recreation activities are pursued. One only has to look for example, at an Australian community and compare it with a Japanese, Italian, Indian or Indonesian community to understand the very different traditions and value systems that exist and the quite different consequences to recreation and leisure provision and needs. Similarly, a review of the changes in the “Australian” community that immigrants from a wide range of overseas countries have engendered shows a wide array of impacts.

Whether a community is large or small; homogeneous or culturally diverse; well educated and fully employed, or whether residents live in rental, apartment or stand-alone housing has a significant impact on the nature and scope of the recreation interests the community will have.

The key characteristics that need to be considered in these contexts are:

- Population size
- Population distribution
- Population age distribution
- Income
- Employment
- Cultural mix
- Type of housing
- Household make-up
- Education
- Car ownership.

Despite the obvious importance of these factors, care must be taken in evaluating their impact. They must only be viewed as *influences* on recreational interests and behaviour, **not** as *determinants*. At best, the findings of an analysis of the demographics of a community can only be used as a *guide* to a range of possible interests and needs and thence, to possible provision options --*not* as the basis for firm decisions for or against a particular initiative.

The following Table highlights some of the key demographic and cultural factors that influence recreation interests and behaviour. These should be reviewed as of the latest date for which information is availability and, wherever possible –that is, depending on time, budget and data availability—an effort should also be made to review how the characteristics have *changed over the previous one or two inter- Censual periods* (ie: over the past 5-10 years). This provides a more accurate picture of the population as broad directions of change can be identified rather than looking at the community at just one point in time.

Characteristic	Potential Impacts
Population size	The larger a population, the greater the capacity to support activities. In small and declining communities, there may well be insufficient residents to support many activities that need a significant number of members to be viable
Population distribution	In general it can be said that the higher the population density, the greater is the capacity to support recreation opportunities. If people have to travel significant distances to reach the facilities they want to use they will travel less often and transfer their interest to other substitute activities.  Rural communities are often significantly disadvantaged by travel distances and costs and have been identified as pockets of rural disadvantage. As such they may warrant provision beyond what is normally expected and for that provision to be subsidised. Otherwise, these residents may have access to few or no recreation opportunities
Population age distribution	Young populations seek active, team pursuits; older residents seek more cultural pursuits and active but non-competitive pursuits. In communities that are "young" in that they have the majority of the population in age categories below say 50 years, the mix of recreation provision that is needed is likely to be very different to that of ageing communities
Income	The wealthier an individual, a household, a community, or a nation the greater the range of recreation opportunities that can be afforded. However, income in most communities is spread across a range of categories and special consideration may need to be given to those groups in the lower income categories – especially as low income is often associated with other indicators of disadvantage including lone person and single parent households, lower education levels, lower access to private transport and lower home ownership levels.
Employment	The mix of occupations in a community can be an important influence on its recreation interests and activities. In general, people in the professional and managerial job categories tend to pursue more intellectual, skilled and small group activities while those in more blue collar occupations spend more time on large group and team activities.
Cultural mix	The cultural mix of a community has a great influence on the types of activities that are enjoyed and on what is and is not permitted to be pursued by different groups in the community. The influx of non-Anglo-Saxon communities into Australia over the past 30 years has brought a wide diversity of new interests and opportunities to the country. Where a community has a wide mix of often small cultural minorities, special support services and program provision may be needed to ensure equity of opportunity.  In traditional societies, many social and recreational activities are used to help preserve cultural and value systems; in western societies, there is far greater leeway and far greater opportunities for individual expression  Other elements of the cultural characteristics of the community that may warrant attention include: <ul style="list-style-type: none"> <li>• The mix of the countries of origin of non-Australian born residents</li> <li>• Length of residence in Australia</li> <li>• Languages spoken at home</li> </ul>
Types of housing	Stand-alone housing generally provides more space within and outside the home whereas people living in flats and apartments are more constrained. As a result, residents in their own homes can acquire and use a wider range of leisure opportunities at home. Residents in flats and apartments must frequently rely on public and commercial recreation opportunities
Household make-up	The household make-up of a community has an important influence on recreation interests and needs. An increasing proportion of Australian households are families with no children or adult children. These families often have quite different recreation interests and needs to families with children, or having no children, have greater time and financial resources to pursue their interests.  Looked at from a different perspective, an increasing proportion of Australian families have a mixed make-up with members often coming from 2- 3 originally different families. This too impacts on recreation interests, needs and opportunities
Education	The higher the education levels in a community the greater the range of activities pursued, the greater the levels of disposable income allocated to recreation and the higher the value of the items and experiences purchased

Characteristic	Potential Impacts
Car ownership	While not a true "demographic" feature, car ownership provides a good understanding of the ability of the community to access recreation opportunities. This is because even where public transport is good, the majority of the community travel by car to many recreation venues because so much recreation occurs outside the times when public transport services are at their most effective. Communities with high car ownership levels reflect a <i>need</i> to rely on personal transport that in turn highlights the barriers to access faced by those without cars: older residents, people with disabilities, low income earners, people below the legal driving age and so forth

Table 7.1: Key demographic and cultural factors that influence recreation interests and behaviour

In reviewing the demographic and cultural attributes of the community covered by the recreation planning project, it must be recognised that while a community might be dominated by one or several age, cultural, income or educational categories, there will still always be significant numbers in other categories. Hence, conclusions as to what the *predominant* target groups for provision might be must be tempered by an acknowledgement of the needs of *other* groups. In many instances, in fact, it is the minority groups in a community that are most in need of support as they have fewer resources to "fight" with, a lesser capacity to join sporting and recreation groups and far less flexibility of choice. Thus the implications of the demographic characteristics may be read in several ways. As noted previously, these differing interpretations may need to be presented so they can be debated and the most appropriate course or *courses* of action determined.

### Demographic data sources

Data on the demographics of a community can be obtained from a number of sources, the most important of that is the 5 yearly Australian Bureau of Statistics *Census of Population and Housing*. The latest national Census was undertaken in 2006 and much of the data collected is now available.

Australian Census data goes back as far as the early Twentieth century so long term analyses of change can be undertaken. Over recent years, the Bureau has prepared a number of reports that detail how various demographic parameters have changed over 2 or 3 sequential inter-Census periods.

The Census and other Bureau publications provide a wealth of detail on the Australian population, including each of the items listed in the chart above. Much of this data can now be downloaded free in both table and mapped form and at geographic levels ranging from the whole nation to individual States, Council areas, suburbs and collection districts, the latter often with no more than several hundred residents.

The Australian Bureau of Statistics Census data can be accessed at:

<http://www.abs.gov.au/>

The Bureau of Statistics also provides a range of client services and can prepare data specifically for particular projects if there is a need. See Appendix 7.1 at the end of chapter 7 for details.

In addition to the Bureau of Statistics data sources, a variety of State government agencies prepare demographic analyses for all or particular parts of the State for that they are responsible or on particular topics of concern. These often use Census data that has been reprocessed in the light of greater local knowledge or that has been updated through specially-commissioned surveys.

A number of commercial firms now prepare detailed data analyses for local government authorities in a user-friendly format. Pull down windows, maps, projections of demographic change and other relevant information is now an integral part of many Council websites. One such company is id consulting pty ltd. The company website can be reached at [www.id.com.au/home](http://www.id.com.au/home) while the email address for enquiries is [info@id.com.au](mailto:info@id.com.au)

Further data sources relating to the demographics of a community include regional economic development studies and plans (commissioned by either State or local government agencies) and University research projects.

On occasions, it can emerge that no data exist for an area being planned or that what does exist is substantially out of date. This can be the case in very new residential subdivisions or in urban renewal areas that have been developed since the previous Census. In these circumstances, it may be necessary to forego the analysis; to liaise with the developers as a means of gleaning information about the demographics of the residents, or to conduct a full or sample household survey to collect the data.

In undertaking a demographic review, a recreation planner should summarise the key features of the community as indicated by the data and draw some initial conclusions as to the possible provision implications.

The findings of an analysis of the demographics of a community can only be used as a *guide* to a range of possible interests and needs and thence, to possible provision options --*not* as the basis for firm decisions for or against a particular initiative

## 7.4 Socio-economic change and trends

Modern, western society has undergone huge change over the past 50 years. In fact, change over that period has almost certainly been greater than in the previous 500 or 1,000 years. As a result, the influences and needs of the past have often changed. Recreation planners need to be aware of these trends and be alert to the possible implications to future needs and provision.

Identifying wider trends in the factors that affect leisure participation and in recreation participation itself can also be a useful way of introducing new ideas to a community that is reluctant to change and as a means of assuring such communities that others have been through change and benefited from it.

Some of the key changes that have impacted on recreation opportunities and participation are:

Burgeoning economic development and enhanced personal and national affluence (although there are pockets of depression)

Population growth and in many parts of the country, ageing

The emergence of a multi-cultural society with literally millions of Australians now having non-Anglo Saxon and non-English speaking backgrounds

The growth of commercial recreation provision across all forms of activity and interest

The relaxation of traditional social and cultural taboos that have allowed people to participate in new recreation activities and at times that were previously not permitted

Changing work, social and family structures: these have entailed longer work hours, extensive shift working, the breakdown of the weekday/weekend dichotomy, and families made up of members from a number of marriages, extended families and the like

Technology and the creation of new, different, more accessible and more affordable leisure opportunities

The global accessibility of technology and information. Modern travel and technology mean that new overseas ideas and activities quickly become available in Australia

A greater focus on equity and access for all, including Federal legislation to protect the rights of disabled groups

The expansion of education, the consequent growth in incomes and the greater awareness of and capacity to acquire recreation opportunities

Growing population concentrations and higher residential densities, and

The recognition of the links between recreational activity and health and well-being.

While the majority of these changes have been positive in their impacts, changing work structures have dramatically impacted on volunteering and club activities. Further, significant pockets of disadvantage have emerged, particularly amongst newly-arrived immigrant groups, the aged, and residents in more remote rural communities that are progressively losing population and suffering the impacts of continuing drought.

A recent report prepared by the Commonwealth Scientific and Industrial Research Organisation (CSIRO) for the Australian Sports Commission identified six 'megatrends', which are likely to shape the Australian sports sector in the future. Some of the key identified trends and the implications to motor sports and Ballarat are summarised in italics below <sup>9</sup>:

*Changing lifestyles are impacting on participation in sport; individualised sport and fitness activities such as aerobics, running, walking, along with gym membership are on the rise at the expense of participation in organised sport, which has been held constant or declined. People are fitting sport into their increasingly busy and time-fragmented lifestyles to achieve personal health objectives*

*Lifestyle, adventure and alternative sports with some element of danger and/or thrill seeking are increasingly popular among youth. BMX cycling, for eg: has been included as a sport at the Olympics, and other such sports including skate-boarding and rockclimbing may also be included in the future.*

*An ageing population and cultural change, with more migrants now residing in Australia, is leading to shifts in demand for certain activities.*

*Increasing affluence of Asian nations will contribute to growing interest in sport. Thus, Australians may need to train harder to compete at international events and work harder to retain those it has. This trend will create opportunities for businesses and*

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<sup>9</sup> CSIRO Futures (2013). The Future of Australian Sport. Megatrends shaping the sports sector over coming decades, Australian Government, Australian Sports Commission.

investment with new markets for sports television, sports tourism, sports equipment, sport services and sports events

Market pressures and new business models are increasingly contributing to the 'corporatisation' of sport. Loosely run community sport associations may be replaced by more organized and corporatized governance structures. The upshot of some of these changes is rising costs of participation which creates a barrier for some to participate in sport.

The broad socio-economic changes outlined above need to be reviewed and, as deemed appropriate, added to in any recreation planning study. The possible implications to recreation provision, programming and management in the planning area should also be identified and discussed. Where there is uncertainty regarding the nature, extent and impacts of the changes, the listing can be used as an input to the consultations processes and participants can be asked which of the changes they have identified locally, how important they have been, what their impacts have been on recreation opportunities and what responses may be needed to ensure that the outcomes of the changes are *beneficial* rather than *detrimental* to the community.

## 7.5 The changing leisure and recreation professions

An important element that has impacted on leisure and recreation provision (and hence, on participation) over the past 35 years has been the emergence of a strong body of professional recreation planners, teachers, and researchers.

Forty-five years ago there were no State or federal government departments or agencies with a direct responsibility for recreation planning and provision; there were no training courses for recreation, leisure and tourism professionals; there were no recreation officers or recreation planners in local Councils, and no recreation planning; there were no data collection programs such as those now regularly undertaken by the Bureau of Statistics, and no needs assessment or other research was being carried out. Public recreation provision was large guided by open space standards (which directed that 4 hectares of open space be provided for every 1,000 residents), by the efforts of individual clubs or by initiatives undertaken by benevolent or self-interested individuals or groups.

Major initiatives occurred in all the above areas from the early 1970s with the outcome being that Australia now has a highly educated group of recreation, leisure, cultural and tourism professionals working at all levels of government; a number of strong teaching and research institutes, and a detailed knowledge of the leisure influences, interests, and activities of Australians. There has also been extensive research into, and action on, the impact of recreation on the environment; into how to effectively plan to meet the recreational needs and interests of the community and of particular sub-groups within it, and into the economic, health and social benefits of recreational participation. In most states there are now legislative progresses which guarantee the provision of open space and national park resources for the community.

Not surprisingly, the professional changes noted above have had a far reaching impact on the nature and quality of the recreation facilities, programs and services provided in the community and on the funding of provision. These changes have greatly enhanced the quality and diversity of the opportunities that are available. At the same time, cultural change within the Australian community has driven far-reaching changes in many areas of recreation including, in particular, all sections of the arts, and the provision of commercial recreation opportunities including restaurants, hotels, travel, music, the wider arts and the development of a wide range of home based and personal use facilities and equipment.

## 7.6 Trends in recreation participation

Not surprisingly, the range of issues, characteristics and changes outlined above has had extensive outcomes in terms of recreational interests and activities.

The following text is taken from a recent report prepared by the author as part of a strategic plan for the future development of aquatic recreation facilities in the Shire of Yarra Ranges in Victoria. The text begins by listing an array of the impacts of socio-economic changes that have been identified in Victoria. It is then followed by a number of general leisure provision trends and a group of more specific *aquatic* leisure provision trends.

### ***"The Impact of Broad Social Trends***

*The broad social, economic and attitudinal changes occurring in society have led to the following changes in community leisure behaviour:*

*A trend toward participation in non-competitive and passive activities rather than traditional formal sports*

*A search for more flexibility and diversity in leisure pursuits rather than a commitment to a small number of activities*

*Participation in activities that range from increasingly elite levels of participation to casual and modified-rules participation in many activities*

*Dramatic falls in a number of traditional team and small group sports – including tennis and lawn bowls-- with the marked exceptions of several sports including junior soccer and junior Australian Rules Football*

*Significant increases in non-competitive but active pursuits such as cycling, walking, travel and swimming across all age groups*

*Greater support for and more involvement in informal, community-focused activities including community days, carnivals, festivals, music concerts and markets*

*Participation in recreation activities across a wider period of the day and week with a major move to week day evening sports participation and weekend involvement with non-sporting pursuits and spectating*

*Continuing growth in home-based leisure entertainment*

*The growth of more personalised leisure venues and services, as evidenced by 'boutique' health and fitness centres, the use of personal trainers, fitness videos/books/programs and home gyms*

*A significant growth in concern for the protection and well-being of the natural environment from both a recreational and political perspective*

*The use of natural and wilderness areas for a wide diversity of often conflicting uses. These include conservation and nature studies, educational activities, bushwalking, skiing, four wheel driving, abseiling, rockclimbing and bouldering, hang gliding, caving, canoeing/rafting, and BASE jumping*

*Acquisition and use of a wide range of recreational equipment. This ranges from computers and video/DVD equipment to SCUBA gear, boats, hang gliders and aircraft, off road vehicles, metal detectors etc*

*Provision and use of a wide diversity of culturally and socially-focused recreation opportunities including restaurants, bookshops, amusement parlours, music outlets (recorded and live), hotels, theatres and galleries, and shopping centres*

*The increasing demand for the management of natural resources on a sustainable basis*

*The emergence of risk management and public liability issues as major concerns for recreation providers, and*

*A growing desire for families to share recreational activities or to pursue related activities at one venue rather than pursuing a wide range of different activities at different venues. This often reflects changing work, leisure and family arrangements."*

A number of the above changes have implications for any proposed new or replacement leisure resources in the community. In particular, the trends and changes suggest that any new or replacement facilities should:

Add to the *diversity* of recreation opportunities available to the community. In other words, replacing like with like will be insufficient if changing community needs are to be met effectively

Be of a high standard: this includes not only the facilities, but also the management, programs and services that are provided. Increased attention may need to be given to targeted, personalised service. In particular, there will be an increasing need for programs and facilities that will specifically cater for the changing aging distribution of the population

Develop a focus on informal and formal recreation *programming* rather than on facilities management alone. Programs should be suitable to and attractive to a wide range of ages, socio-economic and cultural groups and offer interesting user experiences and delivering long term personal and community outcomes

Have a strong family focus

Focus on the integrated provision of opportunities that optimise family and social outcomes and investment returns

Use new provision as both a destination in its own right but also a base for wider recreation programs, including those provided by others, and

Be programmed for different types of users and uses at differing times of the day and week.

In preparing the recommendations of a recreation planning study, the broad leisure trends reviewed above and appropriate responses to them need to be taken into consideration in determining the mix of facilities to provide. It will also be essential that the promotion of any new or replacement facilities take these issues into consideration.

### **Some Key Aquatic Trends**

In addition to the broad recreation trends outlined above, a number of specific trends have emerged in the field of aquatics provision over recent years which warrant recording given the value and importance of aquatics in the community. Key amongst the aquatic provision trends are:

1. The growing recognition of the strong links between aquatics and community and personal health. This has led to a growing focus on healthy living and well-being programs and sports injury and special needs opportunities that ensure that aquatic leisure facilities are accessible to all residents regardless of their skills or physical abilities. This is particularly pertinent in Councils with ageing communities and has programming and services timetabling and design implications eg: scheduling of special use times, provision of ramp, step and hoist access etc
2. A significant diversification in the mix of aquatic facilities and an increase in the number of different pools provided at aquatic centres in response to different market needs. For instance, there has been an increase in specialist pools for learn to swim, water safety for children, rehabilitation and therapy, self-programmed health activities, school programs, squads, youth activities and unstructured family activities. The provision of such a mix of opportunities means that facilities that can be used all year round must be accessible to the community
3. The provision of support facilities and services for parents and families. All recently built aquatic complexes are now providing child care facilities and family/disabled change rooms with these increasingly being seen as mandatory in most States
4. A growing percentage of the population is pursuing swimming as a recreation activity and there are an increasing number of participants of all ages. This reflects the aquatics-health link; the greater availability of improved, heated

and all-year indoor facilities; the continuing position of swimming as a school curriculum activity, and the continuing international successes of Australian swimmers

5. In response to the aquatic trends outlined above, there has been a significant increase in the number of indoor aquatic venues throughout Australia over the past two decades, resulting in the community having a greater choice and awareness of standards and services. Venues that do not reflect these improvements will not attract the markets they need to be viable
6. The 'packaging' of programs and services to make pools attractive to a range of groups in the community. These groups include in particular, public and private health providers, seniors in the community, schools and swimming clubs
7. Concerns over skin cancer have led to indoor pools being favoured over and/or in addition to outdoor facilities
8. Virtually no pool-only developments have occurred in the past two decades due to their assessed poor operational viability. Many pool-only venues that were built in the past have progressively had a mix of other facilities added to them to strengthen their performance and market capacity. New aquatic facilities are now almost universally provided in association with a widening range of other dry sporting, health (physiotherapy, massage, dieticians), fitness, quality food services and social facilities. This co-location reflects several factors:
  - a. The user benefits gained from co-use programming
  - b. Wider client use of additional services and facilities
  - c. Major capital cost savings in the shared provision of toilet, change, cafe/food, parking and other support services, and
  - d. The capacity to cross-subsidise costly aquatic programs with other more lucrative dry health, fitness and social uses.
9. Few new 50 metre pools, whether indoor or outdoor, have been built outside the metropolitan areas or major regional centres in Australia in the past 15 years except where they will support State, national or international competitions and carnivals. This is due to capital and operational costs, lower use flexibility and the fact that where 50 metre pools are provided, other pools still need to be provided to ensure that community needs are effectively met

Further to the above, many of Australia's 50 metre pools were built following the country's successes at the Melbourne Olympics of 1956. Since then, the international aquatics federation, FINA, has instituted 25 metre 'short course' regulations and world championships and the need for 50 metre pools has become far less important. Thus, unless regional competition needs are to be met, 50 metre pools are no longer required at anything less than the regional level

10. Over recent years, a number of more modern facilities have been developed as indoor *and* outdoor venues. This has taken two main forms: first, provision of both indoor and outdoor pools (or water features rather than pools) in order to meet the assessed mix of community needs and second, through the construction of pools that can be opened up in summer and enclosed in winter (as at Inverell, NSW)

The provision of indoor/outdoor venues through the use of removable fabric enclosures has generally been a failure. This is because of the cost and difficulty of removing the covers, the ease with that covers are damaged, and because of the generally poor use conditions under the enclosure (noise, humidity, temperatures)
11. At an increasing number of aquatic centres, indoor and outdoor *non-pool* aquatic areas are being developed as toddler water play areas. These provide, for example, matting-based water play areas and user-operated sprays and sprinklers set on what is essentially a large shower base. These have now been provided as stand-alone facilities in some Councils
12. There is an increasing provision of diverse *non-aquatic* areas. Indoor and outdoor venues are providing beach volleyball, picnic lawn areas, dry play facilities and multi-purpose rooms for teaching, group change and indoor activities in poorer weather. The latter spaces are also used for meetings, art shows, workshops, occasional care etc and are supported by existing amenities and services
13. Because of the increased 'supply' of aquatic leisure venues in metropolitan areas, more people 'shop around' to try out different venues (especially with children, friends) while others seek a venue that best fits their specific aquatic and other needs (eg: health). Research undertaken on behalf of Sport and Recreation Victoria during the 1970s, 80s and 90s found that the proportion of users who visited only one centre dropped from 97 percent to around 85 percent as a result of this changed use behaviour. Other research has shown that alternately, users will select one venue as a 'home' base and then make use of numerous other venues for more specialist services. Thus, only quality and different opportunities and quality staff will attract and retain a growing proportion of users
14. There is now a major growth in specialist 'boutique' health and fitness centres. These are often no larger than a single shop, have restricted memberships and offer totally personalised service
15. Aquatics venues are increasingly being designed with the capacity to allow staged additions that can accommodate emerging and changing needs in the community. The industry has evolved so rapidly that venues that were considered to be industry leaders 10 years ago are now seen as outdated. Unless changes can be made and new opportunities added, they will remain that way, and
16. Despite the high expectations of the 1990s, there is less than a handful of pools that have been built and operated under BOO (where a commercial developer **builds, owns and operates** a venue with some form of initial Council input) or BOOT (**build, own, operate and eventually, transfer ownership to Council**) schemes. A number of developments that were initiated in this way have reverted to Council operation.

It is certain that other influences on recreation behaviour and other trends in the activities of the community will emerge over time. Several that are likely to impact more and more on behaviour over the coming years are climate change, the rising cost of fossil fuels in the face of declining supplies of some, such as oil, and actions to curtail the impacts of recreational activities that are personally, socially or environmentally destructive.

## 7.7 Trends in recreation opportunities provision

In preparing recreation plans, planners must give consideration to changes in the way recreation opportunities are being provided and to the implications of this to future provision as changes of philosophy and what might be termed “leisure culture” often transcend the needs that have been identified. As with demographic characteristics and changes, the lists of possible implications may warrant testing through the consultations stage of the planning process so that more local implications can be identified. Some of the key provision trends include:

- The consolidation of venues to create regional or sub-regional resources. Increasing provision and maintenance standards and costs, and changes in demand and the need for greater financial viability have progressively made local or sub-regional provision unviable. Examples of this consolidation include race tracks, netball complexes, elite level football grounds, showgrounds
- The consolidation and co-location of resources to create multi-use venues that can meet a diversity of needs over each of the short, medium and long term. Rather than activity- or use-specific resources, modern venues are designed to accommodate multiple and evolving uses by the community. Increasingly, these multi-use venues include not only recreational facilities but also libraries, schools, community health and support services and commercial providers
- Creation of a hierarchy of venues so that while local needs can continue to be met to a moderate extent, a lesser number of higher standard venues can also be afforded. Examples include regional libraries, regional playgrounds and long distance trails
- Creation of “systems” of recreation resources wherein the planning of each venue and/or element is undertaken with due consideration being given to how it can complement other provision—even if in another Council-- rather than compete with it
- Creation of networks of open spaces that are linked at the local, district and regional level to create recreational and natural habitat corridors so that people can make a range of trips of differing durations and take in a range of activity settings and experiences
- A move away from an active/passive provision dichotomy to one that focuses more on a distinction between competitive, low level competition and non-competitive pursuits. This has generated a capacity to provide for more elite sports while also supporting sports with modified rules for children, masters and veterans *and* making provision for community fun runs, walking and cycling, all of which are very active but are *not* competitive
- Provision which reflects changes in the organisation of individual sports and a desire to achieve a greater use capacity. For instance, tennis is finding that a minimum of 6-8 courts is needed to achieve a strong, viable club while Tennis Australia is promoting regional complexes of 12-16 courts to allow the development of local through to elite coaching programs. Football, cricket and other field sports are finding that having only one playing field constraints club development. Two or more fields allows a club to consolidate all levels and/or grades at one venue and thereby strengthen the club and its development and social activities. Swimmers and aquatics program users and providers have found that the more bodies of water they can provide—at different temperatures and depths—the more effectively they can cater for a far broader mix of community aquatic and health needs. In another direction, the provision of lighting allows night tennis, night netball and late afternoon/early evening football so that new resident groups can be catered for, so greater use capacity is achieved or so parkland can be turned back to informal community uses at certain times of the day or weekend rather than being used exclusively for sports. The growing introduction of synthetic playing surfaces is achieving the same outcome
- Establishing partnerships with other providers. More and more, provision agencies are realising that there is a broad range of provision partners who can help them achieve their recreational goals. These include schools, shopping centres, churches, and commercial providers. Partnerships with these providers increases the physical resources that are available. They can also allow programs and activities to be offered that a Council might not otherwise feel comfortable providing or which are of such a cost that they will always be “trumped” by other priorities, and
- Much of a community’s recreation takes place in the public realm: on streets, in shopping centres, at airports and in restaurants, amusement parlours and hotels. These resources are often only indirectly managed or controlled by Councils. Yet facilitating their provision and use helps to achieve a greater diversity of opportunities while frequently freeing a Council from the responsibility of having to provide alternatives. It can also free up Council resources that can then be targeted at more critical needs groups in the community.

## 7.8 Conclusions

As noted in the introduction to this Chapter, there are many factors that impact on the recreation interests, activities and needs of the community. These should be assessed to determine whether they are of importance to the area for that planning is being carried out and if so, what the implications to future needs and future provision may be.

Care must be taken in using information from one specific Council as it may not always be directly applicable to the circumstances of the particular planning study. This concern can be overcome by using the material in an “issues paper” prepared as part of the reporting process, or by presenting it in Councillor and community forums for review, comment and revision in the light of local circumstances. Planners should not assume that the types of consequences outlined above will naturally happen: at best, the listing is a guide to possible outcomes.

## Appendix 7.1:

### How to Do It: A Demographic Impacts Assessment

#### A7.1.1 Introduction

As with any research, a demographic impacts assessment entails two things:

1. Collecting and collating a range of data pertinent to the issue under assessment, and
2. Assessing and evaluating the implications of that data.

As discussed in section 7.3, the demographic characteristics of a district, community, Council, region, state or nation can have an important influence on recreation behaviour. This exercise takes a researcher/ planner through the process of assessing the types of influences that may be occurring.

It is important to note, however, that the demographic characteristics of a community only give an *idea* of possible influences. While there are some strong links between the characteristics of the community and their recreational behaviour they are rarely determinants.

#### A7.1.2 Collecting the Data

Demographic data can come from a range of sources including community surveys, observation, and professional records. In Australia, the most comprehensive and accurate source is the regular 5 yearly national census undertaken by the Australian Bureau of Statistics, or ABS. (The Bureau also collects a wealth of data on many other aspects of the Australian population and economy, including a number of very important recreation-related data sets, and household expenditure data. It also publishes an annual report, Australian Social Trends, that has a diverse range of feature articles on aspects of Australian society).

The national census dates back to early in the 20<sup>th</sup> century. While originally undertaken once a decade, the census has been undertaken twice a decade since soon after World War Two. The most recent Census was conducted in August 2011 with previous censuses that might be of value being in 2006, 2001, 1996 and 1991.

It is compulsory for every Australian and everyone in Australia on the night of the census to complete a census survey (whether a resident or overseas visitor) and people can be penalised if they refuse. The census is distributed to every household across the nation by trained collectors although from 2011, some people will be able to complete the census on-line and this is expected to increase in future years.

Much of the data collected by the Australian Bureau of Statistics is made available to the public free of charge although more complex and specialised data must be paid for. Generally, data can be obtained free for a number of collection levels: these are the country as a whole, each state, regions within each state, local government authorities, and suburbs and districts. "Small area data", covering sections of a local government authority can also sometimes be obtained although the Bureau reserves the right to amalgamate some data so that details on individuals can never be identified. For example, if there were only 2, 4 or 6 people of a particular cultural group in a community, it is unlikely that the information would be released as it would allow other residents to identify who those people were.

The data covered by the national 5-yearly census is quite broad and a range of it is valuable to recreation planners, given their desire to better understand the community or communities they are planning for.

The data from the Census was traditionally published in hard form. It is now generally all available on the web and can be downloaded free. If a user wants to treat the data sets in a specific way they may be required to buy it or to buy a Bureau-devised program, that allows them to manipulate data to suit their needs. For most if not all recreation planning purposes however, the data that is available at no cost is sufficient to meet the needs.

The ABS is not the only organisation that produces demographic data. There are several commercial companies that prepare demographic analyses and projections at the suburb/ district, local government and regional level. This data is also often available at no cost on the web, often through individual Council web sites. Generally, the data published by these companies begins as ABS census data which is then manipulated in response to other analyses by the commercial provider to estimate and project current and future population figures. One of the main providers of such data is forecast.id

To access ABS data, use a web browser to go to [www.abs.gov.au/](http://www.abs.gov.au/). This site provides access to a diverse range of ABS data and reports, including, as will be seen, moving "Headlines" on the latest ABS data or research. The main page also has a section, "Spotlight on..." which features major recent materials and then another section titled "Product Releases" and "Media Releases", these featuring current or forthcoming publications.

The left hand column of the opening page lists the broad areas of data that are covered by the ABS. Many of these are worth searching as the Bureau produces a diversity of papers and reports on population, recreation, leisure participation, and social trends, all of which can be directly relevant to the work of a recreation planner.

Two headings to further explore in particular in the left hand column of the ABS site are "Australian Social Trends" and "Papers and Articles".

All of these sections can be important sources of information, even from the perspective of the present exercise. This is because the ABS collects a significant amount of data on *recreation participation* and again, this is published and can be downloaded free at the state and national level. The data can be invaluable in both alerting a planner to trends and participation rates pertinent to the area being planned. As an example, if a planner was preparing details for a series of new football grounds, it is not only useful to know from the census data that there are perhaps, 119 males in the age range that plays football but also, from an ABS participation study, that 12 percent of the population on average, play the type of football for which provision is planned. This would suggest that in the area under study, there may be no more than 14 people “available” to play football. Such a figure would clearly raise serious questions about the viability of the proposal. In this context, another recreation participation data source to explore is the Australian Sports Commission. For the period 2001-2010, the Commission undertook national sports participation studies and the data is invaluable for indicating participation rates for a number of demographic groups in the country but also for allowing *changes in participation* to be tracked. The annual reports prepared by the Commission can be downloaded at no cost. For details go to [www.ausport.gov.au/](http://www.ausport.gov.au/). Then click on “Research” on the header line and under the heading “SCORS Research Group” click on “Exercise, Recreation and Sport Survey”. Ten years of data are available for downloading.

From the perspective of the present topic, demographic influences on recreation and leisure, a researcher has simply to click on “Census Data” under the “National Statistics” heading in the left hand column. Alternately, ABS census data can be accessed more directly by going to <http://www.censusdata.abs.gov.au/>

Data from forecast.id, the leading private provider, can often be found through the web site of individual Councils (if they have commissioned it’s preparation), or simply by googling the Council by name along with the word “forecast.id”. The data is based in i.d’s interpretation of Census and other data.

**So: let’s assume** that as part of a recreation planning study an analysis of the demographics of a particular local government body or of a suburb or district is needed to identify some of the possible implications to the current and future provision of recreation opportunities. Let’s also assume that a study needs to review the characteristics of the Marrickville Council in Sydney, New South Wales.

Entering the general ABS address ( <http://www.censusdata.abs.gov.au/>) into the web browser, the page headed “Australian Bureau of Statistics” comes up. Click on “Census Data” on the left hand side. This brings up a page the top of which, at the time of writing this text, was presenting some of the major highlights of the recently-released 2011 Census findings. As well, this page offers a range of census information in a variety of forms these being “Analytical Articles”, “QuickStats”, “Community Profiles”, “TableBuilder Basic”, “DataPacks” and “Customised Data Services”, “Historical data” and “Registration centre”. Codings on some of the latter data sets indicate that specific skills will be needed to use some of the information while some of it will need to be paid for.

The vast majority of the data, if not all the data, recreation planners need is available free from the “QuickStats”, “Community Profiles”, and “Historical data” sections. In general, QuickStats gives overview summary data while “Community Profiles” provides more detailed Excel spreadsheet tables. As the name suggests, QuickStats gives a summary overview and tables of data across a range of census data about the community being studied. By comparison, “Community Profiles” allows users to bring up more detailed, but individual tables, on particular topics. As QuickStats does not cover every census topic (or all topics in depth), there sometimes be a need to use a combination of both data sets, depending on how detailed the demographic analysis is to be.

To collect Census data on a particular community, the following steps should be followed:

1. Go to the right of the word “QuickStats” and use the arrows to select either 2006 or 2011
2. Type in the name of the suburb or local government authority being researched (eg: Marrickville) and a pull-down screen will allow the selection of a number of different definitions of “Marrickville”. These include, for example, “State Suburb”, “State Electoral Division” and “Indigenous population”. Suburbs *within* Marrickville are also listed. If a user wanted to study the *whole* Council population, he/she would click on “Marrickville (A) Local Government Area – NSW”. It is important to check the list carefully as some names bring up dozens of options, often across several states. Selecting the wrong item will produce the wrong data and could lead to some rather embarrassing conclusions
3. Having clicked on “Marrickville (A) Local Government Area – NSW”, click “Go”. This brings up a map of the Marrickville Council area plus some simple data on the number of males and females, the total population, the number of families and data on private dwellings (ie: homes). If you want, do a screen print of the map as this can be a useful addition to a report as it shows people exactly what area you are discussing

Further down the page are the headings “People”, “Families” and “Dwellings”. Clicking on each of these provides more detailed data on each item, including comparisons with the State as a whole and Australia as a whole. The “Charts” buttons show selections of the data as bar graphs. The data sets can then be printed and/or saved to your computer. It is best to save the data so it can be returned to it later if needed or in case you want to copy data from the files

4. Returning to the ABS page listing the various data options you can now go back to QuickStats and change the date to 2006. Reinserting “Marrickville” will again bring up the list to allow you to select the correct one and clicking “Go” then brings up the 2006 data. This can again be printed and/or saved.

5. Back on the page listing the various data options you can also go down to “Historical data” to readily collect census figures for 2001 and 1996 while some data going as far back as 1911 is also available. Clicking on “Historical data” brings up a screen which again lists each of the data forms and, on the right, 2001 and 2006. Clicking on say, 2001, brings up a further screen which allows you to again insert “Marrickville” (or any other town, suburb, Council, district, State etc). Clicking on “Search” gives you the list of optional “Marrickvilles” to select from. Click on the one you want and the relevant 2001 map will come up, along with a box “View Community Profiles”. It might be useful to check and/or copy this map to make sure that the boundary of the area you are studying is the same over different census dates. If they are different you should explain this in any report as it could otherwise lead to changes in the data which might otherwise mislead your interpretations. Clicking on the “View Community Profiles” box will bring up further lists and users should click on “Basic Community Profile” to download the 2001 Census data. This should, again, be printed off and/or saved.
6. Finally, as noted above, from time to time users may need to go to the “Community Profiles” data sets to get more detailed data or other data that is not included in the briefer QuickStats. Note that the “Community Profiles” data comes in Excel spreadsheets.

Having collected QuickStats data (and any useful “Community Profiles” data) for the selected example study area, there are several other data sets of information that will also be useful. In the Marrickville context, these could be:

1. The same data for New South Wales as a whole for years prior to 2011 (as in earlier years only Marrickville and national data were provided)
2. The same data for metropolitan Sydney as a whole.

Having data sets for both earlier years for the same place and for the State or country as a whole can be important as they will allow a user to assess how the Marrickville data *compare* with New South Wales or metro Sydney as a whole (and thus highlight important *differences*), and how some demographic characteristics have *changed* over time, so the analysis can better assess the trends and implications to future recreation provision.

### A7.1.3 Deciding What Data to Use

As can be seen from the QuickStats data set, information is provided on the number of residents in the area selected, the gender breakdown, numbers by age group, the number born in Australia and overseas, country of birth, language spoken at home, religious affiliation, marital status, workforce composition, types of occupation, industry of employment, income, family make up, household composition, home types, home ownership, rental costs, average household size, and the types of landlords of those renting. What is also useful about the QuickStats data is that it provides both absolute numbers and percentages and that it also provides comparative State and Australian data.

From wider reading and class discussions, decide which of this data is likely to impact significantly on recreation participation and need and which additional or more detailed data may need to be added to that provided by QuickStats. Go through the data in QuickStats and list down those demographic elements that are likely to have an impact, what the impacts might be and whether there are specific characteristics that need to be looked for. (As an example of the latter, it is generally accepted that a population of 40,000 plus people is needed to support an indoor aquatic leisure centre that will operate without heavy subsidies. Anything less than that will mean quite substantial budget support every year so that a Council may well decide that it cannot afford to make provision).

If QuickStats is used as part of a full recreation planning study, it may be necessary to look for other demographic features from some other source, whether that be from the ABS Community Profiles, forecast i.d. or elsewhere. Three examples illustrate this point.

1. The Marrickville QuickStats data only lists the top group of the countries of birth of the community, and in 2006 these accounted for 70.2 percent of the total population. As nearly 50 percent of the Council’s population was born overseas, it is probable that more data will need to be collected through “Community Profiles” if the diversity of cultural backgrounds is to be adequately addressed. In another community, the position may be different.
2. QuickStats never provides information on car ownership, yet “Community Profiles” does. Car ownership can be critical in allowing or constraining access to recreation opportunities so it might be important to collect this data, especially if the community being studied is in an outer suburban area.
3. The census data does not give projections as to population growth (or decline). So it is usually essential to go back to the previous census to make comparisons and make an assessment of what change has occurred and if needed, to use that to project future characteristics. Alternately, it may be found that the area being studied has had forecast i.d. (or some other) data prepared for it.

As it is possible that *all* of the items included in QuickStats and a number in QuickStats or other data sources will have some influence on recreational behaviour, a researcher may also need to determine which items to

focus on within the time (and perhaps, budget) that is available.

#### A7.1.4 Reporting on the Data

Having decided on the data to be used, the next step is to present it and describe it. Data can be presented either in Table form (copied directly from QuickStats or “Community Profiles” or compiled from several of these), or it might be presented verbally with an introduction and a series of dot points.

When a data table is used, make sure that it is given a table number and title and that the data source is cited. See the example below.

When a table is provided, it is *essential* that its structure and contents are described so that a reader is not left to try to understand what is provided with no guidance. Then, a description of the main features of the data in the table should also be described. This second description could be expected to cover things such as high and low values, the range of values, individual values compared with averages and comparisons of the area being studied and state or national values.

An example of the discussion of the age distribution of the community, taken from a recent study into the feasibility of developing a multi-purpose sports and social hub in Wynyard, Tasmania, is given below. Other demographic topics covered in the Wynyard report were population size and its change over 2001-2006, the cultural mix of the community, employment, family income, and family characteristics. The analysis was limited because the project budget was small and so only a few key demographic features were selected.

It can be seen that the Wynyard material does three things: first, it introduces the topic and presents some census data; second, it draws out what are seen as the highlights of the data from the perspective of the feasibility study, and third, it draws out a number of implications to the nature and viability of the project. Depending on the study, it might be appropriate to add data from an earlier census to the table or projections from another source so change over time can be addressed in the same section.

Do not forget to add maps from Mapstats and other data from forecast i.d. or another provider, and from ABS or Sports Commission participation surveys if this information is helpful in understanding the population and the implications to current and future recreation provision needs.

### 3.2.2 The Age Distribution of the Population

Age distribution data for Wynyard and Tasmania from the 2006 census are shown in Table 3.1.

Age Group	Number	Percent	Tasmania	Percent
0-4 years	295	5.2	28,663	6.0
5-14 years	811	14.2	65,359	13.7
15-24 years	691	12.1	61,768	13.0
25-54 years	2,095	36.7	190,969	40.1
55-64 years	734	12.9	58,581	12.3
65 years and over	1,080	18.9	71,141	14.9
Totals	5,706	100.0	476,481	100.0

Table 3.1: The age distribution of the population of Wynyard township and surrounds, 2006  
Source: Australian Bureau of Statistics, Census 2006

The 2006 Census indicated that the Wynyard township and surrounds population was distributed across all age groups but that overall, there was a greater concentration of residents of 55 years and over when compared with Tasmania as a whole, which itself, had a population with a greater proportion of older residents than Australia as a whole.

The key points of relevance to a sporting and community precinct in Wynyard emerging from the data in Table 3.1 are:

- There were only 1,106 children and young teenagers in the community, with these only accounting for 19.4 percent of the total population
- There were only 691 residents in the 15-24 years group, a key age group during which people commit to involvement in sporting pursuits
- There were 2,095 family-age adults –or essentially, twice as many in this group as there were children
- There was essentially the same number of residents *over* 64 years of age as there was of 14 years and less, and
- There was a substantially greater percentage of residents in the older age groups than for Tasmania as a whole: 31.8% aged 55 years + vs 27.2%).

These figures indicate that the number of people of the age when there is a high commitment to sports is quite low as a proportion of the total population while the number of older non-competing residents is high, and almost certainly, growing as a proportion of the total. These conclusions are supported by the fact that the median age of Wynyard residents at the 2006 Census was 42 years while the Tasmanian figure was 39 years and the Australian figure was 37 years. This suggests that to ensure the viability of the overall project, any provision made at the proposed sports precinct should be able to attract and accommodate a range of other non-sporting activities across all age groups in the community.

Finally, it is stressed that *demographic studies should never be taken as providing a definitive answer on an issue: rather, they suggest possibilities and constraints*. This is because two people of an identical age, family circumstances, occupation and income may have entirely different personalities and thus, recreational interests. This is why combining demographic and participation data can be helpful as it links demographics to known behavioural outcomes in the community.

#### **A7.1.5 Using the Data as a Decision-Making Tool**

The process of using the findings of a demographic review in determining the recommended actions from a planning study is discussed further in Chapter 12. In essence, the provisional conclusions drawn from the analysis are assessed in the light of a variety of other provisional conclusions developed from other stages of the planning research. The provisional conclusions are “tested” against this other information to see if they stand scrutiny. If they are supported across a number of information sources they can then begin to form some of the draft conclusions and recommendations of the study. As an example, if the demographic analysis shows that the number of children in a community is increasing rapidly and the inventory shows that many new suburbs have no play facilities or indoor venues for parents with young children, then it is probable that a key recommendation might be the provision of more of these types of facilities. The Census might also show a rapid increase in new immigrants with little or no English skills. Again, the inventory of facilities, programs and services may indicate a dearth of recreation programs and support services for new immigrants and as a result, the planning recommendation might be to employ more support staff and to share use of the indoor parents and children’s meeting room.

#### **A7.1.6 Exercise**

Select a town or district that you are familiar with. Use the process outlined above to collect, present, describe and analyse data on at least four demographic features that could be expected to have an influence on the future provision of recreation and leisure opportunities.

### **Appendix 7.2**

#### **A7.2.1 Researching the Recreation Activity Determinants of a Small Group of Individuals**

Select and interview 7-8 people who are (a) in different age groups eg: child, teenager, young adult, parent of teenagers/adults, senior citizen (b) of mixed gender (c) who do and *do not* pursue active sports, cultural activities (eg: going to theatre, playing a musical instrument, reading or writing books, painting) and (d) who do and *do not* have children aged less than 18 years. No more than one person is to be selected from a student’s immediate family.

The interview with each person should address the following issues:

1. What are the most “important” recreation activities pursued at present? “Importance” can be based on one or more of time allocated, most enjoyed, money spent etc
2. How the respondent got involved with the activities
3. When the respondent got involved with the activities
4. What the respondent enjoys or gains from involvement with the activities
5. What the respondent feels are the personal and/or social factors that have influenced his/her involvement with these activities
6. Whether there are other recreation activities that the respondent would like to pursue but does not and why they are not pursued
7. Whether the availability or *the lack of* money influenced the respondent’s involvement with the recreation activities the respondent does or *does not* pursue, and if so, how
8. Whether there are activities the respondent would pursue or pursue *more* if he/she had more money
9. What factors *other than* money influence the respondent’s selection of the activities pursued and how. eg: time required/available, family make up, age, gender, concern for the environment, upbringing/family history, place of residence
10. Whether the respondent’s leisure activities changed over the years and if so, in which ways/to what activities, to what extent, and why

11. The respondent's age group (use 0-9, 10-19, 20-29, 30-39 years etc); gender; town/suburb/district of residence; occupation; family situation (eg: Live alone, parent without young children; parent with young children; retiree etc)

Having collected the interview information, summarise the responses and use a chart such as that following to record them.

Responses/ Respondents	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5
Respondent Characteristics					
Question 1 Answers					
Question 2 Answers					
Etc					

Provide a description and analysis of the material and draw preliminary conclusions as to the factors that appear to be influencing leisure involvement being drawn from across the 5 interviews. Comparisons should be made between the responses provided by the respondents and the general discussion of the factors influencing leisure involvement in reference materials and course discussions.

**Additional Reading:**

Lynch, R. & Veal, A. J. 2006, *Australian Leisure – 3<sup>rd</sup> edition*. Pearson Longman, Sydney. Ch. 5, 16, 17.  
 Sport and Recreation Victoria, 1995, *Community Recreation: Municipal Recreation Planning Guide, 2<sup>nd</sup> edit.*, Sport and Recreation Victoria section 5.3.4, "Community Profile"  
 Veal, A. J., 2006, *Research Methods for Leisure and Tourism, 3<sup>rd</sup> edit.* Prentice Hall, Ch. 8

## Assessing community & stakeholder recreation activities and needs

### 8.1 Introduction

A program of consultations with the community being planned for and with key “stakeholders”<sup>10</sup> who serve or are actively engaged with the community is a very important part of the recreation planning process. It achieves a number of things, not the least of which is the democratic involvement of the community. As equally important is the fact that consultations allow the views of people with a wide range of experiences, opinions and needs to be tapped while also permitting contentious issues and possible planning solutions to be aired and tested.

This Chapter provides details on the range of consultative approaches frequently used in the course of recreation planning studies. Before looking at these methods however, it is worth spending more time discussing the issue of why planners do and should consult the community and stakeholders.

### 8.2 Why we consult

As indicated above, consultations provide the opportunity for a range of people and organisations to put their views in relation to the issues covered by the planning process. It allows issues to be viewed from a range of perspectives, to be debated and evaluated from the standpoint of different individuals and interest groups.

Perhaps more importantly, as noted above, a consultative program enhances and extends democratic principles in the community. It gives people the opportunity to have a say on issues that are likely to affect them and that are likely to affect their quality of life in one way or another. From this perspective, the role of the recreation planner is really one of *collecting and evaluating* the ideas and interests of the community in the light of a wide range of other factors and processes, not of *deciding* what is good for the community.

In the 1960s, a North American sociologist, Sherry Arnstein, wrote a key paper outlining what she saw as the different types of consultation. Arguing from the premise that the form of community participation in the planning process is a measure of “citizen power”, Arnstein claimed that citizen participation allowed the “have-nots... to be deliberately included in the future” and that participation was the means by which the under-privileged could “induce significant social reform that enables them to share in the benefits of the affluent society”.

Arnstein identified what she saw as eight hierarchical types of community consultation, each of which gave more power and authority to the participants. These were:

*Manipulation*, wherein community involvement and action are defused and diffused

*Therapy*, where professionals used the consultative processes to “massage” the community while perpetuating their own views and objectives

*Informing*, wherein the community is permitted to comment on key issues but not determine what the issues are

*Consultation*, wherein community views and issues are collected and assessed but where the community has no decision-making powers in relation to those views and issues

*Placation*, where community members are appointed to decision-making groups but are “guided” as to the decisions that are made

*Partnerships*, wherein citizens have negotiating and decision-making powers equal to those of professional officers

*Delegated power*, where citizens achieve dominance and are able to initiate, develop and vote for the implementation of action plans, and

*Citizen control*, wherein there is community management of policy-making, planning and implementation without the influences of intermediaries.

Arnstein’s hierarchy warrants considering as a guide to the purpose of a consultations program and of the extent to which power is given to the community in the course of a recreation planning project. Clearly, the further up the “ladder” one goes, the greater the level of community participation and the greater authority given to the community.

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<sup>10</sup> The term “stakeholders” refers to all those individuals, groups and organisations that provide or support the community in its involvement in recreation activities or that through their particular position, can provide a good understanding of the community to be served by the planning. They may also be individuals and/or groups that might be affected by planning decisions. Stakeholders can include teachers, local police, state and federal community support agencies (eg: welfare, disability, aged, arts and sport and recreation departments), as well as private providers and neighbouring Councils

It warrants noting that while Arnstein saw the process of citizen participation as a means of allowing the “have-nots” and the “under-privileged” to have a strong influence on the planning outcomes, that right should also be given to all other individuals and groups in the community. Further, care must be taken to avoid “consultation for consultation’s sake” (or power for power’s sake) and there is no guarantee that “citizen power” will be as informed or as skilled as that of a professional planner.

Whatever view one takes on Arnstein’s “ladder”, a high level of continuing community involvement throughout the planning process –rather than just consultation with the community—will help ensure the quality of the planning outcomes. This is because:

The needs and interests of the community can be better heard and assessed

New and different provision ideas can be tested with the community

There will be greater opportunities to evaluate alternate strategies with the community, to educate the community and to be educated by it

Where there are strong differences of opinion, a consensus can be sought --a process that helps assure elected members that the process will not lead to conflict and dispute

Recently, a number of variations on the Arnstein model of participation have been prepared. One such model, prepared in 2004 by the International Association for Public Participation (Australasia) and commonly referred to as IAP2, defines 5 levels of “public impact” along a participation “spectrum”. These are (1) informing, (2) consulting, (3) involving, collaborating and (5) empowering. The details of the model are provided in the following summary chart which provides a suggested goal, “promise” and list of consultative techniques for each level on the spectrum. Words in brackets in the chart have been added to clarify the meaning. The chart is a useful reinterpretation of the Arnstein model although some of the terminology is unclear and the example consultative techniques do not seem appropriate to the consultative level, with several not really being consultative techniques at all. An example “community engagement policy” based on IAP2 developed by Bayside City Council in Melbourne can be accessed at [www.bayside.vic.gov.au/Community\\_Engagement\\_Policy.pdf](http://www.bayside.vic.gov.au/Community_Engagement_Policy.pdf)

<b>INCREASING LEVEL OF PUBLIC IMPACT &gt;&gt;&gt;&gt;&gt;&gt;&gt;</b>				
<b>INFORM</b>	<b>CONSULT</b>	<b>INVOLVE</b>	<b>COLLABORATE</b>	<b>EMPOWER</b>
<b>Public participation goal:</b>	<b>Public participation goal:</b>	<b>Public participation goal:</b>	<b>Public participation goal:</b>	<b>Public participation goal:</b>
To provide the public with balanced and objective information to assist them in understanding the problems, alternatives, opportunities and/or solutions	To obtain public feedback on analysis, alternatives, and/or decisions	To work directly with the public throughout the (planning) process to ensure that public concerns and aspirations are consistently understood and considered	To partner with the public in each aspect of the decision (making process) including the development of alternatives and the identification of the preferred solution	To place final decision-making in the hands of the public
<b>Promise to the public:</b>	<b>Promise to the public:</b>	<b>Promise to the public:</b>	<b>Promise to the public:</b>	<b>Promise to the public:</b>
We will keep you informed	We will keep you informed, listen to and acknowledge concerns and provide feedback on how public input influenced the decision	We will work with you to ensure that your concerns and aspirations are directly reflected in the alternatives developed and provide feedback on how public input influenced the decision	We will look to you for direct advice and innovation in formulating solutions and incorporate your advice and recommendations into the decisions to the maximum extent possible	We will implement what you decide
<b>Example (consultation) techniques to consider</b>	<b>Example (consultation) techniques to consider</b>	<b>Example (consultation) techniques to consider</b>	<b>Example (consultation) techniques to consider</b>	<b>Example (consultation) techniques to consider</b>
<ul style="list-style-type: none"> <li>• Fact sheets</li> <li>• Web sites</li> <li>• Open houses</li> </ul>	<ul style="list-style-type: none"> <li>• Public comment</li> <li>• Focus groups</li> <li>• Surveys</li> <li>• Public meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Workshops</li> <li>• Deliberate polling</li> </ul>	<ul style="list-style-type: none"> <li>• Citizen advisory committees</li> <li>• Consensus building</li> <li>• Participatory decision making</li> </ul>	<ul style="list-style-type: none"> <li>• Citizen juries</li> <li>• Ballots</li> <li>• Delegated decisions</li> </ul>

### 8.3 Who should be consulted

The number and range of people, organisations and stakeholders that are consulted will vary depending on the nature and scope of the project. For a recreation plan covering part or all of a Council, the following should be considered:

Present and past elected members at the State and local government level

Council officers and former officers who have experience relevant to the study

Representatives from adjoining Councils if these areas are likely to be impacted on by the outcomes or if their residents may be served by new or additional provision

Representatives from relevant State government agencies

Providers and/or managers of facilities, programs and services that are relevant to the study. These may be private operators, Council employees, contractors to Council, State government or public agency employees

Professional service providers eg: from health, police, youth, aged, cultural support agencies/groups, educators

Professional associations

Sporting and recreation group executives and members

Users of any specific facilities being planned or upgraded or users of other nearby or competitor facilities

University and other researchers, and

General members of the community, with the area that they are drawn from being determined by the scope of the study.

## 8.4 How to consult

There are many different consultative strategies that can be used in the course of preparing a recreation plan. In general, the more diverse the methods used, the greater will be the opportunity for people to make an input, as different approaches suit different types of people. Many people for instance, feel reluctant to stand up in a public meeting and express their views, but they could provide an invaluable input through a personal interview or during a walk through a park that is being studied as part of the planning project.

In general, the more personal the consultative method, the more representative the consultations input will be and the more useful the information collected will be as people are able to relax, to consider alternate ideas, and to ask questions about the study.

Wherever possible, the consultative processes should be used as much to exchange views and ideas and to educate those being interviewed about the study and its processes as to collect information. Achieving this balance almost invariably ensures that better information is collected. It also builds trust and confidence on the part of those being interviewed.

In all consultative methods, an explanation of the study process and objectives and of the consultative purpose and processes should be provided. The focus of the consultations should be on encouraging participants to outline their views. The interviewer should collect these views largely without comment unless they are contrary to fact. He/she should refrain from expressing his/her own opinions or raising comparable situations as this uses up time, can sidetrack the discussion and may be off-putting to the interviewee if contrary views are expressed. That said, there is no reason why a planner should not raise suggestions for action that they have identified themselves or that they have identified from past reports research or from situations that they feel might warrant consideration. When that occurs, the suggestions should be prefaced by for example, words to the effect of "Some of the actions that we as planners felt might be worthwhile are..." so that the community and other stakeholders can respond to them. The situation will often arise, in fact, where a planner is "told" to come up with some good ideas as "that is what we pay you for". It is important, however, that when an idea put forward by a planner's is rejected, that it is dropped and not pursued in face of that rejection, unless there is wider evidence to support it. Then, that wider evidence needs to be explained.

The consultative methods that warrant consideration are listed below with some explanatory notes. Readers are also referred to Veal (2011) for a fuller discussion on consultative methods and materials and for a detailed explanation of the various statistical analyses that can be applied to recreation survey data.

### Personal interviews

These:

Are held early and throughout the planning process so that there is a continuing capacity to identify new ideas and issues. As this process continues, the interviews can be used to both collect and test /evaluate ideas and strategies

Use a phone call, personal contact, letters or emails to invite participants to a meeting. A phone call followed by an emailed explanation and confirmation of a meeting time and location is most efficient

Allow the collection of confidential and personal information that might not be disclosed during other forms of consultation

Indicate a sign of respect for those being interviewed as opposed to group meetings and postal surveys

Allow information to be collected by note taking or use of a tape recorder

Can be held at a central office or at a place suitable to interviewee. The former is far more efficient as 45 minute to hourly interviews can be set up (allowing up to 8 per day). Interviewing people in eg: the mayor's office also conveys a sense of importance. By comparison, travelling from place to place to conduct interviews can more than halve the number of interviews completed in a day

Allow more sensitive issues to be covered by having, for example, males interviewing males, females interviewing females or more elderly people interviewing older residents, and

Should be held during day or evening depending on the work situation of the interviewees.

### **Small group discussions**

These:

Allow a number of people/groups with like interests and backgrounds to be interviewed at the one time eg: youth, teachers, program providers for special interest groups, commercial leisure providers, leisure services staff, Council officers

Save time when compared with personal interviews

Are generally held at a central point eg: Council offices, public hall, club rooms, school, depending on the nature of the groups

Are held during the day or evening depending on the nature of the groups

Use letters, phone calls and public advertisements to invite participants with the method selected dependent on the number of potential participants and the degree of information held about them

Allow participants to hear the views and ideas of others and respond to them

Collect information by note taking, tape recorder or recording on display sheets so issues raised can be seen by all and returned to if necessary/desired. The latter method is preferred as it is the most effective in ensuring meeting participants that their views have been recorded

Generally require 1.5 to 2 hours, and

Should collect the names and contact details of interviewees can be collected so they can be recontacted and be invited to be involved in later study stages.

### **Structured workshops**

These:

Are similar to small group workshops but use a list of specific questions or may have work sessions where participants complete surveys, mark issues on maps etc., and

Can take a variety of forms from open public gatherings through to search conferences and charrettes with these latter strategies only involving specifically-selected members of the community (and others).

### **On-site meetings**

These:

Invite participants by use of letterboxing, newsletters, phone, letters to clubs, press releases, flyers on notice boards etc

Take place at key venues/study sites so participants can walk the site and outline their needs and concerns

Can be held after work (at least during daylight saving hours if outdoor venues are to be inspected) or on weekends, and

Should collect the names and contact details of interviewees can be collected so they can be recontacted and be invited to be involved in later study stages.

### **Open public meetings**

These:

Invite participants by letterboxing, newsletters, phone, letters to clubs, press releases, flyers and press advertisements

Can involve a number of meetings held separately at several locations across a large planning area (to enhance equity of access), or organised by recreation activity types, age groups, or special needs/interest groups

Collect information by note taking, tape recorder or recording on display sheets so issues raised can be seen by all and returned to if necessary/desired, and

Generally require 1.5 to 2 hours and can be held at different times of the day depending on those involved.

## **Street interviews**

These:

Involve interviewers contacting respondents in shopping centres or via an information stall/shop display, and

Can be held during week days and weekends.

## **Club and group surveys**

These:

Are used to survey large numbers of clubs and groups when data on memberships, use trends, assets and needs are required

Use agency or researched lists of clubs and groups to identify recipients, and

Use postal distribution with free post return envelope provided, follow-up letters and reminder calls.

## **User surveys**

These:

Are conducted on-site at various times of the day so as to reflect use patterns

Allow collection of the immediate experiences of users, and

Can use a structured set of questions or can be open-ended and general in nature.

## **Calls for submissions**

These:

Can be invited from the community via newsletters (club, schools, Council), web sites, flyers, press releases /advertisements and by letterboxing.

## **Resident surveys**

These:

Use posted, telephone or doorknock processes to contact residents

## **Web sites /surveys**

These:

Allow residents to access surveys and other information from home/work and express their views.

## **Community panels**

Community panels have been established by a number of Councils over recent years. They consist of randomly-invited residents, or residents who have put their names forward following a call for volunteers from Council. The residents are used as a sounding board on issues of concern in the community. As many as 200 people might be included on a panel with the group being consulted either at meetings (which is rare), by post or increasingly, by email. Over recent years, the concept of community panels has come under something of a cloud as Council's have refused to release the names of members so that members of the general community cannot contact them) or to release their deliberations. This makes a mockery of the process. There is also evidence to show that a panel selected from self-nominating residents or others can be manipulated by either or both the community or Council officers. To be effective, the membership of panels should be publicly available, their decisions or recommendations should be open to public scrutiny and their membership should be changed every 2-3 years at the maximum.

Some comment is warranted on various aspects of community consultations:

- The validity and reliability of the information collected must be subjected to close scrutiny. Care must be taken to not allow consultations to be "hijacked" by pressure groups or individuals intent on promoting a particular set of needs and priorities. Where this is suspected, meetings should be managed to eg: reduce speaking times, restrict the number of people talking on one topic, avoid repetition, and encourage those who have not had a say
- Residents often express views and opinions through the consultative process that are consciously or unconsciously incorrect. While incorrect views may be useful in assessing concerns and perceptions amongst the community, care must be taken to ensure that inaccuracies are corrected and explained or as appropriate, rejected. As has been noted previously, the role of a recreation planner is to collect and evaluate community and stakeholder opinions and a wide range of other information and to form, explain

and justify a set of professional opinions as to what course of action may be most appropriate. *No planner should simply repeat or slavishly adopt the views expressed by the community or key stakeholders* (some of whom will almost certainly be “powerbrokers” with a somewhat different agenda to that which they profess).

Where the views of the community are recorded verbatim or in a summarised form, it is wise to indicate when reporting them, that “these views do not represent the formal views of the authors of the report, the planning authority or its officers”

- If a valid understanding of the opinions of the total *community* is required, the only way to achieve this is via *personal* home-based or home address-based survey. If the opinions of venue users is desired, the only valid approaches are on-site or home-based surveys .

Only *home-based* surveys can ensure that all residents and/or wider members of the community have a say. All other survey methods will almost certainly exclude some members of the community. This is because many residents do not use the venues where user surveys are conducted; do not go shopping where shopper surveys are conducted; are not members of sporting and recreation clubs; do not have access to the internet; do not have telephones; or cannot read or write, or cannot read or write *English*. Every one of these problems can be addressed through the use of personal and home-based surveys.

In all *non-personal* and *non-home-based* surveys, residents find it easy to “self-select” in terms of whether they will or will not take part and as a result, randomness and validity are seriously challenged. When this occurs, the views that are collected only reflect the opinions of those who have expressed them *not the community as a whole*. Experience shows that when residents can “self-select”, the majority of respondents tend to be people who know about or who are either strongly opposed to, or in support of, one or more particular initiatives that are being assessed.

Web-based surveys can be subject to particularly high levels of bias as one person can complete the survey many times or encourage other like-minded friends and associates to respond and to provide similar or identical answers. As a result, the opinions expressed should be subjected to close scrutiny and verification sought from other sources

- An increasing number of organisations are turning to Face Book, Twitter and commercial survey tools (such as Survey Monkey) as a means of contacting and gaining input from the community. Because so many in the community do not use these media, any information gained from them should only be treated as informal or “anecdotal” data that carries no statistical weight or significance or as evidence from those who are interested in the issue or topic. With regard to commercial web surveys, a recent client of the author’s insisted on using Survey Monkey and obtained 89 responses from a potential total survey catchment of around 40,000 people. Clearly, such responses have little value and reflect the fact that first people have to be attracted to the issue and then have access to a computer together with the time to make a response. That said, a Survey Monkey style of survey is a very good tool for clubs and groups wanting to survey their own members
- When conducting a community survey, it is not necessary to survey the whole population or even 5 or 10 percent of it, as has often been thought to be the case. A sample of as few as 350 residents, if carefully selected in order to ensure randomness, will achieve results that are accurate to within plus or minus 4-5% of what would have been achieved had everyone been surveyed. If a surveyor wishes to understand the needs of a particular club or group, it might be possible to survey *100 percent* of the members. If there are only 15 members, it is not possible to survey more than 15 people and were only 5 or 10 percent of these 15 surveyed it is quite probable that the results would *not* reflect the views of the remaining members
- Postal and telephone surveys of both clubs and residents have seen non-response rates higher than 90 percent, *even from sporting and recreation groups in the community*. Again, self-selection appears common. As a result, these survey methods should really only be used when no alternate method of collecting data is available. If postal surveys *are* used, *each of* reminder letters, telephone calls and emails to the recipients should be used to help increase response rates

A common telephone surveyor practice is to continue to make calls until a “sample” is achieved within each relevant age and gender group. This then achieves a response distribution which is equivalent to that of the overall community. However, this *does not mean* that the respondents whose views are recorded constitute a valid “sample” of each relevant age and gender group being surveyed. This is because the methodology assumes that people of the same age and gender have the same views and needs – which is simply not so. Rather, responses reflect the psychological and physical make-up, personal and social objectives, education, wealth, culture and so forth. Age and gender may *influence* opinions but as discussed in the previous chapter, they do not

determine responses and views. The fact that differing numbers of people in different age, gender, occupational and cultural groups “opt out” suggests that they are very likely to be different from—and therefore, have different views from—those who “opt in”

- The cost of the different consultative methods varies substantially. Street stalls and public meetings may only take several hours to plan, although identifying what information to collect will take longer. Overall, however, they are quite cheap. By comparison, personal interviews and to a lesser extent, group meetings, take a lot of time to run with the findings then needing collation and evaluation.

The use of club, resident and other forms of surveys may require days of work for design and testing, and more days and numerous staff to implement, code and collate the results. Depending on the nature of the study area, the populations being surveyed and the nature of the questions, random community surveys can cost from \$10,000 to \$25,000 for samples of 400-600 residents. Increasingly, translation services may need to be used in communities where there are significant numbers of residents who do not speak or read English. This can increase the cost per completed survey to as much as \$35

- The mix and complexity of the issues covered can be far greater with personal interviews and home-based surveys than with other consultative methods. This is because respondents can be given time to consider their opinions and with surveys, a number of days to complete their responses. People surveyed by telephone or when using a recreation venue can react negatively to having their activities interrupted by surveys and interviews that often have to be limited to little more than just a few minutes
- Few of the consultative approaches have any value in collecting the views of young children. Strategies for conducting their views through informal discussions (often with parents), storytelling and drawing activities with children at schools, clubs etc can be very effective. On-site observation and informal discussions with children and their carers can also be productive although issues of child security must be addressed (see below)
- Anyone planning to interview the community in public places should inform the local police station as to where, when and who will be involved. They should carry copies of a letter of introduction to give to interviewees and some form of authorisation from the employing agency. Preferably, interviews should be conducted on a same-sex basis
- All survey methods should be applied in a two-way sharing fashion so as to provide information to the public about both the planning process and the wider activities and initiatives of the planning agency. They should also be used to collect contact details from community members who may wish to be involved in other stages of the planning process, and
- Issues of safety and risk mean that care must be taken when undertaking on-site surveys in remote locations and in conducting doorknock surveys. In general, it is better for all surveyors to be accompanied by another person in these instances.

## 8.5 The information collected through consultations

A wide range of information can be collected and tested through a consultations program and what is collected must be determined by the needs of the study. There is always a tendency to collect too much information so care must be taken to ensure that effort is not wasted collecting information that might be “interesting” but which makes little or no contribution to answering the key questions of the study. It is always useful to ask of every item being considered for collection: “How will we use the answers to this question?” and “What do we want the answers to tell us?”

The most common information collected through personal surveys is discussed in the following paragraphs while sample survey methodologies and survey forms are provided in the appendices to this Chapter:

- **Demographic and related data** (age, gender, socio-economic measures, family make-up, place and length of residence, car ownership, home style (eg: house, apartment, flat/owner, purchaser, renting). This allows data cross-tabulations and the identification of the views and preferences of different sub-groups in the community. With *user* surveys, this data also permits a comparison of user demographics with Bureau of Statistics data on the whole community. *This data should be sought at the end of a survey* as asking people personal details right at the beginning can be off-putting
- **Respondent recreation interests and preferences** for types of activities (eg: social, competitive, artistic, travel); the specific activities pursued and participation patterns (eg: frequency, time spent, specific venues used, distance travelled, who pursued with, facilities used, standard of participation). This data allows a picture of current community behaviour to be developed and assessed against the mix of existing

provision. If desired, psycho-graphic groupings of recreation preference types can be created from this information. These are groupings of people with similar interests, benefits sought and expectations who also have strong similarities in terms of age, gender, education, income etc. Commonly, 6-8 groupings can be established and these can often be far more useful in planning future provision than trying to cater for hundreds of different individual activity needs.

- The **reasons for using the particular venues** and programs they visit and why they select these over other opportunities
- **Participation data** for organised sports and other recreational pursuits. A point to be wary of with participation data (which is discussed more fully in Chapter 9 following) is that participation may simply reflect resource availability rather than need or high interest levels. Thus for instance, high tennis participation rates may reflect high court provision, a good passionate and successful coach, and a lack of alternatives *rather than* a passion for tennis in the community. Similarly, planners must avoid the tendency to decide that high rates of participation in a certain activity means there is a need for more of the same. All too frequently, children's rates of participation reflect what their parents want them to do, *not* what the children want.
- The **catchments** served by individual facilities, programs and/or services. This data can be collected by asking on-site survey respondents their suburb of residence (or workplace if they come from work), or their postcode or, if detailed information is required, where they live on a map of the district. Collecting information on user suburbs, districts or towns generally gives a more accurate picture than postcodes that vary in shape and size and can be very large in rural areas. With household surveys, the address of the respondents is known, so a simple process can be used in relation to the venues and facilities they visit. Data can also be collected on how far people travel to each venue they use.

The resulting data –whether distribution maps or tables of numbers and percentages of uses by travel distance zones-- is an invaluable planning tool as it helps to indicate where customers are and are not coming from --and hence, where marketing and/or provision efforts need to be changed or enhanced. Mapped data allows comparisons to be made between the demographic profile of users and the wider community and through this, an assessment of who is and who is not being served by the provision.

Appendix 4 provides further details on catchments and a study exercise using locally collected catchment data.

- **Respondent assessments and ratings** of the existing recreation opportunities on the basis of the *range* of recreation opportunities provided, and their *distribution, quality, accessibility, management* standards and *cost*.

A useful tool in this context is **importance/performance analysis**. This process asks respondents to rate their perception of each of the *importance* and *performance* of individual facilities, programs and services or of *types* of recreation facilities, programs and services on a scale of say, 1 to 5. The mean scores for all respondents or particular groups of respondents (eg: age groups, gender, cultural background, residential location) are then calculated. Individually, comparisons of the results for different types of provision are invaluable. However, when matched *pairs* of importance and performance values are plotted on a graph with importance values on the X axis and performance values on the Y axis, the results are even more informative. The resulting chart will show those items with:

High importance and high performance: that should be retained

High importance and low performance: that need to be improved

Low importance and high performance: that may be wound back

Low importance and low performance: that can be discontinued

- **Respondent proposals or support** for listed suggestions for expanding, upgrading or adding new recreation opportunities. This can be tackled in several ways: residents (and on-site interviewees and workshop participants) can be asked what they *think* ought to be done in terms of new or upgraded provision or they can be given *lists of suggestions* identified through earlier stages of the consultative program. Across a random survey of 400-500 residents, the responses give a highly accurate indication of community needs and priorities. If the sample is large enough, the responses can be broken down by age groups, gender, cultural background and place of residence etc to give an even more specific indication of priorities for action, and
- Other **new, creative action proposals**, concerns or issues that respondents want to raise. The opportunity should always be provided for respondents to suggest totally new provision types and to raise questions about other recreation issues that concern them

Surveys of sporting and recreation clubs and groups and of other organisations relevant to the specific study being undertaken (eg: schools, private clubs) cover different information to personal surveys. The items most commonly addressed in surveys of such organisations are:

- Name of club, contact details and office bearers (for updating inventories)
- Membership numbers by categories over say, the past 4-5 years and reasons for any upward or downward trends of more than eg: 10 percent
- The facilities, programs and/or services that are used, assessments of their quality, and any improvements and additions required
- The facilities, programs and/or services that are *not* used and the reasons for this
- Club/organisation capacity to contribute to the cost of any proposed improvements
- Priorities for action, and
- Other issues and concerns.

Public meetings, on-site meetings and workshops are somewhat more flexible than surveys in that they can be –and should be— less structured so that people can raise issues, question directions and test ideas and proposals. In particular these meetings can be used to:

- Discuss, review and revise the draft policies and principles developed in earlier stages of the research program
- Provide the community with information about itself: its demographics, the available facilities, where they are and plans for the future
- Undertake SWOT analyses of individual or groups of facilities, programs and services
- Collect information on the needs and priorities of the general community or of the specific interest groups involved. Meeting participants will often give the best responses to simple questions, and the four most commonly used are:

What “works well” and why (whether a facility, program or service). Such information can then be used as a guide or benchmark for other initiatives

What “needs fixing” to make it do the job intended of it more effectively and efficiently

What “needs adding” to ensure that modern, current day opportunities are provided; to ensure that sufficient resources are provided for an expanding community, or to ensure that a particular community remains attractive to new residents by having at least the same mix of recreation opportunities as other like communities, and

What are the priorities for action

- Review maps, development plans and photographs and other materials relating to contentious sites or issues. Participants can be asked to write notes on maps re “good” or successful achievements, and on problematic” and “urgent” sites as a guide for future action.

When assessing “needs” it is useful to distinguish between “expressed needs”, these being the activities people actually do; “latent needs”, being the things they would like to do but for one reason or another cannot do, and “normative need”, this being what residents feel their community ought to have if it is to be as attractive as other communities. To assess latent needs, residents can be asked “Are there particular activities you would like to do but cannot?” and “What are the things that stop you pursuing those activities?” These questions are valuable in identifying new venue and program provision needs and also servicing needs (eg: transport, information) and other barriers that stop participation.

All the issues raised at public and on-site meetings and at workshops should be recorded on large sheets of paper that are progressively put on display so that participants can go back and add to, or clarify and modify them as the discussion progresses.

A final group of consultations-related research methods warrant a comment at this point. While these cannot be formally considered as community *consultations*, they relate directly to community use of recreation facilities, programs and services. These are *observation* and the use of *physical evidence*.

Observation entails visiting recreation sites and recording information on how many people are there, what their general demographic characteristics are, group sizes, the activities being pursued, the resources being used and *not* used, times and length of stay, method of travel and the like. While observation does not offer the opportunity to collect opinions, attitudes and reasons for use, it still provides a wealth of material on use, often from people who could not answer survey questions or who might be unwilling to do so (eg: disabled people, CALD groups, children, busy mothers, school groups).

The collection of physical evidence can also prove useful. Scuffing of tan bark under a swing indicates use and research has been conducted in the past to determine the relationship between the extent of scuffing and the level of use. Likewise, the number of cars in a car park, the levels of rubbish in bins, car numberplate States of origin, and the car sales stickers on car back windows have all been used to assess visit rates and origins. The width of tracks, the depths of track erosion, vegetation trampling, visitor record books, volumes of rubbish, and campground registers and permits are also useful sources of data for some studies.

## 8.6 Analysing and using the consultations findings

Having collected some or all of the information outlined above, it must be collated, summarised and evaluated if it is to be used as an input to a recreation plan.

Where written material has been collected, collating and summarising can be achieved by grouping like comments under a series of headings. This process can bring *all* the findings together under those headings although preferably, it should distinguish between the findings gained from interviews, submissions, public meetings and random surveys, as the reliability and the detail of information from these three sources can vary substantially.

Consultative data that can be treated statistically can be presented as tables, graphs and charts. A number of commercial companies provide data collection and processing services if these are needed. While data collection by phone, postal and doorknocking can be expensive, the processing and preparation of comprehensive tables from survey returns can be as low as \$2 per survey.

In all instances, however, it is essential that the planner *describes* and *explains* the findings and *makes an evaluation* –or a number of alternate evaluations-- of the information that has been collected. Little benefit will be gained from simply presenting the material and leaving it to the reader to try to make sense of it. At this point, the planner may also wish to identify some initial conclusions and form some preliminary recommendations for action, with these being carried forward to the final stage of the planning process, the preparation of the plan.

However, prior to the preparation of the plan, it may be that it is decided that a further round of consultations will be undertaken. In this situation, planners often prepare a set of issues or position papers detailing the consultative (and other related) findings and possible solutions to the problems or needs that have been identified. These are first presented to the commissioning authority for review, discussion and approval before being used to generate discussion and responses from the wider community. Such an approach helps to ensure that decision makers know what has been identified and can respond to it. It also helps to educate the community about recreation needs and opportunities, the cost of these and the possible need to stage action. Perhaps most importantly, it demonstrates to the community that its views have been listened to and taken into consideration.

This community review process is now seen as mandatory once a *draft* plan has been prepared. In this context, the planner is essentially going back to the community to say “Here’s what we have drawn out from your input (and other research) and here’s what we think should be done as a consequence. Is there anything we have missed or that could be changed, emphasised more strongly, or added?” In many organisations which commission planning studies, the planners are required to report their draft findings to officers and elected members *before* going back to the public so that issues that are contentious, politically difficult, costly etc can be reviewed and evaluated -and if necessary, revised- before a draft is released to the community. Following say, a month of “public exhibition” of a draft report, any further revisions that are deemed necessary are made before the final version is presented to the planning body for acceptance, adoption and implementation.

The process of preparing the initial draft and final recreation plans are discussed in Chapter 12.

## 8.7 Conclusion

This chapter has provided details on the rationale for and the strategies used to consult the communities to be served by the recreation planning process. Over the years, a long and strong history of consultation has developed in Australia and this is warranted by the fact that recreation planning is being carried out directly for the benefit of the local community. The general experience is that the more diverse the consultative tools that are used, the better and more useful will be the findings.

Yet, despite the long-standing recognition of the importance of consultations, an increasing number of planning agencies are resisting community input and engagement. This appears to reflect an element of professional jealousy on the part of bureaucrats when faced by an educated community, the politicisation of bureaucracies and the growing cost of ensuring effective engagement due to resident apathy, mixed-language communities, growing safety issues. This trend should be resisted: planning decisions without strong community involvement can never be better than when healthy community involvement *does* occur.

## Appendix 8.1

### A Summary of Consultation Strategies:

Strategy	Notes
<b>Letters</b>	<p>Send to clubs and groups and key stakeholders only</p> <p>Send a follow up letter or make a follow up phone call</p> <p>Do not expect more than 25-30% response rate while rates as low as 5-10% are common. In a few instances, <i>no one</i> has responded</p>
<b>On-site interviews</b>	<p>Difficult to select randomly and to include group members</p> <p>Consider short initial interviews and longer take home and return forms</p> <p>Consider use of leave-and-collect surveys at car parks, shelters etc</p> <p>Consider use of a multi-answers sheet</p> <p>The method only covers users, though reverse extrapolation is possible in order to determine who does <i>not</i> use the resource</p> <p>300-400 needed for a statistically valid sample although smaller numbers will still provide valuable anecdotal information</p>
<b>Telephone interviews</b>	<p>Use a private company for efficiency unless interviewing small numbers of clubs, individuals etc</p> <p>Only use if desperate or if contacting key clubs and groups (ie: not a sample of the community). Otherwise, the method is costly, potentially inaccurate due to self-selection hidden by sampling by age group &amp; gender</p> <p>300-400 returns needed</p>
<b>Personal interviews</b>	<p>Prepare a list of questions</p> <p>Provide a copy of the questions to those being interviewed</p> <p>Sample size can be quite small and graphed to indicate point of limiting returns</p> <p>Query unclear points</p> <p>Do not join in the conversation but leave pregnant pauses to stimulate further inputs</p>
<b>Door knock surveys</b>	<p>Select random starting points/ homes</p> <p>Select 2 per house on basis of birth dates</p> <p>300-400 randomly selected respondents needed for statistically reliable results</p> <p>Go at appropriate times eg: 4-6pm, Sat/Sun afternoons</p> <p>Include reply paid return envelope</p> <p>Include a letter from some senior Eg Mayor, Director</p> <p>Go back if not initially home</p> <p>Derive questions from issues identified thru interviews, report reviews, demographics</p> <p>Pre-code questions</p> <p>Leave information relating to the study regardless of response. Record info re non-respondents</p> <p>Expect 60%+ response rates</p> <p>Extensive, cross-tabulated data (eg: by age, location, gender etc) with statistical significance shown can be processed quite cheaply by commercial companies eg: \$750 for 350-400</p> <p>Use rates roll to draw a random sample of 600-800 homes</p> <p>Use community/ students as interviewers but be wary of forgeries &amp; consider using black lights (see discussion in Appendix 8.2 following)</p>
<b>Submissions</b>	<p>Never expect many with 5 – 15 generally being the maximum</p> <p>Be aware that they will reflect personal biases</p>
<b>Press releases</b>	<p>Use as much as possible but do not expect much of a response unless the subject matter is controversial, unless a group organises a write-in or unless you prepare 3+ releases which progressively educate the community about the study/research being undertaken</p> <p>Don't expect a balanced response</p>

Strategy	Notes
<b>Public meetings</b>	<p>Do not overlook even if you do not learn a lot as you will otherwise be criticised</p> <p>Run early <i>and</i> late in the process and use the latter to test earlier ideas</p> <p>Ask “What works?” (as a model for the future), “What needs fixing?” &amp; “What needs adding?”. Seek reasons, ask for priorities</p> <p>If contentious issues arise, allow a max of 3 speakers for 3 mins</p> <p>Write answers on butchers to allow more to be added as the meeting progresses</p>
<b>Observation</b>	<p>This provides good information on use, by who, when, &amp; where but not <i>why</i> the activities occur</p> <p>Time consuming</p>
<b>Web survey</b>	<p>Do not waste time on these as they can be subverted by organised groups and exclude all those without computer access</p>

## Appendix 8.2

### How to Do It: Consulting the Community through a Random Community Survey

#### A8.2.1 Introduction

There are many ways by which the community can be consulted and these have been listed and briefly discussed earlier in this chapter.

One consultative method that is often applied, and which can provide invaluable information, is the community survey. The value of community surveys, how we can be assured that they represent community opinion and how they are carried out are discussed in this Appendix. The contents of a community survey are discussed later in this appendix.

#### A8.2.2 The value of community surveys

The unique value offered by a community survey rather than a club or venue user survey is due to the fact that if carried out properly, it can provide an understanding of the views of the *whole* community as opposed to only part of it. This means that the views of people of virtually all ages, with different cultural backgrounds, in differing socio-economic circumstances and with differing educational backgrounds can be included. Most importantly, a community survey can ensure that the views, needs and behaviour of recreation *participants*, *past* participants and *non*-participants can be included. This allows a balanced assessment of planning and provision issues rather than one that is, for instance, either biased for or against a particular initiative.

#### A8.2.3 Community survey weaknesses

Unfortunately, many community surveys have been poorly applied and this means that the results do not indicate the views of the “community”. Rather they are only the views of a “part” of the community and it is not possible to be accurately sure which part. The most common weaknesses in the application of community surveys are:

1. People being surveyed away from home. This means that where they are when they are interviewed can bias who will be included. To explain, a survey of community opinions undertaken in a shopping centre can only include people who go shopping, who visit the specific shopping centre *where* the survey is conducted, who visit the specific shopping centre *when* the survey is being conducted, or who have time while shopping to take part in a survey. This does not mean that shopping centre surveys are not useful, but it does mean that information collected this way cannot be taken as a valid expression of “community” views but rather, as a statement of the views of a particular (perhaps biased) section of the community
2. A lack of randomness in the selection of respondents. To ensure that the results reflect the views of the community, the ideal would be for a community survey to include *everyone*: just as the national census does. However, surveying everyone is rarely if ever possible (unless the community being surveyed is very small). As a result, researchers and planners use *samples* of the community and many years of research has determined what the *size* of the sample needs to be get results that are statistically accurate. The following chart explains this.

Knowing how many people need to be randomly selected to achieve survey responses of certain levels of accuracy makes surveying everyone unnecessary

3. Believing that 5 or 10 percent of the survey need to be surveyed to have “accurate” results. As implied in the previous paragraph, this is not so. A survey of 10 percent of the population that includes no one under the age of 20 for example, or no one from a multi-cultural background, will clearly not represent the views of all Australians. National political opinion polls taken around the time of elections generally use a sample of just less than 2,000 people from a voting population of 14 million. Because the sampling is done carefully, rigorously and randomly, the results are accurate to within around one percent of what the population’s voting intentions are
3. Many surveys are conducted on the basis of self-selection by respondents. Radio, TV, newspaper and internet opinion polls are common examples. However, when it is left up to residents to decide if they will participate in a survey or not, any chance of randomness is lost. This is because first, when given the choice of responding or not responding, most people don’t respond. Further, most people only respond to surveys that are on a topic they are interested in and as a consequence, the results only reflect the views of those who know about the issues being covered or often, who are strongly for or against a particular proposal. The results of such surveys can only be taken as the opinions of the individuals who respond, not of the community as a whole
4. Posting surveys to the community. Many researchers post surveys to residents. Yet, unless the surveys are written in 15 to 20 or even 40-50 different languages, this method will immediately exclude anyone who cannot read English. And even then, significant numbers of residents born in non-English speaking countries cannot read their own native tongue. Further problems with postal surveys are:
  - Because they are somewhat “anonymous”, people feel less obliged to respond
  - It is easy to forget that a letter has been sent, or to lose it
  - They allow self-selection by the community. If the topics covered by the community are not of interest to many community members, they will not respond

Experience has shown that at the worst, *no one* may respond to a postal survey while at the best, a response of 20-30 percent will be achieved. This means that for one reason or another 70-80 percent (or *all*) of the community has decided not to respond. It would seem fairly logical to conclude from this that all those who chose not to respond must be somehow different to those who did *because otherwise they would have responded*. If this is the case, it means that the 0 to 30 percent who respond are unlikely to reflect the views of the community as a whole.

5. Phoning the community. Telephone surveys have been widely used over recent years because they offer the advantage of ease of contact across a region or even the country as a whole. It is also easy to achieve randomness in the selection of respondents (using, for instance, a table of random numbers and a Council ratepayer role or the phone book). Direct contact with potential respondents also offers the ability to speak directly to residents to explain the purpose of the survey. Unfortunately, phone surveys have suffered from the relentless impact of telephone marketing and this has led many residents to reject phone contact from anyone other than people they know personally. In one Melbourne municipality, some 7,000 residents were contacted by phone in order to achieve a “sample” of 300. Further problems with phone surveys are that a degree of randomness can be lost depending on who answers; an increasing number of people have silent numbers, and “op out” legislation is increasingly limiting who surveyors are legally allowed to call.

Despite these problems, phone surveys can still be useful, especially if it is difficult to contact people by any other means. The reason for contacting a resident must be carefully explained but even then, as indicated above, it is often necessary to ring thousands of numbers to get hundreds of responses. Evidence suggests that no more than one in five or one in six of the people contacted will take part and this immediately raises the question as to whether these people are a valid *random* sample. Telephone surveyors overcome this problem to some extent by “stratifying” the sample: that is, they make sure that the demographic characteristics of the people they include reflects the demographics of the whole population as accurately as possible. This assumes, however, that people of a particular age, cultural background or gender will give the same types of responses as would *non*-respondents of that particular age, cultural background or gender. This is unlikely to be true and as such, even achieving a demographic match does not mean that the responses will be the same.

#### **A8.2.4 Ensuring a reliable community survey**

The best way to overcome the weaknesses of community surveys is to make sure that everyone to be surveyed is contacted personally at their home. This means automatically that the faults identified above are avoided. It also means that the survey sample can readily be selected on the basis of location and personal characteristics, so that it accurately reflects the wider community from which the sample is drawn.

The steps to follow in conducting a community survey through the homes of residents are outlined below.

**1. Deciding when to conduct the survey.** Community surveys are undertaken to collect the views of the community. Yet the fact that many residents may not have views on many of the issues covered in surveys means that they should not be relied on as the only source of community input to a planning study.

Other sources of information regarding community views which should be used are interviews with or surveys of sporting and recreation groups, service providers and Council and government bodies; interviews with active, informed members of the community; public meetings (which tend to attract people with issues of concern to them), and on-site user surveys. These techniques provide information regarding the views, interests and priorities of people who *know about* or who have *opinions on* recreation and leisure issues.

In a sense the views of those who are more involved with sport, leisure and recreation are more informed views although this does not make them more important or more accurate views. In fact, they could be quite biased. As such, a random community survey is an important tool for both collecting the views of those residents who are not as involved as other members of the community or who pursue activities that do not involve clubs and organisations. It is also a very useful way of testing the ideas, needs and priorities of those who have been consulted by other strategies and perhaps, to test strategies for action that have been identified by Councillors, Council officers or planning consultants. If such a range of ideas is to be tested, the best time to conduct a random community survey is toward the end of a planning study.

**2. Deciding on a sample size.** The following Table indicates how accurate survey results will be dependent on the size of the sample. It shows that if a sample of 50 people was used and 2 percent of the respondents gave a particular answer, then the answer from the whole population could be as low as 0 percent or as high as 5.3 percent. If 50 percent of the 50 respondents gave the same answer, the “real” result could be as low as 38.3 percent or as high as 61.7 percent. This indicates a response range of as much as plus or minus 11.7 percent. Such a range makes it clear that a sample of only 50 people does not give a very accurate result.

By comparison a sample of 400 has accuracy levels of plus or minus 4.1 percent. A sample of 500 people gives an accuracy of +/- 3.6 percent and this falls to as low as +/- 2.6 percent with 1,000 residents. One would have to question whether increased accuracy of +/- 1 percent warrants going from 500 to 1,000 surveys.

RELATION BETWEEN SAMPLE SIZE AND PRECISION  
IN A SIMPLE RANDOM SAMPLE  
90 Percent Confidence Intervals

If the per- cent giving the same an- swer to a question is...	...and the sample size is:					
	<u>50</u>	<u>100</u>	<u>200</u>	<u>400</u>	<u>500</u>	<u>1000</u>
	Then there is a <u>90 out of 100</u> chance that the percent of the <u>total</u> population that would respond the same way would fall within these ranges:*					
2	0- 5.3	0- 4.3	0.4-3.6	0.8-3.2	1.0-3.0	1.3-3.7
5	0-10.1	1.9-8.1	2.4-7.6	3.2-6.8	3.4-6.6	3.8-6.2
10	3.1-16.9	5.0-15.0	6.5-13.5	7.5-12.5	7.9-12.1	8.4-11.6
20	10.6-29.4	13.4-26.6	15.9-24.1	16.7-23.0	17.0-23.0	17.9-22.1
50	38.3-61.7	41.8-58.2	44.2-55.8	45.9-54.1	46.4-53.6	47.4-52.6

- NOTES:
1. These apply if simple random sampling is used. If cluster sampling is used, the errors will be slightly greater.
  2. Non-sampling errors are not included.
  3. These apply if the total population from which the sample is drawn is large relative to the sample size. If not, the accuracy of the sample estimate should be greater and therefore the ranges narrower than given in this table.

\* More precisely, if an infinite number of samples of indicated size were taken, 90 percent of them would contain the true value of the total population in the given confidence range.

Source: Hatry, H and Dunn, D, 1972: Measuring the Effectiveness of Local Government Services. Recreation, The Urban Institute, Washington, Appendix A. For a similar but more recent discussion of assessing sample sizes, see Veal, 2011: Research Methods for Leisure and Tourism, Ch. 13 and esp. section “Sample Size”

Given that recreational participation can vary depending on the weather and people's whims, the accuracy delivered by a sample of 1,000 people is unlikely to be needed, especially when doubling the sample size from 500 only increases the accuracy by plus or minus 1 percent, but doubles the cost of conducting the survey.

In conclusion, the figures in the table argue a case for a sample of anything from say 350 people through to 550 people. The higher the number, the more accurate the results but of course, the higher the cost of collecting the data.

A key point to note about a properly conducted random community survey is the higher the sample and the more rigorous the methodology, the greater the accuracy and as such, the greater the capacity to use the findings to reject small group demands or fads.

- 3. Decide how the sample will be selected.** A sample for a community survey can be selected in several ways. The starting point is to use a table of random figures, with these usually available in most books on statistical methods. The random numbers in the table are then used to select the addresses to be visited from a ratepayers roll or to select where the houses to be visited are on a grid placed over a map of the area being surveyed.

To explain the use of a ratepayers roll further, if as an example, there were 20,000 rate payers in the study area and a sample of 500 people was to be used, then 500 numbers between 00001 and 20,000 would be drawn from the table of random numbers. Clearly, numbers above 20,000 would not be used. Alternately, if the 20,000 ratepayers was divided by the sample size of 500, the result would indicate that every 40<sup>th</sup> ratepayer had to be selected. In this instance, a number between 01 and 40 would be selected from the table of random figures. If the number was say, 23, this would indicate the first house to be sampled would be the 23<sup>rd</sup> property on the ratepayer list. After selecting ratepayer 23, the next 500 would be selected by adding 40, 80, 120, 160 and so forth to the original number 23. This second method does not deliver as random a sample as the first method as in reality, only the first number, 23, is randomly selected. It does mean, however, that there is a greater chance of selecting people across all cultural groups as it delivers a "regular" spacing of the sample. By comparison, an entirely random sample could easily miss sampling households with an uncommon name.

(It warrants noting that Councils can use rate rolls as a means of selecting the addresses of ratepayers when postal surveys are used. A concern here, however, is that not all ratepayers are residents and as a result, writing to ratepayers may actually exclude all those renting their homes in the study area. Consequently, when posting surveys to addresses selecting using rate rolls, it is important that they are addressed to "The Resident" and not to the name of the property owner.)

With regard to selecting a survey sample using a numbered map grid, a grid with say, one centimetre spacings, is laid across the area being surveyed, as in the rough example below. The table of random figures is then used to identify the position of the homes that are to be surveyed. For instance, if each of the horizontal grid lines are numbered from 0 to 15, then the table of random figures is used to select two sets numbers from 00 to 150, these representing 0.0 and 15.0 respectively.

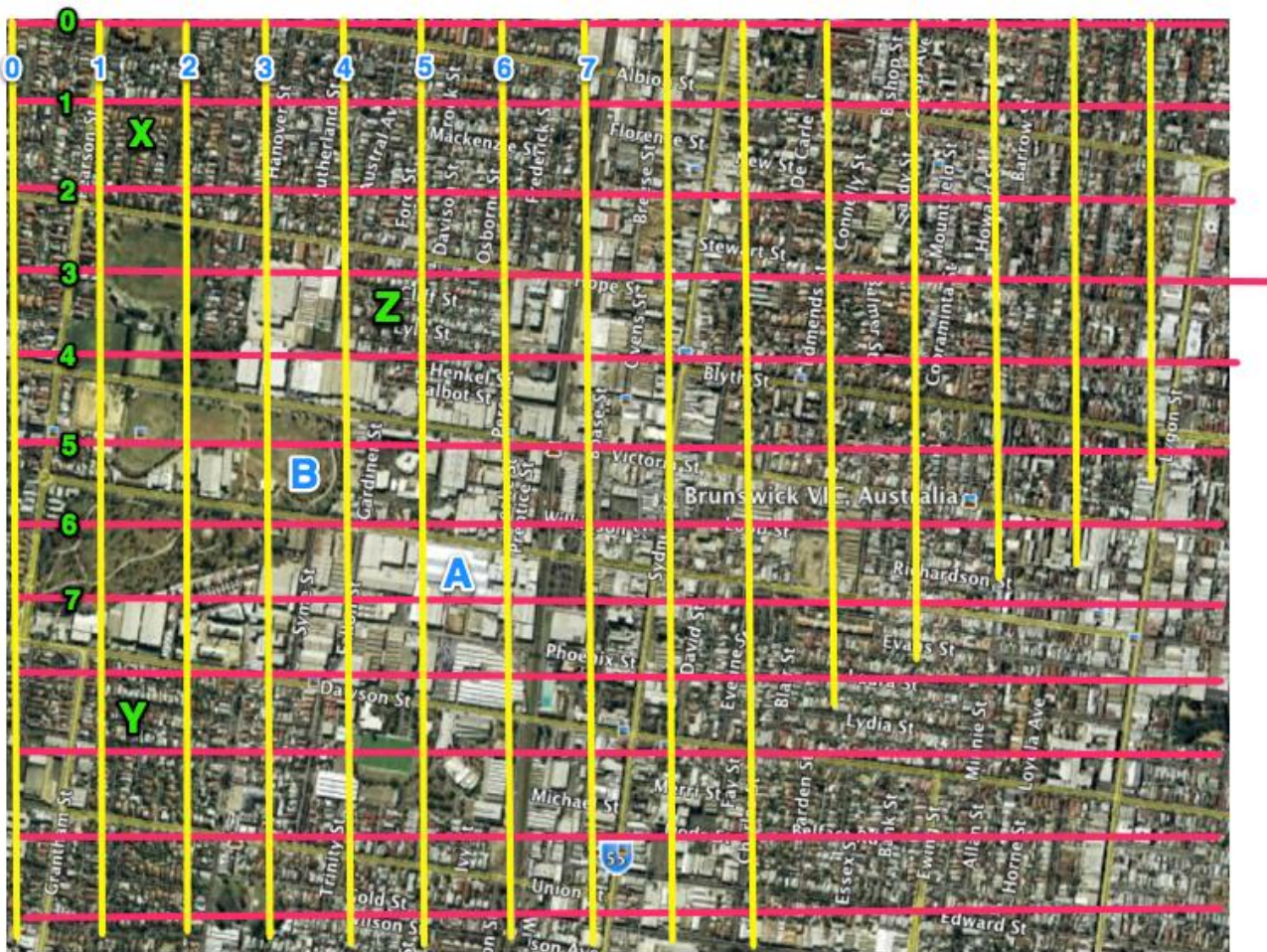
In the diagram on the following page, the vertical and horizontal lines are both numbered and as such, the random numbers 13 14 would generate sample site X, this being 1.3 down and 1.4 across. Sample site Y would be found by the random numbers 85 12, this being 8.5 down and 1.2 across. The random numbers 52 33 would identify site B but this would be rejected as it is on parkland. Similarly, site A would be rejected because it is a factory site. Numbers from the table of random figures would continue to be drawn until the full sample of 500 sites was selected. Numbers outside the range of the grid numbers are rejected. Then, the house nearest to each selected point becomes the interview site.

An alternate strategy to selecting 500 survey points is to select 25 points and to use these as the starting points for surveying the residents of groups of 20 adjoining homes. This still makes up 500 survey sites but it means that interviewers do not have to spend a lot of time going from one random point to another which, depending on the area being surveyed, may be quite some distance apart. Instead, the interviewers go to their starting point and carry out a strip of interviews by going to each adjacent home. If a particular home is vacant or if the residents refuse to be interviewed, the surveyor simply goes to one more home at the end of the strip. If no one is home, the interviewer returns 2-3 times at different times of the day or week so as to make contact. If still no one can be contacted, another home at the end of the strip is added. The ABS has advised that this approach reduces the accuracy of the responses by 1-2 percent, although this loss can be offset by using a slightly higher sample number. The approach substantially reduces the time needed to complete the interviews in that instead of going to 500 separate sites, 25 interviewers can visit 20 homes in a row to cover the survey sample.

Yet another strategy designed to reduce survey times *and* to achieve a more random sample, is to ask *two* people in each home to complete the survey (again based on birthdays). This ensures that there is a spread of respondents from each home as well as doubling the capacity to collect responses. Instead of interviewers having to go to 20 homes from their random starting point, they only have to visit 10 homes. If only one person is available in any particular

home, another is simply added to make up the numbers after the initial 10 have been visited. In both the single or dual person survey approach, recording information on the characteristics of those who refuse to take part can give useful guidance as to whose views are being under-represented.

The door knock survey methodology has achieved returns of as high as 98 percent and at worst, 60 percent, thereby ensuring that a far more valid representation of community opinion is achieved than when other strategies are used.



- 4. Contracting surveyors.** Once decisions have been made as to the sample size to be sought and the distribution process to be used, interviewers need to be contacted. These are often best sought from within the community being researched as they will know the community, will be better able to explain the study purpose to the community and will have some understanding of the issues being addressed.

Residents are most readily contacted through the earlier stages of a planning study, in particular through the special interest and community meetings, as it is generally found that residents who are interested enough to come to community meetings will also be interested in helping with surveys. Often they will offer to help with the distribution process for free. Note though that residents should not be pressured to assist as many people find it very difficult to knock on the doors of strangers, or sometimes even more so, to knock on the doors of their neighbours (in which case, they can be offered a survey area elsewhere in the study area). Note too that some may well drop out at the start of or during the process when they realise what the surveying entails. As such, it is good to have a few “emergencies” available to step in. Finally, note that it is best to not have any more than 2 people from any particular sporting club as they may be tempted to encourage particular responses on the part of the respondents and this will destroy the validity of the results.

If not enough residents can be enlisted, service clubs, university students and Council staff are often willing to help although they may need to be paid. The usual approach here is to “pay by results” so that interviewers are paid, for example, \$10 for every completed survey they collect.

A key point that must not be overlooked when engaging interviewers is that you will need to check your or your employer’s position regarding insurances, occupational health and safety and whether or not tax needs to be taken out of any payments that are made.

- 5. Conducting the survey.** Once the survey sample has been selected, interviewers visit each of the selected homes. They contact the residents (and go back if they are not home), and go

through the following steps:

- Introduce themselves, explain that the survey is nothing to do with commercial sales, explain the purpose of the survey and outline why it is important for household members to take part
- Outline the scope of the survey so that potential respondents know what to expect if they agree to participate. Take time to explain the purpose and scope of the survey and to convince those who might be uncertain that it is important to take part. It is this personal, face-to-face contact that is critical to success
- Provide a copy a letter from the Council Mayor or a senior manager further explaining the importance of the survey and providing contact details in case there are questions as to the survey content and its veracity
- Leave a copy or copies of the survey (depending on the number of householders being surveyed) and an envelope so that residents can complete them at their leisure and in private. Ask respondents to seal the completed surveys in the envelope to ensure confidentiality
- Ask for the one or two people whose birthdays are closest to the survey date to complete the survey. As noted above, this is a good way of achieving randomness within the survey family. It also avoids the problem of only adults completing the survey which thereby biases the responses in favour of adults. A lowest age for respondents can be set (say 15 years) or it can be left for people of any age *who are able to understand the questions* to complete the survey
- Once contact is made with a household the two people who are to complete the survey should be randomly selected. This is achieved by asking for the two people whose birthdays are closest to the survey date to complete the survey
- Agree on a time several days later to return to collect the completed surveys. Write this on the covering letter so the respondents know when they have to have the surveys completed by. If, when the interviewer returns, the surveys have not been completed, a new collection date should be set. If no one is home, a reminder letter should be left setting a new collection date. Go back at least three times to encourage a response
- Use a record sheet to record the addresses of the houses have been included in the survey and when the interviewer needs to return to collect the forms. Also record which houses have rejected taking part and why, and those houses in which residents could not be reached. This record sheet is important because if an interviewer falls ill, someone else will be able to go back to collect the returns. It also means that if quality checking is needed (see dot point two under "Processing the Surveys" below), the checker knows which houses to go to.

An alternate survey strategy that can be used where there are fewer questions, is to use the same sample selection process to identify interviewees but to then conduct the interview on the spot once contact is made. Compilation of the results can be assisted by preparing sheets with questions down the left hand side and columns across the rest of the sheet for recording multiple respondent answers. This strategy will also achieve very high response rates although it is more difficult to achieve randomness by using household member birthdates as the otherwise designated members may not be home. Similarly, it is often more difficult to get two household members to complete the survey

- Provide interviewers with a large stamped and addressed envelope for them to place returns in ready for posting to a central collection point once all forms have been collected
- It warrants noting that some volunteers who offer to do surveying may *not* end up doing it because of time, nervousness or some other reason. As a result, there is a need to have a few back-up interviewers available. Sometimes, so they are not seen to be letting the process down, would-be interviewers who run out of time or find they are too nervous to go doorknocking, will fill in some or all of the surveys themselves. As a consequence, it is critical that survey returns are checked closely to make sure this has not happened. It is often quite easy to recognise the same handwriting on form after form while some who do this also never get around to folding the surveys, as they would be had they been returned in the sealed envelope that is provided. Where there is a suspicion of the process being corrupted, the list of addresses visited can be used to do spot checks. If there are continuing suspicions or the spot checks prove that the work has not been done, the whole batch should be discarded. If the corruption is detected early enough, it should be possible to randomly select a new starting point (preferably in the same part of the area being covered by the survey), and do a new group of interviews. If this is not possible, it just has to be accepted that the desired return level may not be reached, and
- In some instances, it may be appropriate to use fluorescent/ invisible pens and "black lights" to number or identify surveys. These can be bought from most stationers. The pen is used to number or record the name/address that surveys are sent to so they can be checked off when they are returned. This can save considerably on the cost of sending reminder letters. Black light markings can also be used to detect copied and thus "fraudulent" replies.

**6. Processing the Surveys.** As completed envelopes of surveys are posted in or delivered by the interviewers, they should be ticked off and counted so that the success of the process can be monitored. Sometimes it will be found that an envelope of “completed” surveys has not been touched and it will then be necessary to decide whether another survey area needs to be selected and surveyed to make up the shortfall or whether responses from others have been sufficient to offset this loss.

When opening envelopes of completed surveys, the following steps should be followed:

- Check the extent to which the individual surveys were or were not completed. If only one or two questions have been completed, the data is of little value whereas a survey where all but a few questions have been answered is still of value
- Check through a sample of the responses to make sure there have been no “forgeries” (as discussed above)
- Number the *completed* surveys by their survey area and by a number within the survey area eg: 3/1, 3/2, 3/3, indicating survey area 3, responses 1, 2 and 3
- Tally the number of completed surveys and record this on a sheet
- Check that the survey questions have been answered correctly and clearly. For instance, people are often sloppy in answering tick box questions and tick *near* a box but not in it: this only increases the risk of inaccurate data transcription later. Re-tick the correct box where the intended answer can be determined. Where people are asked to tick a box and then to add a written response, they often forget to tick the box. The tick should be added
- Prepare sheets and transcribe any written comments **and/or** use a fairly large sample of the responses to compile a list the answers and then devise a numbering code for them. Try to restrict the number of codes to no more than 10 or 12. Once a code list has been prepared, go back through the surveys and write in the code for each answer
- Enter the survey data into a spreadsheet so the results can be compiled or send the forms to a professional firm for processing. The latter is often the most effective as it is quicker, quite cheap and can provide extensive cross-tabulation tables eg: age, gender by each answer, while measures of statistical significance or the responses from user sub-groups or sub-areas of the area surveyed can also be produced. OzInfo in Melbourne can process as many as 450 surveys in no more than a day or two at a cost of less than \$1,000. Hard copy and/or electronic results can be provided
- Analyse the results. A report or a chapter with a broader report should be prepared on the survey findings. This should present key tables of information, describe their highlights and discuss the possible implications to leisure provision. Data without an evaluative commentary should never be included in a report.

### **A8.2.5 The content of community surveys**

The contents of community surveys will be determined by the purpose and objectives of the overall planning study. Questions can be structured in a variety of formats including tick boxes, rating scales (including importance/performance questions), and open-ended written responses. The questions can also cover factual and attitudinal issues.

Despite views to the contrary, the length of a survey does not appear to affect the response rate or the details of individual responses and surveys as long as 8 pages can be successfully carried out if the questions are interesting.

In preparing a survey, it is best to start with an explanation of the overall study (even if this is in a letter the accompanies the survey), and a brief repetition of the method for completing the survey as a respondent may forget these details once the interviewer leaves. Then, begin the questions with some fairly simple issues, perhaps with “yes” or “no” responses. Do not launch into “heavy” or complicated issues at the beginning as this can deter respondents.

Try to vary the survey format so it does not become boring. Provide maps if this will help. Include questions that allow an informative analysis of the answers, such as importance/ performance analysis questions.

When the question is one for which the likely range of answers is already known (such as the reasons for not going swimming), include those answers and simply ask the respondents to tick those that apply to them. But make sure that room is also left for answers that have *not* been thought of before. This approach makes it easier to answer the question, reduces the need for coding, and makes any coding that is needed far simpler.

Where questions that ask for ratings are used, make sure there is an option for a “no opinion” or “I don’t know” answer. Forcing people to make a decision on an issue they know nothing about generates inaccurate responses and can produce misleading results.

Do not be afraid to give respondents a long list of ideas or suggested actions and to ask them to tick all those they support. Lists with as many as 140 different ideas identified through all the previous research and

consultations have been used very effectively in the past. Such a list alleviates the need to ask for priorities as these emerge from the responses, while cross-tabulating the answers by gender, age group, suburb of residence, cultural background or length of residence provides evidence of the priorities of different sub-groups in the community. Where such lists are provided, again make sure there is room for the respondent to add new ideas and suggestions as looking at a list always gets people thinking.

Leave questions regarding the personal characteristics of the respondents *until the end* as asking them at the beginning can put people off. Try to avoid questions that are too personal as they reduce response rates, are rarely answered and do not throw a lot of light on recreational participation anyway. These include in particular, income and marital status.

Leave room at the end for respondents to add any further ideas or issues they would like to see addressed.

Several example surveys are provided on the following pages. The first is a 2011 survey of Docklands residents in inner Melbourne regarding their use of aquatic leisure facilities and their interest in the components of a proposed new venue. The second survey is a community-wide survey undertaken as part of the preparation of a recreation plan for the City of Ballarat in 2003.

The covering letters prepared with each of these surveys have not been provided. As noted previously, this should be printed on the letterhead of the organisation sponsoring the survey and should be signed by a senior member of the organisation eg: Mayor, Chief Executive Officer, Director. The letter should provide contact names and numbers in case those being surveyed have questions or concerns about the survey and the wider study.

### **A8.2.6 Community survey exercise**

1. Prepare a written statement of the survey methodology to be used in conducting a random community survey in a selected community. Include a timeline for the implementation of the survey
2. Test and refine the methodology through visits to the homes of class members, friends etc
3. Working in teams of two or more people, design a set of questions for inclusion in a random community survey. Where possible, design these to cover a topic or topics of relevance to a local government authority in which the survey could be applied. Test and refine the format and content of the survey through mock interviews with friends and family
4. Devise the specific survey format to be used in doorknocking 10 homes, writing to 10 homes and phoning 10 homes in the selected community. Use the questions from 3. in the survey and assume that you will be seeking two respondents per home
5. Carry out the following steps to select 3 random samples of 10 homes in the one district of the community selected in 1:
  - a. Using your knowledge of local phone numbers or using a district telephone directory, randomly select 10 phone numbers. Additional numbers may need to be selected if insufficient responses are obtained from the first 10
  - b. Using a map grid and a table of random numbers, select 30 random home addresses. Visit, but do not contact, these addresses to confirm that they are homes and to record specific details of their addresses
  - c. Implement a survey of the three random samples you have selected by (a) phoning 10 (b) Writing to 10 and (c) Doorknocking 10. As indicated above, additional homes may need to be added to achieve survey responses from 10 in each category
  - d. Record details of the responses from each home contacted, including any reasons for not participating if this occurs and if possible, profile data on those who reject being involved
  - e. Compare and evaluate the response rates achieved through the three different methodologies
  - f. Manually compile the results from the three samples and compare and evaluate the findings
6. Prepare a group report on the overall project including conclusions and recommendations regarding the methodologies and a summary of the findings on the topic being researched.

### Appendix 8.3. Some sample surveys

#### A Survey of Leisure and Community Facilities Use by Docklands Residents

Thank you for assisting with our research. Please answer the questions below. Most require a tick although some ask for a written response.

1. **Outside any facilities in the building you live in, do you ever use any public, private or commercial leisure, recreation, health or similar facilities that are in the Docklands or in the surrounding suburbs?**  
 Yes     No

2. **Here is a list of the major aquatic leisure and fitness venues and programs that serve the needs of the Docklands.** Tick those you have used at least once in the past 3 months and then answer the other questions about them. If there are other venues you have used that are not listed, please add them to the list:

Venue	Tick those you have used	How often do you use them? Daily / Several times a week / Weekly / Several times a month / Less often	What do you use the venue for?	Why do you use this venue?
City Baths				
North Melbourne Pool				
North Melbourne Football Club				
Melbourne Sports and Aquatic Centre (Albert Park)				
YMCA Docklands at Victoria Point				
YMCA Docklands on Collins (ANZ Centre)				
Other:				
Other:				
Other:				

3. **Are there public, private or commercial leisure, recreation, health or similar facilities in the apartment building you live in?**     Yes     No

4. **If you answered “Yes” to Question 3, please tick those facilities or services that are available** and then complete the questions about your use of them. If your apartment building has other facilities or services that are not listed, please add them in the space provided:

Facility	Tick those you have in your building	Tick those you use	How often do you use the facility? Daily / Several times a week / Weekly / Several times a month / Less often
Fitness gym			
Pool			
Cafe			
Spa			
Sauna			
Pool room			
Massage			
Other:			

5. **If you indicated that your apartment building has a swimming pool, what are its key features?**

Length: \_\_\_\_\_ Width \_\_\_\_\_ Depth \_\_\_\_\_m. No. of lanes if any \_\_\_\_\_

Average temperature \_\_\_\_\_ °C

Hours/ times of availability \_\_\_\_\_

Use restrictions: \_\_\_\_\_

**6. What activities do you use the pool for? (tick)**

Swimming laps \_\_\_\_\_ Social activities \_\_\_\_\_ Learn to swim \_\_\_\_\_  
 Therapy programs/activities \_\_\_\_\_ Other \_\_\_\_\_

**7. If you do not use the pool in your apartment building, what the reasons?**

\_\_\_ I'm not a swimmer  
 \_\_\_ The facility doesn't meet my needs: Why? \_\_\_\_\_  
 \_\_\_ I swim elsewhere: Where? \_\_\_\_\_  
 \_\_\_ Other reasons: \_\_\_\_\_

**8. If you swim elsewhere, what is it that attracts you to that venue? \_\_\_\_\_**

**9. If you don't use the pool in your apartment block, what would need to be done to attract your use? \_\_\_\_\_**

**10. If a new multi-purpose community activities and social hub was developed in the Docklands, what mix of facilities would you like to see provided?** A list of possible components is provided below. *Tick* those you would support being provided and whether you would use them. If there are other suggestions you have, please add them to the list.

Facility	Support Provision	Might Use	Would Use	Would Not Use
Aerobics/ program spaces				
Bookshop				
Cafe /news				
Community centre /social drop in				
Community meeting rooms				
Fitness gym				
Hydro pool				
Indoor lap pool				
Learn to swim pool				
Library				
Medical/ health services				
Outdoor heated lap pool				
Outdoor cold lap pool				
Pharmacy				
Playground				
Sauna				
Spa				
Water play area for children				
Waterside beach setting				
Other:				
Other:				
Other:				
Other:				

**We would like to finish with a small group of questions about yourself.**

11. Are you  Male  Female

12. Which age group are you in?

- 0-9 years     10-14 years     15-19 years     20-29 years     30-39 years  
 40-49 years     50-59 years     60-69 years     70 plus years

13. What is the make-up of your household?

- Live alone     Couple only     Couple with children     Mixed /group membership     Other

14. Home ownership. Which applies to you:

- Renting your home     Buying your home     Own your home

15. How long have you been living in the Docklands?

- Less than yr     1.1 to 3 yrs     3.1 – 6 yrs     6.1 – 10 yrs     Over 10 yrs

16. What building do you live in? \_\_\_\_\_

17. If you have any other comments and suggestions regarding this project, we would like to hear them. Please use the space below:

---

---

---

---

**If you would like to take part in the draw to win one of the three prizes we are offering survey participants, please insert your first name and a contact phone number below.**

First name \_\_\_\_\_ Phone number \_\_\_\_\_

**Please complete this survey by Friday March XXX**

# BALLARAT CITY COUNCIL RECREATION STUDY AND STRATEGY, 2003

This survey is an important part of the **Ballarat City Council Recreation Study and Strategy**. It is your opportunity to express your opinion on the future provision of recreation opportunities in the City.

Recreation is defined as *any activity which people take part in which is free from compulsion*. It may be attending a cultural event, spectating, activities with children, house renovations, studying, being in a services group, sports competition, or relaxing. Recreation is pursued at or away from home & at commercial, private or public venues.

Please answer with *your* opinions, not those of other members of your household. For most questions, simply tick the answer which best fits your opinion. For others, space is provided for you to make your own suggestions.

## A. Your Recreation Interests

1. Which recreation venues in Ballarat have you used in the past 12 months? **Tick those you have used**

- |   |   |                    |
|---|---|--------------------|
| Lake Wendouree and surrounds            | Lake Burrumbeet and surrounds           | Cinemas            |
| Lake Learmonth and surrounds            | Major passive recreation parks          | Botanical Gardens  |
| Other parks with a lake/water feature   | Theatres                                | School ovals       |
| Local indoor sport & recreation centres | Major indoor sport & recreation centres | Ice skating        |
| Outdoor fully fenced sports fields      | Other playing fields                    | Tennis courts      |
| Ballarat Aquatic Centre                 | 50 m. outdoor swimming pools            | Golf courses       |
| 25 m. outdoor swimming pools            | Lake Wendouree Apex Park                | Mobile playgrounds |
| Commercial health & fitness centres     | Local playgrounds                       | Bowling greens     |
| Local walking/cycle trails              | Skate facilities                        | Velodrome          |
| Horse/equestrian facilities             | Sovereign Hill                          | Eureka Stockade    |

Others \_\_\_\_\_

2. What are the three recreation activities that you most enjoy --whether done at or away from home, at public venues, or at private or commercial venues? **Write your favourites in here:**

1. .... 2. .... 3. ....

3. What three recreation *activities* have you most frequently taken part in **over the past 12 months?**

1. .... 2. .... 3. ....

4. Which three recreation *venues* in Ballarat do you most frequently use?

1. .... 2. .... 3. ....

5. If you used **few** or **no** publicly available recreation opportunities in Ballarat during the past year, what were the reasons? **Tick the list below**. If there are other reasons, write them in:

- |   |   |
|---|---|
| 1. ___ I don't know what is available                 | 2. ___ The quality is not good enough           |
| 3. ___ I don't feel safe using facilities in Ballarat | 4. ___ There is nothing that interests me       |
| 5. ___ I am not allowed to use public facilities      | 6. ___ I have enough interests at home          |
| 7. ___ I use facilities outside Ballarat              | 8. ___ I have not been well enough              |
| 9. ___ I cannot afford the facilities in Ballarat     | 10. ___ I can't get to the places I want to use |
| 11. ___ I don't have the right equipment              | 12. ___ Things I want to use are too far away   |
| 13. ___ I don't have enough time                      | 14. ___ I use commercial and private venues     |
| 15. ___ I have no one to go with                      |   |
| 16. Other reasons:                                    |   |
- \_\_\_\_\_
- \_\_\_\_\_

6. What do you think the **three most important** recreation planning, management, upgrading or provision issues that need action in Ballarat are? **Record your views here:**

1. \_\_\_\_\_
2. \_\_\_\_\_

**B. Providing New and Improved Recreation Opportunities in Ballarat**

1. Here is a list of *suggestions* for improving recreation opportunities in Ballarat. Many of them have been suggested by Ballarat residents at meetings held as part of the planning study. At this stage they are only suggestions and do not represent the views of Council or the recreation planners. Further, action on these issues may eventually be taken by a wide range of organisations other than Council.

**Tick all the things you would like to see action on.** Some items ask for *your* specific ideas on what action is needed or where. If you have *other* ideas, space is provided for you to add them at the end.

Many issues relating to the planning and management *processes* followed by Ballarat City Council have already been forwarded to Council. However, if you would like to raise any concerns about these issues, please record them at the end of this section.

**Arts/Cultural Opportunities:**

- Promote arts, gallery & community music
- Support provision of a dedicated theatre space for local performing groups
- Develop more informal cultural & arts programs and activities. What is needed?  
.....
- Develop a multi-use community arts & activities centre as a home for a wide range of groups, events & activities. What activities or groups should be provided for? .....

**Children's Play:**

- Provide challenging, exciting play equipment for a wider age range of children. Where is this needed?  
.....
- Develop a second major play park for the City (in addition to the Lake Wendouree site). Where?  
.....
- Provide play facilities for children with disabilities Where?  
.....
- Provide more seating, shade, paths, tables, taps & toilets at playgrounds. What facilities are needed and at which parks?  

<u>Action needed</u>	<u>Where?</u>
.....	.....
.....	.....
.....	.....
- Improve playground standards and services
- Provide more holiday play programs. Where?  
.....

**Community Halls:**

- Ensure local halls are of a size & standard to allow effective community and group use. What action is needed and where?  

<u>Action needed</u>	<u>Where?</u>
.....	.....
.....	.....
- Ensure that each community in Ballarat has a good local building for community use. Where is there a need? .....
- Are there other hall issues to address?  
.....

**Informal and Local Parklands:**

- Improve the standards of development and maintenance of informal and local parks across the City. What are the priority sites?  
.....  
.....
- Provide pathways through and *within* local parks. Which parks? .....
- Provide seating, weather shelters, paths & taps at parks. What facilities are needed and at which parks?  

<u>Action needed</u>	<u>Where?</u>
.....	.....
.....	.....
.....	.....
- Work with other organisations providing parklands to enhance access to reserves such as Kirks Reservoir, Canadian Forest and the Gong. What are the priorities?  
.....
- Are there other local park issues?  
.....

**Informal Recreation Activities & Services:**

- Provide a mobile skate park & move it to different parts of the City every 3-4 weeks
- Improve user safety in parks. What action is needed and at which parks?  
.....
- Develop more environmental activities and programs
- Provide more public toilets. Where?  
.....
- Provide fenced off-leash areas for dogs. Where?  
.....
- Provide a better mix of equipment, shelters & picnic facilities at smaller parks. Which?  
.....
- Provide recreation "try out" programs at local parks in different parts of the City through the year
- Improve the quality of lawn areas, plantings and maintenance. At which parks?  
.....
- Are there other informal recreation issues that need action?  
.....  
.....

**Information Services:**

Develop a recreation information centre for the City.  
Where? ..... What should it provide? .....

Provide more *and regular* information for the community about recreation groups & activities, times, contacts, costs. How?

Provide more and better signposting to recreation venues. Which in particular?

Publish a regular community sport and recreation calendar

Provide event boards at the entrance to major venues promoting what is on

Develop an easy to use on-line recreation information service

Are there other recreation information issues?

**Lakes in Ballarat:**

Upgrade the cycle/walking track around Lake Wendouree

Take action to consolidate parking around Lake Wendouree to improve pedestrian safety and reduce soil compaction around trees

Provide low level lighting along the Lake Wendouree pathway to allow safe night time use

Upgrade the on-road cycle training track around Lake Wendouree

Improve paths/trails to and at Lakes Esmond, Burrumbeet and Learmonth. What is the priority?

Continue with the implementation of masterplans for Lake Burrumbeet and Lake Learmonth. What should be given priority?

Are there other issues relating to use of Lakes?

**Recreation for People with Disabilities:**

Improve access to all recreation & sport venues for people with disabilities. Which particular venues need action? .....

Provide pathways within parks to toilets, seating & play equipment. At which parks?

Provide & promote programs & *activities* for people with disabilities. What should be provided?

Where? .....

Improve bus stops, footpath quality, lighting, widths & gutter crossings, street and park lighting, etc . What are the priority sites?

Actions needed                      Where?

**Recreation for People with Disabilities (cont):**

Provide more accessible toilet facilities at recreation venues (eg: with change tables, seats). What are the priority sites?

Actions needed                      Where?

Provide more accessible parking facilities at recreation venues. Where?

Provide more and improved pedestrian crossings to parks. Where are they needed?

Provide information about recreation venues & activities which are accessible to people with sight and other disabilities. What form should the information be in?

Provide indoor recreation venues for play & other activities. What is needed? Where?                      Actions needed                      Where?

Develop an indoor horse riding centre for people with disabilities

Provide accessible group accommodation for visiting disabled athletes & their helpers

Are there other disability recreation issues?

**Sporting Activities and Venues:**

Redevelop the Showgrounds, Wendouree Recreation Reserve & the nearby land as a major integrated, multi-use indoor & outdoor sports and events venue for the City *and* region

Redevelop and consolidate the City's sports stadiums to allow higher standards of use & to support more programs & activities. Which need action?

Improve access for fishing with better boat ramps & disabled access to fishing spots. Where?

Upgrade shelters, toilets, seating, kiosks & other support services at sports grounds. What is needed and where? .....

Develop facilities for elite level competition which will serve Ballarat and the wider region. For which sports and where?

Which sports?                      Where?

Upgrade existing facilities to support elite level competition. What is needed and where?

Provide funding assistance for elite sports coaching programs

Provide funding assistance for adult chaperones for junior teams when travelling

**Sporting Activities and Venues (cont):**

Develop a sports academy to help train talented sports people from across the Central Highlands

Develop a multi-use "sports house" for clubs & groups from across the region to use for meetings, training, events, committee activities

Upgrade the grounds used for Touch

Provide support for volunteers running sport and recreation activities. What types of support?

Encourage wider use of existing sports facilities & existing clubs and groups through promotional programs, 'come & try days' etc

Encourage the provision of sports for disabled people. Which sports?

Improve access roads, car parking, lights & security lighting at sports grounds. Where?

Upgrade the grounds, cross country course, disabled opportunities and jumping facilities at the pony club

Upgrade the surrounds and plant more shade and shelter trees at sports grounds. Which?

Support the development of consolidated & upgraded soccer facilities in the City

Consolidate & upgrade tennis facilities in the City. What action is needed? Where? Action needed Where?

Consolidate & upgrade other sports facilities in the City. Which venues need action?

Support the development of an indoor equestrian arena in the Ballarat region

Promote junior involvement in sport

Provide lights for training and competition at sports grounds. Which grounds?

Training or Comp. lights? Where?

Upgrade & improve the maintenance of club/ change amenities, seating, toilets, shade and weather shelters. Where?

Provide better support amenities for junior sport. Where?

Upgrade playing field quality. Where?

Provide financial assistance for junior sport for trips, uniforms, equipment etc to help young people get involved

Are there other sports issues to address?

**Swimming Pools:**

Provide more water space to allow a wider range of activities at the City's pools. What is needed?

Activities? Where?

Develop a different focus of activities & programs at each of the main pools in the City. Do you have suggestions?

Ballarat Aquatic Centre: .....

Eureka: .....

Brown Hill: .....

Black Hill: .....

Wendouree: .....

Buninyong: .....

University: .....

Upgrade the public outdoor pools available in the City. Which should be given priority for up-grading?

What is needed? .....

Provide space for more educational programs and activities at pools

Provide a heated outdoor pool at Ballarat Aquatic Centre

Provide a heated indoor pool at the Eureka pool

Provide extended health club facilities at Ballarat Aquatic Centre

Support the provision of more commercial pools to fill the gaps in community needs

Upgrade the standard of shade and covered areas as the City's outdoor pools

Develop aquatic facilities which will support regional competition opportunities

Are there other swimming issues?

**Transport:**

Improve the hours of public transport availability, especially for aged, disabled, youth

Provide more street seating, bus shelters & shade in town, on bus routes and along key streets away from central Ballarat. Where?

Are there other transport issues?

**Walking and cycling trails:**

Build more bike and walking paths, loops of varying lengths, historical trails and links to recreation venues, schools, shops. Where?

Provide well-signposted links to trails. Where is this needed?

Complete the development of the trail along the Yarrowee River

Provide a safe off-Highway bikeway along the Western Highway

**Walking and cycling trails (cont):**

Provide more support services along trails: eg: seating, shelters, lighting, shade, toilets, directional and distance signposts

Provide good recreational trails maps

Provide internal path loops in some parks. Which parks would be suitable?

.....  
.....

Develop regional trails into rural areas eg: Great Dividing Trail, Mt Clear to Buninyong and long distance to Grampians, Daylesford

Develop a series of trails with different focuses eg: heritage, geology, flora, etc

Develop and promote walking in the City

Develop and promote walking *events* in the City

Improve the quality & appearance of existing trails, bike paths. Which?.....

.....

Link the major parklands around the City with tracks and signposted pathways

Are there other trails issues?

.....

**Youth Recreation Opportunities:**

Provide an informal and comfortable drop in and activities space for young people. Where?

.....

Provide an indoor/outdoor performance area for music, theatre, dance, concerts etc

For what Activities?                      Where?

.....

.....

Provide a changing range of entertainment & programs for youth to try. Such as? .....

.....

Provide a venue for the exhibition of young people's art works



**Youth Recreation Opportunities (cont):**

Provide parks suitable for 10-14 year olds. What is needed? .....

Where? .....

Provide parks suitable for 15-17 year olds. What is needed? .....

Where? .....

Are there other youth recreation issues?

.....

**Other Recreation Opportunities:**

Provide more activities and programs for older members of the community. What is needed?

.....

.....

Encourage existing recreation clubs and groups to provide more informal & introductory activities Which would you like to try? .....

.....

Continue to provide major sporting, recreation and cultural *events* in Ballarat. Are there particular types of events you would like to see?

.....

.....

Develop more events with a *community* focus for Ballarat and district residents rather than for tourists. Do you have suggestions? .....

.....

**YOUR OTHER NEEDS & SUGGESTIONS:**

Write in any other recreation needs you have which have not been listed above:

.....

.....

.....

.....

.....

.....

**C. Council's Role in Recreation Provision:**

Ballarat City Council plays a major role in supporting recreation and sport in the City and wider region. It provides and maintains sports grounds, informal parks, linear trails, community halls, indoor venues (gallery, town hall, libraries etc) and aquatic facilities. It also provides support for recreation programs in the community.

Are there things Council should do in addition to this? Some suggestions are provided below. **Tick those you support and add any others at the end.**

Develop better information services about recreation activities in the City. What types of information are needed? How might it be provided? .....

Ensure that all Council, public and commercial recreation facilities have good amenities & services & are accessible to the whole community, the aged, people with disabilities, the frail, mothers & carers. What are the priority venues? .....

Provide guidelines & advice which will help ensure that all Council, public & commercial recreation facilities are maintained to good, safe standards

Play a greater role in planning & coordinating recreation provision as a means of ensuring the better location of facilities, reduced duplication & higher standards

Increase the overall level of funding available for recreation provision so better parks, sports grounds, trails, pools & other facilities can be provided

**C. Council's Role in Recreation Provision (cont):**

Only provide facilities which reflect community need and which broaden recreation opportunities

Only support provision of new facilities once a proper and comprehensive planning process has been followed

Play a greater role in training & advising clubs & groups on how to manage their activities & plan for the future

Promote passive recreation opportunities in the City. Which?

.....  
.....

Promote the benefits of sporting & recreational involvement to the community

Seek to ensure that all Council & public recreation facilities are managed in a way which allows wide community use

Assist sporting & recreation groups by establishing equitable fees

Assist sporting & recreation groups by consolidating outstanding loans & providing low interest loans

Play a stronger role in recreation provision & leadership for the wider Central Highlands region. What new regional provision needs to be considered?

.....  
.....

Develop Council's capacity to be a resource for individuals, groups & associations to come to for advice on a wide range of recreation issues

Assist sporting bodies to refurbish their existing facilities so they can support multi-use and so current and new needs can be more effectively met. What sports would benefit from this?

.....  
.....

Assist sporting bodies to rationalise the number of existing venues so that higher quality provision at a lower overall cost is possible. What sports would benefit from this?

.....

Assist sporting & recreation groups to help organise and promote their programs & major events

Play a role in coordinating major sporting events to avoid conflicting dates and calendars

Sell some of Council's small under-used parks as a way of funding better development of other nearby sites. Do you have any suggestions?

.....  
.....

Are there other things Council should consider doing?

.....  
.....

**D. Finally, we want to ask a few questions about yourself:**

1. Are you Female Male

2. What is your age group? 0-9 years 10-19 20-29 30-39 40-49  
50-59 60-69 70-79 80-89 90+

3. Are you: A full time student Employed part time Employed full time  
Unemployed Retired/Pensioner Home duties

4. How long have you lived in Ballarat? 0-5 years 6-10 years 11-15 years  
16-20 years Over 20 years

5. Which suburb or town in the City of Ballarat do you live in? .....

**If you have other issues you wish to raise, please feel free to use the space below:**

.....  
.....

**Please have this survey ready to be collected in the next few days.  
Thank you for your help.**

## Recreation Participation and Forecasting

### 9.1 Introduction

Data on current and recent recreation and leisure participation rates provide an understanding of contemporary leisure interests in the community. If used carefully, this data can also help to provide an understanding of the adequacy of the current provision of opportunities, of possible areas of over-provision, of gaps in provision and of possible future needs.

Data on participation across a range of recreation, sporting and cultural activities has now been collected in various forms by various agencies in Australia for a around 40 years. Prior to the early 1970s, the only data on recreation participation rates was that collected by a small number of academic researchers and individual sporting and recreation clubs and providers in the form of attendance counts and estimates, ticket sales and memberships.

Today, detailed data is collected on the levels of participation, patterns of participation and the characteristics of participants on a fairly regular basis by the Australian Bureau of Statistics and a number of State and federal government departments. The Australian Institute of Sport also collected annual data on participation in a range of recreational activities over the 2001-2010 period although this collection program has now been taken over by the Australian Bureau of Statistics.

This Chapter provides an overview of current leisure and recreation participation levels in Australia before outlining a number of approaches to forecasting possible future participation rates and through this, possible provision needs.

### 9.2 Some warnings about leisure and recreation participation data

Before proceeding to the review of leisure participation in Australia, several warnings need to be sounded regarding the use of participation data as a guide to recreation needs, planning and provision. These are:

**Participation and culture:** the culture of a community strongly influences the mix of recreation activities it pursues. Hence, low or high participation in one community, and even in one suburb, may not be a sound guide to what to expect or what to provide in another. Australians are keen followers of cricket; Canadians are fanatical about ice hockey, while residents of the US follow (amongst many other sports), gridiron, baseball and basketball. Yet, participants in many of these activities are from a European and Anglo-Saxon cultural background. Even within Australia, the southern states predominantly follow Australian Rules football while in Queensland and New South Wales, the dominant ball sports are rugby league and union. Residents of all states follow tennis, soccer, cricket and swimming, although even with these activities, there are quite different participation rates. Thus, were average Western society participation rates or average Australian participation rates to be used as a guide to provision, there could well be some rather inappropriate outcomes.

Interestingly, there are some recreation activities that virtually all cultures pursue: family activities, social and cultural events, music, theatre, dance, story telling. Yet the form these activities takes varies widely between cultures, between communities and over time. Conversely, while some cultural activities are forbidden by a number of religious and cultural groups

**Participation and supply:** participation in recreation activities is influenced by the supply of opportunities. If an individual or group decides that they would like to take part in a particular activity but find that there are no facilities or programs for that pursuit available, *they will find something else to do*: something that will give the same types of experiences or the same or similar beneficial outcomes. As such, the demand for individual recreation activities can be extremely elastic. In wet weather, many people do something *other than* going to the football and attendances can be as much as 50 percent lower. In warm, sunny weather *in the right season*, Australians flock to the beach. But not *every* beach is crowded: Australia has so many beaches, the level of supply does not mean that every beach will be used *or* that everyone will be enticed to go simply because there is such good provision. In summary, a lack of provision can stop participation in a particular activity but high levels of provision do not necessarily mean high levels of use. And even where there is good supply, weather, seasons and a host of other factors will influence demand and participation.

A possible implication of the above situation to recreation planning is that planners may do their best work if they can ensure a diversity of opportunities and ensure the availability of *alternative* opportunities rather than trying to accurately match supply and demand

**Expressed, latent, substitute and deferred participation:** A major weakness with recreation participation data is that it only measures what actually happens: that is, “expressed” or direct demand. This is the situation wherein an individual or group can “express” his /her or it’s recreation needs and pursue the activity of their choice.

By comparison, if an activity is not immediately available, a person may wait for some time until it does become available. That is referred to as “latent” demand: people still want to take part, but their demand has to be put on hold. They may hold off for some time, awaiting provision, *if they know that the opportunity is likely to become available*. In other words, they “defer” their demand. Sometimes, latent or deferred demand is not caused by an absolute lack of provision. Rather, they may be due to a lack of transport to a venue, prices that are too high, inappropriate times of availability or a major barrier to access such as a river, railway or highway. An individual may want to participate even more strongly than someone who takes part regularly, but he or she cannot.

Not all people are prepared to wait or, if they know they cannot reach or afford what they had their heart set on, they change their minds. They then “substitute” an alternate activity for the one they originally wanted to pursue. We frequently do the same when buying homes, cars, clothes and food. And we quickly get over what we have missed out on

There has been little research into how much of the recreation participation that is measured is direct or substitute demand and how much latent and deferred demand exists in the community. Thus, those who participate in an activity may be the totality of everyone who wants to. This often occurs with activities like reading, watching television or listening to music. These activities are ubiquitous so there are few barriers to access. Such a situation probably helps to explain why “participation” in them is so high. By comparison, far lower participation figures for many other activities might totally misrepresent community interest in and desire for them. Many more people may well like to take part but cannot for a range of reasons. As an example, very few people go to football matches over summer as the governing bodies do not provide them. Yet, when the season starts, tens of thousands of spectators turn up every week. Many sports and other recreation activities have waiting lists, especially at the start of the season; many restaurants get booked out on weekends. Yet, the lists soon drop off and people don’t queue up outside the restaurants: this is because people defer their demand—perhaps depending on how long they will have to wait—or they find a substitute. As another example, recent research by Tennis Australia found a huge interest in tennis across a wide cross-section of the population. But it was also found that because tennis clubs insist on people using their courts becoming members, most never turn that “interest” into participation. A final and very current example is walking: every time a provision body builds new walking trails, significant new use is generated. Whether this use is a substitute for something else or pent-up latent demand which can now be expressed is difficult to determine

**The “lowest common denominator” activity:** Many people do not choose their recreation activities. Rather, they are chosen for them: by parents, carers, teachers, or their partners. And the activities that are chosen are not always what they would have chosen themselves. Instead, they take part in activities that can be described as “lowest common denominator activities”. These are the activities that it is known a person or most or all of a group *can* or is *willing to* pursue. Activities that only a few members of the group can take part in—whether due to cost, skill, equipment needs, time requirements, motivation or some other reason—are rejected. Research in Melbourne metropolitan regional parks some years ago found that over 90 percent of the people who visited these parks in groups were not involved in the decision to visit. Rather, the decision was made for them by a senior adult or by a small group of family or club leaders. Hence, when a person indicates that they visited a park or went to a movie or went out for dinner, *this response does not necessarily mean that those activities were what they specifically wanted to do*. Rather, they were activities that were appropriate and acceptable to those taking part, and activities that group leaders felt would provide the desired benefits and outcomes in a broad, general way.

**Measures of participation:** One of the major difficulties with using data on recreation participation is ensuring first, the accuracy of the data and second, what the data means. With regard to accuracy, if rigorous sampling procedures are not used, the data collected will not reflect the true pattern of community recreation activities or interests.

By comparison, the issue of what the data means arises because the timing of the collection, the process by which data is collected, and the questions asked all affect the results. To illustrate regarding timing, if people are asked what activities they pursued in the last week, compared with the past *month* or the past *year*, the results will be very different due to both the seasonality of many activities and the fact that many activities are often only pursued once or several times a year. Bureau of Statistics and Sports Commission surveys now generally ask questions about the previous year. But what of activities that are most probably really important to people but are pursued less regularly than yearly –such as family, work or school reunions; overseas and interstate trips; biennial arts festivals and the like? Almost certainly, participation in these is undercounted

Further on the issue of the data collection methods, unless a rigorous methodology is applied to ensure that data is collected from everyone or from a valid random sample of the population being studied, the results will not be an accurate reflection of what the community does. As discussed in Chapter 8, a sample size of 300-500 people should be regarded as the minimum number of people to survey and they should represent all age groups, cultural groups and family styles in the study area. Surveys should only be conducted at home or at recreational venues if they are to represent the whole community or activity/ venue users. Telephone surveys are increasingly being questioned as many people now reject intrusive telephone marketing calls, and not surprisingly, confuse community surveys with these and hence, reject them too. Postal surveys have major weaknesses because of the low response rates and the fact that those who respond actually “self select” (by only responding if the survey topic is of personal interest), so that there can be no guarantee that the responses actually constitute a random sample or reflect community opinion. As has been argued previously, matching the demographics of a survey sample with the demographics of the total population does not mean that the thoughts, motivations and recreational interests of the two groups will also match. If some people do not respond to telephone or postal surveys, *they must somehow be different from those who do*, and it is possible that these differences will carry over to their recreational interests and choices

Because of these problems, data collected by the different methods noted above has varying levels of accuracy (which cannot be readily measured), and as such, the data cannot be validly compared.

With regard to the form of questions, surveys that list activities and ask respondents to tick those they pursued are likely to achieve different results to those where respondents are asked to *recall* what they did. Surveys with wording which can be interpreted in several ways will almost certainly *be* interpreted in several ways. For example, if a survey asked “Have you had any interest in activity X over the past 12 months?” as opposed to “Did you pursue activity X in the past 12 months?” will elicit very different responses, both of which might be useful for planning purposes but may generate different responses. Questions which seek to “force” responses by not providing a “no opinion” option to attitudinal questions may simply be forcing *inaccurate* responses.

**Participation and quality:** The benefits gained from participation in recreation activities do not necessarily increase as the level of participation increases. An activity which a person pursues on a very occasional basis may be far more important and far more valuable to them than some other activity they pursue very frequently. Hence, measures of participation and the popularity of different pursuits is almost certainly a very simplistic approach to assessing leisure and recreation *need* and may mean little in terms of the priorities for action.

**Opportunity versus use:** “Normative” and “comparative” need are measures of what communities *feel* they ought to have available in case they want to use them. If a community does not have a library or a swimming pool –which are seen as provision “norms” for an Australian community-- its members feel that their community is disadvantaged, *even though many residents may never use the facilities if they were provided*. Communities without a good mix of leisure opportunities generally have less self respect and poorer quality lives. Threatening to take away facilities has the same effect. Thus having or not having a particular facility, service or program is not a

good measure of need or of use.

**Fads:** Recreation fads such as clothing and music styles and food preferences can lead to a misinterpretation of need and of provision. In wanting to meet burgeoning demands for certain sports or in wanting to keep up with their neighbours, many organisations have over-provided only to find that demand drops dramatically as the fad passes. Numerous instances of over-provision exist across Australia as a result of fads. Careful planning research could have avoided this.

**The scope of the data collected:** Most published recreation participation data only covers a small proportion of the vast array of the activities which people pursue. Hundreds of pursuits, which in total account for the interests of millions of Australians, are not recorded. As a result, a small number of interests are given excess attention while nothing is learnt about "minority" interests and perhaps most importantly, gaps in their provision.

Several points emerge from the foregoing discussion. First, there is a need to treat participation data carefully because it only measures one aspect of expressed need (and overlooks deferred and substitute demand) and may not indicate what people really want to do in their leisure time. In fact, it may well misrepresent the popularity or lack of popularity of different activities. Second, high levels of involvement or large numbers of participants do not necessarily equate with quality and beneficial outcomes. Third, unless a rigorous collection process is followed, the information which is gained from surveys etc could well be quite inaccurate.

In the light of the above, the collection and use of recreation participation data in the recreation planning process must be treated with extreme care. Planners must ask what the data will tell them, what they will use the information for and what additional light it will throw on understanding community needs and facility, program and service priorities. Participation data cannot be used in isolation as a guide to need or demand but rather, should be used in association for instance, with information on the level of provision of facilities, programs and services provision, on community demographics, on the geography of the community and on the needs, values, attitudes and aspirations of the community.

Despite the above warnings, participation data is still a very useful planning tool. This is particularly so when it gives an understanding of the levels of use which are needed to support particular activities or facilities. Several examples drawn from past studies illustrate this.

Several years ago, a small town with 2,250 residents in rural Victoria wanted an indoor 25 metre heated pool. ABS data showed that no more than 14 percent of the community went swimming, thus suggesting that there might be no more than 308 swimmers in the town who might use such a facility. If a 6 lane venue was built and was opened from say 6 am until 8 pm each day, it would create 84 lane hours of available lane space each day, 588 lane hours a week and around 30,000 lane hours a year (making allowances for down times and closure at say, Christmas and Easter). If every potential swimmer went once a week, only 308 lane hours would be used –if every swimmer had a lane to him/herself-- and the venue would have no swimmers for 280 hours a week, or 560 hours if there were two swimmers per lane, and so on. This suggests little basis for a viable venue. Further, if every swimmer went once a week and paid say, \$6 per entry, they would generate an income of \$96,000 pa. As indoor pools cost of the order of \$400,000 pa. to operate, this again suggests that the venue would not be financially viable. This is where the ABS sports participation data can come in useful. 2011-2012 ABS data for Victoria shows the percentages of swimmers who visit pools at various rates annually (ranging from 1-12 times pa., 13-26 times, 27-52 times, 53-104 times and 105 times or more). If these rates were applied in an approximate fashion to the number of swimmers identified for the town, they indicate that the swimmers might make as many as 72,500 visits pa. which at \$6 per visit, would generate \$436,000 pa. This could thus see an indoor pool as a viable option for consideration and may lead to the planning study recommending that a four lane only pool is built or that a detailed feasibility and costing study be carried out.

In a similar vein, a community meeting held as part of a planning study might be attended by residents who make a strong demand for a new complex for a particular sport. If however, ABS sports participation data shows that only 3 percent of people pursue that sport; if the most recent Census data show that this is the equivalent of 250 young people in the community, and if the inventory of provision has shown underuse of a similar venue not far away, then the resident demands can be rejected on several grounds, including the fact that the number of potential supporters is insufficient to warrant new, additional provision. Here, the recreation planner may seek other solutions which meet the demand but in a more effective manner –such as building a well-lit cycle path to the nearby under-used venue, putting on a community bus to transport players to it, or beginning a participation promotion and development plan so that when the numbers in the participating age groups grow, additional provision can be reviewed on the basis of higher participation rates in the future.

### 9.3 Leisure and recreation participation data in Australia

As noted previously, data on the levels and patterns of participation and on the characteristics of participants has been collected on an irregular basis over the last 40-odd years by the Australian Bureau of Statistics and a range of other government departments and agencies. The Australian Sports Commission collected annual data on participation in a range of recreational activities for the decade 2001-2010, with the results being

published annually as “Participation in Exercise Recreation and Sport” (see [www.ausport.gov.au](http://www.ausport.gov.au)). These data are the most consistent and comprehensive and can still be downloaded at no cost. The surveys covered participation in around 160 or so sport and physical recreation activities, although the Commission has withheld publishing all the data it has collected. The data that is available provides cross-tabulations of the activities by total number of participants, gender, age groups, States, frequency of participation, the type of organisation providing the opportunities, and whether the activities are organised or non-organised. Further data collections have been undertaken by the Australian Bureau of Statistics for the years 2011-12 and 2013-14.

Unfortunately, the Bureau of Statistics and other agencies have not been consistent in terms of the regularity of data collections, so that occasionally, there have been gaps of many years between useful, comparable data being available. Similarly, there have been significant inconsistencies in the questions asked, the age groups covered, the recreation activities included, the groupings of activities and the types of data collected. As a result, comprehensive, comparable and reliable long term participation data really does not exist. Further and very importantly, literally hundreds of activities are not reported on as they do not fall into the “top 50” activities (with the relevance of 50 as a cut off not being explained). Yet it is almost certain that if these less pursued activities were combined by type, many of them would have higher levels of support than the top 50.<sup>11</sup>

Of equal value to recreation planners are a number of other Bureau of Statistics collections programs with these reaching well beyond the simple sport and recreation participation data discussed above. These include the following data sets which should be assessed depending on the planning scope or topic:

- Household expenditure on sport, recreation and cultural facilities, programs and services
- Sport, recreation and *cultural* participation by children and by adults
- Attendance at cultural events
- Retail sales on sport and recreation equipment
- Provision of clubs, pubs, taverns and bars
- Gambling
- Amusement and leisure industries
- Sport and recreation funding by government
- Sport industries in Australia
- Employment in sport and recreation, and
- Sports volunteers.

Other data has occasionally been collected by a range of organisations across Australia as well as by academics and researchers. Again, unfortunately, there is little consistency in collection methods, sampling, timing etc and there is no mechanism to collate and redistribute this data. As such, many researchers constantly have to collect new data when they need to know something specific about community recreation activities at the local level. In overview, the data that exists is very useful but it is also variable in quality and great care must be taken in the way it is used and in drawing conclusions from it.

#### 9.4 Levels and trends in sport and recreation participation in Australia

Despite the concerns expressed above, it is useful for recreation planners to have some understanding of what activities the community pursues, how many people pursue various activities and how recreation and sporting interests are changing. This allows planners to respond to emerging national and state trends and if relevant, to assess possible support levels for particular activities in a particular community, and to evaluate local trends or fads which may be quite different to state or national patterns<sup>12</sup>.

Table 9.1 on the following pages shows data on active sporting and non-sporting pursuits as collected by Australian Bureau of Statistics and the Australian Sports Commission over the 1975 to 2013-14 period. The previous point about using participation data with great care is illustrated by the often dramatic differences between the data from the 2001-2010 Sports Commission collection years and the final two more recent ABS collections. These reflect differences in sample sizes, collection methods and the categorisation of some activities and suggests that the most recent ABS data should not be relied on for planning purposes.

The following points should be noted with regard to the data in Table 9.1:

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<sup>11</sup> Much of the Bureau of Statistics data can be accessed free through the Bureau's web site [www.abs.gov.au](http://www.abs.gov.au) and by clicking on People under the heading “Themes”. The ABS also has a special leisure and recreation research unit, the National Centre for Culture and Recreation Statistics which publishes data and reports on various recreation and leisure issues and which can be accessed through the ABS website

<sup>12</sup> An informative exercise for recreation planners is to prepare their own State-based table similar to Table 9.1, even if this only uses the ERASS 2001-2010 data and any other supplementary or more recent data

- a. The data were collected by a range of agencies including the then Department of the Arts, Sport and Recreation in the 1970s, the Australian Bureau of Statistics in the 1990s and post-2010 and the Australian Sports Commission between 2000 and 2010
- b. All the data except columns 4 and 5 refer to people over 15, and as such, grossly understate participation in many activities, as a comparison between columns 4, 5 and the rest of the table indicate
- c. Activity names in column 1 have varied at various points over the 1975-2014 period. In some instances, an initial group activity name eg: football, was later subdivided into different football codes. The names commonly used today have been recorded in the table. Some of the activity names render the data relatively useless. These include "horseriding and equestrian events, polo", "ice/snow sports", "surfing, surf sports" and perhaps, "Walking for pleasure, exercise" and "Walking: other"
- d. Gaps in the data which was collected are common at various points over the 39 year period and are indicated by the minus symbol, ' - ', except in the final column
- e. The final column provides a rough assessment of trends in participation in the activities over the 2001-2010 period when consistent data was collected by the Australian Sports Commission. The number of plus or minus symbols reflects the extent of growth or decline in rates, the equals sign indicates stability while a combination indicates, for example, a rise early in the decade followed by a decline or a fall followed by stability.

The Table highlights a number of interesting points about sporting and active recreation participation:

- Very few activities attract a significant proportion of the adult population. In fact, only 4 of the 59 categories (these being aerobics, cycling, swimming and walking) were pursued by more than 10 percent of adults in 2010. These were walking (other) on 35.9 percent; aerobics and fitness, 23.5 percent; swimming, 13 percent; cycling, 11.9 percent, and running/jogging, 10.6 percent. Only three activities were over 10 percent in the 2013-14 ABS data. In 2010, only golf and tennis attracted between 5 and 10 percent
- For those activities which both children and adults took part in, children's participation rates were generally two to five times higher than the adult rates. Yet despite this, there were again only 5 children's activities which attracted participation rates above 10 percent, these being bike riding, dancing, soccer, skateboarding and swimming
- Across the adult activities, there was a general tendency for participation rates to rise over the 1975-2006 period, with 25 of the 59 activities listed increasing substantially. Significantly, the greatest increases occurred amongst activities which had a health and fitness focus: aerobics, cycling and running/jogging. However, nearly a half of these stopped growing or fell in the second half of the 2000-2010 decade
- By comparison with the number of growth activities, only 8 activities had some or substantial falls in the rate of participation (the most significant being darts, squash, golf, scuba and ten pin bowls), although many remained largely unchanged or stagnated and fluctuated, and
- Despite the far higher children's participation rates, only dancing saw a marked increase in participation rate although martial arts and soccer grew to a lesser extent. Many children's activities seemed to stagnate or fall away between 1996-97 and 2000.

While the full implications of these data would need to be assessed in each community being studied<sup>13</sup>, they suggest that participation by Australian's in sport and physical activities is quite low. While it is known that some activities are pressured for space and facilities –such as soccer, junior football and some indoor court sports-- overall, the data suggest that the community is not very active and that in fact, the level of activity is possibly declining. If this is the case, it has clear implications for the health and wellbeing of the community and suggests that greater efforts may be needed in promoting participation and in providing attractive, enjoyable activities rather than ion providing more facilities. Interesting, sport and recreation participation rates are very low compared with arts and cultural involvement, as indicated in later paragraphs.

A further set of sports and physical activity data which is of particular interest is that showing the relationship between participation in particular recreation activities and age. Selected figures are reported as a case study in Table 9.2. For purposes of comparison, data from both the Australian Bureau of Statistics and the Sports Commission surveys covering 2005/06 are provided.

The data in Table 9.2 highlight a number of points regarding collecting participation data, data on patterns of participation and the evaluation of the implications. These are outlined below:

#### Data collection methods:

Although the two sets of data in Table 9.2 record similar trends in participation by age, the figures from the two agencies differ quite radically at times. This is likely to reflect:

<sup>13</sup> A useful exercise to be undertaken as part of the consultations phase of a planning study is to collect membership data over the past 10 years from clubs and groups so comparisons can be made with State or national data. Similarly, some of the Table 9.1 data can be presented at meetings and participants can be asked to comment on any local or regional trends (and possible reasons for them) they have identified over recent times which may endorse or be different to the Table 9.1 data

Table 9.1: Participation in sports and physical activities, Australia, 1975 –2014

Sports and Physical Activities	1975 % Aust	1996-97 % Aust	1996-97 % Aust Childn 5-14 yrs	2000 % Aust Childn 5-14 yrs	2002 % Aust	2004 % Aust Total	2006 % Aust Total	2008 % Aust Total	2010 % Aust Total	2011-12 % Aust Total	2013-14 % Aust Total	Indicative change 1975-2010
Aerobics and fitness	-	4.1	1.5	0.5	10.9	17.1	19.1	23.5	23.5	18.7	17.9	++=
Aquarobics	-	-	-	-	0.3	1.0	1.4	1.1	1.1	0.4	0.5	+=
Athletics / track and field	0.3	0.3	4.3	3.9	0.2	0.7	0.6	0.7	0.7	0.4	0.6	+=
Australian Rules Football	4.0	1.1	7.1	6.6	2.1	2.9	2.7	2.9	3.3	1.3	1.2	++
Badminton	-	0.3	-	0.2*	0.6	0.9	0.9	0.9	0.7	0.6	0.5	+-
Baseball	0.5	0.3	1.3	1.7	0.3	0.3	0.2	0.3	0.2	ND	ND	=
Basketball	2.3	1.8	9.1	7.6	2.4	3.2	3.3	3.6	3.5	2.0	2.2	+=
Bike riding	-	-	-	63.8	-	-	-	-	-	-	-	-
Bowls –carpet indoor	0.9	0.3	-	-	0.2	0.2	0.2	0.3	0.2	0.2	ND	=
Bowls -lawn	3.1	2.0	-	-	1.9	2.3	2.1	2.2	2.1	1.4	1.0	=
Boxing	-	-	-	-	0.3	0.6	0.7	0.9	1.2	0.6	0.5	+++
Canoeing, kayaking	0.3	0.2	-	-	0.5	0.9	0.7	1.1	1.3	0.8	0.7	+++
Cricket: outdoor	1.5	1.3	6.8	5.3	2.5	3.1	3.2	3.5	3.2	1.6	1.2	++
Cricket: indoor	-	0.7	0.9	0.3	0.9	1.1	0.9	0.9	0.7	0.4	0.3	=
Cycling	0.4	0.6	0.6	0.5	5.7	10.5	10.2	11.6	11.9	7.6	6.2	++
Dancing	-	0.6	5.5	10.4	1.8	2.4	2.4	2.3	2.6	1.4	1.3	+
Darts	0.5	0.3	-	-	0.3	0.2	0.1	0.1	0.1	ND	ND	--
Fishing	9.2	0.9	-	-	3.5	2.3	2.1	2.2	2.2	1.4	1.0	-=
Football (soccer : outdoor)	In all	1.1	8.8	11.4	2.6	1.9	4.2	5.2	4.8	2.7	2.4	++
Football (Soccer : indoor)	football	-	1.1	0.9	0.9	4.2	1.9	2.3	1.9	1.1	1.2	++
Golf	7.4	3.2	0.9	1.0	-	7.9	6.8	7.1	6.7	4.8	4.0	-
Gymnastics	-	-	3.3	2.6	-	0.3	0.2	0.2	0.3	0.3	0.2	=
Hockey	0.6	0.5	2.1	2.4	0.5	0.9	1.0	1.2	0.9	0.6	0.7	+
Horsriding and equestrian events/polo	2.2	0.7	1.0	1.2	0.9	1.3	1.3	1.0	1.0	0.8	0.8	=
Ice/snow sports	-	0.4	0.5	0.2*	0.9	1.8	1.1	1.4	1.3	0.8	0.5	+=
Lifesaving, surf lifesaving	0.1	-	0.7	0.8	-	-	-	-	-	0.2	0.2	=
Martial arts	-	1.2	3.3	4.0	1.5	2.0	1.8	2.2	2.1	1.4	1.2	+
Motorsports	0.7	0.7	-	-	0.9	1.2	1.2	1.2	1.3	0.4	0.3	++
Netball	In bsktball	2.3	9.0	9.1	3.1	3.6	3.6	3.9	3.7	2.5	2.2	+=

Table 9.1 continued:

Sports and Physical Activities	1975 % Aust	1996-97 % Aust	1996-97 % Aust Childn 5-14 yrs	2000 % Aust Childn 5-14 yrs	2002 % Aust	2004 % Aust Total	2006 % Aust Total	2008 % Aust Total	2010 % Aust Total	2011-12 % Aust Total	2013-14 % Aust Total	Indicative change 1975-2010
Sports and Physical Activities (1)	1975 % Aust (2)	1996-97 % Aust (3)	1996-97 % Aust Childn 5-14 yrs (3)	2000 % Aust Childn 5-14 yrs (4)	2002 % Aust (5)	2004 % Aust Total (6)	2006 % Aust Total (6)	2008 % Aust Total (6)	2010 % Aust Total (6)	2011-12 % Aust Total (7)	2013-14 % Aust Total (6)	Apparent change 1975-2010
Orienteering	-	-	0.4	-	-	0.6	0.5	0.7	0.7	ND	ND	=
Rockclimbing	-	-	-	-	0.5	0.5	0.5	0.5	0.3	0.3	0.2	= -
Roller sports	-	-	0.4	0.2	0.6	0.8	0.6	0.4	0.4	0.4	0.3	-
Skateboard or rollerblading	-	-	-	30.9	-	-	-	-	-	-	-	-
Softball	In basebl	0.3	2.3	-	0.3	0.6	0.3	0.4	0.3	0.1	0.2	=-
Rowing	-	-	-	0.2	-	0.4	0.4	0.3	0.4	0.2	0.2	=
Rugby League	]	-	3.3	3.6	0.7	1.1	1.3	1.3	1.4	0.6	0.5	++
Rugby Union	]	0.3	1.1	1.4	0.6	0.9	1.0	0.9	0.8	0.6	0.5	+
Running and jogging	-	-	1.0	0.3	4.6	8.3	7.4	9.9	10.6	7.5	7.4	++
Sailing	2.0	0.5	-	0.3	0.7	0.9	0.5	0.7	0.8	0.4	0.4	=
Shooting, hunting	2.1	0.7	-	-	0.6	0.5	0.5	0.6	0.8	0.3	0.3	- +
Scuba diving	-	0.2	-	-	-	0.7	0.5	0.5	0.5	0.4	0.2	-
Snooker, billiards, pool	1.2	0.3	-	-	0.4	0.3	0.2	0.2	0.1	ND	ND	- -
Squash, racquetball	5.5	0.8	-	0.3	1.7	1.9	1.3	1.4	1.4	0.9	0.6	-
Surfing, surf sports	1.0	0.3	-	0.3	2.0	3.2	2.3	2.0	1.9	1.3	1.1	+=
Swimming	15.5	1.8	12.8	14.4	10.9	16.5	13.7	14.5	13.0	7.8	6.4	+
Table tennis	0.6	-	-	-	0.6	0.5	0.5	0.8	0.6	0.3	0.2	=
Tennis	5.2	2.7	7.8	8.5	6.8	8.4	6.9	6.8	6.0	4.2	3.0	-
Ten pin bowls	1.0	1.2	0.8	0.6	0.9	0.9	0.7	0.8	0.6	0.4	0.3	-
Touch	-	1.0	1.2	1.3	1.7	2.3	2.4	3.2	2.8	ND	ND	++
Triathlons	-	-	-	-	0.3	0.4	0.3	0.3	0.3	0.3	0.3	=
Volleyball	0.2	0.7	0.6	0.3	1.1	1.5	1.2	1.4	1.2	0.5	0.5	+
Walking for pleasure, exercise	3.0	0.3	-	-	25.3	-	-	-	-	23.6	19.2	-
Walking, bush	-	-	-	-	-	5.2	4.7	6.4	4.8	2.4	1.5	=
Walking, other	-	-	-	-	-	39.0	36.2	39.2	35.9	ND	ND	=
Water polo	-	-	-	0.2*	-	0.1	0.2	0.2	0.1	ND	0.1	=
Water skiing, power boating	1.6	0.2	-	-	0.9	1.4	0.9	1.1	0.7	0.5	0.5	+ -
Weightlifting, training	-	0.4	-	-	0.9	2.7	3.1	3.7	2.9	0.4	0.3	+ -
Yoga	-	-	-	-	2.1	3.4	3.0	3.2	3.5	1.9	1.7	+=

Sports and Physical Activities	ABS 15-17 yrs	ABS 18-24 yrs	ABS 25-34 yrs	ABS 35-44 yrs	ABS 45-54 yrs	ABS 55-64 yrs	ABS 65+ yrs	Aust Sports Comm 15-24 yrs	Aust Sports Comm 25-34 yrs	Aust Sports Comm 35-44 yrs	Aust Sports Comm 45-54 yrs	Aust Sports Comm 55-64 yrs	Aust Sports Comm 65+ yrs
Aerobics/fitness	10.3	20.1	17.2	14.1	12.2	7.6	5.4	25.1	21.4	19.7	19.3	15.4	12.4
Aquarobics	-	0.1	0.4	0.4	0.2	1.1	0.7	0.4	0.6	0.9	1.2	2.8	2.8
Athletics/track & field	3.3	0.3	0.3	0.1	0.1	-	-	2.7	0.1	0.1	0.3	-	0.1
Aust football	7.6	5.2	2.7	0.7	0.3	-	-	9.4	3.2	1.9	0.7	0.2	0
Baseball	0.5	0.7	0.3	0.2	-	0.1	-	0.5	0.3	0.2	0.1	0.1	-
Basketball	9.0	6.4	2.7	1.2	0.9	-	-	11.5	3.5	2.4	1.1	0.2	0.1
Canoeing/kayaking	-	0.2	0.6	0.6	0.6	0.4	0.1	0.6	0.9	0.7	1.1	1.1	0.1
Cricket indoor	1.4	1.7	1.8	0.6	0.3	-	-	1.9	2.2	0.6	0.3	0.1	0
Cricket outdoor	6.6	4.5	4.1	1.5	0.7	0.5	0.2	9.0	4.1	3.0	1.5	0.4	0.2
Cycling	5.9	5.8	7.9	9.5	7.0	5.2	1.7	8.1	13.2	17.0	9.8	8.6	3.1
Golf	1.2	2.8	5.0	5.5	6.6	8.6	5.4	3.8	5.7	7.2	7.7	10.2	6.9
Gymnastics	1.0	0.9	1.0	1.0	0.6	0.2	-	0.7	0	0.3	0.2	0.1	0.1
Hockey -outdoor	1.2	1.2	0.7	0.7	0.2	0.2	-1.5	2.8	0.7	1.2	0.5	0.2	0.1
Horseriding/equestrian	1.5	1.1	0.9	1.2	0.9	0.4	-	2.2	1.5	1.6	1.3	0.5	0.3
Ice/snow sports	1.6	1.2	1.6	0.9	1.1	0.5	0.2	1.5	1.5	1.5	1.2	0.3	0.1
Lawn bowls	0.1	-	0.4	0.5	0.7	2.9	5.6	0.5	0.8	0.8	0.7	2.8	7.6
Martial arts	3.1	2.3	1.8	1.1	1.1	0.7	1.3	3.8	2.2	1.4	1.0	1.0	1.5
Motor sports	1.8	2.0	1.5	0.9	0.6	0.3	0.1	2.6	1.5	1.6	0.9	0.5	0.1
Netball	10.3	6.5	4.6	2.5	0.6	0.1	-	10.0	5.9	3.6	0.9	0.2	0.1
Rockclimbing	0.4	0.5	0.5	0.1	0.1	0.1	-	0.9	1.2	0.4	0.3	0	0
Rowing	1.9	0.4	0.1	0.1	0.3	0.2	-	1.1	0.3	0.2	0.5	0.2	0.1
Rugby League	4.1	1.4	0.8	0.2	0.1	-	-	5.3	1.4	0.5	0.1	-	-
Rugby Union	2.4	1.4	0.6	0.2	0.2	-	-	4.3	0.6	0.5	0.3	0.1	-
Running	3.6	7.0	7.4	5.7	3.9	1.4	0.1	12.3	11.5	10.5	5.3	2.5	0.6
Sailing	0.3	0.4	0.5	0.8	0.8	1.0	0.2	0.4	0.2	0.8	0.5	1.0	0.5
Soccer	15.6	6.3	3.3	2.1	0.2	0.5	-	13.7	3.9	4.4	1.8	0.3	0
Softball	1.5	0.3	0.3	0.2	0.1	-	-	0.8	0.3	0.3	0.2	-	-
Squash/racquetball	0.4	1.6	2.4	1.5	0.7	0.7	0.1	1.4	2.5	2.0	1.4	0.3	0
Surf sports	2.2	3.2	2.9	1.9	1.5	0.5	-	4.2	3.2	2.8	2.4	0.5	0.3
Swimming	9.6	9.1	11.5	11.4	10.7	6.1	4.2	13.6	17.0	17.3	15.4	11.0	6.1
Table tennis	1.1	0.8	0.6	0.5	0.1	0.2	0.3	0.5	0.9	0.7	0.3	0.4	0.1
Tennis	8.9	5.9	6.2	5.0	4.6	3.8	2.0	9.4	8.0	6.7	8.1	5.5	2.6
Touch	4.8	3.7	2.5	1.9	0.4	-	-	5.4	4.2	3.0	1.1	0.1	0.1
Triathlon	0.4	-	0.7	0.3	-	0.1	-	0.5	0.7	0.6	0.1	0.1	-
Walking (bush)	nd	nd	nd	nd	nd	nd	nd	1.8	5.1	5.6	7.1	5.9	2.5
Walking (other)	nd	nd	nd	nd	nd	nd	nd	13.7	30.3	34.9	47.0	49.5	45.2
Walking for exercise	6.8	10.8	20.7	25.7	30.7	34.8	29.1	nd	nd	nd	nd	nd	nd
Weight training	2.2	1.3	1.8	1.4	0.9	0.4	0.4	3.7	4.6	3.8	2.3	2.5	1.3
Yoga	0.3	1.2	3.1	2.1	1.8	2.0	0.3	1.6	3.7	4.1	2.9	3.4	1.9

Table 9.2: Participation by age in selected sports and physical activities, Australia, as recorded by the Bureau of Statistics 2005-2006 and the Australian Sports Commission, 2006 (nd = no data collected under this heading)

The time periods over which they surveys were undertaken varied: the Bureau of Statistics survey was conducted from July 2005 to 2006 while the Sports Commission results were aggregated from quarterly surveys undertaken in February, May, August and September of 2006

Both sets of results are derived from samples of the Australian population. Although the sample sizes were slightly different (ABS 14,219 and Sports Commission, 13,710), the Bureau of Statistics was somewhat more rigorous in its sample selection process, and

The surveys used very different methodologies. Thus, the Sports Commission survey used a telephone interview method based on a response rate of 42 percent whereas the Bureau of Statistics surveys were completed personally, with an 88 percent response rate.

The questions to be asked in relation to the above are, which data set is more reliable, and could misleading interpretations arise from using either or both sets? In general, the recreation planning profession accepts that the Bureau of Statistics data is more accurate: yet many people use the Sports Commission data because there a consistent time series set of data covering 10 years. However, if provision was made on the basis of some of the Sports Commission data, twice the provision rate might be made compared with using the ABS figures. Conversely again, however, a visual comparison of the percentages recorded for various sports in the 2011 to 2014 ABS data suggest levels and similarities of participation levels that just do not appear to be realistic eg: Australian Rules Football vs martial arts and squash, and roller sports vs shooting and hunting.

Yet, as telephone contact with the community is becoming increasingly more difficult and as 60 percent of those contacted in the Sports Commission study declined to take part, the accuracy of the data also has to be questioned.

#### Patterns of participation:

Both sets of data in Table 9.2 show that overall, participation declines with age. However, there are quite substantial variations between activities. In some, the rate of participation starts at a relatively high level and then declines dramatically so that by the time the 35-44 years age group is reached, participation is low or negligible

Other activities start strongly, build to a peak and then decline with age

Still other activities –and these are predominantly non-competitive pursuits-- continue to build with age and occasionally do not reach their peak until the 40s or 50s age groups. Walking is the strongest activity in this category

Finally, another group of activities maintains strong participation rates across all age groups: swimming, cycling and walking fit into this category.

#### Evaluating the implications:

As with the earlier tables, the data shown in Table 9.2 can be evaluated in a number of ways, depending on the philosophical stance of the researcher or the organisation commissioning the planning. For instance:

- An organisation wanting to strengthen junior sports participation as a way of giving young people a health and positive recreational program might initiate a range of strategies to keep them involved and to stop participation “falling away” when they reach their teens, as the table so clearly demonstrates
- An organisation concerned with life-long activity, aged health and community well-being may push for more action on non-competitive activities such as walking and swimming which, the data show, people pursue until much later in their lives, and
- An organisation with limited financial resources may seek to offer the community a mix of activities from that it can choose from but focus on those that offer involvement through all life stages rather than investing heavily in activities that only meet the needs of younger age groups (and one or the other genders).

Other data sets prepared by the Bureau of Statistics that may warrant review and evaluation dependent on the nature and scope of a recreation planning study are those showing the relationship between participation and gender, cultural background, place of residence (metropolitan cities versus the regions, State versus State), and socio-economic status. All such analyses generally show statistically significant variations that can help enhance a planner’s understanding of the community or communities they are working in. Clearly, however, great care needs to be taken in using participation data as a guide to the future provision of leisure and recreation opportunities. As has been argued with regard to the findings of all the types of research outlined in this text, no one set of information should be used in isolation from a range of other resources.

## 9.5 Participation in arts and cultural pursuits

The participation data in the previous sections have focused on sporting and physically active recreation pursuits. Substantial data sets are also available on participation in arts and cultural pursuits and these warrant review as all too often, cultural provision is overlooked. Some of the most recent data collected by the Bureau of Statistics is reported below. Readers are referred to the section "People" under the heading "Themes" on the Australian Bureau of Statistics website ([www.abs.gov.au](http://www.abs.gov.au)). This provides a wide range of data, much of which can be downloaded at no cost.

The report, *Children's Participation in Cultural and Leisure Activities*, (ABS Catalogue No. 4901.0) was published in 2006. The survey covered participation by 5 to 14 year olds in selected cultural and leisure activities over the 12 months prior to April 2006. Some of the key findings were:

- 20% of 5-14 year olds played a musical instrument outside school

- 12% had lessons or gave a dance performance

- 6% had lessons or gave a singing performance

- 4% participated in drama

Cultural activities were far more popular amongst girls than boys: 44% of girls and only 22% of boys were involved in one of the selected cultural activities and 12% of girls and only 3% of boys pursued two or more activities

There were major differences in boy/girl participation rates in individual activities: 23% of girls were involved in dance whereas only 2% of boys were

For most cultural activities, participation peaked amongst 10 year olds and then dropped. Dancing peaked at 6 years while playing a musical instrument did not peak until 11 to 13 years, and

The vast majority of children pursuing cultural activities took lessons: dance, 93%; musical instrument, 75%; drama, 70%; singing, 60%.

Comparative data is available for 2003 and 2000. In reviewing the 2003 data, the Bureau reported that:

"For the combined selected cultural activities, after no change to participation rates between 2000 and 2003, there was a three percentage point increase reported for 2006 (from 30% to 33%). This was largely due to a 5 percentage point increase between 2003 and 2006 in boys' participation (from 17% to 22%). Playing a musical instrument showed the largest increase (from 13% to 18%) between 2000 and 2006... playing computer or electronic games ... fell 7 percentage points between 2003 and 2006 from 71% to 64%. This was also below the participation rate of 69% for this activity in 2000".

Participation rates in selected cultural activities by adults (aged 15 years and above) are reported in the Bureau of Statistics report, *Attendance at Selected Cultural Venues and Events* (Cat. 4114.0) for 2005-2006. Again, extensive comparable data from earlier years is also available. The full report provides data by age, gender, activity type, State of residence, family make-up, employment, education and household incomes. Table 9.3 reports participation by all residents on the basis of their State of origin.

The data reveal some significant features of Australian's involvement in cultural activities and in wider recreation participation. Visiting a cinema was by far the most popular activity with around two-thirds of the total population attending in 2005-06. By comparison, classical music concerts were the only activity to attract below a 10 percent participation rate nationally.

Interestingly, participation rates varied quite substantially between the States for some activities. The very high rates of attendance for nearly all activities in the ACT when compared with the rest of Australia highlights these differences. Perhaps the most interesting point about Table 9.3 is the differences in attendances at cultural events compared with participation in sport and physical recreation activities as shown in Table 9.1. This shows that only 4 of the 67 sport and physical recreation activities had *over* a 10 percent participation rate compared with only one cultural activity which fell *below* 10 percent.

Other significant findings from the 2005-06 cultural participation survey report were:

- Attendance rates dropped significantly after the 35-44 years age group and even more dramatically after 55-64 years. By 75 years and over, rates were 25 percent below the overall average and 40 percent below teenage rates

- Attendances by females were generally 5-8 percent higher than male rates

- People of different ages had quite different preferences for the venues and events they attended

The types of venues and events visited was strongly influenced by household make up with, eg: households with children having far higher visit rates to zoos and aquariums

English-speaking and Australian-born residents had higher attendance rates than those born overseas

Venues & Events	NSW %	Vic %	Qld %	SA %	WA %	Tas %	NT %	ACT %	Aust %
Art galleries	20.8	23.9	22.0	24.0	22.8	24.0	25.9	39.7	22.7
Museums	21.3	20.9	21.7	26.9	22.2	30.8	38.2	47.3	22.6
Zoos and aquariums	33.2	37.0	33.2	37.9	43.4	31.6	36.0	41.4	35.6
Botanic gardens	28.3	36.7	37.2	36.5	33.4	32.3	38.8	44.4	33.7
Libraries	31.9	33.2	35.1	40.3	36.7	35.6	28.1	34.9	34.1
Classical music concerts	9.7	9.3	8.2	9.7	10.8	9.3	7.9	13.3	9.4
Popular music concerts	23.9	23.6	25.8	26.2	30.8	24.1	29.5	34.1	25.2
Theatre performances	16.9	17.9	15.2	17.6	16.8	19.5	12.1	25.5	17.0
Dance performances	10.9	9.9	8.7	11.2	9.7	7.5	9.6	16.6	10.2
Musicals and operas	16.6	18.4	15.4	13.0	14.8	15.3	9.4	19.1	16.3
Other performing arts	15.3	16.7	16.4	20.5	17.6	16.9	14.8	19.7	16.6
Cinemas	62.9	67.1	66.8	64.0	66.6	56.4	68.2	71.3	65.2

Table 9.3: Adult attendance at selected cultural venues and events, 2005-06 (Note: NT data is for urban areas only)

Employed people had higher attendance rates at the more “elite” events than the unemployed. However, libraries attracted higher rates of unemployed attendees

People whose educational attainment was 10 years or less had significantly lower attendances at most types of venues and events

There were major variations in attendances on the basis of whether residents lived in capital cities and other areas of the State

Cinemas and libraries attracted visitors on a very frequent basis (over 10 and 20 times in the past 12 months respectively) whereas museums, dance events, musicals, performing arts and opera generally only attracted one visit per person in the 12 month period.

A final set of data provided in the 2005-06 *Attendance at Selected Cultural Venues and Events* report is a comparison of the 2005-06 attendance rates with data for 1995 and 1999. This is summarised in Table 9.4. The full report also provides data on changes over the 10 year period in relation to States, frequency of attendance, and age.

Table 9.4 indicates that there was little change in attendances at galleries, zoos and aquariums, popular music concerts, theatre and dance performances over the 1995 – 2005/06 period. By comparison, attendances at museums, botanic gardens, libraries, musicals and operas and other performing arts fell – with museum and botanic garden attendances falling quite dramatically.

What is perhaps most significant about the results is that despite higher educational levels and greater government and commercial spending on arts and cultural initiatives, only classical music concert attendances rose, and then only marginally. So while high in popularity when compared with sports and physical activities, arts and cultural pursuits involvement appears to have stagnated at best and in some areas, declined markedly.

## Discussion

Interpreting the foregoing participation data and then using the conclusions for planning purposes is a complex and difficult task. For instance, the stagnation in participation in arts and cultural pursuits may reflect changing needs, or it may reflect changes in the cultural mix of the community and perhaps, as a result, the reduced relevance of what is offered. In one culture or in a very conservative society, the response to this finding might be to put more effort into traditional cultural activities and to encourage newer immigrant groups to join in and “assimilate”. In a more progressive, open society, those providing arts and cultural opportunities may decide

instead, to bring in new forms of arts expression and performance that better reflect the more diverse culture of the community. Alternately, the figures may simply mean that supply and demand are well matched and that those who want to go to a cultural venue or event *can* go. So no changes of provision or programming may be made at all.

Where sports participation is booming, this may reflect a growing recognition of the value of physical activity, a rejection of more traditional sports, the impact of better management and improved marketing and world sporting events (such as with soccer over recent years). Or it may reflect the provision of good opportunities for that sport that allow growth to occur when provision for other activities is over-subscribed. Certainly, some of the differences that have been identified must reflect variations of supply eg: those between the States, while they also reflect the impact of overall educational and income levels on demand.

Venue or Event	Aust. 1995 %	Aust. 1999 %	Aust. 2005-06 %
Art galleries	22.3	21.2	22.7
Museums	27.8	19.9	22.6
Zoos and aquariums	35.3	33.9	35.6
Botanic gardens	38.5	36.1	33.7
Libraries	38.4	38.1	34.1
Classical music concerts	7.7	8.8	9.4
Popular music concerts	26.9	25.4	25.2
Theatre performances	16.6	16.5	17.0
Dance performances	10.0	9.0	10.2
Musicals and operas	19.3	16.3	16.3
Other performing arts	18.7	17.8	16.6
Cinemas	62.1	67.0	65.2

Table 9.4: Attendance at cultural venues and events by Australians, 1995, 1999 and 2005-06

## 9.6 Forecasting

Forecasting is the process of taking a range of data (participation figures, expressed needs, demographic changes) and using it to build a picture of a likely future and likely future social, economic and resource demands. From a leisure and recreation perspective, forecasting seeks to create an understanding of future needs and aspirations and to understand the implications of this to the provision of leisure and recreation facilities, programs and services.

Because the Australian (and world-wide) sport and recreation participation data that is available is somewhat piecemeal and has significant shortcomings, it is not appropriate to try to forecast future leisure needs and provision priorities on the basis of this data alone. Rather, as has been argued in previous paragraphs, a broad range of information needs to be brought together before meaningful conclusions can be drawn about the possible future recreation and leisure interests of the community and the implications of this to provision and provision priorities. The "broad range of information" that needs to be reviewed includes all that reviewed and discussed elsewhere in this text and possibly, a wide mix of other data about other social, political and cultural issues. This includes, from time to time, national and international politics, international relations, patterns and levels of world trade, issues of social equity, and in the current day and age, global warming, climate change, environmental protection and environmental sustainability. Given the complexity of these issues and given the very large elasticities of demand that can occur in leisure and recreation, making firm projections and predictions of demand and need too far into the future can be dangerous. Rather, one is far better to use the resources available to reach modest conclusions and to make a series of small, well-monitored and evaluated steps, rather than to leap into the unknown.

## 9.7 Conclusion

Data on participation in leisure and recreation activities is a useful addition to an inventory of opportunities as, all other things being equal, it provides guidance to the likely demand for various facilities. As noted earlier in the Chapter, most of the participation data that does exist has been collected by national organisations such as the Australian Bureau of Statistics and the Australian Sports Commission and, unfortunately, it is rarely collected at anything below the individual State level (or if it is, it is not widely released). As such, care must be taken in its use as participation variations *within* a State –particularly between capital cities and rural and regional areas—could otherwise mislead. In face of this concern, some State agencies and even local Councils have collected their own participation data. Common weaknesses in the latter case include the lack of consistency between the survey tools, survey methodologies, data collection regularity and sample sizes. Further, individual agencies are reluctant to share data –when sharing would be invaluable—and no agency has accepted the responsibility for collecting, collating and evaluating what data is made available.

This Chapter has sought to review and evaluate the use of data on recreation and leisure participation in Australia as an input to the recreation planning process. It has raised a number of concerns regarding the nature and accuracy of the data that is available and hence regarding its use. It has also provided a number of data sets that indicate broadly what types of recreation activities people pursue and how these can be influenced by a number of personal, locational and cultural influences. It is suggested that while participation data is useful in understanding what people do at present—so that the planning process does not make proposals that are too radically different—it must be used with great care as a planning tool.

## Recreation Provision in “Greenfield” and “Brownfield” Sites

### 10.1 Introduction

Recreation planning and provision is not an issue that is only considered in *existing* residential areas. The continuing expansion of Australia’s major urban areas, of rural residential areas (or “peri-urban areas”) of small rural towns, and of regional cities onto “greenfield” farming land, means that the future recreational needs of the people who will move into new residential areas also needs to be considered. Similarly, where areas previously used for other purposes such as inner city industrial land, rail yards, military reserves, agricultural research institutes or former schools, is being converted to residential uses, it is probable that recreation planning of these “brownfields” will be needed.

In both “greenfield” and “brownfield” residential developments there are no communities to consult and generally, no existing recreation provision to review and evaluate. As a result, a number of the research-based planning strategies that have been covered in this text cannot be applied and planners must look for some other form of guidance as to provision needs and priorities. Unfortunately, many town planners and others resort to open space standards and developer contributions as the solution to this situation. This is very poor practice as section 4.2 demonstrated clearly that standards in particular have no sound research basis and can deliver an inappropriate and inadequate mix of recreation opportunities.

So what can be done in this situation? The following paragraphs outline a number of strategies --but also highlight some of the legislative realities that exist in Australia that make sound recreation planning in greenfield and brownfield situations a difficult task.

### 10.2 Determine the objectives and principles

Before any decisions are made about any form of provision, guiding decisions need to be made about the *objectives* of recreation and leisure provision in a greenfield area (*and about a whole range of other services* in new residential areas) and about the *principles* that underpin these. This is critical as it will provide a basis for decisions on the mix, types and scale of provision to be made.

To illustrate, if a new development is near existing residential areas, a key guiding principle may be to provide *local* opportunities, on the expectation that residents will rely on higher order facilities elsewhere to meet their regional needs. Alternately, opening up new land may allow previous gaps to be filled by new regional provision. By comparison, a planning authority may decide that it wants to use new residential development as a means of restoring derelict land, of bringing new wealth into the community and of attracting a form of residential living not previously available in the district. It may therefore, prepare principles that seek a very different type of outcome. In another instance, a heritage farm may form the basis of a new regional cultural centre, of a sympathetic open space system, or allow for a different approach to street layout and to the mix of community facilities that are provided.

One real advantage enjoyed by recreation planners is that there are no rigid, fixed standards as to what must be provided and where. As a result, planners have the opportunity to create exciting new residential environments. The fact that such creative thinking lives on in our cities is attested to by the layout of Adelaide and its parklands, by Canberra, and by the world-wide garden cities movement and the layout of many smaller towns and suburbs across the country.

### 10.3 Assessing the context

The first thing to do in planning for recreation in new residential areas is to assess the context in that the provision is to be made. This includes reviewing:

**The natural environment** and the associated opportunities and constraints. The climate, soils, terrain, aspect, geology and flora and fauna of a region --and their variability and rarity-- will all impact on the recreation opportunities that can be provided. Hot, wet or dry climates and cold, wet or dry climates impose serious limitations on what can be provided and what residents like to do. A rugged environment with regular snow falls is likely to mean that quite different recreation participation and provision are likely.

If the local environment provides excellent beaches, rock climbing opportunities, wetlands or bushland trails, a greater interest in the use of these facilities will almost certainly evolve, with a consequent lesser need for other more traditional or “main-stream” recreation facilities, programs and services. At the same time, some of these resources may have an important non-recreational role and may thus be reserved and

managed in a way that allows “secondary” recreational use eg: floodways, utilities easements, wetlands, conservation reserves

**The scale of the development.** As discussed in the review of the @leisure planning model in section 6.7, an understanding of the scale and nature of the residential development is important. The mix and scale of facilities that are appropriate to a small rural community will be very different to those provided in a larger centre or on the urban fringe.

**Recreation provision in nearby residential areas.** During their day to day lives, people like to stay in familiar environments. Research by geographers and town planners has shown that when people move house, or when young couples set up new homes, most move outward along growth corridors from where they previously lived or into new residential areas that reflect their past experience. Others move up the social ladder by moving into *nearby* new estates and suburbs or making a “seachange” (to the coast), a “greenchange” (to the bush) or a lifestyle change by “downsizing” into (often inner city) apartments that are considered to be better or more modern than, but not far from, where they used to live.

By identifying where new residents are likely to come from, planners are able to assess what the demographics of the “donor” areas are like, what these people do and use in terms of recreation activities and as a consequence, and what might need to be provided in the new residential areas.

Some property developers collect data on the characteristics, origins and leisure (and other) interests of visitors to home displays as a means of determining who is likely to move into the new estates and what this means in terms of the mix and level of provision. Obviously too, people buying homes priced at say, \$300,000 may well be restricted as to what they can afford and, as they are often at a different lifecycle stage, may well want different recreation opportunities to those buying homes priced at \$800,000 or \$2.5 m. or \$5 m. Developers who put properties onto the market at the latter prices will have already done a lot of research into the “demographic” they are targeting and what this means in terms of lifestyles, recreational interests and needs.

Similarly, developers building retirement villages, “lifestyle” estates, holiday home estates or rural retreats will have formed a good idea of what their projected clients will want. In some of these instances, recreation provision will be focused on, for instance, a top quality golf course and club house or a marina, water ways and boat clubs. A high level of attention is generally also given to quality gardens and environmental amenity but residents wanting playgrounds, sports halls, football ovals, neighbourhood houses, scouts, seniors clubs, community halls and other more traditional facilities may find that they have to travel some distance to a nearby town for these resources. Of recent times, the majority of major new residential developments have featured lakes or waterways but developers have also been known to provide a range of other features to set their estates off from competitors and to attract buyers.

Major land and housing development companies report that they make quite extensive analyses of *existing* local and regional provision and future provision *plans* as part of the planning of new recreation opportunities in new residential estates <sup>14</sup>. Some of the key elements of this analysis include:

- Ensuring that the local and/or sub-municipal requirements of any regional and/or local planning authorities for recreation, childcare, aged services, health services etc are met
- Assessing provision proposals in reports covering the wider region that address recreation, health, childcare, environmental and other similar needs
- Assessing existing recreation *provision* and future provision *proposals* by district Councils and others, even if this provision is some distance away, in order to create “provision overlays”. These overlays are then used as a basis for a gap analysis to determine what additional or new services might be required in the new residential areas
- The assessment of existing *regional* facilities to determine what complementary, *local* facilities might be provided eg: a learn to swim facility to complement a regional Council aquatic leisure centre. This analysis may also indicate where there are opportunities for providing new *regional* venues, or at least, reserving land for their provision

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<sup>14</sup> The assistance of Mr Rob Dagnall, Manager Community Development (Vic) for Delfin Lend Lease Australia in the preparation of this material is gratefully acknowledged

- Consideration of the scale of the residential development. If it constitutes a small extension of an existing suburb or town, very little beyond local provision of play, social areas, trails etc may be required. However, if the development is more of a “satellite” town development, then larger versions of these facilities as well as sports grounds and indoor venues may be needed
- The assessment of commercial provision and liaison with other property developers in the region to identify development opportunities and avoid undue competition
- Liaison with other property developers to avoid provision duplication and undue competition, and
- The review of traditional provision standards to guide the level of provision for eg: sports grounds, tennis and the like.

One potential weakness with this approach –and several of the other provision approaches outlined in this chapter-- is that it can lead to a regime of facilities, programs and services provision that is essentially a mirror image of what exists elsewhere and innovation and creativity can be overlooked. This problem can be overcome to a substantial extent if the initial provision processes are viewed as a starting point only and are reviewed and refined by a program of demographic analyses and consultations as soon as residents begin to move into the new estates.

**State government or regional planning requirements.** Many State and/or regional planning authorities have legislation and/or guidelines covering a wide range of issues that must be addressed by anyone undertaking residential development. These include a range of developer contributions schemes, the reservation of land for recreation and other community facilities, and the protection of resources that have potential for recreational use eg: important fauna and flora areas, waterways, transport and utilities corridors and reserves for schools.

As an example, the Metropolitan Planning Authority in Victoria (and its predecessor, the Growth Areas Authority), has prepared Precinct Structure Planning Guidelines<sup>15</sup> for new communities in 5 metropolitan growth corridors. These require Plans to be prepared for new subdivisions in these corridors. The Plans cover major road networks, public transport, trails and pedestrian links, open space, community facilities and development land, activity centres and employment areas, residential provision at varying densities and in a form that will contribute to wider government policies, and a native vegetation plan.

Guidelines and planning principles are provided for each of these topics as are a set of performance measures. Recreation-related initiatives occur in each area, showing the close interrelations between recreation and all other aspects of community life. Examples of the guidelines that apply to leisure and recreation include:

- Provide higher density housing for people who do not have access to private vehicles and locate these close to activity centres and public transport
- Principal/major activity centres should provide shopping centres together with a mix of community facilities, higher density housing, cultural venues and entertainment and recreation opportunities
- Principal/major activity centres should feature a town park with links to the surrounding open space network
- Schools, health care and other community facilities should be adjacent to public transport services
- Direct, safe and attractive walking and cycling routes should be provided to and from residential areas, activity centres and community facilities
- Local community facilities should be located in or next to activity centres or clustered at junctions of the open space, trail and public transport networks
- Open space areas and networks should be designed on an integrated and shared basis to serve multiple purposes based on assessments of the function to be served, the nature of the landscape setting and the catchment to be served
- Provide open space at the local, district and regional scale that provides for social, cultural, recreational and sporting needs of different age groups and abilities

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<sup>15</sup> See <http://www.mpa.vic.gov.au/planning-activities/greenfields-planning/precinct-structure-planning-guidelines/>

- Connect open spaces into existing and planned open spaces in surrounding communities
- Use waterways as part of the open space network
- Incorporate aspects of any cultural or historical attributes of an area
- Protect waterways and wetlands and integrate these with open space networks.

These and others of the Precinct Structure Planning Guidelines provide an invaluable set of tools for the planning of new residential areas.

**Benchmarking.** As discussed in Chapter 4, benchmarking essentially consists of assessing the level and quality of what is provided in other established communities and using this as a guide to provision in a new community. As indicated in the earlier discussion, this can be a useful check but care must be taken to ensure the comparisons are realistic and useful. There is little to be gained for instance, from benchmarking provision needs in a new, lower income outer suburb against the levels of provision and standards achieved in a wealthier, older inner suburb.

### Assessing recreation activities and leisure trends

The analysis of Australian Bureau of Statistics data on recreation participation and recreation expenditure and Bureau trend reports, of Australian Sports Commission reports and of a range of other recreation studies, is an invaluable process for helping to understand recreation provision needs and opportunities.

Care must be taken however, to not use the data analyses in a simplistic way and to simply provide “more of the same”. Yet, if the data and report analyses show that Australian communities enjoy for example, outdoor sports, walking, arts and cultural pursuits, casual picnics, educational pursuits and the like, then provision can be safely made for them, provided it is made with some awareness of the likely characteristics of the population that will be served.

Another useful method of determining activity and leisure trends is to consult with sporting and recreation groups, clubs, sports teachers and coaches, arts and leisure groups, facility managers and recreation officers about what they know of changing district needs and the implications to future provision. This approach ensures that trends gleaned from State or national data do not lead to the misinterpretation of needs at the local level.

## 10.4 Making provision

The findings of research into the above issues will assist a great deal in determining what *types* of recreation facilities, programs and services might be appropriate for new residential areas. However, they do not indicate specifically *what* ought to be provided. In new emerging communities in fact, it is more important to ensure a longer term *capacity to provide* in response to *evolving* needs rather than to provide a complete mix of very specific facilities, programs and services upfront that it is later found do not effectively meet needs.

While the types of research outlined above will indicate a need for some types of provision, other types of provision may not be as clear. To illustrate, the research is likely to demonstrate that a new residential development that is selling in a moderate price range on the fringes of a metro area or regional city is attracting young couples with young and still-growing families from mixed cultural backgrounds. It is thus highly likely that the community will need maternal and child facilities, community meeting venues, cycling and walking trails, playgrounds, informal parks, childcare facilities, primary schools and the like. Thus, land can be reserved for these facilities. But what of trails, sports grounds, tennis courts, neighbourhood houses, and indoor courts: should these be provided? In short, the answer is “no, not necessarily”, as there is no proven need for them. However, as indicated above, the *capacity to provide* them should be ensured by reserving land that can be developed once and as needs are identified. If this land can be reserved adjacent to other community facilities where it is known there *will* be a need—such as next to schools—then greater certainty can be introduced.

To assist with ensuring a *capacity to provide*, the following actions are proposed:

1. Prepare an *outline development plan* or *structure plan* for the area being developed. This entails designing the desired “skeleton” for transport, retail, residential, open space, cultural, educational, retail and community services provision across the landscape that is to undergo development to provide a framework to guide later more detailed development and provision processes

At the local government level, a Council should involve each of its operational divisions in the structure planning process. It should also invite participation by a

range of other State, regional and not-for-profit agencies so that a “linked-up” process of development can occur and so the potential needs of all elements of the future community are effectively addressed. In some States of Australia, the preparation of some form of structure plan is now required in new residential growth areas <sup>16</sup>

2. Accept open space or financial contributions legislated for by developer contributions schemes but only accept the land in the form and at the locations where it contributes to the recreational objectives that have been established *and to other appropriate guidelines* eg: transport, health, safety, accessibility
  3. Make provision for as wide as practical a cross-section of different types of recreation opportunities so that a diversity of experiences can be gained by the future community. Use Table 6.1 in section 6.5 of this text as a guide to the mix of facilities that might be provided
  4. Exploit the natural resources that are available. Buffers along creek and drainage lines that are not already zoned for water and flood management purposes (and can thus be used for recreational trails as a “secondary” use), should be acquired or zoned to exclude inappropriate development so the creek environs can be used for passive recreational activities, for conservation studies and for walking. Swamps, rocky outcrops, other areas of natural value and heritage or historic sites should be protected for both their natural assets *and* for recreational and educational purposes
  5. Acquire a comparatively small number of open space sites but ensure they are of a sufficient size to accommodate a mix of uses and ensure that those uses can be expanded if needed. Some key elements of this principle are:
    - At the local level, do not acquire sites of less than 0.5 hectares (a minimum of 1 hectare is even better) for recreational activities, unless they have a predominantly informal seating and amenity role or a linear linkage role. These sites should serve local communities and offer a mix of opportunities including local play, kick-about spaces, seating, informal sports court/half court, ornamental gardens and trees, footpath/cycling links
    - Seek to provide local venues no more than 500-700 metres apart unless access is hampered by busy roads, railways, other land uses (such as retail, industrial, commercial), rivers, or changes of terrain, when a shorter distance may be appropriate so that these major barriers do not have to be crossed
    - At the district and sub-municipal level, seek to acquire land parcels of a minimum of 2 hectares, or of a size that is sufficient for a mix of at least 3-4 (*but not all*) of the following:
      - two full size sports grounds, associated club and social rooms and off-street parking
      - informal seating, social areas
      - informal kick-about areas
      - outdoor court sports eg: a minimum of 6-10 tennis courts, 3 bowling greens, or 4 netball courts (with club facilities shared with the sports ground users)
      - one or more playgrounds, with these designed to serve different age groups
      - informal amenity, seating and planting areas
      - linear trail links
      - neighbourhood house/multi-use community meeting centre
      - skate facility.
    - At the regional or Council-wide level, seek to acquire land parcels of 10 plus hectares, or of a size that is sufficient for a mix of at least 3-4 of the facilities listed above plus, potentially, an indoor sports court complex with 3-4 indoor sports courts and an indoor aquatic leisure centre/ community activities /wellbeing centre
- Table 10.1 following is adapted from the *Bendigo Open Space Strategy* prepared by the author, Inspiring Place and Conceptz in 2003. The open space classification is similar to that in Table 6.1. Column 5 records the mix of amenities that should be considered in at each open space type and, more importantly, column 6 records the indicative provision sizes and/or rates for the different types of open space. Additional categories could be developed for indoor, built recreation

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<sup>16</sup> See for example the Victorian Growth Areas Authority referred to in footnote 10

## resources

6. Ensure that the shape of all sites enhances access. For example, a site should have its longest side facing a road or have road boundaries on at least three sides; it should not be narrow and deep and surrounded by back fences; it should have good pathway links from all directions to it, and it should provide for passive supervision and not have hidden corners or blind spots
7. Ensure that *local* facilities are located so users can develop an affinity with them (eg: put them near schools, shops, main roads etc so people know they exist) and make use of them without having to compete with non-local residents
8. Seek co-location and partnership developments with schools, shopping centres, welfare and other government and not-for-profit agencies *and* with transport routes and nodes to optimise use and access <sup>17</sup>
9. Evaluate opportunities for private investment in the initiatives
10. Provide signposted (and most probably, lit) footpath/trails and strong visual links between all recreation facilities and all significant community assets (such as schools, shops, railway stations). Where appropriate, design the footpath/trails for both recreational and commuter use. Pay attention to issues of user safety with regard to view lines, regular access points, reserve widths for trails (eg: a minimum of 5 m.), and
11. Ensure that all resources are effectively serviced with paths, shade, lighting, signs, and toilets, taps and car parking (depending on the scale).

Recent planning work undertaken by Stonnington Council in Melbourne has sought to break down the distinction between open space and the other resources that have recreational value to a community. These include shopping strips, streetscapes, pathways, road reserves, school grounds, car parks etc. All have been treated as part of the “public realm” and the planning of all these spaces has been integrated with all aspects of for example, urban, transport, trails, community health, conservation and environmental planning *rather than treating each as a separate entity*. This is a valuable principle that warrants wider application in the planning of community recreation spaces.

The Stonnington approach highlights the point that there are new and often better ways of providing for recreation. Taking an integrated approach serves to recognise the central importance of recreation and leisure and to move it away from a focus on “green” space to a focus on community life, community hubs, civic facilities and centres, waterways, community gardens, libraries, and to a sense of *community* and *community wellbeing*. Further, it raises the point that both existing and greenfield developments offer the opportunity to “break the mould” and to do something new and different in terms of recreation provision.

## 10.5 Conclusions

This Chapter has sought to provide guidance for planners having to make provision for recreation opportunities in new residential developments where there is no existing provision to evaluate and no community to consult. It is evident that planning from “scratch” raises a number of difficulties: however, a range of strategies and tools are available and these can be used to create an initial framework for provision. It is stressed, however, that *once a base population of as few as several hundred or several thousand residents moves into a new area, planning authorities should begin using a number of the other planning methodologies detailed in this text to assess more specific provision needs*. Consultations with residents and an analysis of resident demo-graphics will be two of the most useful tools. A continuing programs of needs monitoring and provision reviews may be needed before an initial mix of provision is achieved and, as in any other community, this may need further review, additions and change on a regular basis over the coming years.

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<sup>17</sup> The co-location of a wide range of recreation and other community facilities and services is increasingly common. Examples can now be found where schools, libraries, pre-schools, child care centres, youth services, cultural facilities, neighbourhood houses, health services, hairdressers, physiotherapy, medical and recreational clothing retailers co-locate in what are being seen as community leisure and wellbeing centres rather than just recreation centres. Not only does co-location service a wider market and enhance viability, it also provides the opportunity to tap funding from a wider cross-section of non-for-profit, State and Federal funding agencies. Example venues where a range of services have co-located are presented in the associated web site files.

OPEN SPACE TYPE	DESCRIPTION	PRIMARY USES & BENDIGO EXAMPLES	SECONDARY AND OTHER USES	AMENITIES TO BE ASSESSED FOR PROVISION	INDICATIVE SIZES & BUFFERS	MANAGEMENT ISSUES
<b>1. Parks</b>	Reserves that have had their physical character &/ or vegetation modified to support community recreation, community development and well-being uses.  Venues include ornamental gardens, play facilities, community gardens, informal lawns	Social activities, picnics Play activities Sightseeing Displays Cycling/walking Informal sports Relaxation Cultural activities: performances, fairs, displays of photography, painting, dance  Examples: Local parks, playgrounds, Regional town centre ornamental and heritage park	Conservation/nature study Heritage protection Indoor/outdoor sporting, club, social, cultural, community services facilities  Fauna/flora habitat Landscape & amenity Halls, swimming pools, stadia Social and management facilities/ rooms Flood mitigation Heritage conservation	Toilets Change Seating Shade Weather shelters Parking Lighting Bins Protective fencing Food services User information and regulations Information services Tourist services	Minimum size to be determined by primary uses.  Local, 0.75 ha. min. Sub-/Municipal, 2 ha. min. Municipal and above, 10+ ha. depending on uses  Buffers dependent on hierarchical position: Local, 3 m. from buildings, roads if fenced; 10 m. without fencing; Sub-Municipal and above, 10 m.	Noise, lighting, traffic and waste management Retention of quality Use management & controls to protect resource quality
<b>2. Landscape &amp; Amenity</b>	Reserves created for their attractiveness and to add to or protect the character of an area  Venues include reserves adjoining residential and industrial areas, ridge lines, river flats and sections of road reserves	Buffers between different types of land use Enhancing all forms of rural and urban land use A backdrop to all forms of recreational open space and Utilities & Services reserves  Examples: Plantings around former mining sites; plantings adjacent to major road intersections; small plantings in shopping strips and along highways	Walking Cycling Nature study Conservation activities Educational activities Painting, photography  Managing & directing urban form Nature conservation, protection and enhancement	Dependent on types and scale of secondary uses	Minimum 2 m. width and 4 m. length but dependent on plant species used, associated land uses and open space types and relevant government guidelines  Buffers dependent on hierarchical position: Local, 1 m. from buildings, roads; Sub-Municipal & above, 3 m.	Weed and rubbish control Selection of appropriate species Clearing of native vegetation on private land Application of development controls over private land

Table 10.1: The Classification of Open Space Resources, adapted from City of Greater Bendigo, Open Space Strategy, 2003

OPEN SPACE TYPE	DESCRIPTION	PRIMARY USES & BENDIGO EXAMPLES	SECONDARY AND OTHER USES	AMENITIES TO BE ASSESSED FOR PROVISION	INDICATIVE SIZES & BUFFERS	MANAGEMENT ISSUES
<b>3. Conservation &amp; Heritage</b>	Reserves created to protect and enhance natural and cultural resources	<p>Natural and cultural re-source conservation protection and enhancement Fauna, flora research and study Scientific research</p> <p>Examples: Box-Iron Bark National Park; former mining sites of heritage importance</p>	<p>Water management Fire management Study/research</p> <p>Sightseeing Walking/cycling Camping Heritage appreciation Amenity Non-competitive, intellectually-focused leisure pursuits</p>	As per 1., (Parks) dependent on asset rarity, conservation significance, fragility, location, user experiences to be provided, and management regime/objectives	<p>Minimum to be determined by primary uses, area required to ensure environmental sustainability and relevant government guidelines</p> <p>Buffers dependent on hierarchical position: Local, 3 m. from buildings, roads; Sub-Municipal, Municipal, 10 m., Regional and above, 50 m.</p>	<p>Protection from introduced plant species and feral animals Protection from degradation, vandalism &amp; inappropriate uses, Weed and rubbish control Selection of appropriate species for regeneration programs Clearing of native vegetation on private land Application of development controls over private land</p>
<b>4. Linear &amp; Linkage</b>	<p>Small pathways linking residential streets in urban areas to municipal and regional trails using former rail and water race reserves and dedicated land</p> <p>Creek and river reserves, floodways</p>	<p>Walking and cycling activities; linkage to recreational and other activities Commuter travel Habitat corridors Urban amenity and buffers</p> <p>Examples: Bendigo Bush-land Trail, Bendigo Creek Linear Park, Rail Trail</p>	<p>Conservation/nature study Amenity Utilities &amp; services</p> <p>Recreation trails (when used as habitat corridors) Urban amenity and buffers (when used for recreation) Commuter/shopper access</p>	<p>Signs Toilets at points of intersection with other open space types Seats Shelter Lighting Road crossings Trees Protective fencing</p>	<p>Units of 200 metres to 1 km. long dependent on location &amp; destination. 10 metres min. width unless preconditions limit this</p> <p>Local, 0.2 km min Sub-municipal, 1 km min. Municipal, Regional, 5+ km</p> <p>Buffers dependent on hierarchical position: Local, 3 m. from buildings, roads; Sub-Municipal, 5 m. from buildings, roads; Municipal &amp; above, 20 m.</p>	<p>User safety Path materials User conflicts Rubbish control Control of inappropriate uses Management of impacts on surrounding land uses Positioning of amenities</p>

OPEN SPACE TYPE	DESCRIPTION	PRIMARY USES & BENDIGO EXAMPLES	SECONDARY AND OTHER USES	AMENITIES	INDICATIVE SIZES	MANAGEMENT ISSUES
5. Outdoor sport	Venues designed to support team sports training and competition	Competitive sport Special events: fairs, shows; displays  <i>Examples:</i> Regional football and cricket oval, regional harness racing venue, outdoor swimming pool	Play facilities, halls, pools, stadia, social & management facilities, informal lawns, gardens Walking/cycle Picnics, barbeques Amenity Emergency meeting points Fire refuge Helicopter emergency landing Buffering, amenity Flood mitigation Habitat preservation Open space types 2, 3, 4, 5, 7 and 8 as appropriate	Toilets Change Parking Seating Shade Weather shelters Lighting Storage Bins Protective fencing Food services User information and regulations	Dependent on whether Local, District, or Regional:  Local, 5 ha. min. Sub-Municipal, Municipal, 5-10 ha. min Regional, 5-10 ha. depending on uses	Noise Lighting Traffic Waste management Use management and controls to protect resource quality Protection of secondary uses
6. Utilities & Services	Venues reserved for urban and rural support services	Water / irrigation reservoirs Pipe- & powerline easements Road sides & road reserves Council depots Sewerage treatment pondages Airports & flight lines  <i>Examples:</i> Pipe and power line easements; water supply dams; sewerage works; airport	Linear trails Model aircraft flying areas Bird observing/ conservation Boating Golf Horse agistment BMX Motor bike courses Flora/fauna habitat, corridors Landscape and amenity	Dependent on any constraints imposed by primary use  As per linear and linkage reserves if developed as linear routes for recreation Safety barriers, signs Advisory signs Protective fencing	Dependent on any requirements of primary use(s)	Ensuring that secondary uses do not impact detrimentally on primary use Weed and rubbish control and management Fire management Control of inappropriate uses
7. Un-developed	Land acquired or zoned for open space purposes to protect its assets, or to meet assessed community needs once development of an area proceeds	To be determined by future needs and feasibility studies  <i>Examples:</i> Former mining wastes; farmland; forest on private land	Landscape and amenity value Informal, short term uses Others dependent on nature of any residential development	Generally nil but dependent on existing uses	Dependent on projected use but other-wise minimum of 0.75 ha.	Weed and rubbish control Environmental protection Fire management Control of inappropriate uses
8. Pro-posed	Land which it is <i>proposed</i> to zone or acquired for open space to protect its or to meet community needs once development of an area proceeds	Uses to be determined by future needs and feasibility studies  <i>Examples:</i> Former mining wastes; farmland; forest on private land	Landscape and amenity value Informal, short term uses Others dependent on nature of any residential development	Generally nil but dependent on existing uses	Dependent on projected use but other-wise minimum of 0.75 ha.	Weed and rubbish control Environmental protection Fire management Control of inappropriate management prior to zoning or acquisition

## Planning for Recreation in Natural Areas

### 11.1 Introduction

Many elements of the planning for recreation in natural areas are quite similar to planning for recreation in other areas: there is a need to assess policies, to assess the needs and aspirations of potential or existing users, to evaluate the demographics of the community or communities being served and to review and evaluate other competing or complementary provision. However, there is one major difference, that being understanding the complex characteristics of the natural areas to be used and evaluating the likely impacts of recreation on those areas. Unchecked or uncontrolled recreational use of natural areas –be it a creek corridor in an urban area, a remnant of bushland on the fringe of a city or a vast national park—can irreparably damage or totally destroy these resources. The consequence of this is weaken environmental sustainability and reduced opportunities for future generations.

A strong argument can be put that protecting the assets of natural areas should be given priority ahead of recreational uses, even if this means the exclusion of some or all recreational activities from some areas. This argument is based on the premise that first, *there are always alternate recreational activities that people can pursue in non-natural areas to achieve the same beneficial outcomes* and second, that once the complex fauna, flora, soil, water, geological and other resources of an area are damaged or destroyed, they will either never fully recover or will take many years to do so. In a similar vein, it would seem fair to argue that any recreational use should be secondary to natural processes unless there are very good reasons to the contrary.

This Chapter looks at some of the issues surrounding recreational use of natural areas and the strategies that are available for planning and managing that use. It also provides case study reviews of several recent natural area planning reports<sup>18</sup>.

### 11.2 Recreational Uses of Natural Areas

Natural areas are very popular for many recreational activities. The reasons for this vary substantially depending on the uses that occur. For instance, there is now an extensive body of research that shows that for many people, activities such as bushwalking, nature study, photography and environmental research take them back to their “roots” as a human being and give them a sense of belonging, wellbeing and harmony. This is particularly so for residents of large cities who find that natural areas give them a break and relief from the rush, noise and pressures of urban life. Unfortunately, however, it is often urban residents who have such a limited appreciation of the importance of natural areas and natural processes that they fail to understand or respect those areas and processes when they use them.

Unfortunately, there are other popular recreation activities that use natural areas that are less benign in their impact and that are pursued for very different reasons. In an increasing order of impact are activities such as camping, rock climbing, orienteering, fishing, abseiling, hang gliding, horse riding, mountain biking, hunting, trail bike riding, off road driving and skiing. Each has the capacity to disturb or destroy natural reproductive cycles; to bring in rubbish, foreign weeds, fungi, as well as human and animal wastes; to trample vegetation and cause erosion; to increase the incidence of fires; to deplete native animals, fish and birds, and to totally destroy total ecosystems. And unlike bushwalking and natural contemplation, many of these activities are pursued by individuals wishing to “test themselves against nature”, to show their individuality and resilience, and to display their skills and stamina. To them, the natural environment is a resource to be exploited and subdued, not respected and protected.

Unfortunately, there is neither a comprehensive nor detailed collection of data on the levels of recreational use of natural areas. However, as examples of the scale of these activities, Australian Sports Commission and Bureau of Statistics surveys over the 2008-2010 period have found that of the order of 770,000 Australians go bushwalking annually, 380,000 go fishing, around 200,000 people annually pursue snow and ice sports, 100,000 go water skiing and power boating and 35-40,000 go rock climbing. The capacity of these and other activities to degrade the environment and the very resources that are being enjoyed is substantial.

### 11.3 Dealing with Recreational Uses of Natural Areas

Addressing and resolving recreational use of natural areas entails:

1. Understanding the nature of the natural resources that *are* being or will be used

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<sup>18</sup> The assistance provided by Jerry de Gryse from Inspiring Place, through the provision of reports for review and an editorial review of the text in this Chapter is gratefully acknowledged.

2. Understanding the nature of the recreational uses the community does, or *would like to make*, of the resources; understanding the characteristics of use (eg: activities, seasonality, user group size, equipment used, infrastructure needed); understanding participation trends, and understanding the characteristics of users (age, gender, socio-economics, benefits/experiences sought etc
3. Determining the mix of the recreational activities using or being planned for natural areas and the characteristics of the use eg: whether it is seasonal, by individuals or groups, the number of users, day or overnight etc
4. Identifying and measuring the impacts of the recreational uses
5. Determining how impacts might be mitigated or eliminated, and
6. Implementing, promoting, monitoring and policing actions designed to minimise or eliminated impacts.

The first of these issues is addressed in the following section while issues 2. to 5. are addressed through a discussion of several natural area planning frameworks that have been developed over the past 30 to 40 years.

It warrants highlighting that the complexity of the processes involved in planning for recreation in natural areas generally means that a range of professional skills other than those used in planning for urban recreation are needed. These skills are rarely if ever available at the local government level (although some of them such as those of ecologists do exist in many Councils), as the frequency of planning for recreation in natural areas is generally not sufficient to warrant their employment, although there are often published or on-line resources that a planner could use to make a first level assessment. As a result, local government bodies tend to employ specialist consultants (wether commercial bodies or universities) to carry out this work. While this is the most effective way of achieving the best planning outcome, it is important for recreation managers to understand and evaluate the scope and purpose of the range of strategies that external planners might bring to a specific natural area planning study. Reviewing a range of other studies is a good way to identify the most effective approach to use.

### 11.3.1 Understanding the Nature of the Natural Resources

Completing an "inventory" or assessment of the past or present natural resources that are, or are planned to be, used for recreational purposes is a key starting point for assessing recreational impacts.

The topics on which data might need to be collected and the questions that might be asked about it are listed below. In all instances, consideration should be given to the likely impacts of climate change:

- **Regional and micro-climates and weather:**
  - what is the regional climate, what are the seasonal variations and how might these impact on the viability of flora and fauna communities and their susceptibility to disturbance
  - what is the spatial spread of the climatic regime and how rare is the experience of the area under study
  - are their local microclimate effects due to eg: elevation, slope and aspect that create rare or susceptible plant and animal communities

This analysis is undertaken using data from the Australian Bureau of Meteorology if it is available and any existing local research data. Where local data does not exist, wider regional data may need to be used as a guide. On extreme occasions where it is known that there are rare and endangered native flora and fauna species, local recording and trapping programs may need to be established.

- **Geology:**
  - what is the geology of the area and how common or unique is it
  - how does the geology effect soil types, soil moisture content, plant species and susceptibility to erosion

Geological data is generally available from State government agencies that have conducted detailed geological mapping. Evidence from local specialists or enthusiasts is often also available while on occasions it may be useful to explore road cuttings, cliffs, quarries and the like, or to dig exploratory pits.

- **Landform:**
  - is the land flat or sloping, elevated or variable

- does the land have cliffs, deep valleys, caves etc
- what is the aspect of the land
- what impacts does landform have on solar insolation, vegetation communities, runoff and microclimates

Landform analyses are carried out through the use of topographical maps, aerial photography and field surveys. These are used to measure the elevation of the land being studied, relative relief (this being the difference between the highest and lowest points), slopes and their steepness, and the position and characteristics of ridges and valleys. Landform features may have recreational and natural systems significance within themselves --such as cliffs, high peaks, caves—and they may have a profound influence on climate, microclimate, soils and vegetation.

- **Waterways, Drainage Systems and Other Water Features:**

- are there rivers, creeks, streams, lakes, wetlands, waterfalls, drainage depressions or other features in the study area and if so, what are their characteristics eg: catchment, size, flow volume, seasonality
- is the site adjacent to / include shorelines and offshore areas
- what impacts do the water features have on the nature and complexity of the natural systems of the area under study

Data on waterways, drainage systems and other water features is generally collected from topographical maps, aerial photographs and on-site surveys. State government agencies responsible for managing water resources may also have useful data. The fact that water features can change significantly over time due to floods, dune movements, landslides and the like means that historic records can also be important.

- **Soils:**

- what types of soils does the site have and what are their characteristics eg: depth, erosion
- do the soils reflect the regional geology or other factors such as flood deposits and wind blown sand
- how do soil types appear to affect or relate to vegetation
- are the soils subject to erosion if vegetation is removed or from burrowing by introduced animals

Data on soils is available from State government agencies, regional resources surveys and catchment management bodies. Local and regional conservation bodies may also have some information. That said, it is sometimes necessary to bring in specialist researchers if a detailed picture of the area being planned is required.

- **Flora species and communities:**

- what are the dominant flora communities
- are there rare or unique species that need to be protected
- are there introduced weeds
- are the vegetation communities likely to be susceptible to floods, drought, fire and other natural or man-made events and changes

Flora and fauna data is often available from regional resources surveys and conservation organisations. However, field confirmation by specialist researchers is often essential given the micro-scale diversity of so many natural systems in Australia. This can often stretch the time line for a study as many plant species can only be found or identified during their flowering season, which is usually in spring. Where it is known that an area is likely to have a high level of significance from a flora (and fauna) perspective, it is advisable to carry out detailed surveys of these elements well before any planning for recreational (or other uses) is commissioned.

- **Fauna: birds, animals, insects:**

- what are the dominant fauna species

- are there rare or unique species that need to be protected
- are there introduced /feral animals that threaten the ecosystems
- are fauna species likely to be susceptible to floods, drought, fire and other natural or man-made events and changes. What is the proximity to human activity (eg: eagle nests generally require a 500 m. no go zone)

Information on birds, animals, insects and other fauna is generally available from regional resources surveys, government agencies, local enthusiasts and conservation groups. However, the scale of government-sponsored reviews is often such that detailed on-site data collection is needed.

A very important adjunct to natural systems information is information on Aboriginal and Torres Strait Island and early European heritage and settlement sites. In both instances, State and sometimes, Federal legislation imposes tight restrictions on what can and cannot be done and this must be reviewed and adhered to. Again in both instances, local history groups and Aboriginal and Torres Strait Islanders community representatives should be contacted and involved in the assessment process while State government agencies should also be contacted.

The amount of detail collected on each of the above issues will depend on the scale and complexity of the area being assessed and the types of uses that are occurring or being planned. For instance, small areas of remnant vegetation along an urban creek corridor may warrant no more than a flora survey to determine whether there is any value in protecting what remains, so much having already been lost. Where larger land parcels are being assessed, however, the full range of information may need to be collected so that an accurate understanding of the nature and quality of the natural assets can be developed. Where there is evidence that the area being planned has already been degraded, it may be necessary to find a similar area to use as a benchmark, so that an effective understanding of what the planned area was like before it was damaged and to indicate what actions may be needed to restore it.

In some Australian states, extensive mapping of natural ecosystems has been carried out by State government agencies. This information often indicates the ecological significance and rarity of various ecosystems and this can be an invaluable resource. The Bureau of Meteorology can provide weather and climatic data while various other State government agencies can often provide information on soils, geology and other natural attributes. Local conservation and naturalist groups are also frequently an important source of detailed local information.

As can be recognised from the above discussion, where the natural systems of an area which is being planned are complex or where a large area is being studied, it is often useful to employ the services and skills of specialists such as climatologists, pedologists, archaeologists, geologists, biologists, botanists, geographers, fluvial engineers and other natural systems specialists. These specialists will know what to look for, how to "read" the story conveyed by the nature of the land, and what the significance of the natural and cultural resources are.

The information collected on each of the issues outlined above should be brought together as a background "resource and assessment" document that explains the nature of the area being planned, the nature, strengths and importance of the natural and archaeological resources and their importance on the local, regional and if appropriate, state and national level.

In assessing the information that has been collated it may well be that for one or a number of reasons some sections of the area being planned are recommended for exclusion from further consideration because their use would threaten endangered habits or species or because their use would contravene legislative provisions in terms of what uses or activities can and cannot be carried out in the area being studied or in parts of it. Alternately, the assessment may recommend that certain recreational (and other) activities are excluded entirely or that they are excluded at certain times of the year (such as during breeding seasons or wet seasons in marshlands). Other activities may have restrictions placed on them. These could include limits on the size of walking groups in sensitive areas; on the number of days that a camp site can be occupied; on the need to carry out all wastes and rubbish; on the types of fires that are lit and the fuels used; on the equipment used, and on whether horses, dogs and other domesticated animals are allowed to be taken into the natural area.

On occasion, the findings of a "resource and assessment" document may lead to the abandoning of an area for consideration for recreational use as it becomes evident that the fragility of the natural resources could not sustain the use types or levels being planned. In other instances, the assessments may lead to use being focused in less pristine areas which are treated as "sacrificial" so that bigger, better and more important natural areas can be protected through the exclusion of recreational uses.

Making decisions re the use or non-use of natural areas for recreational pursuits can be difficult, especially when economic, investment and development pressure is being asserted. However, as noted previously, from a recreational perspective, this pressure should be rejected as far as is possible because there are always other ways by which people can gain the benefits of recreational involvement and *no one activity or location is ever essential* to delivering those benefits. By comparison, once a natural resource is destroyed, it is likely to be lost forever.

## 11.4 Recreation Planning Frameworks

In order to bring each of the five elements of natural area planning (see 11.3 above) together in a structured way, the 1970s and 1980s saw a number of US and Canadian government agencies and individual researchers develop a range of planning frameworks to guide the planning for recreation in natural resource areas. The most widely known and used of these are the Recreation Opportunity Spectrum (or ROS), the Limits to Acceptable Change (LAC), Visitor Experience and Resource Protection (VERP), Visitor Impact Management (VIM), and Visitor Activity Management Process (VAMP) frameworks. The ROS has been used widely by national parks planners in Australia and the LAC to a lesser extent. Alternate strategies have been developed in Europe (and Australia), with a recent European paper detailing “adaptive management” and “boundary management” as two further strategies<sup>19</sup>. There is now an extensive literature on the topic.

To provide an overview of natural areas planning strategies, three of the frameworks, the well-known and widely used US Forestry Services’ ROS and LAC and the lesser known Canadian VAMP, are reviewed in the following pages. Readers should Google these and the other frameworks for further details.

### 11.4.1 Recreation Opportunity Spectrum

The concept of the Recreation Opportunity Spectrum was developed by US forest researchers in the late 1970s. Essentially, the approach sought to get away from past approaches to recreation provision wherein the popularity of a particular venue led to its further and further development to meet demand until eventually, it was no longer able to deliver the experiences that had attracted users in the first place.

The Recreation Opportunity Spectrum approach argued that a “combination of physical, biological, social and managerial conditions...give value to a place”<sup>20</sup> for recreationists and that by “combining variations of these qualities and conditions, management can provide a variety of opportunities” that meet the needs and preferences of recreators and provide them with a range of differing recreational experiences (p. 1).

Clark and Stankey state:

“The basic assumption underlying the Recreation Opportunity Spectrum is that quality in outdoor recreation is best assured through provision of a diverse set of opportunities. A wide range of tastes and preferences for recreational opportunities exists amongst the public and... providing a wide range of settings varying in level of development, access and so forth ensures that the broadest segment of the public will find (enjoyable) recreational experiences, both now and in the future”. (p. 3)

The “spectrum” of opportunities developed by Clark and Stankey sought to avoid the “averaging” of provision so as to better meet expectations, to provide more appropriate and cost effective services and particularly, and to reduce the use of rare wilderness areas when other more appropriate less sensitive areas may well have sufficed.

Clark and Stankey’s spectrum posited that differences in recreation settings could be defined by or created by differences in:

- **Access:** whether there are or are not roads or trails; the types and maintenance standards of roads and trails; whether cross country travel has to be used to access venues
- **Other, non-recreational uses:** these could include grazing, mining, or logging in natural areas or factories, car parks and freeways adjacent to urban recreation areas –both of which could significantly decrease the quality and enjoyment of the experience
- **On-site management:** this generally includes provision of support and service facilities of varying complexity such as car parks, bridges, formed trails, support and services facilities and the like
- **Social interaction:** the levels of crowding and the extent to which recreators can or do interact when visiting or using a venue
- **Acceptability of visitor impacts:** whether use will impact detrimentally on the venue being used and how this might be managed, minimised or eliminated
- **Acceptable regimentation:** implementation of a continuum of strategies (design, rules, regulation, policing) in an endeavour to control inappropriate uses

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<sup>19</sup> Pouwels, R., Opdam, P. and Jochem, R. 201: Reconsidering the Effectiveness of Scientific Tools for Negotiating Local Solutions to Conflicts between Recreation and Conservation with Stakeholders. *Ecology and Society*, vol. 6, no. 4, (See <http://www.ecologyandsociety.org/vol16/iss4/art17/>)

<sup>20</sup> Roger N. Clark and George H. Stankey, 1979: The Recreation Opportunity Spectrum: A Framework for Planning, Managing and Research, U.S. Department of Agriculture Forest Service, Pacific Northwest Forest and Range Experiment Station, General Technical Report, PNW-98 December 1979, p. 1. The full ROS paper can be downloaded from [http://74.91.226.186/Library/Visitor\\_Experience\\_Management/Recreation\\_Opportunity\\_Spectrum\\_1979.pdf](http://74.91.226.186/Library/Visitor_Experience_Management/Recreation_Opportunity_Spectrum_1979.pdf)

- **Landform types, vegetation, scenery, water, wildlife etc:** the quality of these features often have a key role in attracting people to a particular venue or location and play an important part in determining the mix of activities that people want to pursue or that a location can support.

Essentially using the absence or presence of these features (or *degrees* of their absence or presence) as a guide, Clark and Stankey devised the recreation opportunity “spectrum” or continuum, with this ranging from “modern” to “primitive” settings at each of the extremes and with variations between. Along this continuum, “modern” settings (such as city parks, plazas, outdoor performance spaces and urban playgrounds) were characterised as: having high levels of accessibility; often being surrounded by a diversity of other land uses; having high inputs of management and servicing; facilitating or generating high levels of interaction between users; seeking to minimise negative impacts on the resource/venue by supervision, selection of hardy plant species and durable building materials; and having higher than usual regulatory processes in place. Landform, vegetation and scenery were seen to play a part in attracting use as well but may have been highly modified over time.

By comparison, “primitive” settings were described as having little or no developed or even marked access; no other conflicting non-recreational uses; very low or absent on-site management inputs (with general “rules” of use being promoted by off-site means); use rate approvals or land areas of a size that minimise interaction between users; use regulations that minimise visitor impacts (such as, as noted earlier, limits on the number of users permitted into an area at the one time or on a seasonal basis), and a set of rules which seek to actively discourage users seeking higher levels of access, servicing, management and so forth. As with “modern” settings, landform, vegetation and scenery were seen to play a part in attracting use ---and this time, a major part---and protecting those assets was seen to be a major feature of any use regimentation.

Overall, the Recreation Opportunity Spectrum is a valuable tool for planning recreation for natural areas both within themselves and within a broader provision mix. The authors stressed however that, “it does not (seek to) offer a prescribed formula for providing outdoor recreation opportunities. (Rather) it does provide a systematic framework for looking at the actual distribution of opportunities and a logical procedure for assessing possible management action” (p. 18).

As such, in planning for recreation as a whole and for natural areas in particular, a planner may use the ROS framework as a guide to provision and to ask “what overall spectrum of opportunities should be provided for the community?” and “within the natural resources available, what spectrum of opportunities can be offered from the semi-natural to the primitive?” This can be illustrated using a recent Victorian management plan for a coastal cliff, dune and woodland reserve. The land has suffered as a result of parts of it being cleared and developed for a sewerage treatment works, a rifle range, a harness racing track, and a golf course. Other areas are readily accessible via a sealed road and car park and well-developed walking trails. Yet, still other sections of the reserve are more remote and are only accessible from the sea or via a rough, sandy trail. Under these circumstances, it is highly unlikely that it would be possible to re-establish a full “primitive” setting, even in the more remote sections of the reserve. As such, other sites might need to be identified and reserved if this experience is to be delivered in the region. However, if there are no other sites, it might be that the land managers seek to re-establish as close as practical to a “primitive” experience by relocating as many of the non-recreational uses off the reserve, by narrowing tracks down or eliminating them, and by removing the car park.

#### 11.4.2 Limits to Acceptable Change

A continuing problem with natural areas used for recreation is the detrimental impact of use on the environment. This issue was touched on by the Recreation Opportunity Spectrum model but has been developed further by other researchers. Initially, the concept of “carrying capacity” was thought to provide a solution but it was soon recognised that within a natural systems context (as opposed, for example to seats in a theatre or sheep on farmland), every component of the natural system (vegetation, wetlands, bird life, animal breeding cycles, water quality) will respond differently to different types of recreational use and generate a different “carrying capacity”. As a result, it is simply not practical to try to delimit an effective overall carrying capacity for any particular natural area.

The deficiencies of the “carrying capacity” concept led researchers to develop the more integrated planning frameworks noted earlier, these being the “Limits to Acceptable Change”, “Visitor Experience and Resource Protection”, “Visitor Impact Management”, and “Visitor Activity Management Process”. Each is briefly summarised in Moore and Driver (2005) <sup>21</sup>.

In essence, the first three of the frameworks cited above entail a similar analysis process. As detailed by Moore and Driver (p. 167), each has around seven steps of research, these being:

1. Reviewing and evaluating the existing management objectives of the area being planned

<sup>21</sup> A fuller discussion can be found in Moore, R. L. and Driver, B. L., 2005: Introduction to Outdoor Recreation. Providing and Managing Natural Resource Based Opportunities, Venture Publishing, State College Pennsylvania, Chs. 12, 14 See also Graham, R.,

2. Defining the key indicators of the likely recreational impacts eg: loss of vegetation cover, reduced species diversity, reduced bird count
3. Establishing use and management standards to be met to ensure that unacceptable or unsustainable impacts will not occur
4. Comparing the standards with the existing conditions
5. Identifying the probable causes of any discrepancies that are found
6. Selecting and implementing management actions to reduce the discrepancies, and
7. Monitoring the outcomes of the changed management actions to ensure that standards are being met.

**The limits of acceptable change model (LAC)** is somewhat more specific in its response to the shortcomings of the carrying capacity concept. Developed between the late 1970s and mid 1980s, it took the view that *any* recreational use of a natural area could have an impact on the natural environment. The “limits of acceptable change” was thus defined as “the amount of human-induced change (*as opposed to natural change*) that was acceptable in a wilderness setting, oriented principally around recreational uses”<sup>22</sup>. Significantly, McCool, Stankey, and Clark noted that “Because low amounts of recreational use lead to disproportionately high amounts of impact, preventing impacts is not necessarily the issue, but managing them is” (p. 71). The approach thus sought to focus on how much change was *acceptable* to the condition of a natural area rather than seeking an elusive *carrying capacity* number and also, rather than a more idealised *preferred* condition.

In discussing recent modifications to the Limits to Acceptable Change model, McCool, Stankey, and Clark stated:

“More recently, this definition of LAC has been generalized to situations where two (or more) goals are in conflict. One goal is viewed as having higher priority or greater importance than another, but there is a willingness to compromise on that goal so that the other goal may be attained (Cole and Stankey 1997). In wilderness and backcountry situations, for example, one goal may be sustaining the natural conditions and processes that give rise to the area’s value, and a secondary goal may be providing recreational access. The first goal is termed the “ultimately constraining goal,” but can be compromised somewhat in order for (the second goal) recreational access, to be permitted. Natural conditions are allowed to be degraded somewhat by recreation, but only until they have reached the limit of what is socially permissible. At that point, recreational access is limited in order to protect the principal or higher priority goal” (p. 72).

McCool, Stankey, and Clark argued that “this newer, more generalized definition of the Limits to Acceptable Change model allows managers to more easily transfer the concept to areas other than designated wilderness and backcountry situations”. To illustrate, a coastal area that was once used as a food collecting area by Aborigines may have remnants of cooking areas, shell middens and perhaps even, evidence of fish traps in local streams. In most if not all Australian states, the “ultimate constraining goal” for this area is likely to be the protection of these important cultural and archaeological remains. However, because the area is near a large coastal town, a secondary goal for the area might be to allow the use of the land for coastal walks, bird observing and cycling. If the early levels of recreational use have no observable impact, they may be allowed to continue. But if, over time, it is found that people are beginning to make tracks over the midden area and to dig in the campfire areas looking for “souvenirs”, recreational access is likely to be restricted, if not banned at all.

When the Limits to Acceptable Change model is used as a practical planning tool, a 10 step process is followed<sup>23</sup>. These are summarised from McCool, Stankey and Clark (pp. 72-80). Readers are referred to the full document for fuller details and discussion:

1. **Develop an explicit statement of the goals** for the area being planned and of the values associated with it in the light of the role the area does or will fill locally, regionally or even nationally
2. **Identify the issues and concerns** facing the area being planned including special features or qualities that need attention, management problems and concerns, and issues that the community feel are important. Seek to reach agreement on these issues and concerns
3. **Define and describe “wilderness recreation opportunity classes”** or more simply, the “current diversity of conditions” that could or do support recreational uses. Opportunity classes are “subdivisions or zones of the area being planned” where “different resource, social and managerial conditions will be maintained” in the light of differences of natural

<sup>22</sup> McCool, S. F., G. H. Stankey, and R. N. Clark, 2007: An assessment of frameworks useful for public land recreation planning. Gen. Tech. Report GTR-705. Pacific Northwest Research Station, Portland, Oregon, p. 71. For this invaluable review go to: [http://www.fs.fed.us/pnw/pubs/pnw\\_gtr705.pdf](http://www.fs.fed.us/pnw/pubs/pnw_gtr705.pdf)

<sup>23</sup> The original Limits to Acceptable Change model had 9 steps. However, more recent versions, endorsed by McCool, Stankey and Clark, have added a 10<sup>th</sup> step, this being the first listed, the formulation of an explicit statement of goals

features, evidence of recreational use, use levels and wilderness recreation opportunities (p. 73-4). The use of the term “opportunity” refers back to the Recreation *Opportunity Spectrum* discussed earlier in this Chapter.

Example opportunity classes could be, for instance, the shoreline of a coastal park; a system of scrub-covered dunes inland from the shoreline; open, sandy swales between dunes; low grasslands surrounding a lake system inland from the dunes; the lakes themselves, and undulating open woodland rising to higher forested ridges several kilometres inland from the lakes. The definition and identification of the opportunity classes provides the basis for later management prescriptions and a rationale for any changes or reallocation of uses that may be needed.

McCool, Stankey and Clark also imply that some opportunity classes may encompass parts or all of several natural zones. For instance, in the example cited above, an opportunity class could, perhaps, include part of the undulating woodlands, sections of the lake shore and the lake itself, as these three components together can offer a specific mix of recreational opportunities and experiences.

- 4. Select indicators of the biophysical and social conditions.** Indicators are “specific elements of the biophysical and social setting selected to represent (or to be “indicative of”) the conditions deemed appropriate and acceptable in each opportunity class” (p. 74). In other words, these are “benchmarks” as to what is an acceptable condition in each opportunity class. The indicators should be measurable and relate to the conditions of the opportunity classes. They might include for example, the amount of bare ground at a camp site, the number of groups encountered on a walking trail, or the number of sites showing current activities of feral animals.

Interestingly, McCool, Stankey and Clark state that “Because it is impossible to measure the condition of and change in every biophysical and social feature in a wilderness, only a few indicators need to be selected” (p. 74). This would seem to be inappropriate however, if there is widespread evidence of detrimental change of either a variety of types or from a variety of causes. For instance, if fieldwork suggests that bird populations are in decline, that feral animals are on the increase, that native animals are increasingly scarce, that users are leaving rubbish behind, that campers are camping illegally and cutting up fallen timber for firewood, and that some native plant species are either dying out or are being stolen, a far wider list of indicators may be needed. It would seem more appropriate to use as many items as are appropriate to effectively specify the circumstances being investigated.

Whatever indicators are used, McCool, Stankey & Clark argue (p. 75) that they should be:

- Quantitative: to avoid ambiguity
  - Reliable: differences over time and place are due to real change not measurement error
  - Sensitive to change: so that the outcomes of management actions can be measured
  - Administratively feasible: so they are not too costly or require too highly skilled staff
  - Relate to goals and objectives: so that the outcomes of actions can relate back to the desired conditions
- 5. Create an inventory of the existing biophysical and social conditions.** The inventory is only compiled after step 3 ie: “only after there has been deliberation about what biophysical attributes, social conditions, and management actions are important and why” (p. 76). This saves the expenditure of time in creating an inventory of elements that may not be important or used in the planning process. By focusing on the stage 3 indicators, the inventory “provides a measure of the indicators’ existing condition throughout the area, as well as a data base from which managers can formulate the standards for each indicator in each opportunity class” (p. 76).
  - 6. Specify the standards for the biophysical and social conditions in each opportunity class.** This stage takes the indicators of stage 4 and the inventory findings of stage 5 to provide a specific range of measurable conditions that are considered to be appropriate and acceptable *for each opportunity class*. These become the “standards that define the limits to acceptable change...” and “the maximum permissible conditions that will be allowed in a specified opportunity class” (p. 76).

Importantly, McCool, Stankey and Clark state that “Typically, each opportunity class would have a distinctive, quantitative standard for each indicator, generally along a continuum that reflects the increasing primitiveness of the desired conditions” (p. 76).

The standards are critical to indicating when restoration, enhancement or other types of management action are needed. For instance, when erosion along a walking trail begins to approach the standard, or when bird counts drop to a level close to or below the standard, management actions to counter the impacts and their causes will be needed.

**7. Identify alternate allocations of the opportunity classes to differing management regimes.**

This step uses previous information, especially from steps 1. (goals and values), 2., (issues and concerns), 3. (the opportunity classes), 5. (the inventory), and 6., the standards, to define optional ways in which the land resources could be allocated and managed. The optional allocations are then evaluated in terms of the philosophy that underpins them and what they would offer to various recreational interest groups.

Again with reference to the examples given in step 3., it might be that the shoreline is seen as an opportunity for walking or fishing or that given the presence of rare local sea plant and fish species, is seen as an opportunity for conservation and heritage studies. Similarly, the lake might be classified as an opportunity for low impact rowing/canoeing and sailing activities or because it is associated with a wetlands fish-breeding zone, as an area where use is restricted to shoreline walking and scenic experiences. McCool, Stankey and Clark state that "Critical to the development of the alternatives is a statement of philosophy or purpose for each alternative, such as 'this alternative seeks to maximise the availability of primitive recreation opportunities' " (p. 77) The step is thus important to evaluating "different pathways to protecting a particular wilderness" area (p. 78).

**8. Identify management actions for each alternative.** This step entails assessing the management strategies needed to achieve the alternate opportunity class allocations determined in step 7., together with the cost of those strategies. Management actions may include use exclusions, policing, provision of information, education, path closure, revegetation, restrictions on group size, and limits on the length of use of a site. Possible tradeoffs that optimise recreational benefits while minimising impacts may need to be debated.

**9. Evaluate and select a preferred alternative.** Having identified optional strategies, costs and possible trade-offs, managers and planners use this step to select and agree on the preferred course of action. The decisions and the reasons for them are publicised to educate the community and stakeholders as to the rationale for any actions that are to be taken. In selecting the agree strategy, planners and managers need to consider the overall cost implications, the ease of implementation, and any likely consequences elsewhere.

**10. Implementation and monitoring.** The set of strategies agreed to in step 9. are implemented and monitoring processes are put in place to assess the consequences and effectiveness of the actions. This is a critical step because if the actions taken are not monitored, no one will be any the wiser as to the appropriateness or not of them.

In terms of the monitoring *process*, McCool, Stankey and Clark state that this "focuses on the indicators selected in step 3 and compares their condition with those identified in the standards" (p. 79). They note that "if conditions are not improving, the intensity of the management effort might need to be increased or new actions implemented. Monitoring does not need to be intensive or very regular but should reflect the nature of the elements being monitored. Most monitoring can be an annual process".

In overview, the Limits of Acceptable Change model of natural resource planning for recreational uses provides a detailed and structured approach to assessing uses and resource capacities, setting impact benchmarks and monitoring user impacts. While somewhat complicated, it has a strong scientific base and has been widely used in many natural area planning processes over the past 20 years. It has achieved excellent outcomes.

### 11.4.3 Visitor Activity Management Process

The Canadian Visitor Activity Management Process (VAMP) planning framework was essentially developed over a similar timeframe to the Limits of Acceptable Change model<sup>24</sup>. However, it takes a somewhat different approach, having a far greater focus on understanding, providing for and managing defined visitor activities.

The Visitor Activity Management Process essentially has two starting points. These are (1) the assessment and understanding of the natural and cultural resources of a venue and of the management processes applicable to them and (2) the understanding of different types of potential visitor activities. These two inputs are then assessed and responded to so as to produce a park management plan that reflects a sustainable balance between the two.

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<sup>24</sup> See Graham, R., Nilsen, P. and Payne, R. J., 1988: Visitor management in Canadian national parks, *Tourism Management*, vol. 9, No. 1, March, 1988, pp. 44-61. The full paper can be purchased for \$US20 through [www.sciencedirect.com/science/article/pii/026151778890057X](http://www.sciencedirect.com/science/article/pii/026151778890057X)

Three clear differences between the Visitor Activity Management Process framework and the Limits of Acceptable Change framework are the focus on understanding and categorising different types of visitors and visitor activities; research to understand the benefits and experiences sought by visitors, and the focus placed on educating visitors and on broadening their understanding and appreciation of natural areas while minimising disturbances. In fact, the framework seeks to match visitor interests and specific education and outdoor recreation opportunities for each conservation area through a management plan.

The Visitor Activity Management Process framework has seven key steps, a number of which are quite similar to the other frameworks reviewed in this chapter. The steps are:

1. Prepare a project “terms of reference”. This is essentially a statement of goals and objectives of the planning process to be undertaken
2. Confirm the existing purpose and objectives of the reserve/park/land being planned
3. Compile a data base or inventory of information covering the reserve ecosystems and “settings”; potential visitor educational and recreational opportunities; existing visitor activities and services, and the regional context
4. Undertake an analysis of the existing situation to identify heritage themes, resource capability and suitability; appropriate visitor activities; the reserve’s role in the region and the role of any private sector involvement
5. Prepare alternative visitor activity concepts for the reserve ecosystems and settings, the experiences to be supported, the visitor market segments, levels of service guidelines, and the roles of the region and private sector
6. Create a reserve management plan including a statement of the reserve’s purpose and role, management objectives and guidelines, regional relationships and the role of the private sector
7. Implementation: set and act on priorities for conservation and reserve service planning and provision.

As noted, steps 1. to 4. of the Visitor Activity Management Process are very similar to other planning frameworks. However, what stands out as the key difference is the focus on visitors in step 5. Graham, Nilsen, and Payne state that “The VAMP framework attempts to identify park visitors and their motivations in order to determine appropriate markets for the park and its immediate region. VAMP is also concerned with the socioeconomic advantages and disadvantages associated with the mix of opportunities” (p. 51).

In fact, the framework seeks to identify a wide and detailed range of information about each of the possible “visitor activity profiles” relating to a specific reserve or locale that is being planned. The key features of this component of the framework are somewhat interventionist or directing of the activities pursued and are:

- Matching visitor interests and specific educational and outdoor recreation opportunities for each conservation area through a management plan
- Encouraging uses that broaden visitor understanding and appreciation of the natural environment, and that cause minimal disturbance to the environment, wildlife and local lifestyles, and
- Take into account the different needs of visitors depending on their age, physical capabilities and levels of skill and knowledge so as to function safely in the natural environment.

In the example of nordic skiing cited in their paper, Graham, Nilsen, and Payne indicate the collection of visitor information on the following (p. 53):

- **Activity:** four different types of nordic skiing are identified: Recreational day use; sport/fitness; competition, and backcountry skiing
- **Participant age** in relation to each nordic skiing activity type
- **Gender and occupation** of participants in each nordic skiing activity type
- **Income**
- **Visit frequency**
- **Skill level**
- **Market participation** breakdown
- **Market trends**
- **Settings used:** eg: urban park, urban ski centres, training centre, backcountry/national park

- **Site locations**
- **Facilities** needed/used
- **Services** required: eg: instruction, day care, guides, media access
- **Management/provision agencies** involved
- **Appropriateness** in natural areas, and
- **Research** requirements.

This information is broken down by trip stages data and together with measures of user satisfaction, is used to create comprehensive “visitor activity groups” or segments. In essence then, the Visitor Activity Management Process seeks to integrate detailed information about the nature of what are deemed to be considered as “appropriate” recreational activities with detailed information about the resources and resource-capacities of the area being planned. The basic structure of the framework is shown in Figure 11.1 while Figure 11.2 shows a more detailed outline of the framework (these are from Graham, R., “The Canadian Parks Service’s Visitor Activity Management Process, University of Waterloo, Ontario, Canada (undated resource booklet).

In Figure 11.2, the left hand side of the chart indicates a process of assessment of the natural and cultural resources of the area being planned with this leading to the creation of a resource management plan, which would be applied if there were no reserve users. The right hand side of the chart shows the Visitor Activity Management Process input, the visitor activity concept (ie: details on visitor types and activities) and associated with this, the VAMP data base. This leads to the preparation of a “Park Service Plan”, this being a distillation of user needs. The integration of the natural resource data and the visitor activity data create the park management plan which incorporates sub-activity area plans and facility/site plans which in turn give form and substance to the park operations plan(s). Feedback loops ensure that the monitoring of resource, activity and management inputs allow the constant adjustment of resource and activity management strategies.

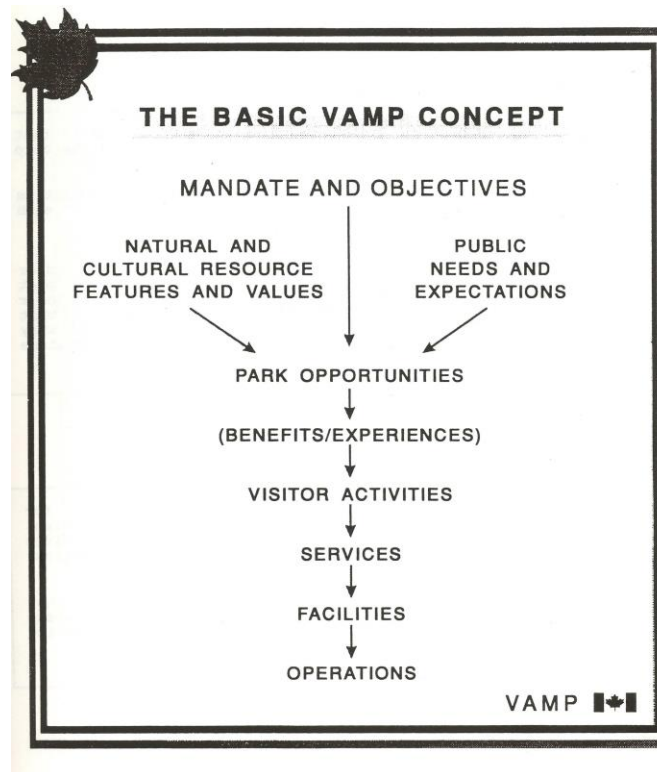


Figure 11.1: The simplified Visitor Activity Management Process framework (from Graham, R., The Canadian Parks Service’s Visitor Activity Management Process University of Waterloo, p. 5, undated)

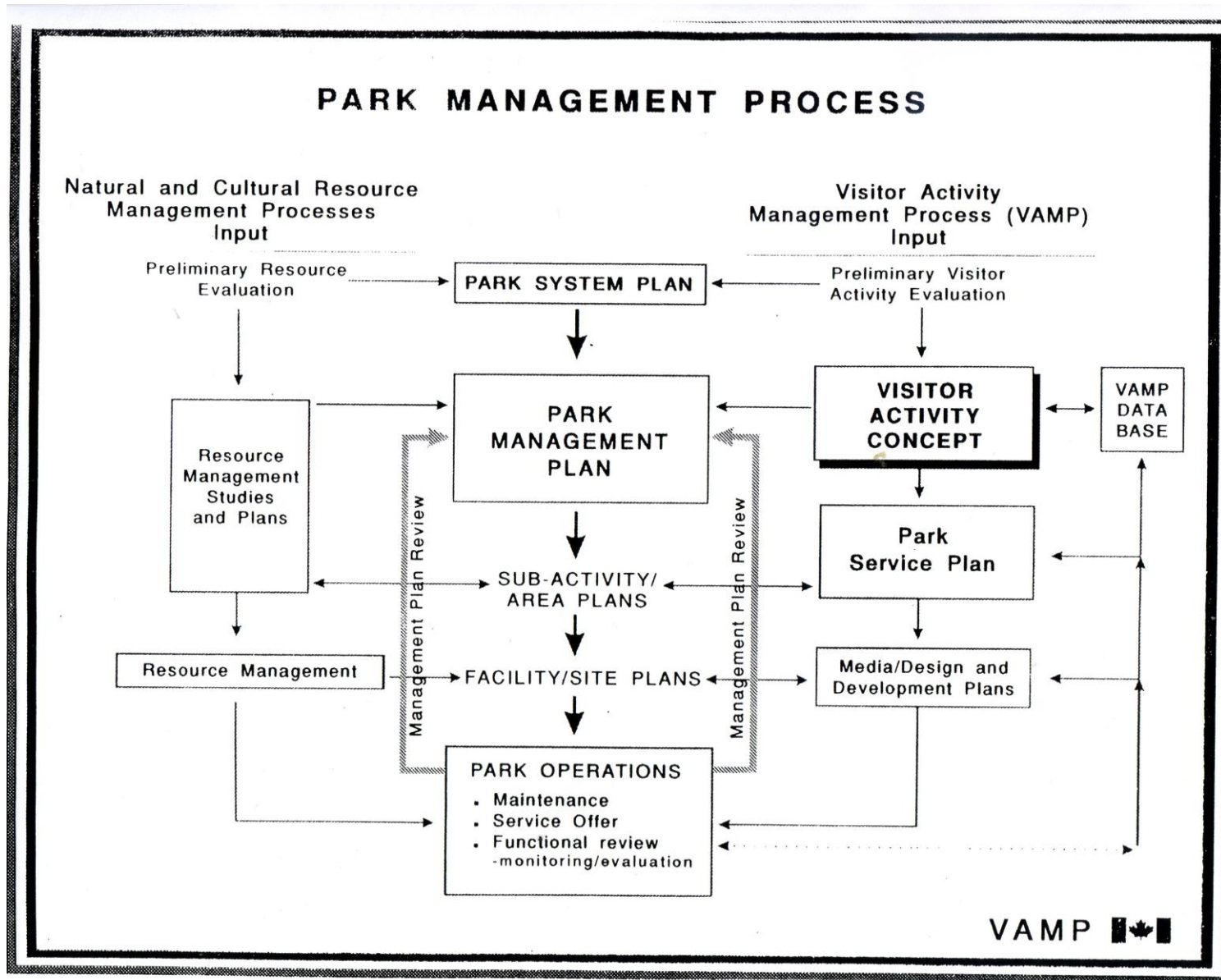


Figure 11.2: The detailed Visitor Activity Management Process framework (from Graham, R., University of Waterloo, undated)

## 11.5 Recent Australian Natural Area Planning Case Studies

The scope of several Australian natural area planning studies are reviewed in the following paragraphs as a means of demonstrating the approaches used to natural area planning in this country.

### 11.5.1 Grampians National Park Management Plan

This plan was prepared by Parks Victoria in 2003<sup>25</sup>. The Table of Contents is provided below together with notes in brackets explaining the scope of each report component where this is deemed necessary.

#### 1. Introduction

- 1.1 Location and planning area
- 1.2 Creation of the park (history of establishing the park)
- 1.3 Developing the management plan (who was consulted)

#### 2 Basis

- 2.1 Regional context
- 2.2 Park values and significance (highlighting the very high natural, water catchment, cultural, landscape and tourism values)
- 2.3 Past land use
- 2.4 The park visitor (visitor numbers, activities, travel to and within the park, and uses that need to be managed to protect park assets and values)
- 2.5 Legislation, Land Conservation Council recommendations and guidelines (Acts and other reports, policies and guidelines that direct or control the use and management of the park)

#### 3 Strategic Directions

- 3.1 Park vision (see below)
- 3.2 Zoning (see below)
- 3.3 Management directions (see below)

**4. Strategies for Natural Values Conservation** (This Chapter of the Plan describes each of the key features of the park and management issues and concerns associated with it. The report then provides a management aim and a set of action strategies for feature)

- 4.1 Geological and landform features
- 4.2 Rivers and catchments
- 4.3 Vegetation
- 4.4 Fauna
- 4.5 Landscape
- 4.6 Fire management
- 4.7 Pest plants and animals and diseases

**5. Strategies For Cultural Values** (as above)

- 5.1 Indigenous cultural heritage
- 5.2 Brambuk: The National Park and Cultural Centre
- 5.3 Post-settlement cultural heritage

**6. Strategies For Visitors** (as above)

- 6.1 Information, interpretation and education
- 6.2 Access
- 6.3 Scenic driving
- 6.4 Scenic viewing and picnicking
- 6.5 Camping
- 6.6 Bush and long-distance walking
- 6.7 Rock climbing and abseiling
- 6.8 Fishing
- 6.9 Cycling and mountain bike riding
- 6.10 Horse riding
- 6.11 Hang gliding and paragliding
- 6.12 Orienteering and rogaining
- 6.13 Commercial tourism services
- 6.14 Public Safety

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<sup>25</sup> The full Plan can be downloaded from [http://parkweb.vic.gov.au/\\_\\_data/assets/pdf\\_file/0018/313281/grampians-np-mp.pdf](http://parkweb.vic.gov.au/__data/assets/pdf_file/0018/313281/grampians-np-mp.pdf)

## **7. Strategies For Community Awareness and Involvement** (as above)

- 7.1 Friends and volunteers
- 7.2 Community awareness and park neighbours
- 7.3 Agency and stakeholder partnerships
- 7.4 Advisory group
- 7.5 Research partnerships

## **8. Strategies For Other Issues**

- 8.1 Authorised uses
- 8.2 Boundary and adjacent uses
- 8.3 Aircraft

## **9. Implementation**

The key elements of Chapter 3 of the Plan, Strategic Directions, warrant attention as these set the framework for the overall development, management and use of the park. They cover the park vision, zoning and management. With regard to the *vision* for the park, the report states the following (p. 8):

“A future visitor to Grampians National Park finds an outstanding park renowned for its spectacular natural scenery and wildflowers, diversity of flora and fauna, range of highly significant cultural sites, and opportunities to enjoy these features in a variety of settings.

Community views and aspirations for the park are respected and integrated into park management. The park’s natural environment is well protected and conserved by management based on a sound and increasing understanding of the park’s natural values, ecological processes, and the specific requirements of significant plants and animals.

The cultural heritage of the park is protected, conserved and managed on the basis of a sound understanding of cultural values, including Indigenous tradition, and the interests and rights of Aboriginal peoples in land within the park.

The park attracts visitors with diverse backgrounds and interests. Visitor numbers to the park are sustainably managed to ensure that disturbance to natural and cultural values by visitor activities is minimal and the park is preserved for future generations.

Visitors enjoy the park’s unique environment through a diverse range of appropriate recreational activities and gain an appreciation of its natural and cultural values. Walking is the most popular activity.

Visitor services and facilities are appropriately located to cater for the essential needs of visitors undertaking activities that provide enjoyment and understanding with minimal impact on the park.

The park is a key focus for local, interstate and international visitors and an integral component of Victoria’s tourism infrastructure”.

With regard to *zoning*, the Plan allocates the park resources to one of 8 different “management zones and overlays” and provides details on the extent of each zone. It also provides details as to the values of each zone; the general management aims, and access constraints. Details are provided in the following table drawn from page 9 of the Management Plan.

On the issue of *management*, the Plan specifies that management of the Park will be consistent with legislative directives and that management will focus on the conservation of natural features, cultural values conservation, park visits, community awareness and involvement and several “other” purposes. Examples of the conservation, park visit and “other” management objectives are listed below:

### **Conservation**

- Preserve and protect the natural environment
- Allow natural environmental processes to continue with the minimum of interference
- Maintain biodiversity
- Protect water catchments and streams
- Protect human life, the park, and adjacent lands from injury by fire

- Eradicate, or otherwise control, introduced plants, animals and diseases
- Conserve features of archaeological, historical and cultural significance (p. 7)

**TABLE 2 MANAGEMENT ZONES AND OVERLAYS**

<b>ZONES</b>					
	<b>REFERENCE AREA</b>	<b>CONSERVATION</b>	<b>CONSERVATION &amp; RECREATION</b>	<b>RECREATIONAL DEVELOPMENT</b>	<b>EDUCATION</b>
<b>AREA / LOCATION</b>	1465 ha, 1% of park. The Sisters, Moora Valley and Grasstree Creek Reference Areas.	65 500 ha, 39% of park.	99 546 ha, 59% of park.	<10 ha, <1% of park. Brambuk Cultural Centre/Grampians National Park Visitor Centre Precinct.	679 ha, <1% of park. Potter Creek, Wannon Divide and the proposed Halls Gap Education Areas.
<b>VALUES</b>	Relatively undisturbed representative land types and associated vegetation.	Broad areas with sensitive natural environments.	Important natural values and scope for recreation opportunities.	Grampians National Park Visitor Centre and Brambuk Aboriginal Cultural Centre.	Area for education purposes (figure 2).
<b>GENERAL MANAGEMENT AIM</b>	Protect viable samples of one or more land types that are relatively undisturbed for comparative study with similar land types elsewhere, by keeping all human interference to the minimum essential and ensuring as far as practicable that the only long-term change results from natural processes.	Protect sensitive natural environments and provide for minimal impact recreation activities and simple visitor facilities, subject to ensuring minimal interference with natural processes.	Protect less sensitive natural environments, and provide for sustainable dispersed recreation activities and small-scale recreation facilities without significant impact on natural processes.	Develop as a tourist destination incorporating the Grampians National Park Visitor Centre and the Brambuk Aboriginal Cultural Centre.	Provide primarily for environmental education in a relatively undisturbed area.
<b>ACCESS</b>	For approved scientific research.	Limited vehicular access.	2WD and 4WD public access generally available.	2WD.	2WD.
<b>OVERLAYS</b>					
	<b>SPECIAL PROTECTION AREA</b>	<b>SPECIAL MANAGEMENT AREA – PUBLIC UTILITIES</b>		<b>REMOTE AND NATURAL AREA</b>	
<b>AREA / LOCATION</b>	Areas detailed in appendix 1 and figure 2.	Areas detailed in appendix 2 and figure 4.		32 100 ha, 19% of park. Victoria Range, Serra Range and Major Mitchell Plateau Remote and Natural Areas.	
<b>VALUES</b>	Discrete significant areas requiring special attention.	Public utilities.		Significant remote and natural areas.	
<b>GENERAL MANAGEMENT AIM</b>	Protect specific natural or cultural values in specific areas and sites where a special management focus is required.	Provide for public utilities.		Protect the area's remote and natural attributes; prevent new and incremental developments, including the construction and upgrading of vehicular tracks and construction of new structures.	
<b>ACCESS</b>	Limited access.	Management access only.		As per underlying conservation zone.	

Note: Three quarters of the park is included in Special Water Supply Catchment Areas listed under Schedule 5 of the *Catchment and Land Protection Act 1994 (Vic.)* (section 4.2).

Management zones and overlays, Grampians National Park Management Plan, Parks Victoria, 2003, p. 9

### The park visit

- Promote and encourage an appreciation, understanding and enjoyment of the park's natural and cultural values, and its recreation opportunities.
- Encourage appropriate park use and visitor behaviour, and foster a conservation ethic in visitors and respect for cultural heritage.
- Provide opportunities for appropriate recreation and tourism.
- Take every reasonable step to ensure visitor safety (p. 7).

### Other management purposes

- Cooperate with local, State and interstate government authorities, the community and other interested organisations to assist in the management of the park
- Provide for and encourage scientific research, surveys and monitoring that will contribute to the better understanding and management of the park.

Further with regard to the park visit, the Plan provides a Table indicating what park uses can occur in each of the management zones. This is provided below. However, how or why these activities were selected or approved (when some appear to contradict what would generally be thought of as the purpose of a national park), and how and why others were rejected, is not explained.

ACTIVITY	MANAGEMENT ZONES				MANAGEMENT OVERLAYS			
	1	2	3	4	5	6	7	8
	59% of Park	39% of Park	<1% of Park	<1% of Park	1% of Park	19% of Park	<<1% of Park	<<1% of Park
Picnicking	Y	Y	Y	Y	N	Y	Y	N
Camping – designated sites (limited facilities)	Y	N	N	N	N/A	N/A	N/A	N/A
Camping – dispersed (no facilities)	Y	Y	N	Y	N	Y	N	Y
Camp-fires	Y	N	N	Y	N	N	N	N
Bush walking	Y	Y	N/A	Y	N	Y	Y	Y
Bicycle riding	Y	Y	Y	N/A	N	Y	N	N
Horse riding	Y	Y	Y	N	N	N	N	N
4WD touring	Y	Y	N/A	N/A	N	Y	N	N
Pleasure driving	Y	Y	N/A	Y	N	Y	N	N
Trail bike riding	Y	Y	N/A	Y	N	Y	N	N
Orienteering or rogaining	Y	N	N/A	N/A	N	N	N	Y
Rock climbing or abseiling	Y	Y	N/A	N/A	N	Y	N	N/A
Fishing	Y	Y	N/A	Y	N	Y	N	N
Bait collection	N	N	N/A	N	N	N	N	N
Firewood collection	N	N	N	N	N	N	N	N
Hunting	N	N	N	N	N	N	N	N
Dogs	N	N	N	N	N	N	N	N
Hang gliding or paragliding	N	N	N	N	N	N	N	N
Fossicking	N	N	N	N	N	N	N	N

**KEY:**

1	Conservation and Recreation Zone	N	Not appropriate
2	Conservation Zone	Y	Permitted except where specifically constrained by overlay as indicated in the table, or by conditions specified elsewhere in the plan
3	Recreation Development Zone		
4	Education Zone		
5	Reference Area Zone	N/A	Not applicable
6	Remote and Natural Area		
7	Special Protection Area		
8	Special Management Area—public utility		

Approved uses of management zones and overlays, Grampians National Park Management Plan, Parks Victoria, 2003, p. 9

Finally, as noted in the listing of the Table of Contents, Chapters 4 to 8 of the Grampians National Park

Management Plan provide a detailed description of the status of each issue/park feature, an aim for action on each issue and detailed recommended initiatives to achieve the aim.

Overall, the methodology used in preparing the Grampians National Park Management Plan does not the research-based rigour of either of the Limits to Acceptable Change or the Visitor Activity Management Process models and this leads to a less responsive and educational plan.

### **11.5.2 Barwon South West Regional Trails Master Plan**

This planning study was prepared in 2009 by Inspiring Place and Robin Crocker and Associates on behalf of 9 south-western Victoria Councils and Parks Victoria. The scope of the research undertaken to prepare the recommended trails master plan is indicated by the following Table of Contents of the main report.<sup>26</sup>

#### **1. Introduction**

- 1.1 Background
- 1.2 Purpose of the Study
- 1.3 Approach
- 1.4 Report Structure
- 1.5 Acknowledgements
- 1.6 Limitations

#### **2. The Barwon South West Region**

- 2.1 Study Area
- 2.2 Audit of Regional Trails
- 2.3 Review of the Policy Framework
- 2.4 Trends in Recreation Participation
- 2.5 Visitor Numbers and Visitor Use of Trails
- 2.6 Potential Benefits of Regional Trails
- 2.7 Overview of Community Consultation
- 2.8 Benchmarking of Regional Trails

#### **3. Identifying Regional Trail Opportunities**

- 3.1 Definition of Regional Trails
- 3.2 Vision
- 3.3 Criteria for Identifying Regional Trails
- 3.4 Assessment of Nominated Best Regional Trail Prospects
- 3.5 The Proposed Regional Trail Network
  - 3.5.1 Best Prospect Regional Trails and Mountain Bike Hubs
  - 3.5.2 Strategic Benefits of the Proposed Regional Trail Network
  - 3.5.3 Evaluation of the Trails Within the Regional Network
- 3.6 Order of Cost Estimate for the Development and Improvement of Trails in the Regional Trail Network
- 3.7 Estimate of Economic Benefits
- 3.8 Other Nominated Trails

#### **4. Critical Issues**

- 4.1 Governance and Policy
- 4.2 Coordinated Planning and Development
- 4.3 An Emphasis on Infrastructure not Experience
- 4.4 Marketing and Promotion
- 4.5 Funding for the Future

#### **5. Strategic Action Plan**

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<sup>26</sup> The full report and separate file of attachments can be downloaded from [http://www.geelongaustralia.com.au/common/Public/Documents/8cc3be9f4a2ec8f-BSW\\_Final%20Main%20Report.pdf](http://www.geelongaustralia.com.au/common/Public/Documents/8cc3be9f4a2ec8f-BSW_Final%20Main%20Report.pdf)  
[http://www.geelongaustralia.com.au/common/public/documents/8cc3beaf44f659b-BSW\\_Attachments\\_Final.pdf](http://www.geelongaustralia.com.au/common/public/documents/8cc3beaf44f659b-BSW_Attachments_Final.pdf)

- 5.1 Clear Leadership, Policy and Governance Structure for Regional Trails
- 5.2 Improved Coordination of Trail Planning, Development and Management
- 5.3 Experience-led Trail Development
- 5.4 Effective and Coordinated Marketing and Promotion
- 5.5 Increased Funding and Resources for Trail Planning, Development, Management and Maintenance
- 5.6 Ten Year Action Plan for the Region
- 5.7 Action Plans for the Proposed regional Trails
- 5.8 Review of the Regional Trails Master Plan

It is evident from the Table of Contents alone that this is a very comprehensive and detailed study and report and it provides an excellent guide as to the scope of research needed to effectively plan a regional trails network. Some of the highlights of the study include:

- The use of consultations with government and planning agencies, local government personnel and the community to help identify issues, needs, actions and priorities
- Identification of social, community, environmental, educational, transport, tourism and economic benefits that can flow from trails development
- The use of data on trails use and trends in participation
- The use of a detailed literature study and site analyses
- The principles used to guide trail selection: sustainability, quality experience, capacity to manage, proximity to regional population centres, proximity to tourism markets, stage of development (of existing trails), cost to complete, whether existing trail is a rail trail, landscape setting/experience offered, and “catalytic” benefits – these being environmental, potential revenue generation and community-focused
- The attention given to equity of distribution across the 9 nine Councils; to routes that emanate from major towns and cities and tourist destinations; provision of trails for people of varying abilities; to north-south as well as east-west routes; the mix of users to be served (eg: walkers only; walkers-cyclists; walkers-cyclists-horse riders; canoes/kayaks)
- The estimation of the economic benefits of developing the recommended trails
- The attention given to governance, marketing, management and trail maintenance, and
- The attention given to a detailed implementation strategy.

That said, the study overlooks some of the insights which are offered by the depth of asset and client analyses undertaken in each of the Recreation Opportunity Spectrum, Limits to Acceptable Change and Visitor Activity Management Process models.

### **11.5.3 Tasmanian Mountain Bike Plan**

The Tasmanian Mountain Bike Plan was prepared for the Tasmanian Department of Economic Development, Tourism and the Arts in 2009 by Inspiring Place in association with Dirt Art. The study was commissioned in the light of the dramatic growth in the popularity of mountain biking at all levels nationally and internationally; the realisation that Tasmania does not have enough opportunities to meet demand and the increasing demands being placed on land managers to address issues of use of protected areas, illegal trails, unauthorised trail use, public liability issues and the safety of users and users of shared trails.

The Tasmanian Mountain Bike Plan study and the final report (together with an attachments report) covered the following issues:

- 1. Introduction**
  - 1.1 Background
  - 1.2 Purpose of the Tasmanian Mountain Bike Plan
  - 1.3 Process
  - 1.4 Acknowledgements

## **2. Mountain Biking in Tasmania: Trends, Infrastructure and Tourism Products**

### 2.1 Trends

#### 2.1.1 Participation and Demographics

#### 2.1.2 Primary Rider Motivations

### 2.2 Existing Infrastructure and Products (by region, apparent needs and gaps, state events, existing tours and products)

## **3. Consultations**

### 3.1 Consultation Process

### 3.2 Key Findings (from community forums, land managers and stakeholders, rider survey)

## **4. A Vision for Tasmanian Mountain Bike Riding**

### 4.1 SWOT Analysis (of mountain bike riding in Tasmania)

### 4.2 Issues

#### 4.2.1 Governance and Policy Issues

#### 4.2.2 Planning, Management and Resource Issues

#### 4.2.3 Gaps in Supply to Meet Demand

#### 4.2.4 Public Liability and Risk Management

#### 4.2.5 Marketing and Promotion

## **5. Making It Happen**

### 5.1 Governance and Leadership

### 5.2 Hierarchy of MTB Trails (context and recommended actions)

### 5.3 Enabling Policy and Legislation

### 5.4 Classification of Trails and Signage System

### 5.5 Innovative Trail Design, Construction and Maintenance

### 5.6 Resource Commitment

### 5.7 Partnership Between Land Managers and Users

### 5.8 Leading Events and Products

### 5.9 Marketing and Promotion

### 5.10 Education

### 5.11 Risk Management

### 5.12 Research

## **6. Action Plan**

As with the earlier Inspiring Place report, the Tasmanian Mountain Bike Plan features wide-ranging consultations, detailed exiting provision analyses, and detailed guidance on implementation and the management, policy, marketing and management issues that need to be addressed as part of this.

What are perhaps the most value issues identified in the Plan that could be used as a checklist to guide any future trails planning are:

1. The need for a formal process to define authorised mountain bike trails rather than let them evolve in an irregular, unauthorised fashion
2. The value of a program of targeted trail development as opposed to a reliance on existing fire control, logging and management tracks or walking tracks and illegally built trails
3. The valuable contribution of trails that are on private land, even if, due to liability issues, they are only available during events
4. The need to classify trails in terms of the skill levels required and by the types of activities they support eg: general purpose, cross country, single purpose, downhill
5. The need for equity in the spatial distribution of different types of trails so there is equity of accessibility to different trails experiences
6. The need for facilities that build rider skills and a progression of skills development
7. The need to enhance the quality of urban dirt jump facilities

8. The importance and value of interconnected trails networks
9. The need for better support infrastructure and services including wash-down stations, trail head signs, trail maps and brochures, information re rider safety and etiquette
10. Recognition of the availability of the International Mountain Bicycling Association *Guidelines* for trail design and construction (*Trail Solutions: IMBA's Guide to Building Sweet Singletrack* <sup>27</sup>)
11. The importance of offering a hierarchy of trails. Page 66 of the Plan presents a recommended hierarchy with 5 levels of provision, these being, from the "highest" to the "lowest":

**Epic Rides** that will attract international and interstate riders. These would offer "an outstanding trails experience", would be nominated by the State riding fraternity and would warrant/seek International Mountain Bicycling Association endorsement

**Iconic Wild Rides** which would be "world-class trail experiences located within the wild landscapes of Tasmania"

**Mountain Bike Adventure Centres**, these being "locations that provide a service base for exploring a diversity of adventure trails in a natural setting"

**Regional Mountain Bike Trail Hubs and Bike Parks** which would provide networks of regional-scale trails and /or park facilities used regularly by riders, and

**Local Mountain Bike Trails**, these being "highly accessible local trail networks and park facilities used regularly by...riders".

#### 11.5.4 Lake Barrington Recreation Management Framework

This excellent study was prepared by Inspiring Place in 2010 to guide the future development and management of Lake Barrington in Tasmania <sup>28</sup>

As background, the introductory report Summary, notes that:

"Lake Barrington was constructed in the 1960's as water storage for the generation of hydro-electricity, as part of the Mersey Forth Hydro Electric Scheme.

Lake Barrington has become a popular recreational asset for Tasmanian residents and has attracted competitors and visitors for a range of national sporting events in rowing, water skiing and kayaking. The Lake Barrington Rowing Course is a national level competition facility regularly hosting local, state and national rowing events, with significant infrastructure investment and value. Other recreational activities at the lake include fishing, camping, swimming, jet skiing, picnicking and general sightseeing. The lake has also provided a venue for events such as the Mark Webber Challenge, Australian Nationals Waterskiing Championships and Victorian Great Bike Ride. Apart from power generation the Lake Barrington precinct (i.e. lake and surrounds) also has value as a local water supply, timber harvesting, tourism and potentially irrigation". (unpaginated).

More importantly from the perspective of the present review, the authors also state:

"This project was commissioned to consider the fragmented management responsibility across the whole of Lake Barrington precinct, the growing popularity of recreational activities, the potential for conflicts between users, the need to ensure that the values are maintained, and the need for adequate management resources to sustainably manage the resources and use into the future". (unpaginated) .

The value of the study from the perspective of recreation planning is that the Plan seeks to blend the protection and management of significant semi-natural resource while at the same time advancing its use for State and national level sporting competition.

The scope of the research and planning undertaken in preparing the Lake Barrington Management

<sup>27</sup> This 272-page 2004 publication is available in both new and used form through Amazon for \$US67-90

<sup>28</sup> The full report can be accessed at <http://www.stors.tas.gov.au/au-7-0095-02916>

Framework report is indicated by the Table of Contents:

- 1. Introduction**
  - 1.1 Background
    - 1.1.1 Location
    - 1.1.2 Existing Land Tenure and Management
    - 1.1.3 Recreational Use
    - 1.1.4 Background to the Project
  - 1.2 Purpose of the Project
  - 1.3 Approach
- 2. Lake Barrington Values and Use**
  - 2.1 Values
    - 2.1.1 Natural Values
    - 2.1.2 Cultural Values
  - 2.2 Use
    - 2.2.1 Utilitarian Use (eg: forestry, power generation, water supply, irrigation)
    - 2.2.2 Recreational Use
    - 2.2.3 Tourism
  - 2.3 Assessment of the Economic Benefits of Rowing at Lake Barrington
- 3. Views and Vision**
  - 3.1 Land Managers and Agencies Views
  - 3.2 Community Views
  - 3.3 Sharing a Common Vision
  - 3.4 Management Objectives, Principles and Policy Directives
    - 3.4.1 Management Objectives
    - 3.4.2 Guiding Principles
    - 3.4.3 Policy Directives
- 4. Strategic Directions**
  - 4.1 Instigating a More Effective Management Framework
    - 4.1.1 Context
    - 4.1.2 Options
    - 4.1.3 Recommended Actions
  - 4.2 Pathway Process for Future Development
    - 4.2.1 Context
    - 4.2.2 Options
    - 4.2.3 Recommended Actions
  - 4.3 Existing Infrastructure
    - 4.3.1 Context
    - 4.3.2 Options
    - 4.3.3 Recommended Actions
  - 4.4 Resolving Recreational User Issues and Conflicts
    - 4.4.1 Context
    - 4.4.2 Options
    - 4.4.3 Recommended Actions
  - 4.5 Environmental Impacts
    - 4.5.1 Outline of Issues
    - 4.5.2 Options
    - 4.5.3 Recommended Actions
- 5. Lake Barrington Management Framework 2010-2015**

Attachment 1 Natural Values Assessment

Attachment 2 Notes from Government Agencies Workshop, April 2nd 2000, Lake Barrington

Attachment 3 Community Forum Notes – Monday May 18<sup>th</sup>.

It is evident from the above that the report pays close attention to an assessment of the natural and cultural assets of Lake Barrington, to the recreational and other uses made of it, and to the views and aspirations of the diverse array of agencies, groups and individuals who use it or who are responsible for its care and management. It is also evident from the information collected and reported, that there are significant and often competing opportunities for improving the benefits that the Lake delivers to the community, to users and to the wider Tasmanian population. The report presents a clear, structured strategy for enhanced management, for reducing user conflicts, for balancing competing demands and for minimising environmental impacts.

## 11.6 Natural Resource Planning Frameworks and Case Study Overview

The natural area planning frameworks and venue-specific case studies reviewed in the earlier sections of this Chapter provide a good indication of the complexity of planning for recreation in natural areas. They raise a range of new philosophical issues and highlight the fact that recreational pursuits can, if left unmanaged, be severely detrimental to natural ecosystems. While only a limited number of studies and reports has been reviewed, some useful conclusions can be drawn from them. These are:

1. There is a strong focus on understanding natural resources which, in the ROS and Limits of Acceptable change frameworks, almost entirely neglects an assessment of those for whom the planning is being conducted: the community. This, however, is significantly reversed in the Canadian Visitor Activity Management Process framework and in several of the more recent Australian case studies where a significant effort is made to collect, assess and reflect community needs and aspirations
2. There is a general lack of analysis of the rationale for, or the philosophical basis of, the reservation of the resources being assessed. Rather, there is an acceptance that the venues exist, that they will largely continue "doing" what they have been doing and that new planning and management initiatives will "tweak" past processes rather than throw them out and start again
3. With some notable exceptions, there is a lack of detail regarding many issues covered by other sections of this text eg: the demographics of users; leisure needs and trends; service catchments; regional inventories (versus site-only inventories), and the benefits of provision. The VAMP framework and the Inspiring Place planning studies stand out as strong exceptions to this but even there, more detail could be provided
4. Most of the case studies are very "light on" regarding details of the natural ecosystems in the areas being planned. As such, they tend to imply or assume recreational impacts that need to be managed rather than assessing, evaluating and measuring them to provide a hard-edged basis for the resource allocation decisions. An exception to this is the Grampians National Park Management Plan
5. Somewhat surprisingly, none of the case studies make any reference to or use any of the features of the natural area recreation planning frameworks detailed in the earlier parts of the Chapter. Rather, they tend to rely on the researcher's unstated assessments of the natural environment. The Grampians study, in particular, simply lists the various recreational uses will be permitted (and one that will not), and fails to give any explanation. Whether this is a reflection of the substantial complexity of the planning frameworks, their academic origins or the cost of implementing them or the lack of knowledge of them on the part of practitioners is unclear. However, it would seem that some use of these frameworks would serve to strengthen the planning that has been carried out, and
6. The Inspiring Place trails planning reports provide invaluable guidance as to the scope of the issues that need to be addressed of effective trails planning is to be undertaken. The key issues identified through the Tasmanian Mountain Bike Plan is particularly valuable as a checklist of issues to ensuring that any planning is both comprehensive and effective.

## Preparing a Recreation Plan

### 12.1 Introduction

Although the process of undertaking the research outlined in the previous chapters is quite complicated, it is not too difficult to compile a comprehensive dossier of information about the community that is being planned for. This is likely to cover reviews and assessments of:

- The demographic characteristics of the community and recent and projected trends in these
- Trends in recreation participation and provision
- The findings and recommendations of previous studies and reports
- The existing recreation facilities, programs and services available to the community, and
- The recreational needs and aspirations of the community.

The scope of the material likely to have been collected is shown diagrammatically in Figure 12.1. Yet, this information is of little use if it is simply presented as factual material that has not been assessed, evaluated and interpreted. From a planning perspective, it will be of even less use if the future recreation provision implications haven't been identified, explained and prioritised. Quite a bit of preliminary assessment, evaluation and interpretation should have been carried out at the completion of each of the research stages, yet it is only when the information that has been collected is viewed as a whole that broader conclusions can be drawn.

This chapter looks at the processes by which the collected material is evaluated and how relevant conclusions and recommendations are the identified.

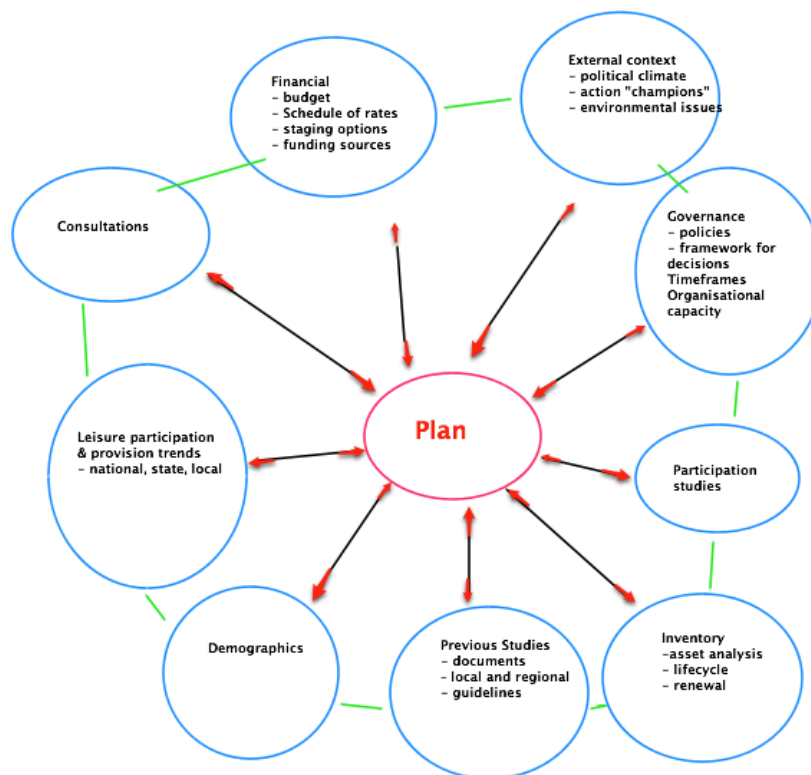


Figure 12.1: A summary of the issues to be addressed in preparing a recreation plan

## 12.2 Evaluating the research findings

The first step in the information evaluation process is to go back to the draft goals, mission statements, principles and objectives defined at the start of the planning process and that make up the recreation plan's policy framework. These should reflect the desired outcomes of the planning process, the nature and aspirations of the community, political objectives and imperatives and social values and priorities. These elements may have been reviewed and revised during the planning process through discussions with the community, key stakeholders or elected members of Council or parliament. These statements broadly define what is to be achieved through a recreation plan and as such, *should be used to evaluate the relative importance of the findings of each research stage.*

Having agreed on the initial or revised goals, mission statements, principles and objectives, the researcher then turns to the research findings. A chart can be drawn up summarising the key provision implications of the research (eg: the past report implications; the demographic implications; the trends implications; the consultations implications; the inventory/provision assessment implications etc) or the recorded outcomes of each research phase can be progressively worked through and a series of questions is asked of them. An example format for a chart is shown in Figure 12.2. With each question, answers are sought from the lists of needs and aspirations that have been identified. Sometimes a "solution" cannot be identified or it might be found that a possible solution has not been fully thought through. Under these circumstances, it is the responsibility of the recreation planner to use his or her wider experience to propose possible strategies or solutions that would be appropriate to the communities to be served *in keeping with* the broad goals and vision statements.

Policies	Demographics	Reports	Inventory	Consultations
Identify key policy directions or directives  Determine action implications	List key findings by eg: gender, age groups, cultural background, location  Determine provisional action implications	List key findings and determine if action has already been taken and/or is still warranted  Determine provisional action implications	Identify potential gaps and provision opportunities  Determine provisional action implications	List key findings by eg: gender, age groups, cultural background, location  Determine provisional action implications

Figure 12.2: The general structure of a chart designed to record action and issues and priorities for a recreation plan

It does not particularly matter which section of the research the questioning begins with: the demographic review findings; the existing provision findings; the consultations findings, or some other section. However, one useful starting point is the outcomes of a rigorously conducted random community survey, if that survey has included a list of issues and needs gleaned from all the other research elements. The community responses to the issues that have been identified provides a list of statistically valid "priorities" that can be cross-tabulated by gender, age, residential location, cultural background, type of home, family make-up etc if this information has also been collected through the survey.

Issues that emerge as having some level of importance through the research but that do not advance achieving the draft goals, mission statements, principles and objectives or that conflict with them, are likely to warrant serious questioning and may need to be dropped from a final action list. Obviously, careful explanations will need to be provided if this course of action is taken and it may be that alternate forms of provision can be explored that meet the needs that have been identified *without* conflicting with the goals, mission statements, principles or objectives.

The process of building up lists of potential action priorities needs to be repetitive and circular so that the planner eventually comes back to the start, but with a lot more knowledge, to recheck and refine the earlier conclusions.

Some examples of the questions to be asked of the research findings of the various sections of work are listed below.

### Demographics

- What age groups are growing or declining and thus may need different levels of provision or alternate provision?
- Are their new or growing cultural groups in the community that will need provision?

- Are there substantial numbers of single parents, lone householders, families in rental properties or families with one or no cars and what facilities, programs and services may be needed to ensure equity of opportunity for them?
- Are there income groups who are likely to need special attention or who, in fact, can be left to their own devices and resources?
- How does the distribution of the population match the distribution of recreation facilities and programs? Are there geographic areas with no provision or potentially, excessive provision levels?

### **Recreation Trends**

- Are there recreation trends that have not been responded to in the past that are disadvantaging some or all in the community?
- What provision may be needed in order to reflect wider provision trends and standards of provision?
- What facilities and programs may need upgrading, changing or adding so as to better reflect trends in community interests and needs?

### **Existing Provision**

- Are there gaps in the mix of recreation facilities and programs?
- Are there gaps in the distribution of recreation facilities, services and programs?
- Does the existing provision reflect modern design principles, can it be upgraded or should new replacement provision be made?
- Is there excessive provision of some opportunities?
- Is the quality of the existing provision of a adequate and safe standard?
- To what extent does the existing provision match the needs identified through the consultations and where are the biggest gaps or disparities?

### **Community consultations**

- What initiatives are given highest priority by the community? How do the top priorities vary between age groups, gender, cultural background, length of residence, family make-up, and location within the planning area?
- Do the priorities identified through the consultations match the needs identified from the other research stages and where there are clear differences, how can these be reconciled?
- Are there groups in the community –such as women, the aged, people with disabilities and emerging cultural groups—whose “needs” ought to be met ahead of the “wants” of other groups?
- What are the major themes emerging from submissions and how can these be accommodated?
- Is it possible to give all major groups in the community some enhanced opportunities while offering more to the most needy?

The answers to the above questions should be cross-referenced with the findings of all other sections of the research. For example, in the first list above, dot point 2 asks: “Are their new or growing cultural groups in the community that will need provision?” If the answer is “Yes”, this should then be followed by the questions “Which cultural groups are they?”, “Where do they live in the study area?”, “What needs did the consultations identify in association with these groups?”, “Did the evaluated the existing provision of recreation facilities, programs and services, indicate that sufficient provision is being made for these groups, or was it patchy provision, and was it reaching all groups?”

As the questioning progresses, a list of needs and potential priorities is progressively built up and refined. This process will be greatly assisted if each component of the research material identifies a series of “provisional” recommendations for action.

To summarise the above, a researcher will decide what provision actions should be put into the

recreation plan on the basis of say, the demographic analysis. This creates the first list of provisional actions.

Then, the researcher will review say, the inventory research and draw up a list of provisional actions from *just* that research. These provisional actions are then tested from the perspective of whether they endorse, add to, are rejected by, or need revision in the light of the demographic analysis conclusions. This provides a *revised* list of provisional actions.

Then next the researcher will review perhaps, the consultations research and draw up a new list of provisional actions from just that research. Again, these conclusions are tested as to whether they endorse, add to, are rejected by or need revision in the light of the action conclusions reached from *both* the demographic and inventory research. This provides *an even more revised list* of provisional actions. This is likely to be longer and more specific than the earlier lists and it is likely that some priorities will be starting to emerge.

The researcher then proceeds to go through the same process with each of the other areas of research: leisure trends, past reports review, participation studies and so forth so as to assess the likely actions arising from them and the influence they have on the earlier actions and priorities list.

Once the above process has produced a “full” draft listing of possible initiatives, these might be allocated a “High”, “Medium” or “Low” priority for action based on the frequency with which they arise and the variety of different areas of research that supports them, or they may be arranged in keeping with the financial capacity of the planning body. But the researcher has to test these conclusions. Thus, a key step that must follow the preparation of this listing is to hold meetings with each of the planning study management group, elected members and eventually, the community, so that each can review, question and suggest possible revisions to the listings and its provisional priorities. At the meetings, the researcher essentially says: “*Here’s what we have found that needs to be done and here are our provisional recommendations. Are we on the right track? Have we misinterpreted anything? Have we missed anything?*” It is possible that at this point, some elected, stakeholder and/or self-interest groups will push to change certain recommendations and priorities. If they have strong evidence to explain why, *a range of changes might well be made*. If the researcher does not agree with the proposals, he/she will need to marshal the evidence to support the no-change case.

Following the above review, a researcher might well need to go through the whole assessment process a second time to make sure they have got their recommendations as “correct” as possible.

Following this work, all the material that has been collected is put into a report which is released as a public document for 6-8 weeks so everyone who is interested can read it and provide further feedback.

The final recommendations of a planning study report can then be presented in a number of ways although a chart format is an excellent tool for summarising a wide range of information. A chart may:

- List *all* priorities from highest to lowest; list the priorities identified for *different types* of recreation facilities, programs and services eg: sports, culture, passive parklands; list priorities for *different geographic areas*; and list the priorities for *different cultural groups* in the community
- Organise the priorities for action under each of the objectives identified through the policy development process
- Organise priorities under headings such as “Managerial and operational initiatives”; “Budget issues”; “Enhancing and improving existing provision” (with subsections for each of facilities, programs and services), and “Providing new recreation facilities, programs and services”.

In addition to the priorities for action, a recommendations chart can be made more useful by have additional columns covering:

- A summary or explanation of the action being recommended
- A timeline for action on each recommendation (eg: short, medium and long term – which are better than specific years as an action may otherwise be deemed to no longer of significance if it’s action year has been passed)
- An indication of who will be responsible for the action, and
- An indicative cost (although if detailed costs are required, an additional project budget allowance may be needed for this so a quantity surveyor can be employed to provide cost estimates).

On the issue of timelines for action, anything beyond 10 years is generally too long to trust that conditions and trends will remain unchanged, or that the report will even be remembered. Conversely, and as noted above, the inclusion of very specific dates (eg: by December 2010) can mean that if action is not achieved by that date, the plan is seen to have failed and/or to be out of date.

Finally, it may be appropriate to provide a second chart that summarises the “top” ten or 20 priorities for action.

Further changes may yet again be needed following the public exhibition stage of a planning study after which the report is sent to the client for adoption and implementation.

In following the above approach, several further strategies warrant consideration:

- Ensure some provision is made for each type of recreation opportunity eg: sport, culture, passive, conservation/amenity, trails etc so that the diversity of opportunity is at least maintained, if not extended
- Ensure some provision is made for each geographic area of the district or Council being planned, even if the mix and scale of provision varies
- Ensure that the principles of modern design and provision outlined earlier in this text are followed eg: co-location of provision, multi-use capacity
- Put a strong emphasis on upgrading, programming and servicing *existing* physical provision rather than simply providing more built infrastructure. All too often, recreation providers “fix up old mistakes by building new ones” and overlook applying higher standards of management and programming to their existing resources
- Prepare a chart that lists the top 20-30 preferences for action as identified by age, gender, residential and cultural groups through a random community survey to identify which items have the strongest support across the community as a whole and which meet the needs of particular target groups. Make sure that the report recommendations make provision for initiatives meeting the needs of *both* the whole community and special needs groups
- Prepare importance/performance charts and evaluate which areas of provision or what specific facilities, programs and services need adding to or improving and those that can possibly be wound back or abandoned.

While the foregoing paragraphs have given some guidance as to how to identify priorities and recommendations for action, some guidance is also warranted on the format of the final “plan” report. Increasingly, recreation planners are presenting their reports in a number of separate volumes. These may cover (1) separate papers on each of the research areas (population, past reports, existing provision reviews etc) or a volume covering all of these; (2) issues and discussion paper(s) that have been prepared on key topics during the planning process as a means of airing critical issues, and (3), the plan itself. These may also be separate appendices volumes that include “raw” Bureau of Statistics census data; survey proformas; survey results; written submissions and other similar “background” materials.

Ideally, the “plan” document should be a stand-alone report so that anyone can read it and get an understanding of the purpose, scope, methodologies and findings of the overall planning project. To achieve this, the “plan” document essentially becomes an “executive summary” of the whole study. Its chapters –or better still, *sections*-- will generally be quite brief, but they could be expected to cover the following:

- Section 1: A statement of the purpose of the planning study  
Details on the scope of the research undertaken  
Details on the research methodology and who was involved  
Acknowledgements
- Section 2: A 1-2 page summary of the core findings of each stage of the research ie: demographics, past reports review, consultations etc with references back to the “research findings report” for fuller details
- Section 3: The mission/goal/aim of the plan; the planning principles and what they mean in terms of action by the client of the project  
  
The objectives of the plan, that indicate the broad areas on which action

will be recommended

The chart of recommended actions and the priorities allocated to them.

This format is indicative only and a range of other components may be added. A key point to note, however, is that the more succinct and "readable" the "plan" volume, the more widely will it be read.

### 12.3 What if new issues emerge?

It sometimes occurs that six months, a year or several years after the completion of a recreation planning study, a new issue or need emerges that has somehow been overlooked or missed by the study. This may be due to some constraint on the depth of the research that was undertaken during the planning process or perhaps, external factors such as a new government grants scheme, new overseas trends, a new commercial development, a new sporting club wanting to develop new facilities, a new creative idea on the part of one or more people, or a significant change in leisure technology.

The issue of how to "fit" the new idea or proposal into the recreation plan then arises. Should it await a revision of the plan? Should it be ignored or should it be slotted in somewhere along the list of priorities... and risk the ire of others who have already been waiting their turn for new or upgraded provision? The following steps are proposed as a means of evaluating the proposal:

1. Evaluate whether the proposal meets/contributes to achieving the recreation principles and goals set out in the recreation plan
2. Check whether the proposal is a fad. If it appears that it might be, what evidence can be collected about the proposal from other sources that might sustain or reject it?
3. What group or groups in the community will the proposal serve and to what extent; what do members of those groups think about the proposal? Are these groups in a priority category for provision?
4. What are the present action priorities in the community; where would the new proposal sit within these and would any of them have to be changed as to their timing to accommodate the proposal? Would any changes in priorities detrimentally affect the benefits to be achieved through other priorities? Would any groups in the community be detrimentally or positively affected to a marked extent by action on the new proposal?
5. If the proposal is a facility, what is the size and viability of comparable, benchmark provision elsewhere; how does market size compare; are there economies of scale or is there a base unit of size regardless of market size? If scaling can apply, what is the minimum level of provision needed to provide a worthwhile recreation experience and can that be achieved within the assessed catchment?
6. If the proposal is a program or service, can it be accommodated at an existing venue; can an existing organisation provide it?
7. What space requirements does the proposal have and what site opportunities exist? Will there be site impacts?
8. How small can initial provision be --how big may it need to grow to and is there sufficient space to accommodate future growth? If a venue for provision has been suggested, does the proposal fit with the agreed hierarchical rank of the venue or might there be a later inappropriate demand for the venue to be expanded and/or upgraded?
9. What is the likely order of costs of the proposal and what are the implications to other desired actions?
10. What is likely to happen if the proposal is ignored?
11. Can the proponents of the proposal assist in funding and sustaining it?, and
12. Where is the most appropriate location for the provision of the proposal?

Once these questions have been answered to the best of staff abilities, it may be possible for the value of the proposal and wider Council provision implications to be assessed and decided on. If need be, other action priorities may then be changed or sustained and a decision to take action or not can be

made. If decisions cannot be finalised but it seems the project/initiative may be worthwhile, it may be deemed appropriate to go to a fuller feasibility and planning study.

Working through the above steps may take as little as a few weeks or as much as a year. The proponents and the wider community should be involved throughout the process.

## 12.4 Presenting the findings and the plan

In the majority of the recreation planning studies prepared over the past 20 years or so, the findings of each of the research chapters has been written up and presented as an integral part of the recreation plan. This material has then been followed by a final chapter or two that presents the actual plan.

More recently, a number of planners have taken somewhat different approaches to the presentation of the research findings and the recreation plan and some client groups have also required different approaches. Some of these differences are:

1. Preparation of an "Issues Paper" that summarises one or more of the demographics, trends, existing provision review, consultative stages and other research issues. This Paper is released for review and discussion with the findings then being used as an input to the formulation of the final plan. In some instances—more commonly where the study has a *feasibility* focus—subsequent stages of the planning process are only funded where the initial phases endorse the need for future action
2. Preparation of *separate* issues papers on each of the demographics, trends, existing provision review and other research issues, with each paper being issued and workshopped as part of the community consultations program in order to identify the implications.

In this approach, the final recreation plan is likely to be a far shorter, document with a focus on the methodology, goals, principles, objectives and prioritised actions rather than a much larger document that presents all the information that has been covered, identified and assessed. A short, concise document is far more accessible to all who are interested in the outcomes and only a few may need to or wish to read the full background "research" findings

3. Preparation of a number of topic-focused discussion papers—such as on youth, sport, cultural needs, demographics, open space, aquatics, and particular needs groups or localities in the community. As in 2., these are used as a basis for discussion, consultations and the identification of priorities for action, and
4. Use of a search conference approach where detailed workshops are held with senior officers, elected members, and key stakeholders in the community to identify a short list of critical issues for action. This reduces what can otherwise be a long community consultative program that may produce extensive lists of needs and wishes, many of which are not strategic in nature.

These variations on the more traditional sequence of research stages to recreation planning have emerged as a means of reducing the volume of written material to be digested; of taking a more focused and strategic approach to the research, and making the consultative stages of the research more productive and less all-embracing in their reach. They also mean that a bright, attractive recreation plan can be produced and distributed widely in the community. The detailed research report then sits behind this and can be referred to by those in need of greater detail.

## 12.5 Revising recreation plans

As the earlier sections of this text demonstrated, the determinants of recreation and the resulting nature and patterns of recreation are changing quite rapidly. As a consequence, a recreation plan cannot be expected to guide future upgrading and provision initiatives over a long period. Needs change, priorities, the politics of the planning organisation, the wider community or the State and national governments change, and so must a recreation plan.

Most planning agencies do not have the resources to undertake a comprehensive and continual monitoring of change as recommended by Hamilton-Smith in section 2.1 of this text. Yet, they should monitor their performance and the extent to which the plan is being implemented on a continuing basis

and if this is done, quite significant change can be made over a period of time. Similarly, they can monitor various facets of their communities on a regular basis (eg: the characteristics of the population; the use of existing provision; the needs of particular groups in the community) without having to undertake a whole new planning program. This can identify ongoing changes in the way in which and the extent to which recreation facilities, programs and services are changed.

Eventually, however, the goals, values and principles of a plan can become outdated and many of the recommendations will have been acted on, or if not, become dated and inappropriate. Then, a new planning study will most probably be needed. In rapidly growing and changing communities this may be needed within 5-7 years while in older communities or communities undergoing little change, a new plan may only be commissioned every 10 to 12 years.

## 12.6 Planning and feasibility studies

In many instances, the recreation planning process is used as a key element in a feasibility study: that is, a study undertaken to assess the *feasibility* of going on to the development of a particular initiative, whether it be a service, a program or a building. Under these circumstances, several additional elements of work need to be carried out. These can include some or all of the following:

1. Determining the need for a particular program, service or building and the components of provision that might be appropriate
2. Identifying and evaluating optional sites or locations for provision
3. Designing and costing the recreation program, service or building
4. Devising staffing and management structures
5. Preparing a financial and business plan, and
6. Identifying funding sources and strategies.

Each of these research elements can take a number of days, weeks or months and require additional budget resources. They frequently require the planner to bring in a range of other professional expertise including specialist engineers, architects, landscape architects, quantity surveyors (to determine capital costs), venue management specialists, and programming specialists. These specialists can add significantly to a planning study budget.

### 12.6.1 Programming

In identifying the need for a recreation *program*, research will be needed to determine the number, types and location of residents who might wish to use the program being planned; to identify suitable venues and provision times; to identify program managers and providers with appropriate skills (and whether they will be professionals or volunteers); to devise the program content; to determine costs (venues, materials, staff etc), and from these, fees.

Conversely, if program provision is to be made for a particular, defined group of residents (such as those living in a particular suburb, or the youth or aged residents of a community), the research will need to focus on what types of programs and activities those groups may like, on evaluating what is already available, and then proceed through the program development stages noted previously.

### 12.6.2 Services

A similar process may be required regarding recreation *services*, depending of course, on what the service is. Services can range across things such as funding grants, community transport, information resources, and club training programs. As such, the range of issues that will need to be addressed can be quite broad, quite costly and very time consuming. Many service initiatives require various types of permits, applications and approvals so again, timelines can be quite lengthy.

### 12.6.3 Buildings

With regard to *building* projects, a range of specialists may be required to undertake, for example:

1. Audits of any existing buildings (by an engineer or architect)
2. Plant and equipment audits of existing buildings (engineer)

3. Competitor analyses (recreation planner, programmer)
4. Optional site assessments (engineer, geologist, hydrologist, planner, archaeologist, botanist, transport engineer, economist)
5. Design development and costings (architect)
6. Landscape design and costings (landscape architect)
7. Assessment of funding strategies (economist)
8. Development of management, operational and programming strategies (Management/ programming specialist), and
9. The assessment of the financial viability of the proposed developments (management/ financial management specialist).

#### **12.6.4 Site assessments**

With specific reference to the optional site assessments listed above, some of the issues that are likely to need attention are:

1. Land ownership and acquisition costs
2. Land size
3. Site slope(s), aspect and relative relief (ie: Changes of height)
4. Zoning and use regulations (town planner)
5. Existing and adjoining land uses
6. Past uses
7. Utilities and services available (water, power, sewerage, roads, public transport), and load capacities
8. Vegetation types and significance (botanist, ecologist)
9. Geology and sub-surface conditions (geologist, engineer)
10. Archaeology and pre- and post European settlement heritage (archaeologist, heritage specialist)
11. Access
12. Proximity to other related activities, and
13. Opportunities for co-location and sharing.

For some site attributes, it is possible to score sites in terms of their suitability whereas in other instances certain conditions may automatically exclude a site. These latter instances could include archaeological evidence, ground contamination and fill, site size, rare vegetation communities and potential conflicts with adjoining land uses.

The chart on the following pages is an edited of the site assessment criteria identified for use in a motors sports venue feasibility study in Ballarat, Victoria, in 2015.

#### **12.6.5 Other specialist staff**

The work of some building-related specialists will provide a yes/no answer on issues of relevance. However, other inputs may need to be carefully integrated into the overall planning project. For instance, while an engineer may conclude that a particular site can or cannot be serviced or is or is not capable of being used for a particular project, the work of architects and landscape architects will need to be taken through a process of community and client consultations so their inputs can be identified, reviewed and responded to if needed. And once a concept design has been agreed on, the services of quantity surveyors will be needed to provide indicative capital costs, which may generate the need for further or staged design work if the costs are found to be beyond the capacity of the planning body.

Preparation of a staffing and management structure and a financial and business plan are essential elements of a feasibility study as these provide a guide to funding strategies, to the scale of what can be afforded, to the possible staging of development and to the continuing financial subsidies that a project may require.

**Motor Sports Site Assessment Criteria**

Site Name: \_\_\_\_\_

Site Address: \_\_\_\_\_

Map ref/GIS: \_\_\_\_\_ Date of assessment: \_\_\_\_\_ Assessors: \_\_\_\_\_

**Note:** The scores for the criteria are indicative only. Sites that score poorly on key criteria eg: size, zoning, adjoining uses, utilities and services, access roads, should most probably be rejected regardless of other scores.

Criteria	Notes and Assessment Parameters
<p><b>1. Size:</b></p>	<p>It is difficult to accommodate all or most uses on a small site and this thus tends to compromise the scale of what is provided, the provision of adequate surrounds, and opportunities for future expansion. Large sites allow separation of potentially conflicting uses while excess land can be leased out for other purposes (eg: cropping, agistment), while the capacity for expanded and/or new uses in the longer term is retained.</p> <p>300+ ha. = 5                      250-300 ha. = 4                      250-300 ha. = 2                      Less than 250 ha. = 0</p> <p>Site must have a north to south (or close to) length of a minimal of 1500m. for a drag strip</p>
<p><b>2. Access road(s) to site</b></p>	<p>Safe, all-year access to a site is critical to its success. Some user groups have trucks (up to B-double size) for vehicles and equipment and roads must be capable of carrying these vehicles. Two way traffic flows and emergency vehicle access must be guaranteed at all times.</p> <p>A sealed, two lane road is the minimum requirement with no narrow/ low load bridges. Note importance of direct access to service hubs such as Ballarat, accommodation, caravan parks, hotels (meals). Consideration must be given to positioning vis access roads. Sites that require access via suburban streets; new highway crossings; small, local rail crossings, and use of more than two local roads from the Western Highway should be avoided.</p> <p>Sealed dual lane = 5                      Sealed single lane = 3                      Gravel = 0</p> <p>Council should liaise with VicRoads re access road suitability, redevelopment issues and needs etc prior to committing to any specific property</p>
<p><b>3. Existing roads</b></p>	<p>It is possible to exploit existing sealed or gravel roads adjacent to or within a site for each or parking, access and competition purposes.</p> <p>An existing single lane, sealed road of 800 m. to one kilometre in length has the potential to provide a hillclimb and/or sprint track, a sealed section of an autocross track or simply, an access road. Unsealed roadways could also be used for these purposes. More developed dual lane roads within or adjacent to a venue could be used as part of an entrance road or for part of a racetrack on an occasional or special event basis as is done for example, at Bathurst, Albert Park, Melbourne, and Le Mans.</p> <p>Existing sealed and/ or gravel roads or unmade road reserve within or adjacent to site with potential to be closed permanently or on a scheduled basis for event use = 5                      No existing roads or road reserves = 0</p>
<p><b>4. Distance from Ballarat CBD</b></p>	<p>Sites too close to the City face a long term threat of urban encroachment while those at some distance will hamper access and discourage wider community use.</p> <p>Within 10 km. = 5                      From 10 – 15 km. = 4                      From 15 -20 km. = 3                      From 20-30 km. = 2                      Over 30 km. = 0</p>

Criteria	Notes and Assessment Parameters
<b>5. Regulatory issues</b>	<p>Land use zoning, overlays, the nature of adjoining uses, land ownership, utilities and services alignments and optional funding and management arrangements can impact detrimentally on the value of a site. Liaise with VicRoads, VicTrack, relevant Catchment Management Authorities, CFA and other agencies re all shortlisted sites</p> <p>There are no identified regulatory or zoning issues or controls which will constrain the development = 5  Regulatory and/or zoning issues can be readily resolved = 3  There are regulatory and/or zoning issues which cannot be resolved readily = 0</p>
<b>6. Meteorological conditions</b>	<p>Local weather conditions can be important re the positioning of buildings, roadways etc and in spreading or constraining noise and dust, both internally and beyond the venue.</p> <p>The predominant wind direction will carry noise and dust away from residential areas and/or other on-site uses = 5  The predominant wind direction will occasionally carry noise and dust toward residential areas and/or other on-site uses = 3  The predominant wind direction will regularly carry noise and dust toward residential areas and/or other on-site uses = 0</p>
<b>7. Adjoining uses</b>	<p>Adjoining land uses are important in either enhancing or constraining the use of a site eg: state/commercial forests, water catchments, race tracks, other motor sport venues, wind/ solar farm zones, pastureland vs housing, passive parklands.</p> <p>Industry /Crown reserve/large water storage facility, protected forest or natural land uses act as a noise, visual and dust buffer= 5  Farm land has very limited impact from site use= 4  Farm buildings have limited impacts from site use = 2  Township/residential housing is nearby and could be badly impacted by site use= 0</p>
<b>8. Land use “offset” potentials</b>	<p>Partnerships with other similar or unrelated developments can reduce the cost of road works, utilities and services etc or act to broaden the population base attracted to the site. For example, there may be potential to co-locate with <i>existing</i> or planned green initiatives and waste management services, industrial land uses; agricultural/ industry services zones; wind/solar farms, recycling depot etc</p> <p>Site offers strong opportunities for other/ associated uses = 5  There are moderate opportunities for other/ associated uses = 3  There are low opportunities for other/ associated uses = 2  There are no opportunities for other/ associated uses = 0  Assess</p>
<b>9. Number of residential properties within 1-2 km.</b>	<p>The fewer the number of nearby residential properties, the lower is the chance for opposition prior to development or complaints after development.</p> <p>No residential properties within 1-2 km. = 5  Up to 5 residential properties within 1-2 km. = 3  Over 5 residential properties within 1-2 km. = 0</p>
<b>10. Utilities and services provision</b>	<p>Provision of power, water, sealed roads and waste water management are expensive while the use of generators, dams and/or tanks, and septic tanks/portable toilets etc can impose use, health and safety constraints.</p> <p>Potable water and power on site = 5  Water and power within 500 m. = 4  Water &amp; power within 501 – 1000 m. = 3  Water &amp; power within 1001-1500 m. = 2  Water &amp; power more than 1500 m. away = 0</p>
<b>11. Natural water supply</b>	<p>On-site water courses and/or supplies suitable/sufficient for watering dirt-based roads and vegetation watering/ irrigation and fire management are a valuable resource. Dams may also be able to be used for manned jet boats, model boats, fishing etc</p> <p>On-site stream(s) or other drainage suitable to supply water = 5  Adjacent, divertable stream(s) or other drainage suitable to supply water = 3  Some potential to collect runoff = 2  No accessible piped or natural water supply = 0</p>

Criteria	Notes and Assessment Parameters
<b>12. Distance from regional highway</b>	<p>Good access from a regional highway minimises regional travel times and reduces impacts on local residential areas. It can also minimise access road upgrades.</p> <p>Within 1 km = 5            From 1-3 km = 3            Over 3 km = 0</p>
<b>13. Ownership</b>	<p>Having access to Council land or Crown land can save substantial land acquisition costs although this must be balanced against land quality, accessibility etc</p> <p>Council = 5            Council/Crown = 4            Crown = 3            Private = 0            Assess capacity to lease land</p>
<b>14. Land cost</b>	<p>No cost = 5            Less than \$500,000 = 4            \$500,001-600,000 = 3            \$600,000 - \$800,000 = 2            \$800,000 - \$1 m. = 1            \$1 m. plus = 0</p> <p>OR use \$ rate per ha. Values to be determined by Council/ funding source and capacity            &gt; \$1000 / ac. = 5            \$1001 - 2,000 = 3            \$2,001 - \$4,000 = 1            &gt; \$4,000 / ac. = 0</p>
<b>15. Property shape</b>	<p>Property shape can restrict the ability to fit all desired facility components on a site and hamper internal access. Irregular shapes are acceptable provided there are not narrow sections which impede access, support limited uses and impact on surrounding properties.</p> <p>Square = 5            Rectangular/oblong=5            Irregular = 1 unless over 200 ha. and with minimum N-S length of 1,500 m.</p>
<b>16. Topography</b>	<p>Topography is important to achieving interesting, variable tracks and to provide differing viewing perspectives. However, flat land is needed for pit areas, parking, drag strips, skid pan/ display areas and for large marquees. Land which requires extensive cut-and-fill works prior to use should be avoided.</p> <p>Undulating <i>and</i> flat = 5 (provided there is sufficient flat land for a drag strip and car parking)            Flat = 4            Only undulating = 3            Part flood prone/ substantial portion hilly or steep = 2            All flood-prone, hilly or steep = 0</p>
<b>17. Land condition</b>	<p>Land requiring extensive working, clearing or remediation prior to use is less attractive than land which is predominantly pasture with eg: some rocky outcrops, water features or clumps of trees.</p> <p>No land remediation and/or clearing required = 5            Minimal remediation and/or clearing required = 3            Major remediation and/or clearing required = 0            Note possibility of site contaminants eg: land fill and type; land compact-ion; former military use/ waste/ ordnance; former factory/ farm chemicals</p>
<b>18. Geology</b>	<p>The underlying geology of a site impacts on drainage, building stability and the cost of development. In the Ballarat region, surface lava flows create a landscape which is very difficult to develop and use.</p> <p>Readily worked well-draining substrate = 5            Moderately draining substrate = 3            Difficult, poorly draining substrate = 0</p>
<b>19. Surface cover/ vegetation</b>	<p>Heavily vegetated land may well have planning controls attached to it while planted forest or weed-infested land can be costly to clear. A mix of vegetation with a predominance of pasture/ grassland is to be preferred.</p> <p>Part cleared &amp; natural vegetation (provided natural veg. can be retained) = 5            All farmland = 3            Weed infestation = 3            All natural vegetation/habitat = 0</p>

Criteria	Notes and Assessment Parameters
<b>20. Site attractiveness and views</b>	<p>An attractive venue is an important part of a total visitor experience. This can be achieved through site selection and can be augmented by positioning of facilities and buildings, plantings and the like. Use of natural features for spectator viewing can save considerably in terms of costs.</p> <p>Good views across site and spectator viewing potentials = 5            Limited spectator viewing = 3            Need to build spectator viewing = 0</p>
<b>21. Layout and development flexibility</b>	<p>Site can accommodate all facilities in an efficient, effective &amp; staged manner = 5            Some duplication of infrastructure will be needed to accommodate all proposed facilities = 4            Some proposed uses will not be able to be accommodated = 0</p>
<b>22. Potential for shared parking, spectator facilities</b>	<p>Layout will allow shared parking and other facilities across different disciplines and events = 5            Limited shared parking possible = 3            Most or each use activity/ area will need separate parking = 0</p>
<b>23. Potential environmental risks, impacts &amp; management issues</b>	<p>Fire, flood, frequent adverse weather, wind, storms, fog, landslides and other natural conditions can detrimentally impact all outdoor events and activities. Former land uses and management practices can also be detrimental including land fill, use of fertilizers, pesticides and weedicides, and the presence of old/unsafe/asbestos-based buildings.</p> <p>No impacts to be resolved = 5            Development design, layout, land remediation or other actions will be needed to minimise impacts = 3            The nature of the site raises significant environmental and man-made management issues which will have to be resolved = 0</p>
<b>24. Risk management issues</b>	<p>Fire, flood, landslides and other natural conditions can have a detrimental impact on motor sports.</p> <p>No risk management issues can be identified or need to be resolved = 5            A small number of risk management issues will have to be addressed = 3            Site has major risk management issues = 0</p> <p>The key natural risk management issues are fire, flood, fog and landslides which other risks could include potential changes in land use zoning, adjoining uses, land ownership, utilities and services alignments, as well as changed funding and management arrangements</p>
<b>25. Capacity to replicate iconic features of other race venues</b>	<p>The attraction of a motor sports development can be enhanced if it has features that replicate iconic elements of other venues eg: corners, curves, straights, elevation changes. As such, the capacity to accommodate these warrants assessment.</p> <p>High capacity to accommodate iconic features = 5            Medium capacity to accommodate iconic features = 3            No capacity to accommodate iconic features = 0            (See further discussion in section 8.2, p. 90)</p>
<b>26. Regional funding opportunities</b>	<p>Some sites may exist which have a greater capacity to attract regional funding grants. In the Ballarat context, it is probable that development of the project in partnership with or within the boundaries of a smaller, rural Shire could strengthen the capacity to attract development grants. It would also strength the project's regional credentials.</p> <p>Partnership opportunities exist with adjoining Council(s) = 5            Partnership opportunities may exist with adjoining Council(s) = 3            No opportunities exist for a partnership with adjoining Council(s) = 0</p>
<b>27. Other criteria</b>	<p>Provision is made within the process for other criteria that might be identified or become pertinent</p>

Source: HM Leisure Planning Pty Ltd and C Leisure Pty Ltd, 2015: *Ballarat Motor Industry and Events Hub: Planning Study*

### 12.6.6 Management planning

Management planning is beyond the scope of this text but the following issues need to be addressed:

- The form of management to be used eg: community-based, professional, committee, Board
- Who will undertake the management eg: Council officers, contracted private individual, management company, committee, board
- Who management will answer to
- Management and program objectives
- Staffing levels, mix and responsibilities
- What programs will be offered and how needs will be identified
- The schedule of user fees
- Hours of operation
- Marketing and promotion
- Asset management and maintenance, and
- Performance monitoring.

Specialist, professional advice is almost certain to be needed on these issues and to appoint an individual, group or organisation ready to take on the management role.

### 12.6.7 Business planning

With regard to business planning, a wide range of information and data needs to be generated and collated. The first element of this should be a clear statement of the goals and objectives of the projected initiative so that the implications of this to programs, staffing and budgets can be determined. Data on at least the following market, income and expenditure items will then need to be generated:

#### **Market:**

- The current and projected population size and its (changing) age distribution
- The mix of programs and services which it is intended to offer
- Current and projected participation rates in the proposed programs and services and the consequent number of groups, classes, sessions etc needed to accommodate the projected demand

#### **Income:**

- Current and projected fees for use of the proposed programs and projected incomes
- Current and projected consumer price indices and the implications to prices (and costs)
- Sales: programs, equipment, food
- Grants and owner budget allocations

#### **Expenditure:**

- Staffing needs to mount the mix of programs and services which it is intended to offer and the salary and on-costs of these staff
- Staffing needs and costs to manage the venue, accounts, budgets, train other staff etc and the salary and on-costs of these staff
- Utilities (gas, water, power), materials and maintenance costs
- Telephone costs
- Marketing and promotion costs
- Insurances, and

- Capital replacement costs.

These data are incorporated into a detailed financial model, using for instance, an Excel spreadsheet, that allows the projection of the annual financial outcomes over say, a 5, 10 or 15 year period. This should be designed using an interactive model to allow testing of a range of market sizes, fee scales, program and service costs and the like so that low, medium and high performance projections can be made over. This data is then be used to determine the projected financial viability of the proposed initiative, the levels of profit or subsidies that can be expected and the possible implications to programming, fees, marketing or any other provision that is or was being considered.

In addition to business planning, the client of a planning study may require an impact assessment study to be undertaken for a project. Such studies seek to measure the long term financial, social and environmental impacts and contributions to a town or region of a specific project over a 10, 20 or 30 year period and can be important in identifying wider social and economic benefits and possible negative social and environmental consequences which will need action to avoid.

### 12.6.8 Funding

**Funding** a major sporting and recreation development which has been identified and recommended through a planning and feasibility study is a final area of work that needs to be covered. The list below records some of the possible sources of funds that should be explored:

- Federal government development grants or loans
- State government development grants or loans
- Local Council rates
- Local Council borrowings
- Local Council grants or loans
- Local government special levies
- Local government land and other asset sales
- Club contributions
- Establishing community cooperatives to generate bank loans
- Community fundraising: raffles, giving programs, gifts, auctions, bequests
- Commercial investments, leases, and
- Crowd-sourcing.

The extent to which each of these can be used will need to be explored and an assessment made of the optimal mix of sources.

It is evident from the foregoing paragraphs that when a planning study is extended to the point where it becomes a *feasibility* study, a variety of specialists, including architects, engineers, landscape architects, botanists, archaeologists, heritage assessors, quantity surveyors, town planners, hydrologists and others is likely to be required. If a planning study has a feasibility focus from the beginning, a number of these specialists should be included in the planning team *from the beginning* so they develop a full understanding of the issues as they emerge. Others may be contracted in for short periods at relevant stages of a planning study. The cost of specialist inputs can range from as little as \$1,000 through to well over \$50,000 depending on the scale of the project and the complexity of the issues.

### 12.7 Monitoring the performance of a recreation plan or feasibility study

It can be argued that unless a planner identifies and evaluates the outputs and *outcomes* of a planning project, there is no point in beginning the process. In other words, unless planners measure the extent to which the project goals and objectives are achieved, having those goals and objectives is useless. Unfortunately, there is little evidence of the outputs or outcomes of planning projects being evaluated by most agencies that undertake them. This would appear to be because:

- There is an inappropriate belief that the provision of a facility, program or service *demonstrates* effective outputs and outcomes
- Budgets are rarely allocated for effective evaluation studies to be carried out
- Planners have moved on to other projects, and
- There is an unstated fear that looking too closely at outputs and outcomes might reveal answers that either the planners, the community or politicians would rather not know or admit to.

Unfortunately, project “evaluation” in Australia is all too often based on hearsay, anecdotal evidence and raw through-the-door attendance numbers and financial results rather than on detailed research.

Despite the above, there is an extensive body of literature on evaluation (as a Google search will indicate) and planners may wish to follow this through. An excellent and entertaining Australian guide has been prepared by Wadsworth (1991) and is cited in the bibliography.

The distinction raised above regarding planning *outputs* and *outcomes* is important as too many planners see the completion of the planning phase as the completion of the project: it is not. It is simply one step along the way to achieving the goals and objectives of a project (and of the provision authority) and in many instances is really only the start of an action phase. That does not mean, however, that the planning phase of a project should not be evaluated as this in itself can provide invaluable lessons for future planning studies.

The comparison between *outputs* and *outcomes* noted above can be readily explained by example. If for instance, the goal of a recreation planning project was “to enhance the health, happiness and well-being of X community group”, then a range of activities, events and facilities might be planned for that particular group. If those activities are run and are rated as “successful” by both the providers and participants, it could be claimed that the planning was successful. And if high attendances are achieved, these figures might also be trumpeted as a measure of the success of the outputs of the project. Australia-wide, facility, program and service managers record and proudly promote the data on the number of attendances they achieve annually. Yet, they rarely assess *who* it is who comes; *which groups* in the community they represent and do *not* represent, and *what proportion* of the population is actually using the opportunities that are provided. This represents a focus on *outputs* rather than on *outcomes*.

Yet, if 4, 8 or 10 years down the track, the facility, program or service users were revisited and it was found that these people had no better a quality of life than *non*-participants, it might be concluded that the project did not achieve sustainable long term *outcomes*. Not surprisingly, measuring outcomes is far more difficult than measuring outputs as it requires long term data collection commitments. However, an increasing number of State and federal agencies are now beginning to collect such data and some of that now addresses recreation planning and provision projects. A consistent program of collecting outputs data will contribute to this longer term resource. This can be readily combined with wider community needs studies or it might be that a sample of participants is followed up over a number of years and compared with a similar-sized and demographically-similar group of non-participants. Significantly, at the time of writing, *no such study is known to have ever been undertaken in Australia*. Yet, local, state and federal government authorities and commercial providers spend literally billions of dollars annually on the provision of recreation facilities, programs and services. Whether –or the extent to which-- this expenditure is contributing to the wellbeing of the Australian community is essentially not known.

## Performance Monitoring: Two Case Studies

**A. A proposed multi-purpose community centre:** The following listing of key performance *objectives* is drawn from a recent Gold Coast City Council, Queensland, feasibility study into a proposed multi-purpose community centre. The list is quite extensive and it is probable that not all the performance measures could be tackled at the one time. (It is also possible that a number of the items may need to be refined and consolidated over time and from an operational perspective, that a core group of items might need to be selected to develop further for use as performance monitoring and management tools).

To be fully effective, each of the objectives will require the formulation of a statement of:

1. The indicators that could or will be used to demonstrate that the objective has been or is being achieved
2. How information on the indicators will be collected
3. How frequently the information should be collected

4. Who will be responsible for collecting information on each of the indicators
5. How the information will be reported
6. To whom the information will be reported, and
7. How the information will be used.

Once finalised, the key performance objectives and their indicators could then be adopted as a key tool to guide the long term design, construction, management, programming and maintenance of the proposed development. The performance *objectives* are:

**1. Build social capital, strengthen social networks, enhance health and wellbeing and add to the quality of life of the community**

- 1.1 Development a statistical and survey-based data series to record and map information on social networks, community groups, levels of health and wellbeing, and measures of social capacity and community need
- 1.2 Identify and monitor community needs through community surveys, activity/ program, service and facility provision assessments, demographic analyses and other data sources
- 1.3 Develop a diversity of activities that deliver networking, health, wellbeing and social outcomes
- 1.4 Develop and apply a range of qualitative and quantitative measures that are applied on a regular basis to assess the extent to which networking, health, wellbeing and social outcomes are achieved
- 1.5 Build awareness of the facilities, programs and services provided through the Hub in the Upper Coomera community
- 1.6 Offer a diverse range of activities through the Hub
- 1.7 Measure the pre- and post-provision capacity of the community to establish community and cultural activities
- 1.8 Measure the pre- and post-provision levels of volunteering in the community
- 1.9 Promote use of the venue as a base for programs that are provided in the community and away from the venue
- 1.10 Measure the pre- and post-provision levels of self-programming of community and cultural activities in Upper Coomera
- 1.11 Develop programs, activities and services which reflect community expectations and values

**2. Contribute to the diversity of relevant opportunities for personal and community development**

- 2.1 Assess the characteristics of the community and community need and establishing programs which reflect these
- 2.2 Record the number and breadth of different programs and the target groups in the community for which these cater
- 2.3 Establish agreed participation levels for the different programs to be offered, with these reflecting client groups in the community and the assessed importance of achieving outcomes for these groups

**3. Provide for a high level of community participation in defining needs and opportunities and in the programming and management of the venue**

- 3.1 Develop and apply mechanisms to encourage community input to management and programming of the venue
- 3.2 Measure and evaluate the continuing level of community input achieved by each mechanism
- 3.3 Assess the usefulness and application of the information provided through the mechanisms

**4. Reflect the current community and cultural needs and aspirations of all elements of the Upper Coomera community**

- 4.1 Establish base line community needs data (vs "wants") for cultural and community programs, services and facilities and regularly monitor changes in the data
- 4.2 Determine the provision implications of the community needs data and of changes in these needs

- 4.3 Review the extent to which the activities, programs, services and provision against the needs which have been identified.

**5. Develop the capacity to change the physical, managerial, staffing and programming capacities of the Hub to reflect researched and changing needs of the community**

- 5.1 Establish management processes that ensure the capacity to change the activities, programs and services provided in response to changes in community need over time
- 5.2 Establish a mechanism for measuring and evaluating the effort and cost required to make changes in the activities, programs and services that are provided

**6. Create and maintain activities, services and facilities of a standard relevant to the setting and the community**

- 6.1 Undertake surveys of users and non-users to assess community acceptance and “ownership” of the venue, its programs and its services
- 6.2 Seek user and wider community feedback on levels of satisfaction with the standard, design and quality of the facilities and the programs and services that are offered
- 6.3 Assess rates of retention of users by the venue
- 6.4 Determine the building maintenance and asset management responsibilities that will be allocated to each of Council and any external operators
- 6.5 Establish a sinking fund to ensure on going maintenance of all buildings in accordance with asset maintenance plan
- 6.6 Use secret shopper programs to assess management performance and asset maintenance standards
- 6.7 Establish appropriate maintenance schedules to ensure retention of provision quality
- 6.8 Measure and evaluate the activity/program and service delivery impacts of down times at the venues
- 6.9 Develop a mechanism for determining the maximum /optimum use numbers for each facility, programs and service that ensures the retention of provision quality

**7. Be seen by the community as the hub of community life and activity**

- 7.1 Conduct surveys of users and the wider community to measure and assess awareness of the venue, satisfaction with the activities, programs, services and facilities provided and the role filled by the venue for the community

**8. Be economically responsible**

- 8.1 Devise fee structures which will attract use by different socio-economic groups in the while contributing to the financial viability of programs, services and the venues
- 8.2 Manage operating costs in a manner which reflects sound financial practice, including the allocation of resources for day to day operational maintenance and longer term cyclical asset maintenance
- 8.4 Identify and seek to minimise the levels of subsidy provided for the activities/programs, services, and programs offered
- 8.5 Ensure that the cost of provision is assessed in terms of community benefit as well as financial returns
- 8.6 Use the Hub as a means of direct and indirect job creation and skills development in the community

**9. Be environmentally sustainable**

- 9.1 Design and operate the venue in order to minimise environmental impacts with this process including embodied energy and recurrent costs
- 9.2 Determine the investment paybacks of all actions designed to minimise environmental impacts
- 9.3 Design and operate the venue in order to minimise resource use and recurrent energy, water and other utilities and services costs
- 9.4 Use the venue as an educational resource regarding sound environmental design and management practises
- 9.5 Identify and development management and operational strategies which minimise the impact of facility on its environment through eg: travel reductions, meeting local needs, optimising access via path and bikeways, rail and other forms of public/ community transport

**10. Make provision in the context of other programs, services and facilities in the Northern Growth Corridor and in the City**

- 10.1 Prepare a base data on other related and relevant provision and providers in the Northern Growth Corridor and as appropriate, elsewhere in Gold Coast City Council
- 10.2 Benchmark all proposed provision against the data base in 10.2 to ensure provision of complementary programs, services and facilities rather than to duplicate provision by others
- 10.3 Support the provision of local programs, services and facilities where these fit into a logical hierarchy of local, district, Council-wide and regional provision
- 10.5 Develop strategies to fill identified provision gaps as appropriate

**11. Collaborate with other venues and providers of like and complementary programs, services and facilities**

- 11.1 Prepare a base data on other related and relevant provision and providers in the Northern Growth Corridor and as appropriate, elsewhere in Gold Coast City Council
- 11.2 Seek co-programming opportunities with other providers
- 11.3 Develop a referrals process in association with other providers
- 11.4 Pursue opportunities to share staff with other appropriate providers and venues

**12. Demonstrate and strengthen Council's commitment to the community**

- 12.1 Develop common branding across this and all Council venues
- 12.2 Conduct surveys to monitor community awareness of the venue as a Council venue
- 12.3 Identify and implement measures that will improve Council's profile and image through the venue
- 12.4 Identify and implement measures that will raise community knowledge and awareness of Council's role in the provision of social infrastructure
- 12.5 Develop strategies for using the venue as a means of creating local employment and building the skill base of the local community
- 12.6 Develop programs, activities and services which reflect community expectations and values

**13. Provision of services that are complementary (within the venue)**

- 13.1 Develop use scheduling which minimises conflict between users and that optimises provision of compatible and complementary uses
- 13.2 Develop management and scheduling strategies that will minimise complaints about incompatible uses

**14. Maximise community benefit**

- 14.1 Determine the optimum use numbers for each component of the venue and use these as a base to determine use levels
- 14.2 Pursue the appropriate use and programming of all spaces to ensure their optimum use
- 14.3 Promote the mix of opportunities available at the venue and their intended target audiences
- 14.4 Assess the capacity of the community to pay fees for use and use this as a guide to the pricing of programs and services
- 14.5 Promote use and measure and assess the number of users and uses in light of the demographic profile of users and non-users
- 14.6 Identify the benefits which can be delivered to the community through the activities, programs and services offered by the centre and monitor the extent to which these benefits are being gained.

**B. A community aquatic centre:** As part of the development of the Ballarat Aquatic Centre in the early 1990s, Ballarat City Council required the contracted management agency, the YMCA, to prepare a set of operational performance measures as a means of providing Council with information as to how the venue was performing. The paper prepared on these measures by the Victorian YMCA in association with Hepper, Marriott and Associates (*Performance Measures for Aquatic Leisure Centres*,

1994) is listed in the bibliography and a revised and updated version is included as Appendix 5 to this text. It provides 8 performance measures and the following for each measure:

1. A definition
3. Details on how the measure will be assessed
4. The recommended frequency of reporting of measurement data
5. The reporting format
6. How the performance measurement information could be used, and
7. Optional additional data to be collected on each measure.

Although the measures and the indicators were essentially “output” rather than “outcome” measures, they are still valuable as a tool for assessing the performance of a leisure venue and could readily be updated and expanded to include outcome measures if they were to be used today.

## **12.8 Conclusion**

This chapter has sought to provide guidance on the preparation of a recreation plans using the findings of the previous research stages. Essentially, this has entailed assessing the provision implications of an initial area of research in order to identify the possible provision actions to be taken, with these then being tested against the findings of each other area of research. This approach has been tried and tested over a period of 30 plus years and no instances have been identified where action on the recommendations has led to inappropriate or ineffective outcomes. This does not mean, however, that there are no other methods that can be used in planning for the provision of recreation facilities, programs and services. If and where other methods *are* identified, it would be useful to compare the findings and conclusions they generate and to test and refine the outcomes of that methodology against those gained from the processes recommended in this text.

## Further Appendices

### Appendix 1.

#### The Benefits of Recreation

The following table is a summary of the benefits that recreation delivers to the community. It is drawn from the Canadian report, *The Benefits of Parks and Recreation. A Catalogue*. It was published by Parks and Recreation Federation of Ontario and the Ministry of Tourism and Recreation, Ontario, in 1992

##### Personal benefits

- 1.1 Physical recreation and fitness contributes to a FULL AND MEANINGFUL LIFE
- 1.2 Regular physical activity is one of the very best methods of HEALTH INSURANCE for individuals
- 1.3 Relaxation, rest and revitalisation through the opportunity of leisure is ESSENTIAL TO STRESS MANAGEMENT in today's busy and demanding world
- 1.4 Meaningful leisure activity is an essential SOURCE OF SELF-ESTEEM AND POSITIVE SELF-IMAGE
- 1.5 Leisure provides the opportunity to lead BALANCED LIVES; ACHIEVE OUR FULL POTENTIAL and GAIN LIFE SATISFACTION
- 1.6 CHILDREN'S PLAY IS ESSENTIAL TO THE HUMAN DEVELOPMENT PROCESS
- 1.7 Leisure Opportunities for youth provide POSITIVE LIFESTYLE CHOICES AND ALTERNATIVES to self-destructive behaviour
- 1.8 Parks and open spaces bring beauty to an area , while GIVING PEOPLE SATISFACTION AND IMPROVING THEIR QUALITY OF LIFE.

##### Social benefits

- 2.1 Leisure provides leadership opportunities that BUILD STRONG COMMUNITIES
- 2.2 Community recreation reduces ALIENATION, LONELINESS AND ANTISOCIAL BEHAVIOURS
- 2.3 Community recreation PROMOTES ETHNIC AND CULTURAL HARMONY
- 2.4 Recreating together BUILDS STRONG FAMILIES, the foundation of a stronger society
- 2.5 Leisure provides opportunities for COMMUNITY INVOLVEMENT AND SHARED MANAGEMENT AND OWNERSHIP OF RESOURCES
- 2.6 INTEGRATED AND ACCESSIBLE LEISURE SERVICES are critical to the quality of life of people with a disability and disadvantaged individuals
- 2.7 Leisure opportunities, facilities and the quality of the local environment are the FOUNDATIONS OF COMMUNITY PRIDE
- 2.8 Leisure services enrich and complement protective services for LATCHKEY CHILDREN through after-school and other recreational services

##### Economic benefits

- 3.1 Pay now or pay more later! Investment in recreation as a PREVENTIVE HEALTH SERVICE makes sense
- 3.2 A fit work force is A PRODUCTIVE WORK FORCE
- 3.3 Small investments in recreation yield BIG ECONOMIC RETURNS
- 3.4 Parks and recreation services motivate BUSINESS RELOCATION AND EXPANSION in your community
- 3.5 Meaningful leisure services REDUCE THE HIGH COST OF VANDALISM AND CRIMINAL ACTIVITY
- 3.6 Recreation and park services are often the CATALYST FOR TOURISM, growing sector of our economy
- 3.7 INVESTMENTS IN ENVIRONMENTAL PROTECTION through the provision of parks and open spaces PAY FOR THEMSELVES

### **Environmental benefits**

- 4.1 Through the provision of parks, open spaces and protected natural environments, recreation can contribute to the ENVIRONMENTAL HEALTH of our communities.. This is an essential, life-sustaining role.
- 4.2 The public is often prepared to pay for ENVIRONMENTAL PROTECTION AND REHABILITATION in their communities, and to support parks and recreation organizations that play a lead-role in that protection
- 4.3 INVESTING IN THE ENVIRONMENT through parks and the provision of open space in residential areas, leads to an increase in neighbourhood property values through accessibility to environmentally friendly green spaces and associated recreation opportunities
- 4.4 The trend toward natural environment, based. leisure activities is INSURANCE FOR A NEW AND IMPROVED ENVIRONMENTAL FUTURE

For a detailed and constantly updated listing of research into benefits of recreation see the Canadian National Benefits Hub under *National Benefits Hub* in the bibliography.

## Appendix 2.

### Writing Reports: Some points for consideration

1. If you recognise that your writing and presentation skills are weak/poor, take a course to improve those skills
2. In writing a report, divide it into sections using sub-headings so it is easily read and digested in small “bites”
3. Provide an introduction that tells the reader (a) what the report is about and (b) what subsequent sections will cover. Do this for each major sub-section or chapter as well. Summarise your findings in a conclusion and perhaps, point to further research and planning that may be needed
4. If you use tables and diagrams, describe and explain them” a picture may be worth 1,000 words but it still benefits from 100 explaining it
5. Do not use colloquial, chatty or abbreviated language eg: replace “**We** did x, y and z” with “The Study did x, y and z.”. Replace “The experiment **didn’t** really work” with “The experiment **did not** work”
6. Spell check
7. If you have the opportunity, ask someone else to read your work to find spelling and grammatical mistakes and to identify areas where the meanings are not clear and where rewriting would be beneficial
8. **Do not plagiarise:** acknowledge the sources of your ideas and information
9. Provide an accurate bibliography of information sources

### Appendix 3.

#### Sample Inventory Forms

##### A. CITY OF GREATER BENDIGO OPEN SPACE STRATEGY: Site Assessment Sheet

1. SITE NAME \_\_\_\_\_
2. LOCATION \_\_\_\_\_
3. PROPERTY NO: \_\_\_\_\_ AREA \_\_\_\_\_

4. BRIEF DESCRIPTION:  
 \_\_\_\_\_  
 \_\_\_\_\_

5. KEY SITE ATTRIBUTES: \_\_\_\_\_  
 \_\_\_\_\_

6. KEY SITE CONSTRAINTS:  
 \_\_\_\_\_

7. FACILITIES									
Facility Type		Comment	Condition						
7.1 _____	_____	Poor	1	2	3	4	5	VG	
7.2 _____	_____	Poor	1	2	3	4	5	VG	
7.3 _____	_____	Poor	1	2	3	4	5	VG	
7.4 _____	_____	Poor	1	2	3	4	5	VG	
7.5 _____	_____	Poor	1	2	3	4	5	VG	
7.6 _____	_____	Poor	1	2	3	4	5	VG	

##### 8. ASSESSMENTS

A. Appearance	Poor	1	2	3	4	5	VG	NR (not relevant)	
B. Accessibility	Vehicle	Poor	1	2	3	4	5	VG	NR
	Pedestrian	Poor	1	2	3	4	5	VG	NR
	Disabled	Poor	1	2	3	4	5	VG	NR
C. Parking	Poor	1	2	3	4	5	VG	NR	
D. Signs	Poor	1	2	3	4	5	VG	NR	
E. Lighting	Poor	1	2	3	4	5	VG	NR	
F. Shading	Poor	1	2	3	4	5	VG	NR	
G. Safety	Poor	1	2	3	4	5	VG	NR	
H. Maintenance	Poor	1	2	3	4	5	VG	NR	

##### 9. OVERALL ASSESSMENT

Recreation Values \_\_\_\_\_  
 \_\_\_\_\_  
 Conservation Values \_\_\_\_\_  
 \_\_\_\_\_  
 Amenity Values \_\_\_\_\_  
 \_\_\_\_\_  
 Other Values \_\_\_\_\_  
 \_\_\_\_\_

##### 10. KEY MANAGEMENT ACTIONS (IMPROVEMENTS)

- 10.1 \_\_\_\_\_
- 10.2 \_\_\_\_\_
- 10.3 etc \_\_\_\_\_

##### 11. FUTURE OPTIONS

- |   |          |
|---|----------|
| A. Maintain as is.                      | Yes / No |
| B. Upgrade and enhance.                 | Yes / No |
| C. Dispose/ find alternative use.       | Yes / No |
| D. Rationalise - part use/part dispose. | Yes / No |
| E. Link with other open space.          | Yes / No |
| F. Uncertain - further review.          | Yes / No |

G. Other option ..... Yes / No

12. CATEGORISE AS:

- A. Developed, Informal, Non- Competitive Venue
- B. Landscape and Amenity Resource
- C. Conservation and Heritage venue
- D. Waterway and Lake Venue
- E. Outdoor Sporting Venue
- F. Linear and Linkage Venue
- G. Utilities and Service Site
- H. Zoned/Proposed Open Space Site

13. OTHER COMMENTS

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14. PRELIMINARY SITE RISK ASSESSMENT

Possible risk	Risk For	Risk Level	Option	Comments
etc				

**Risk For** – 1 = environment, 2 = people, 3 = assets and 4 = intangibles

**Risk Type** is based on assessment of likelihood and consequences using the following table as a guide:

**Consequences**

Likelihood	Negligible	Minor	Medium	Very High	Extreme
<b>Almost Certain</b>	moderate	moderate	major	severe	severe
<b>Likely</b>	moderate	moderate	moderate	major	severe
<b>Possible</b>	low	moderate	moderate	major	major
<b>Unlikely</b>	low	low	moderate	moderate	major
<b>Rare</b>	low	low	moderate	moderate	moderate

**Treatment Options**

- 1 = Tolerating the risk - an option if the likelihood and consequences of the risk is consistent with the activity (e.g. minor sports injury)
- 2 = Avoiding the risk - deciding either not to proceed with the activity that contains an unacceptable risk, or choosing an alternative with acceptable risks
- 3 = Reducing the risk – using various measures that contribute to the reduction of a risk to an acceptable level
- 4 = Transferring the risk - generally occurs through written agreements or notices e.g. insurance contract, leases, personnel contracts, disclaimers, tickets, and warning signs
- 5 = Retaining the risk – is about acceptable risk as risk elimination is not often possible.
- 6 = Financing the risk - is essentially a form of self-insurance against loss**

15. PHOTOGRAPHS TAKEN

**B. Some Possible Components of an Inventory**

The following is a list of information which might be included in an inventory of recreation *facilities*.

**1. Background**

- 1.10 Venue name
- 1.11 Address and map reference. Maps of locations should also be prepared
- 1.12 Council Ward, Riding, suburb (suburb to allow cross-tabulation with demographics)
- 1.13 Owner/agency name
- 1.14 Management organisation name
- 1.15 Management contact person, phone number, Postal address
- 1.16 Planning scheme zoning(s) and overlays
- 1.17 Name of person(s) recording/updating the inventory

1.18 Dates on which inventory was recorded and updated

## **2. Facility Description**

2.11 Venue number

2.12 Council property number(s) (from rates roll or other)

2.13 Size in sq. m. or hectares

2.14 Description, including current land uses; vegetation types and cover; geology; soils; topography/aspect; ecology; environmental constraints

2.15 Adjacent uses and constraint/opportunity implications

2.16 Available services: water, power, drainage, sewerage, sealed roads, public transport

2.17 Components: Number of eg: rooms, playing fields (by size/sports supported), change rooms, stores, play equipment, kitchens, plus size, number and condition of all the above; undeveloped land capable of accommodating additional facilities

2.18 Services: parking, disabled access, toilets (type, number), bike parking, pathways, signage, plus size, number and condition of all the above

2.19 Venue classification: what it is: (see following page) *This allows tabulate number of classification types by Ward, Riding, suburb by hierarchical type*

2.20 Venue hierarchy: who it is intended to serve: (Local, Part Council, Council-wide, Regional, State, National, International) *This allows tabulate number of hierarchical venues by Ward, Riding, suburb by hierarchical category*

2.21 Assessment of condition and quality

## **3. Use**

4.4 Uses

4.5 Booking officer name and contact details

4.6 User group names

4.7 User contact name/phone/email/postal addresses

4.8 Use times/seasons

4.9 Use levels/standards

4.10 Use numbers

4.11 Fees

## **4. Values**

4.1 Recreation values

4.2 Landscape values

4.3 Conservation values

4.4 Heritage values

4.5 Other values

## **5. Upgrading/additions**

4.12 Needs: as identified through a professional inspection and/or user input

4.13 Needs identified by users, through consultations

4.14 Site capacity to accommodate additions or availability of adjoining land

4.15 Priorities for action and recommended responsibility

## Appendix 4.

### Catchment Analysis

As indicated in section 8.5, catchment analysis is an invaluable planning tool as it helps to indicate where customers are and are *not* coming from --and hence, where marketing and/or provision efforts may need to be changed or enhanced. Catchment data allows comparisons to be made between the demographic profile of users and the wider community and through this, an assessment of who is and who is not being served by the provision. It is useful to think of catchments from the perspective of each of the *current* catchment and the *desired* catchment and to ask the question, what do we need to do to get from the first to the second?

### Defining Catchments

The Macquarie Dictionary defines catchments in two ways: "a drainage area, especially of a reservoir or river" and "the area from which persons may come to a central institution, as a school or hospital"<sup>29</sup>. The second of these definitions is pertinent to the present review and of significance in the definition is the use of the words "may come" as opposed to "do come". This indicates that there are both "active" and "potential" catchments. In fact, five different types of catchments can be identified, these being "expressed", "latent", "administrative", "free market" and "unserved".

These are defined as:

- "Expressed" catchments: the boundary of this catchment type encompasses the area from which users actually come, these individuals being able to "express" their need for or desire to use a facility or program by going to it and using it
- "Latent" catchments: the boundaries of this catchment type encompass areas where there are people who *want* to be users of a facility or program but who do not because of some form of barrier: cost, transport issues, physical barriers such as rail lines and rivers or issues associated with the venue or program itself: such as hours of operation, the programs on offer, the characteristics of staff or other factors. These people have a "latent" or hidden and unmet need
- "Administrative" catchments: in keeping with the Macquarie Dictionary definition, administrative catchments are those "...from which persons may come to a central institution, as a school or hospital", with the catchment being delimited by some form of administrative or regulatory boundary. In a recreation context, such a catchment could be a local government or State boundary that delimits where users or members are allowed to come from or it could be a franchise boundary for a commercial service provider
- "Market" catchments: such catchments are generally defined by commercial operators. These are somewhat nebulous, being the area a venue or program provider aims or desires to reach
- "Unserved" catchments: unserved catchments are the areas which fall *outside* any other catchment. No one from such catchments does, or wants to use the venues provided, either due to different personal preferences and interests, relevance, cost, distance or alternate opportunities. Importantly, identifying "unserved" catchments alongside expressed and latent catchments can be a powerful tool in identifying possible locales for new venues *which offer new and alternate experiences*.

All five catchment types warrant research from a recreation planning, management, programming and performance evaluation perspective. Expressed catchments define where success is being achieved; latent and unserved catchments where delivery is failing; administrative catchments where responsibility for delivery lies, and market catchments where aspirational markets *may* exist. Expressed, latent and un-served catchments also allow an assessment of the effectiveness of administrative catchments and the success or failure of defined market catchments. From an operational perspective, an effective venue manager should seek to identify and convert areas which fall into latent and unserved catchments into expressed catchments, whether by changes to marketing programming, pricing or some other operational factor or perhaps, by establishing a new venue in the unserved and latent area or areas. From a performance evaluation perspective, understanding the reach, shape and nature of the community living in an expressed catchment vs a latent catchment and an un-served catchment will assist substantially in understanding where a venue has succeeded and failed and in guiding the changes that might be made to extend the reach to new markets and sub-groups of clients.

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<sup>29</sup> Macquarie Library Pty Ltd., 1981: Macquarie Dictionary

Catchment analysis can focus on the differing catchments serviced by one venue (such as the learn to swim, fitness only, seniors or lap swimming catchments of an aquatic leisure centre) or by the multiple catchments served by a group of different playgrounds, community halls, skate parks, neighbourhood houses or other recreation venues. With playgrounds, expressed catchments derived from simple user surveys spread over several weeks are far more useful from a planning perspective than the largely useless 400 metre radius circles that are so often used.

### Factors Affecting Catchments

A wide array of factors influence the size and shape of venue catchments. These are not analysed in detail in this paper but in general, the most important factors are:

- The demographic characteristics of a community such as age, gender, socio-economic status, cultural background, family make-up and education in the context of what is on offer. The impact of demographic characteristics can be tested for by collecting this data and either plotting catchments for each sub-category or by for example, cross-referencing travel distances, use frequency, programs used etc by the demographic characteristics
- Barriers to access including rivers, highways, railways and topography, which can be tested via numbers coming from opposite sides of a barrier
- The attributes of a venue including the mix and quality of its facilities, programs and services, its staffing, fees, size and hierarchical position, which can be tested by comparing catchments from venues with different characteristics
- Competing opportunities, which can truncate or distort the shape of a catchment
- Use trends and user preferences, which, depending on what is on offer, can mean some catchments are larger or smaller than others or are growing or contracting. The analysis of catchment change over time is an invaluable element of catchment research, and
- Venue and program marketing and promotion. There is evidence to show that good marketing and promotional activities will impact positively on catchments.

With regard to venue size and hierarchy, in the field of retailing, Reilly's Law of retail gravitation postulates that while people will travel short distances to use retail services whenever that is possible, they will, all other things being equal, travel longer distances to larger cities and larger venues<sup>30</sup> The influence of the above factors can and should be evaluated as part of any catchment analysis.

### Tools for Collecting Catchment Data

A number of tools can be used to collect catchment data and these are recorded in the Table below. Data collection for expressed catchments is the most straight forward as attendance records and membership information are generally available, while on-site interviews can readily be applied where other data does not exist. Household surveys can also be used (although they are time-consuming and costly) and if only a small proportion of a community are actual users, many homes will need to be contacted before a statistically valid sample of users is achieved.

Catchment Type	Data Sources
Expressed	Membership records User interviews Household surveys
Latent	Household surveys Web-based surveys
Administrative	Government zones, franchise boundaries, sports association feeder zones
Market	Venue owner, manager
Unserviced	By extrapolation from expressed and latent catchments

Table 1: Catchment types and related data sources

<sup>30</sup> As cited by Bozdo, R., Thanasi, M. and Hysi, V., 2013: Shopping Centres, Retail location, and Trade Area: The Case of Shopping Centers in Albania", Journal of Marketing and Management, 4 (1), 21-30, May

Latent catchment data is less readily available as latent demand reflects non-users. As a consequence, non-users need to be contacted at somewhere other than the venue being researched and asked if they do or do not use it. While this contact may be made via street surveys or using web-based tools, it is only through household surveys that a random sample of the community can be guaranteed. Depending on the sampling method used, household surveys also make plotting the boundaries of latent (and expressed) catchments more straightforward and more accurate.

Information on administrative catchments is readily obtained from the relevant authority or organisation while market catchment information can be provided by the individual or organisation marketing a particular venue or program. These two types of catchments are quite different to the first two in that they do not reflect what is actually happening (as with expressed catchments) or what consumers would like to happen (as with latent catchments) but rather, reflect what has been (often legally) promulgated to happen or is hoped will happen or aspired to.

Expressed and latent catchment analyses will often show the assumptions behind administrative and market catchments to be wrong, particularly with regard to commercial suppliers, although where an administrative catchment is legally mandated, users will not be found to originate from beyond it. As indicated in the above Table, information on unserved catchments is generally gained as a by-product of the analysis of the other four catchment types. Mapping expressed and latent catchments will reveal areas from which no users originate or want to originate and/or which do not fall into an administrative or market catchment. A simple example could be a suburb whose socio-economic attributes are such that fitness franchisees avoid it and using such a venue is not one of the aspirations of the community.

Because data on expressed catchment users is the most readily available (often through existing membership or similar records), or is the easiest to collect (via on-site user surveys), it is the form of data most commonly used in catchment analyses. Yet, expressed catchment data suffers from the fact that it is only about users who are, to a lesser or greater degree already having their needs met, and who for most recreation activities, are a minority group within the community. Latent catchment non-user data is often more valuable than expressed catchment data (with anecdotal evidence suggesting that it is non-users who would benefit most from accessing recreation opportunities), but it is far more difficult and costly to collect yet. Fortunately, some information on non-users can be identified by extrapolation from user data but the direct collection of data from non-users is far more valuable.

### **The Data Collected**

The key data required for catchment analyses is information on where venue and program users and non-users live (or in some circumstances, begin a trip to the venue under study eg: from work or school).

This information can be very usefully augmented by a range of other data including demographic characteristics, the frequency with which programs and services are used, use of competing opportunities and information on any barriers to use, including for example, information on physical barriers and also on the quality, cost, diversity and staffing of the venues under study and the programs offered. Information such as that listed here allows a far more comprehensive analysis of the catchments served and not served as “sub-catchments” based on a range of parameters can be defined and evaluated.

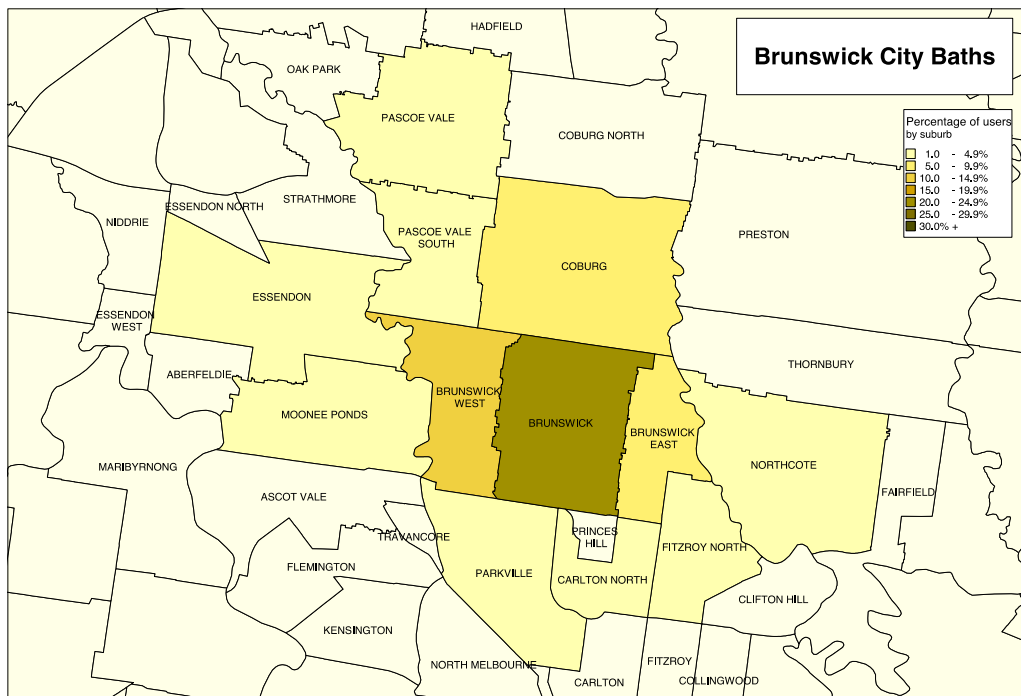
### **Mapping User Origin Data**

Catchment information can be mapped in various ways including as individual points, by user numbers residing in specific map grids, or by shading user numbers from their suburbs/localities of origin. Once mapped, the catchment boundaries can be drawn in, again using several techniques.

An easy way to map expressed catchments (and to extrapolate latent catchments) for venues which draw users from a comparatively wide area is to shade the user suburbs or locality origins using colour densities which represent the particular percentage ranges of members or users coming from each area. The higher the percentage of users, the darker the shading used.

An example of a mapped expressed catchment drawn using membership data for Brunswick City Baths in Moreland Council in Melbourne in 2009 is shown on the following page. This indicates that the suburb of Brunswick supplied 20 – 24.9 percent of all members, Brunswick West 15 – 19.9 percent, and Coburg and Brunswick East 5 – 9.9 percent each. Another 8 suburbs supplied 1 to 4.9 percent of members while all others were less than 1 percent. Overall, the map suggests a high concentration of members with well over half originating from only 4 suburbs. If it was the intent of Moreland Council that Brunswick City Baths only serve a small, local market, then the venue could well be deemed to be successful in its market reach. However, if the Council held the view that the majority of the suburbs

shown on the map should be equally served by the Baths, then the venue would be deemed to have failed in meeting that objective as even the second and third highest membership suburbs supplied 30 to 50 percent less members than Brunswick with the highest rate. Research could then be initiated to seek to determine the causes for the failure to reach a wider catchment and into future facility provision, management and programming strategies might be pursued to redress the imbalances identified.



### Planning exercise: Mapping and Evaluating Venue Catchments

The table following records the 15 suburbs that generated more than 1 percent of the memberships of Broadmeadows Leisure Centre in Hume City Council in suburban Melbourne in 2008. The table also records the resident population at the then most recent Census (2006), who lived in the suburbs and the number of members from each suburb. The total centre membership in 2008 was 2,465 people.

1. What type(s) of catchment(s) does the data refer to? Expressed, latent, deferred, substitute?
2. Calculate the percentage of the members originating from each suburb and insert the figure in column 5 of the table. Compare the data for the suburbs. What reasons can you suggest to explain any differences between them?
3. Using the following categories, rank each suburb in terms of its importance in providing members. Record the allocated category in column 6 of the table
 

Category 1: 1.0 – 4.9%	Category 2: 5.0 – 9.9%	Category 3: 10.0 – 14.9%
Category 4: 15.0 – 19.9%	Category 5: 20.0 – 24.9%	Category 6: 25.0 – 29.9%
Category 7: 30.0+ %		
4. Using a shading from very light for the lowest category to dark for the highest category OR colours as in the accompanying map, shade each suburb on the map on page 165 according to its membership percentage category
5. Describe and suggest possible reasons for the catchment pattern you have mapped. How does it differ from that shown for Brunswick City Baths above?
6. Use columns 2 and 4 of the table to calculate the number of members *per 1,000 residents* in each catchment suburb and record your answers in column 7. Calculate sub- averages and averages as well

7. With reference to column 7, what are the highest and lowest membership rates? How do these compare with the average rates? What might the reasons be for the differences you have identified in column 7? How might a recreation planner or manager respond to the data.

Suburb	Resident Population 2006	% of Total Catchment Population	No. of Members / suburb	Percent of Total Members / suburb	Membership Category (1-7)	Members per 1,000 residents
Attwood	2,915	2.3	74			
Broadmeadows	9,983	7.7	363			
Campbellfield	5,400	4.2	51			
Coolaroo	3,094	2.4	88			
Dallas	5,847	4.5	90			
Gladstone Park	8,669	6.7	160			
Greenvale	10,401	8.0	185			
Jacana	1,963	1.5	51			
Meadow Heights	14,560	11.3	256			
Tullamarine	6,540	5.0	101			
Westmeadows	5,858	4.5	153			
Sub-total/ av.	75,230	58.1	142.9			
Glenroy	18,892	14.6	314			
Roxburgh Park	16,907	13.1	164			
Pascoe Vale	13,557	10.5	56			
Oak Park	4,610	3.6	58			
Sub-total/ av.	204,426	158	148.0			
Overall Totals/ Av	408,852	100.0	144.3			

Table: The 2006 population of suburbs with more than one percent of Broadmeadows Leisure Centre members; member numbers and rates

**Sources:** Australian Bureau of Statistics. Community Profile Series. Catalogue No. 2001.0 and Hume City Council (Membership data, Broadmeadows Leisure Centre) Note: The last four suburbs are not in the Broadmeadows Planning Area and Glenroy, Pascoe Vale, and Oak Park are within the City of Moreland

8. If you were asked to use the data to help decide the location of a new leisure centre, where might you locate it and why? How might the information be used for the marketing and management of recreation facilities?
9. Collect membership-by-suburb/district data from a leisure venue in your work or home locality eg: outdoor summer pool, indoor aquatic fitness centre (or one section of it eg: swim school, fitness program), library, tennis, football, or netball club. [If members come from a large number of suburbs/districts
10. Use the ABS website to collect demographic data for the suburbs/districts
11. Prepare a table similar to the Broadmeadows Leisure Centre Table to record your data
12. Prepare a map of the suburbs/districts. These are often now available from a Council's GIS system but can also be traced off street directories. In rural areas there may be a need to collect/confirm district boundaries from Council planners or the local post office, and
13. Prepare a map such as that shown on the previous page for Brunswick City Baths. Describe, comment on and suggest explanations for the map that you create. Discuss whether you feel there might be differences between a map based on member data as opposed to casual user data.



## Appendix 5.

### Performance Measures, Ballarat Aquatic Centre

As part of the development of the Ballarat Aquatic Centre in the early 1990s, the local Council required the contracted management agency, the YMCA, to prepare a set of operational performance measures as a means of providing Council with information as to how the venue was performing. The paper prepared on these measures by the Victorian YMCA and Hepper, Marriott and Associates, *Performance Measures for Aquatic Leisure Centres* (1994) is presented in an updated and revised form below.

#### PREFACE

Evaluating the extent to which leisure facilities achieve the goals and objectives established for them by their owners and managers is critical to their continuing success, to their relevance to the community they were established to serve and to their change and evolution in keeping with community needs.

The performance measures detailed in this paper have been designed to provide a basis for evaluating key service goals and outputs at aquatic and leisure centres which are managed by the YMCA.

The measures are:

1. Financial performance
2. Participation
3. Safety
4. Diversity of opportunity
5. Access
6. Asset management and maintenance
7. User satisfaction, and
8. Positive user and community outcomes.

Each of these measures has one or more indicators which together will provide a comprehensive overview of the extent to which each aquatic and leisure centre achieves its goals and objectives.

Several points warrant stressing in relation to the evaluation measures and indicators which have been developed.

- a. Only measures which have a clear *outputs* and *outcomes* focus have been included. Measures relating to *inputs* will be covered by internal, operational performance procedures and measures. These include, for instance, staffing numbers, staff qualifications, capital expenditures, provision for refurbishment, advertising programs and down times. They have not been included as they reflect operational *inputs* used to achieved the *desired outputs* and *outcomes* rather than being outputs within themselves. Wider and more detailed internal and external data collection and analysis processes can be expected to augment that which is collected to meet the needs of the measures contained in this document.
- b. A major emphasis in the development of the measures has been to achieve:
  - a. Ease of application, often through the use of existing data
  - b. A breadth of measures
  - c. A mix of quantitative and qualitative measures
  - d. Measures which can be readily understood and responded to by a range of individuals and groups in the community, and
  - e. Measures which are directly useful for achieving a higher standard of client services.
- c. The prime focus is on developing measures which will be used as an information source about and a management tool for a centre, rather than for comparative purposes. However, performance comparison between centres is recorded as one of the uses of the indicators. This should only occur where there is a clear understanding of the similarities and differences between centres and where there is a time series of data to allow trends and patterns of performance to be understood and explained in terms of

management practice, catchments, programs offered, client characteristics and so forth. Until this analysis is complete it is not possible to identify what is and is not best practice in the leisure centre industry nor to establish industry benchmarks.

- d. No weighting or priority has been given to any of the measures as all are considered important.
- e. Scope exists for broadening the performance analysis when and where resources permit.

The following pages present details on each of the measures listed on the previous page. For each, the following is provided:

- a. The measure and the indicators to be used with it
- b. A definition of the indicator
- c. A statement of how the indicator will be measured
- d. The reporting frequency
- The reporting format
- How the information will be used, and
- Further data to be collected as resources and circumstances permit to enhance the quality and usefulness of the measure.

A preliminary set of reporting charts covering each indicator is provided at the end of the measures. Individual centres may also wish to present the specific data collected in various graphical forms.

## PERFORMANCE MEASURE 1: FINANCE. INDICATOR 1: Cost Recovery

1. *Definition:* "The accrued financial position after income and operating expenses (excluding capital works and equipment purchases) have been accounted for"
2. *Method of Measurement:* a. Accounts system
3. *Reporting frequency:* Monthly, year to date, annually, as specified below
4. *Reporting format:*
- Monthly cash position or accrued financial position on a monthly or quarterly basis depending on the capacity of centre accounting systems
  - Variance from budget for each month of the business year
  - Accrued variation from budget, year to date
  - Annual surplus as a percentage of annual turnover
5. *How the measure will be used:*
- To review and evaluate centre goals and objectives
  - To measure financial performance
  - To assist with the evaluation of the impact of factors such as management, programming, marketing, staffing, client relations, weather/environmental conditions and competition on financial performance
  - As an input to program and operational changes
  - To compare performance with other centres
6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source
• Accrued monthly and year to date financial position <i>for each program</i>	Accounts system
• Accrued monthly and year to date financial position <i>for each facility component</i>	Accounts system

## PERFORMANCE MEASURE 1: FINANCE. INDICATOR 2: Distribution of Expenditure

---

1. *Definition:* "The allocation of expenditure across each of
  - a. Administration
  - b. Program costs
  - c. Total staff costs as a percentage of turnover
  - e. Cost of sales
  - f. Operating expenses
  - g. Staffing and related costs"
2. *Method of Measurement:* a. Accounts system
3. *Reporting frequency:* Annually as part of budget process and then monitoring throughout the year with monthly reporting of variations from the budget
4. *Reporting format:* Expenditure on each area listed under 1. for each month, the year to date and annually
5. *How the measure will be used:*
  - a. To review and evaluate centre goals and objectives
  - b. To assess expenditure levels and trends
  - c. To assist with the evaluation of the impact of factors such as management, programming, marketing, staffing mix and competition on financial performance
  - d. As an input to program and operational changes
  - e. To compare performance with other centres
6. *Optional data to be collected on this indicator as resources permit are:* Nil

## PERFORMANCE MEASURE 1: FINANCE. INDICATOR 3: Gross Unit Cost of Service Provision

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1. *Definition:* "The average cost of each visit"
2. *Method of Measurement:* Accounts system
3. *Reporting frequency:* Monthly and annually
4. *Reporting format:*
- a. Cost *per visit* for the overall centre
  - b. Cost *per hour* of overall centre operations
5. *How the measure will be used:*
- a. To review and evaluate centre goals and objectives
  - b. To assess financial performance and trends
  - c. To assist with the evaluation of the impact of factors such as programming, marketing, staffing mix and competition on financial performance
  - d. As an input to program and operational changes
  - e. To compare performance with other centres
6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source
• Statement of cost per visit for each program	Accounts system
• Statement of cost per hour for each facility component	Accounts system

## PERFORMANCE MEASURE 2: PARTICIPATION. INDICATOR 1: Total Number of Visits

1. *Definition:* "The total number of entries made to the centre for any purpose with the exception of those made by staff, Councillors, Council staff or other people *visiting in the course of their work*"
- Example:* "A total of 500,000 entries to the centre was counted in 1994"
2. *Method of Measurement:*
- Manual counting by front desk staff
  - Electronic counters where these are available
  - Supplementary staff estimates where necessary. The type and extent of visits which are estimated will be recorded
3. *Reporting frequency:* Daily, monthly, annually as indicated below
4. *Reporting format:*
- Total visits for each day, month and year
  - Average daily number of visits for each month
  - Total visits for year to date
5. *How the measure will be used:*
- To review and evaluate centre goals and objectives
  - To assess use levels and trends
  - To assist with the evaluation of the impact of factors such as programming, marketing, staffing, client relations, weather/environmental conditions and competition on performance
  - As an input to program and operational changes
  - To compare performance with other centres
  - As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source	Data Collected	Source
<i>Visits frequency data:</i>		• Visitors by age group	Manual/counters; interviews
• Number of visits per day	Manual counts/counters		
• Number of visits by day of week	Manual/ counts/counters	• Number of visitors who are participating in programs, who are spectating and who are socialising	Analysis of membership use data; observation; interview
• Number of visits by each hour	Manual counts/counters		
<i>Visits type data:</i>			
• Visits by sex of visitor	Manual counts/counters; membership information		

## PERFORMANCE MEASURE 2: PARTICIPATION. INDICATOR 2: Program Participation

1. *Definition:* "The total number of participations in programs by people visiting the centre" *Example:* "A total of 700,000 uses was made of the programs run by the centre in 1994"
2. *Method of Measurement:*
  - a. Centre records of the number of different programs offered in each month
  - b. Registration data on the number of visitors who use programs offered by the centre
  - c. Programmer counts of participants
  - d. Membership records data
  - e. Annual visitor surveys to collect data on visit frequency (and other data), resources permitting
3. *Reporting frequency:* Monthly, quarterly and annually as indicated in 4. below
4. *Reporting format:*
  - a. Total number of monthly program users by program type
  - b. Average monthly number of program users per class by program type expressed as:
    - i. an absolute value (eg: 6.6 per class)
    - ii. a ratio of actual to potential (eg: 7 out of 10)
    - iii. a percentage of capacity (eg: 70%)
    - iv. retention of members (quarterly percentage retention)
5. *How the measure will be used:*
  - a. To review and evaluate centre goals and objectives
  - b. To assess use levels and trends in specific program areas
  - c. To assist with the evaluation of the impact of factors such as programming, marketing, staffing, client relations, weather/environmental conditions and competition on program use
  - d. As an input to program and operational changes
  - e. To assess the efficiency of the number and timetabling of programs
  - f. To compare performance with other centres
  - g. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source
<i>Visits frequency data:</i>	
• Number of program uses per day	Extension of records as in 2.
• Number of program uses by day of wk	Extension of records as in 2.
<i>Visits type data:</i>	
• Program use by sex of user	Extension of records as in 2.
• Program use by age group	Extension of records as in 2.

**PERFORMANCE MEASURE 2: PARTICIPATION. OPTIONAL INDICATOR 3: The Number of Individual Participants and Use Frequency**

- 1. *Definition:* "The number of different visitors who use the centre (excluding staff, Councillors, Council staff or other people *visiting in the course of their work*) and their frequency of use"
- 2. *Method of Measurement:*
  - a. Centre records of the number of visits made by members
  - b. Annual visitor surveys to collect data on visit frequency (and other data), resources permitting
  - c. Annual community surveys to collect data on visit frequency (and other data), resources permitting
- 3. *Reporting frequency:* Six monthly or annually, resources permitting
- 4. *Reporting format:*
  - a. Total number of different members and their frequency of visits
  - b. Estimated total number of different centre visitors
- 5. *How the measure will be used:*
  - a. To review and evaluate centre goals and objectives
  - b. To assess use frequency and trends in frequency rates
  - c. To assist with the evaluation of the impact of factors such as programming, marketing, staffing, client relations, and competition on market penetration
  - d. As an input to program, marketing and operational changes
  - e. To compare performance with other centres
  - f. As an input to funding applications
- 6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source
<i>Visits frequency data:</i>	
• Number of repeat visits per month	Data sources recorded in 2.
• Number of repeat visits by day of week	Data sources recorded in 2.
<i>Visits type data:</i>	
• Repeat visits by sex of user	Data sources recorded in 2.
• Repeat visits by age group	Extension of records as in 2.
• Number of repeat visits by program area	Data sources recorded in 2.

## PERFORMANCE MEASURE 3: SAFETY. INDICATOR 1: Ensuring a Safe Centre

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1. *Definition:* "Ensuring that the centre is safe for all clients, staff and other people visiting it"
2. *Method of Measurement:*
  - a. Assess extent of compliance with all relevant industry standards covering:
    - Water
    - Handling of chemicals
    - Fire management
    - General safety procedures
    - Evacuation procedures
    - Safety equipment
    - Play equipment and settings
    - Client health and injury treatment
    - Staff qualifications
  - b. Preparation/adoption of centre supervision and safety inspection manual
  - c. Evidence of external safety audit
3. *Reporting frequency:* For a. above, monthly; for b., c. and d., annually
4. *Reporting format:*
  - a. Statement of safety standards and evidence of compliance
  - b. Statement of inspection and supervision procedures and evidence of compliance
  - c. External auditors report
5. *How the measure will be used:*
  - a. Ensuring maintenance of a safe centre
  - b. Ensuring the application of appropriate inspection and supervision procedures
  - c. As a basis for improved monitoring of potentially unsafe settings and facilities
  - d. As an input to centre maintenance and replacement programs
  - e. As a marketing input
  - f. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit are:* Nil

## PERFORMANCE MEASURE 3: SAFETY. INDICATOR 2: Injury Treatment

---

1. *Definition:* "Dealing effectively and efficiently with minor and major injuries to clients, staff and others injured at the centre"
2. *Method of Measurement:*
  - a. Evidence of adoption of an injuries treatment procedure
  - b. Record of injuries treated at the centre
  - c. Record of injuries requiring treatment elsewhere
  - d. Evidence/record of follow-up action
3. *Reporting frequency:* Internally, daily; externally, monthly
4. *Reporting format:*
  - a. Record of individual injuries treated by staff at the centre, including information on:
    - Nature of injury
    - Apparent cause
    - Time and location of injury
    - Follow-up action
  - b. Record of individual injuries requiring medical or hospital treatment, including information on:
    - Nature of injury
    - Apparent cause
    - Time and location of injury
    - Follow-up action
    - Name and address of person injured (Recorded but not reported publicly)
    - Age and sex of person injured
5. *How the measure will be used:*
  - a. Ensuring maintenance of a safe centre
  - b. Ensuring the application of appropriate inspection and supervision procedures
  - c. As a basis for improved monitoring of potentially unsafe settings and facilities
  - d. As an input to centre maintenance and replacement programs
  - e. As a marketing input
  - f. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit are:* Nil

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**PERFORMANCE MEASURE 4: DIVERSITY. INDICATOR 1: Diversity of Programs Provided for Client use**

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1. *Definition:* "The number of *different* programs and programs of *differing skill standards* provided for visitors"
2. *Method of Measurement:*
- a. The number and differing standards of *programs* provided
  - b. The number of different programs *added or deleted* in the past three months and the reasons for the changes
  - c. The extent to which a. and b. permit or reflect compliance with centre goals and objectives or specified target groups
3. *Reporting frequency:* Quarterly
4. *Reporting format:* Statement of 2a. to 2c.
5. *How the measure will be used:*
- a. To review and evaluate centre goals and objectives
  - b. To monitor the extent of compliance with existing centre goals and objectives
  - c. As an input to program, staff, operational and facility changes and additions
  - d. To improve marketing and program targeting
  - e. To compare performance with other centres
6. *Optional data to be collected on this indicator as resources permit is:*

Data Collected	Source
Community responses	Surveys of a random sample of the catchment community

**PERFORMANCE MEASURE 5: ACCESS. INDICATOR 1: Extent of Access to the Centre**

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1. *Definition:* "The extent to which ethnic, disabled, single parent and other specified disadvantaged individuals and groups in the community use the centre, as measured by the ration of centre users in specified disadvantaged groups and their proportion of the general community"
2. *Method of Measurement:*
- a. Record of total concessional use and as a percentage of total participation
  - b. Record of the number of participants in programs offered to specified concessional groups and individuals as a percentage of all users and of the catchment population as a whole
3. *Reporting frequency:* Annually
4. *Reporting format:*
- a. Statement of the extent of concessional use in absolute terms and as a percentage of total participation
  - b. Statement of the extent of concessional use of specific programs
5. *How the measure will be used:*
- a. To review and evaluate centre goals and objectives
  - b. To assist with the evaluation of the impact of factors such as management, programming, marketing, staffing and client relations on the clientele served
  - c. As an input to program and operational changes
  - d. To compare performance with other centres
  - e. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit is:*

Data Collected	Source
The socio-demographic characteristics of clients and of the catchment which the centre wishes to and does serve	Visitor survey Community survey Bureau of Statistics census data

## PERFORMANCE MEASURE 5: ACCESS. INDICATOR 2: The Catchment Served

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1. *Definition:* "The area and shape of the catchment served and the size of the population in the catchment"
2. *Method of Measurement:*
- Use of membership records to collate data on the spatial distribution of home addresses
  - Visitor surveys to collect data on the spatial distribution of trip origins
3. *Reporting frequency:* Annually, resources permitting
4. *Reporting format:*
- Map and description of the area, shape and coverage of the catchment which includes 50, 75 and 90 percent of all *members*
  - Map and description of the area, shape and coverage of the catchment which includes 50, 75 and 90 percent of all *visitors*
  - The ratio of use totals to the catchment population
  - The ratio of user numbers to the catchment population
5. *How the measure will be used:*
- To review and evaluate centre goals and objectives
  - To assist with the evaluation of the impact of management, programming, marketing, staffing and advertising on the clientele served
  - As an input to program and operational changes
  - To compare performance with other centres
  - As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit is:*

Data Collected	Source
The socio-demographic characteristics of clients and of the catchment which the centre wishes to serve and does serve compared with those of visitors	Visitor survey Community survey Bureau of Statistics census data

**PERFORMANCE MEASURE 6: ASSET MANAGEMENT AND MAINTENANCE. INDICATOR 1: Asset Presentation**

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1. *Definition:* "The quality of appearance and presentation of the centre"
2. *Method of Measurement:*
- a. Council officer and/or Councillor inspection and rating of the centre
  - b. Visitor survey to assess their rating of the centre
3. *Reporting frequency:* Quarterly and annually
4. *Reporting format:*
- a. Statement of the score attributed to the centre by Council officers and/or Councillors to:
    - Cleanliness
    - Atmosphere/ambience
    - Colour
    - Staff responsiveness/ability to deal with requests
    - Service quality
    - Service promptness
    - Quality of water, floor surfaces etc
    - Information about facilities and use
    - Physical state of buildings
    - Other (as required/specified)
5. *How the measure will be used:*
- a. To review and evaluate centre goals and objectives
  - b. To assist with the evaluation of the impact of management processes, maintenance programs and staffing on the quality of the centre offered to visitors
  - c. As an input to program and operational changes
  - d. To compare performance with other centres
  - e. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit is:*

Data Collected	Source
Community ratings of the centre	Random community survey

## PERFORMANCE MEASURE 6: ASSET MANAGEMENT AND MAINTENANCE. INDICATOR 2: Facility Down Times

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1. *Definition:* "The number of hours and/or days during which each facility component is unavailable for use due to unforeseen breakdowns"
2. *Method of Measurement:* a. Record of hours and days of unavailability of each facility component and cause
3. *Reporting frequency:* Monthly and annually
4. *Reporting format:*
  - a. Record of the hours and days of unavailability of each facility component and the causes
  - b. Annual summary of a.
5. *How the measure will be used:*
  - a. To review and evaluate centre goals and objectives
  - b. To assist with the evaluation of maintenance programs, schedules and staff responsibilities
  - c. As an input to maintenance program and operational changes
  - d. To compare performance with other centres
  - e. As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit is:* Nil

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## PERFORMANCE MEASURE 7: USER SATISFACTION. INDICATOR 1: User satisfaction and dissatisfaction

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1. *Definition:* "How users feel about the activities they participate in at the centre, about the availability of desired activities and about general and specific features of the centre as a whole"
2. *Method of Measurement:*
- Comments from users provided via a prominently-positioned comment book
  - Program evaluation sheet completion by visitors
  - Staff to make personal contact with a specified number of visitors each day/week for the purpose of collecting their views on their satisfaction and dissatisfaction with the centre
  - User surveys of satisfaction and dissatisfaction
3. *Reporting frequency:* Items a.-c. above, monthly; item d., 6 monthly or annually
4. *Reporting format:*
- Counts of positive and negative comments by activity by month, accumulated to annual count
  - Ratio of positive comments to negative comments by activity
  - Staff rating of satisfaction and dissatisfaction from discussions with visitors collated to monthly/twice yearly totals
  - Record of centre management response to visitor comments
5. *How the measure will be used:*
- To review and evaluate centre goals and objectives
  - To monitor visitor satisfaction and dissatisfaction
  - To evaluate the impact of service quality, staffing, and client relations on customer satisfaction
  - As an input to program, staff, operational and facility changes and additions
  - To improve marketing and program targeting
  - To compare performance with other centres
  - As an input to funding applications
6. *Optional data to be collected on this indicator as resources permit are:*

Data Collected	Source
User responses	Visitors assessment of long term beneficial outcomes eg: health, community involvement etc
Community responses	Surveys of a random sample of users covering an array of issues including satisfaction, dissatisfaction and long term beneficial outcomes eg: health, community involvement etc

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**PERFORMANCE MEASURE 8: USER AND COMMUNITY OUTCOMES. INDICATOR 1: Long term social, health and other positive outcomes**

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1. *Definition:* "Long term social, health and other positive outcomes amongst residents in the venue catchment"
2. *Method of Measurement:*
- a. User surveys regarding health and wellbeing outcomes
  - b. Community surveys regarding health and wellbeing outcomes in the wider community
  - c. Liaison with health professionals, community services professionals, police, teachers etc regarding enhanced community wellbeing, crime reductions etc
  - d. Community surveys regarding attitudes to community, quality of life and community wellbeing and the contribution of the venue and its programs to this
3. *Reporting frequency:* Annually
4. *Reporting format:*
- a. Counts of improved health and wellbeing amongst users and the wider community by month, accumulated to annual count
  - b. Measures of crime and anti-social behaviour
  - c. Measures of the community's sense of wellbeing and quality of life
  - d. Professional's responses re quality of life and community wellbeing
5. *How the measure will be used:*
- a. To review and evaluate centre goals and objectives
  - b. As an input to program, staff, operational and facility changes and additions
  - c. To improve marketing and program targeting
  - d. As an input to funding applications

## REPORTING

### 1. FINANCE.

#### INDICATOR 1: Cost Recovery

Indicators	January \$	February \$	March \$	April \$	May \$	June \$	July \$	August \$	Sept. \$	October \$	November \$	December \$	Year \$
a. Monthly cash, or accrued financial position on a monthly or quarterly basis													
b. Variance from budget for each month of the business year													
d. Accrued variation from budget, year to date													
e. Annual surplus as a percentage of turnover													

#### INDICATOR 2: Distribution Of Expenditure

Indicators	January \$	February \$	March \$	April \$	May \$	June \$	July \$	August \$	Sept. \$	October \$	November \$	December \$	Year \$
a. Expenditure variation from budget for:													
i. Administration													
ii. Program costs													
iii. Total staff costs as a percentage of turnover													
iv. Cost of sales													
v. Operating expenses													
vi. Staffing and related costs													
b. Expenditure allocation for each month of the business year on:													
i. Administration													
ii. Program costs													
iii. Total staff costs as a percentage of turnover													
iv. Cost of sales													
v. Operating expenses													
vi. Staffing and related costs													
c. Statement of expenditure allocation for year to date on as per above categories:													
i. Administration													
vi. etc													

## 1. FINANCE.

### INDICATOR 3: Gross Unit Cost of Service Provision

Indicators	January \$	February \$	March \$	April \$	May \$	June \$	July \$	August \$	Sept. \$	October \$	November \$	December \$	Year \$
a. Cost <i>per visit</i> overall													
b. Cost <i>per hour</i> of overall centre operations													

## 2. PARTICIPATION.

### INDICATOR 1: Total Number Of Visits

Indicators	January	February	March	April	May	June	July	August	Sept.	October	November	December	Year
a. Daily visits													
b. Monthly visit totals													
c. Average daily visits per month													
c. Visit totals, year to date													
d. Annual total visits													

### INDICATOR 2: Program Participation

Indicators	January	February	March	April	May	June	July	August	Sept.	October	November	December	Year
a. Total number of monthly program users by program type: Program: a.													
Program: b.													
Program: c.													
Program: d.													
b. Average number of program users per class by program type as:													
i. an absolute value (eg: 6.6 per class)													
ii. a ratio of actual to potential (eg: 7 out of 10)													
iii. a percentage of capacity (eg: 70%)													
iv. Membership retention, quarterly %													

## 2. PARTICIPATION.

### OPTIONAL INDICATOR 3: The Number of Participants and Use Frequency

Indicator	Six monthly result	Annual result
a. Total number of different members		
Members frequency of visits		
b. Estimated total number of different centre visitors		

## 3. SAFETY

### INDICATOR 1: Ensuring a Safe Centre

Indicators	January statmt /compliance	February statmt /compliance	March statmt /compliance	April statmt /compliance	May statmt /compliance	June statmt /compliance	July statmt /compliance	August statmt /compliance	Sept. statmt /compliance	October statmt /compliance	November statmt /compliance	December statmt /compliance	Year
a. Statement of safety standards and evidence of compliance													
b. Statement of inspection and supervision procedures and evidence of compliance													
c. External auditors report													

### INDICATOR 2: Injury Treatment

Indicators (1)	January no.	February no.	March no.	April no.	May no.	June no.	July no.	August no.	Sept. no.	October no.	November no.	December no.	Year
a. Number of injuries treated by staff at the centre													
b. Number of injuries requiring medical or hospital treatment													

(1) Plus details on the nature, cause, time and location of injury and follow up action

## Injury Report Form:

Name:	Address: Street: _____	Town: _____
Age: _____ Sex: _____	Phone: _____	
Nature of injury:	Apparent cause:	Action taken:
	Time and location of injury:	Medical referral (as appropriate:)
Staff member:	Date: _____	

## 4. DIVERSITY

### INDICATOR 1: Diversity of programs provided for client use

Indicator (1)	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Annual result
a. The number and differing standards of <i>facilities</i> provided					
b. The number and differing standards of <i>programs</i> provided					
c. The number of different programs <i>added or deleted</i> in the past three months					

These indicators will require a written report in addition to the data record.

## 5. ACCESS

### INDICATOR 1: Extent of Access to the Centre

Indicators (1,2)	January (percent)	February (percent)	March (percent)	April (percent)	May (percent)	June (percent)	July (percent)	August (percent)	Sept. (percent)	October (percent)	November (percent)	December (percent)	Year
The number of all users who are concessional users													
The percentage of all users who are concessional users													

(1) A statement of the disadvantaged groups targeted by the centre will be required in association with this measure

(2) Details will be collected on the extent of concessional use of specific centre programs

### INDICATOR 2: The Catchment Served

- Map and/or table and description of the area, shape and coverage of the catchment which includes 50, 75 and 90 percent of all members
- Map and description of the area, shape and coverage of the catchment which includes 50, 75 and 90 percent of all visitors
- Map and/or table recording the percent of users from each catchment suburb and the visits/user rate per 1,000 residents

An array of mapping techniques is available to undertake this analysis.

Indicator	Six monthly result	Annual result
c. The ratio of use totals to the catchment population		
d. The ratio of user numbers to the catchment population		

## 6. ASSET MANAGEMENT AND MAINTENANCE

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### INDICATOR 1: Asset Presentation

Indicator	Six monthly result Score range	Six monthly result Median	Annual result Score range	Annual result Median
The score attributed to the centre by Council officers and/or Councillors for:				
Tidiness				
Cleanliness				
Atmosphere/ambience				
Colour				
Staff responsiveness/ ability to deal with requests				
Service quality				
Quality of water, floor surfaces				
Information about facilities and use				
Physical state of buildings				
Other				

### INDICATOR 2.1: Facility Down Times

Monthly statement: Facility which is "down"	Day and Date	Duration and times of day over which facilities are down	Cause	Actions taken to resolve cause(s)

### INDICATOR 2.2: Facility Down Times

Annual summary: Facilities which were "down"	Total no. of times down	Total time duration over which facilities were down (days and hours)	Summary of causes	Summary of actions taken to resolve causes

## 7: USER SATISFACTION

### INDICATOR 1: Visitor satisfaction and dissatisfaction

Indicators (1)	January no.	February no.	March no.	April no.	May no.	June no.	July no.	August no.	Sept. no.	October no.	November no.	December no.	Year
a. Number of positive comments, negative comments by activity													
b. Ratio of positive comments to negative comments by activity													
c. Staff rating of satisfaction and dissatisfaction from discussions with visitors													

(1) A record should be maintained as to the nature of the comments made and the responses to them

## 8: USER AND COMMUNITY OUTCOMES

### INDICATOR 1: Long term social, health and other positive outcomes

Indicators (1)	Year
a. Percent of users reporting improved health and wellbeing	
b. Percent of community reporting improved health and wellbeing	
c. Professional reporting re improved community health and wellbeing, reduced crime etc	

## Appendix 6. Stages in the Evolution of Aquatic Leisure Venues, Australia

Stage	Stage 1	Stage 2	Stage 3	Stage 3A	Stage 4	Stage 5	Stage 6	Stage 7
<b>Type of Provision</b>	Indoor baths	Outdoor lap and LTS pools, some with diving pools. Lawns, toddler pools, kiosks	Enclosure of former outdoor pools	Retention, diversification and upgrading of outdoor lap pools	New multi-purpose indoor aquatic (lap, LTS, spa) and fitness centres	New specialised targeted and "niche" aquatic leisure venues eg: leisure pools of northern Australia; health /hydro pools, dedicated learn to swim facilities, competition venues nation-wide	Fully commercial "water worlds"	Development of community "hubs" which include aquatics, fitness, other community services, retail, libraries etc
<b>Impetus</b>	Public health. Meeting ablution needs in low income areas	To build on the post Melbourne 1956 Olympic Games fervour Public recreation	Falling pool use due to alternate venues, other activities, end of baby boom	Community action as a result of the threat of total loss of pools	Technical and market failure of many older outdoor pools; changed market needs & financial capacities	Tourism; an ageing community; recognition of aquatic/health links; inability of lap pools to meet changed community needs; parental demands for specialist teaching and coaching; pursuit of international events	Tourism	Recognised use synergies; capital cost savings; improved access; 'non-government' image
<b>Dates</b>	1880s-1930s and again, 2010+	1930s on but particularly, late 1950s to early 1970s	Late 1970s to early 1990s	Late 1980s and continuing	Mid 1980s-	Mid 1990s and continuing	1970s on	Emerging now
<b>Dominant markets served</b>	Poorer residents	Learn to swim, swim clubs, schools, lap swimmers, community	All year use by schools, lap swimmers, community	Schools, lap swimmers, community, people with health needs	The whole able-bodied community	People with significant health needs and disabilities Tourism	Tourists	The whole community
<b>Asset and program provider</b>	Council	Council	Council	Council, some private programmers	Council, management groups, some private programmers	State, Council, State health agency	Entertainment companies	Council, State agencies in association with private investors, management groups, and programmers
<b>Examples</b>	Melb. City Baths, Brunswick Baths, Noble Park Aquatic Centre	Coburg, Prahran, Carlton Baths	Melton, Nunawading, Northcote	Fitzroy, Prahran	Ashburton, Maribyrnong Aquatic	Southbank Brisbane, Cairns, Princes of Wales Hospital Sydney, MSAC, AIS Canberra	Wet n Wild, Gold Coast	Mildura, Craigieburn, Melton

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## Appendix 7.

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