

# Organizational Review



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*MetraPark, a multi-use complex, shall serve entertainment, trade, athletic, educational, and agricultural needs of the region by providing quality facilities, programs, and events with complete and efficient services to the economic benefit of the region.*

- MetraPark Mission Statement

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## Overview

MetraPark engaged Venue Solutions Group, LLC (VSG) to review the complex's operations to assist them in determining where opportunities exist to enhance day-to-day operations, efficiency, employee relations, accountability, and communication. We were tasked with assessing the following:

1. Organizational culture and environment
2. Standards of accountability
3. Skills sets and general experience
4. Available resources (personnel, technological, equipment)
5. Communications within the department
6. Training and development approach

The project is also intended to support the ongoing effort of providing optimal experience to subscribers, guests, facility users and all employees.

To provide a thorough and comprehensive review of MetraPark operations, VSG interviewed twenty-four (24) employees and stakeholders during a two-day visit on January 12-13, 2022, and three follow up virtual interviews (see Appendix A for list of interviewees). The interviews lasted approximately one hour each. The employee interviews included candid discussions about interviewees' personal and professional backgrounds, interests, skills sets, experiences in their current roles and responsibilities within MetraPark. For other stakeholders, we inquired about the relationship with MetraPark and their thoughts on strengths and areas of opportunity of the complex. We also toured MetraPark to gain an understanding of general condition, cleanliness, and organization, and reviewed a number of documents in order to ascertain the current level of written policies, procedures and protocols.

The employees and stakeholders we interviewed were extremely cooperative, forthcoming, and participated without resistance.

### About MetraPark

MetraPark is a multi-venue complex in Billings, MT that covers 189 acres and houses a variety of public assembly facilities, including First Interstate Arena, Montana Pavilion, and Expo Center. The complex also contains a large equestrian barn, stalls, spaces for recreational vehicles, and a pond. MetraPark is the state's largest event center offering a year-round schedule of concerts, conventions, rodeo, hockey, and football in the 10,000-seat arena. Trade shows, agricultural, and equestrian events take place in the Expo Center and the Montana Pavilion. MetraPark is home to MontanaFair held annually the second full week of August.

The arena was completed in 1975 and named the METRA, an acronym that stood for Montana Entertainment Trade and Recreation Arena. It was built at the Midland Empire

Fairgrounds, which later was renamed MetraPark, at which time the arena became MetraPark Arena. Naming rights were sold in 2007 in a 10-year agreement, and today is known as First Interstate Arena. On June 20, 2010, the Father's Day Tornado hit the arena, causing major damage. The arena was then remodeled, resulting in many new amenities such as improved acoustics, more restrooms and concession areas, and easier access from the parking areas.

Currently, MetraPark is considering a master plan for the complex that could add additional venues, including an outdoor amphitheater and small indoor music venue, to the offerings.

## Systems and Processes

### Standard Operating Procedures (SOP's)

Maintaining written documentation for operating policies and procedures is critical on multiple fronts. In general, written documents allow the employees to understand their roles and responsibilities and allow management to guide operations without constant management intervention. There is no misunderstanding or misinterpretation. The policies and procedures documentation can also provide the template for annual staff training.

There should be a single, current, authoritative source of guidance and information that management can use when making decisions or enforcing policy. This will reduce the tendency to act on memory or instinct. With a written policy, managers and supervisors will be able to act decisively, fairly, legally, and consistently. The arena staff will also know that their managers or supervisors are acting in accordance with established policy as well as applicable federal and state regulations.

Well documented policies can have the following effects: serve as a basic communications tool, serve as a training resource, provide evidence of the facility's commitment to employee safety and health, and save time by providing direct answers to employee questions.

Throughout the interview process, a recurring theme was there are few, if any written policies and procedures, including checklists, for MetraPark operations. It was described to us during the interviews that information was "between the ears." As several key long-term employees MetraPark are nearing retirement age there is an inherent risk of losing information on how job functions are performed. Written policies, or standard operating procedures (SOP's), provide the foundation for transferring knowledge as staff transition in and out of an organization, can be utilized as a tool for establishing performance benchmarks and for organizations to more easily correct system "breakdowns."

We recommend starting at the department level down to individual staff positions developing written procedures for each task, no matter how small or trivial. A task SOP should be continually updated with the goal of creating a process where information can be easily transferred between existing employees and reduce the learning curve for new ones.



We have included examples of written SOP's in Appendix B of the report, and below is a list of common SOP's in public assembly venues:

Accident Investigation	Electrical Safety - Arc Flash	Minimum annual employee training
Active Shooter	Elevator Operator	On Sale lottery procedure
Advertising-Soliciting Coworkers	Emergency Evacuation	PPE usage
Alcohol Compliance and Cutoff	Ergonomics	Permit Confined Space
Alcohol Management and Service	Eye Wash usage and maintenance	Power Interruption
Application for Rental	F&B Deliveries	Powered Industrial Truck
Back, Proper lifting	Fall Protection	Promotional giveaways
Backstage employee behavior protocols	Fire Extinguisher inspections	Radio Usage
Bag & Article Search	Fire Extinguisher training	Resolving a guest dispute
Booking policy/priorities	Fire/life Safety	Respirator
Cash handling – food service	Flammable liquid storage	Safe Food Handling
Cash handling – merchandise sales	Gas cylinder storage	Scaffolding
Cash handling- box office	Hazard Communication	Scoreboard lowering & raising
Catwalk Access	Hearing Protection	Security Screening
Chemical usage	Heavy equipment operation	Service Animals
Cleaning (floors, glass, restrooms)	Incident Reporting (event and non-event day)	Slip and Fall Prevention
Concert stage assembly and placement	Infection Control/BB	Snowplow operation
Contraband collection	Knife, Dishwashing	Spill Response
Contractor Safety	Ladder Safety	Ticket Scalping
Crisis Communication	Lock Out Tag Out	Vehicle operation (personal, plows, gators)
Disabled patrons/ADA	Lost & Found	Vendor management
Documentation Team	Machine Guarding	Venue Security - Weather Alerts
Driver Safety	Man-Lift/High Lift	Welding, Cutting, Brazing
	Material Safety Data Sheet books	
	Media Inquiries	

We encourage MetraPark to review their current SOP's (written policies) and compare to the list to determine any missing ones.

## Computerized Maintenance Management System (CMMS)

Public assembly facilities that are well maintained and upgraded when appropriate remain contemporary and competitive with their local and regional rivals. On the other hand, poorly maintained facilities have a negative impact on the operator and owner's ability to attract regional and national events that have large economic impacts.

Well-maintained facilities do not happen by accident and require an actionable plan, resources to implement the plan, and staff with proper skill sets to execute the work, which includes tracking and capturing data, transferring knowledge, and implementing training and professional development.

The plan should have a set of objectives on how the operator wants to execute preventive maintenance for the facilities, and the following items should be part of the overall plan:

1. Develop policies for preventive maintenance (which would start with a list of equipment by facility)
2. Utilization of a computerized maintenance management software (CMMS)
3. Develop a set of checklists for equipment maintenance
4. Establish who does the work
5. Establish process for employee feedback
6. Establish quality assurance process to ensure work is actually being done
7. Establish performance metrics for department employees and contractors

Preventive maintenance (PM) is not an attractive or high-profile function, and decisions to defer preventive maintenance are made every day by well-intentioned people when prioritizing resources. More resources are typically allocated toward revenue generation. Poorly maintained systems and equipment typically results in more rapid, untimely breakdowns, expensive emergency service calls, and higher utility costs. Proper preventive maintenance procedures require investments in staff and materials; however, an effective program will save the operator money over the life of the facility by limiting repairs and replacements, therefore avoiding costly breakdowns and accelerated equipment replacement, and facilitating lower utility costs.

Employees tasked with executing preventive maintenance require training and updating on the systems they are to maintain. Mechanical, electrical, plumbing, roofing, telecommunication, and other facility systems require specific training that is ongoing, and this takes a commitment from the employer and employee in the investment of time and financial resources. Well trained employees and a continued commitment to maintaining certification in their respective disciplines will lay the foundation for adherence to the preventive maintenance program. As technology advances, the commitment to training will ensure that employee skills do not become dated and obsolete.

One of the most critical aspects for effective asset preservation is the utilization of a computerized maintenance management system (CMMS) that allows for the implementation of preventive maintenance along with the necessary tracking and budgeting for preventive maintenance. Daily work orders can be produced through the system, employee hours tracked, and materials required to perform preventive maintenance can be identified and managed. The system can assist the operator administratively as it can also be used for contract and insurance tracking, purchase orders, inventory ordering and scheduling.

Currently, there is no documented process for performing work orders and preventive maintenance at MetraPark. Also, there are no dedicated operations staff for the day-to-day maintenance of the complex. Operations staff is organized primarily to execute the



set up and tear down of events. Preventive maintenance of equipment and systems has never been prioritized on the same level as event set up, which is not consistent with industry “best practices.” MetraPark management indicated a desire to hire an additional operations position dedicated to performing day to day maintenance.

The new leadership of MetraPark has made the integration of a CMMS a priority and is currently investigating options with County support. VSG understands that Yellowstone County municipal government utilizes FMX CMMS that is deployed at other county run facilities. FMX customers are school districts, manufacturers, quick service restaurants, and an NFL team training facility. VSG recommends that MetraPark assess the viability of FMX CMMS for utilization at the complex before exploring other CMMS options. Based on our review of the company’s website it appears the FMX CMMS provides appropriate functionality consistent with other CMMS’s deployed in the public assembly facility industry.

The following CMMS programs are currently in use at other similar public assembly venues:

1. HippoCMMS by IOffice+SpaceIQ - <https://hippocmms.iofficecorp.com>
2. Dude Solutions - <https://www.dudesolutions.com>

Both firms will provide an on-line demonstration of their product and allow you to ask questions about its functionality.

Utilization optimization of the CMMS will require administrative support to ensure equipment data base is kept up to date and that the flow and assignment of work orders is managed efficiently. The personnel assigned to executing the work generated from the CMMS should not be tasked with the administration of the CMMS program.

## Communication and Chain of Command

Throughout the course of our interviews, the topic of communication was mentioned with some frequency. Specifically, event related communication when events are held in the calendar or booked, tentative or confirmed. Several individuals lamented that they did not receive event information in a timely manner or were directed to check the MetraPark website for upcoming events. That is not a reasonable course of action, and the MetraPark calendar should be made available to at least managerial staff, Starplex and vendors. The details aren't necessary, but information related to date, expected attendance, and type of event are vital for preparation. For instance, food service would need to know if there is to be a concert and the type – a county show will have more alcohol sales than an Elton John concert, and likely heavier beer sales than spirits.

We understand MetraPark is considering the implementation of VenueOps (<https://www.eventbooking.com/venueops>), a booking and event management software. This is a well-regarded software, and should MetraPark move forward, we recommend providing appropriate viewing capability by managers, vendors, and subcontractors (such as Starplex), so that they know as far in advance as possible what the event calendar looks like; not only for events, but also for major occurrences on the property such as maintenance efforts that may impact significant areas or buildings. The level of detail in the software can be dictated by MetraPark management so that private details are not available.

Another area identified by several stakeholders is not using the chain of command to address commissioners' concerns relating to the presentation of Metrapark. The County Commission has an obligation to strive to ensure the success of MetraPark and at times has taken it upon themselves to perform tasks at the venue to correct issues and/or personally direct employees to perform work. While well intentioned, this can put employees in a difficult position of prioritizing assigned work versus the immediate needs of a commissioner. The remedy to this requires the complex's senior management and the commissioners develop a policy, and adhere to the process developed in the policy, that prioritizes and communicates, in a timely fashion, how issues are addressed.

We recommend the commissioners follow an agreed-upon process to offer directives to the MetraPark General Manager, both verbally and, if necessary, in writing. The GM is then accountable for addressing the concerns of the Commission in a timely fashion. Should this not occur, then the Commission is within their right to follow the county HR disciplinary process. Based on past issues identified by Commission members, MetraPark staff should be in the position to anticipate at least some of the items and rectify them before they are noted, and frustrations rise.

We recognize the relationship between MetraPark staff, and the Commissioners could be improved, and absent the implementation of private management, we recommend leadership and conflict resolution training to improve the rapport.

## Human Resources

Currently there is no Human Resources Department at MetraPark, as Yellowstone County's HR department handles this function for MetraPark. This is not uncommon in municipally managed venues.

Human Resources Departments perform such a variety of functions necessary for success, and since public assembly venues represent a rather unique niche of business, it is critical that HR professionals understand the specific needs that venues such as MetraPark require. Recruiting box office or marketing staff for a venue many times requires more effort than just placing an ad on local websites and in local publications.

Beyond the mechanics of hiring staff, HR departments are necessary for things such as providing a quality orientation (especially with regard to MetraPark policies and procedures), determining appropriate training and motivating staff to participate, reducing turnover and associated financial impact, resolving conflict between employees, assisting with union negotiations, managing the employee performance review process (which is lacking at MetraPark). Because there is no on-site HR presence, we received only limited information in this area, however it is not a stretch of the imagination that a lack of on-site HR will allow issues to fester longer and create a more difficult environment in which to work.

It was offered by a few individuals that the lack of performance reviews was possibly borne out of a fear of lawsuits brought by (former) employees. Regardless of the reason, performance reviews are critical to the growth and development of employees, and also serve as a basis for wage increases. We understand there is an annual CPI increase for all County employees, regardless of the quality of work. That in itself can be detrimental to morale, as high-quality employees see those who put forth little effort receive the same increase. We recommend annual performance reviews with pay increases be tied, at least in some part, to the reviews.

## Organizational Structure

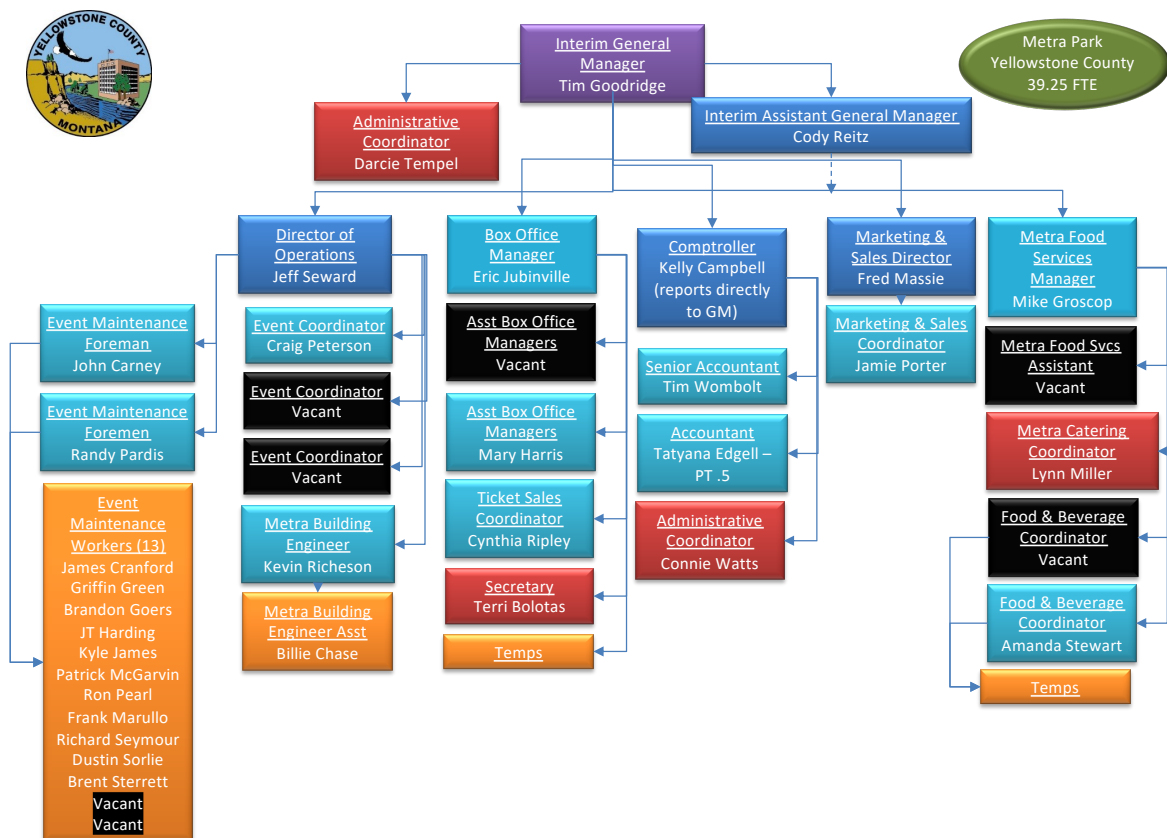
Organizational structure determines the manner and extent to which roles; power and responsibilities are delegated, controlled and coordinated within a company. It also serves to form communication channels and define how information flows between levels of management. An ideal organizational structure should be designed to ensure that individuals and departments that need to coordinate their efforts have lines of communication reflected within the structure.

Reporting relationships must be clear so all members of the organization understand what their responsibilities are and know to whom they are accountable. These clear relationships make it easier for managers to supervise those in lower organization levels. Each employee benefits by knowing to whom they can turn for direction or assistance. In addition, managers are aware of who is outside the scope of their authority, so they do not overstep their bounds and interfere with another manager's responsibilities.

A sound organizational structure ensures that a company has the right people in the right positions. As the company grows and changes, the organizational structure should also evolve. Oftentimes, additional layers of management are created when the growth of an organization results in department heads with too many individuals reporting to them to give each employee the attention, direction and support needed for the employee to succeed.

Poorly structured organizations find that critical objectives are not met because there are not sufficient human resources in each department to accomplish all parts of a given task, or because it was not clear who is ultimately responsible for certain tasks or projects. Poorly structured organizations often lead to confusion within roles, a lack of coordination among functions, failure to share ideas, and slow decision-making.

VSG was provided with a proposed organizational chart for MetraPark.



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We believe the number of staff as currently employed is adequate to maintain the status quo of MetraPark operations, although dedicated resources are needed to better address maintenance and repair around the complex.

Through our interviews and observations, there appear to be enough operations staff to handle the number of events occurring at MetraPark, however there is not enough dedicated staff who focus on preventive maintenance and normal repairs. The staff must spend so much time focusing on event preparation and in-event needs, that there is little time for other work, such as landscaping, changing light bulbs, and other maintenance and repair work – especially work that is visible to the public. We recommend a review of how current staff are utilized and their work assigned, and then a determination should be made if additional hires are necessary. Ideally, there would be 2-3 individuals who focus on preventive, routine, and spot repairs/maintenance for at least 90% of their working hours.

Another area of the organization that should be reviewed is accounting. The fact that the top finance person at MetraPark reports to the County Director of Finance, and not the

MetraPark General Manager, is atypical of the organizational structure. We support the proposed org chart above that shows the Comptroller reporting to the GM. For a General Manager to be effective, he or she must be able to direct the activities of everyone who affects the success of the complex. It is also unfair to the employee to have, in essence, two supervisors; the employee is forced to mentally pledge allegiance to one of them, or will struggle to attempt to please both, which can be difficult and stressful. In either situation, an unhealthy working relationship may develop that can result in a variety of things such as poor work attitude or production, negative office morale, or a perception that situations the venue may want to keep private are being discussed with outsiders.

Related to this subject, financial statements should be provided to the General Manager on a monthly basis. For a public assembly venue manager to be successful, he or she must have financial information on a regular basis and be able to act based on the data. Additionally, event "flash reports" should be provided within a day or two of each event so that adjustments in operations can be made quickly (see Appendix C for an example). Flash reports are simply an event profit and loss that shows all revenues and expenses. If a flash report exhibits a financial anomaly, management knows to investigate and make necessary changes prior to the next event; if it takes a month or longer to find out about the anomaly, then during that time there can be financial losses. Currently, if the MetraPark GM requests financial information in a timelier fashion, it would be easy for the tasked employee to dismiss the request, knowing there are no ramifications.

We strongly recommend that MetraPark and the County investigate a way to bring all employees under the General Manager.

As mentioned, we believe the number of staff is adequate for maintaining the current level of operation. However, should MetraPark seek to offer better customer service, a greater number of events and revenue, more efficient operations, and/or prepare to accommodate the items that would be developed in the master plan, then there are some positions we believe should be added to the current organizational structure.

### **Guest Services**

Current there is no guest services department, and MetraPark leaves it to Starplex to determine policies and procedures for ushers, ticket takers, and security. Best practices would have MetraPark making these decisions, and we recommend the creation of at least one position in this area, a Director of Guest Services. This position would be responsible, under supervision of the General Manager, for creating policies and procedures for ushers, ticket takers, and event security. This position would implement industry best practices, create orientation and training programs, manage a guest feedback program, work with other departments on Guest Service initiatives, propose employee uniform standards, and monitor and track event incidents, among other responsibilities. They would manage the contract of Starplex and any related subcontractors, verifying invoices and ensuring adherence to the terms of the agreement.



### **Finance**

Venues of this size would typically have a Director of Finance, and, at a minimum, two accountants who would handle accounts payable, accounts receivable, and payroll. If a decision was made to put all finance personnel under the General Manager, this is the level of staffing that would be appropriate, and is reflected in the organizational chart on page 13.

### **Sales & Marketing**

The efforts of this department could be enhanced with the addition of a person to handle the bulk of the sales effort at MetraPark. They would be tasked with soliciting for permanent advertising, including exclusive advertising rights, selling memberships to the Red Carpet program, finding suite purchasers, and selling any empty suites on an event basis. This position will be highly valuable if the master plan is executed in its current form.

The current Director of Sales and Marketing could then focus more on booking MetraPark, developing appropriate marketing campaigns, assisting Users with their own event advertising and marketing efforts, managing any media inquiries, creating the plan for MontanaFair marketing, and working with the local tourism bureau to bid on larger events. As we learned in our interviews, Metrapark would benefit from positive public relations stories touting their success; this would be a good area for the current Director to spend time.

## KPIs and Performance Metrics

### Performance Metrics

MetraPark management should establish a set of performance metrics to formally measure operational efficiency and effectiveness for the complex's staff. Effective performance metrics will serve to increase accountability, ensure operations are geared towards meeting the organization's mission and goals, and allow staff to know how efficiently and effectively facility operations are being carried out at all times. Once established, performance metrics should be viewed as the fundamental cornerstone of MetraPark management.

Management should develop performance metrics to encourage performance improvement, effectiveness, efficiency, and appropriate levels of internal controls. The established metrics should incorporate industry best practices related to the performance measurement and cost/risk/benefit analysis, where appropriate.

The appropriate set of performance metrics should lead to a quantitative assessment of gains in:

- Cost savings
- Customer/user satisfaction
- Organizational performance
- Workforce excellence

The key elements of the performance metrics should address:

- Alignment with organizational mission
- Cost reduction and/or avoidance
- Meeting commitments
- Timely delivery
- Cycle time reduction – equipment downtime
- Customer satisfaction
- Quality of product

In order to develop appropriate performance metrics for operations, it is critical that the appropriate stakeholders are part of the process. Key stakeholders in the development of performance metrics should include the Commissioners, General Manager and his/her direct reports and Human Resources. It is very important that staff responsible for the work to be measured are involved in developing the performance metrics because they are the most knowledgeable about the requirements.

Once a performance metrics committee has been established, the committee should work together to:

- Identify critical work processes
- Identify critical results desired
- Develop measurements for the critical work processes or critical results
- Establish performance goals, standards, or benchmarks.

The SMART test is widely used to determine the quality of a particular performance metric. Specifically, good performance metrics should be:

**S = Specific**: clear and focused to avoid misinterpretation. Should include measured assumptions and definitions and be easily interpreted.

**M = Measurable**: can be quantified and compared to other data. It should allow for meaningful statistical analysis. Avoid "yes/no" measures except in limited cases, such as start-up or systems-in-place situations.

**A = Achievable**: achievable, reasonable, and credible under expected conditions.

**R = Realistic**: fits into the organization's constraints and is cost-effective.

**T = Timely**: attainable within a given timeframe.

In order to determine the quality of a potential metric, the following questions can provide assistance.

- Is the metric objectively measurable?
- Does the metric include a clear statement of the end results expected?
- Are the metrics challenging but at the same time attainable?
- Does the metric allow for meaningful trend or statistical analysis?
- Does the metric focus on effectiveness and/or efficiency of the system being measured?
- Are assumptions and definitions specified for what constitutes satisfactory performance?
- Have those who are responsible for the performance being measured been fully involved in the development of this metric?
- Have staff and senior leadership mutually agreed upon the metric?

The best metrics will be ones that can accurately communicate to all levels of management by showing that Metrapark is progressing toward its goals or if they are simply just in a holding pattern. Metrics should be developed to give the organization-specific insight into particular ways that performance can be improved. The first important requirement in this process is for MetraPark to look at its daily, monthly, and annual operational and maintenance goals and establish the significance of the task as which to track and report for operational efficiency and effectiveness. These tasks can then be tracked in multiple ways including but not limited to:

- Project completion percentage
- Cost of competition
- Employee/contractor time to complete
- Response time by employee/contractor
- The reoccurrence of assigned maintenance or repairs

It is important to note that as organizational goals change over time, so should the established metrics. The metrics should be looked at as an evolving working model, examined continually for relevance and adjusted to help guide the departmental decision making towards the strategic goals set by the organization.

Once the required tasks and procedures of the performance metrics have been established, the senior leadership, directors and supervisors can set performance baselines for each of the required tasks. These baselines can contain a variety of information that Metrapark can use to proactively track the efficiency and/or effectiveness of each task. The baselines should include as a benchmark for each task but not limited to:

- Labor hours/time to complete
- Tools and or parts required
- Safety in the workplace
- Contractor management
- Vendor satisfaction
- Expected life cycle of repair/maintenance
- Response time on work orders
- Patron experience
- Food service operational efficiencies
- Over/under on box office cash banks
- Timeliness of financial reporting

Once the performance measurement baselines have been established, it is important to set tangible targets for improvement relating to each of the baseline tasks and procedures. In setting the targets, it is important to evaluate its success or the challenges of a particular activity in which it is engaged. Sometimes success can be defined in terms of making progress toward the company-wide strategic goals, and others success may be in workplace safety, employee time, and/or cost savings for the department.

The targeted metrics should also have credibility, be consistent, and repeatable to be able to be accurately measured. In setting internal targets for each task, it is important to track how a particular department/area is performing in relation to the goals set for the department and how they tie into the strategic goals of Metrapark. The accumulated data collected from each of the metrics will display operational trends which can assist in determining areas for improvement. These improvements will lead to overall success of each department's goals.

It is important to note that performance metrics can also have a very positive effect on employees. The most direct way to achieve results for the internal targets set will be through employee performance. Employees can feel a sense of pride when achieving the desired targeted results of a metrics system. They also understand that they have to justify to their coworkers, whether goals have, or have not, been met. It is this personal satisfaction that creates a strong incentive for performance.

## Examples of Potential Metrapark Performance Metrics

Metric	Description
Preventative Maintenance Completion Percentage	Measures the work orders generated and completed (closed out) over time which allows the manager to better understand workloads and better schedule staff. Another measurement could include the total number of work orders outstanding.
Backlog of Corrective Maintenance	An indicator of workload issues and effectiveness of preventive maintenance programs.
Maintenance Overtime Percentage	Measures the total maintenance overtime during a period to the regular maintenance hours during the period.
Emergency Maintenance	Measures total hours worked on emergency jobs to the total hours worked during a measure period.
Preventative Maintenance Budget/Cost	Measure the amount of preventive maintenance to total maintenance costs to ensure sufficient resources are being allocated to preventive maintenance activities.
Energy Use	A key indicator of equipment performance, level of efficiency achieved, and possible degradation. For example, this can be measured in kilowatt hours for electricity, cubic feet for gas, or gallons for water.
Safety Record	Commonly tracked either by number of loss-of-time incidents or total number of reportable incidents. Useful in getting an overall safety picture.
Inventory Control	An accurate accounting of spare parts can be an important element in controlling costs. A monthly reconciliation of inventory "on the books" and "on the shelves" can provide a good measure of your cost control practices.
Overtime Worked	Weekly or monthly hours of overtime worked has workload, scheduling, and economic implications.
Recycling	Tracking the tonnage of recycled products.
Game & Event Incident Tracking	Tracks the number of maintenance incidence reported on game and events over time. Effective preventive maintenance will result in fewer game day maintenance issues.
Customer & User Satisfaction	Measure Fan and user satisfaction through a periodic survey process and compare results to previous surveys to identify positive or negative trends and compare to desired rating levels.
Actuals to Budget Expenses	Measures actual operations and maintenance costs to budgeted on a monthly or quarterly basis.
Professional Development	Measure frequency of staff participation in industry conferences and visits to comparable venues.

Departmental Category	Recommended Metrics
Operations & Guest Services	% of Work Orders Outstanding % of Work Orders Closed Daily/Monthly CMMS Analytics and Reporting Safety Records Documentation Contractor performance Contractor documentation Event Incident Tracking Survey of the Guest Experience Survey of User Satisfaction Industry "best practices" knowledge
Human Resources	Staff Turnover Staff Training Completion of Annual Performance Reviews Customer Service/Comment Cards Staff Communication Staff Meeting Frequency Staff Participation in Staff Meetings Professional Development
Financial	Budget to Actual Project cost savings Facility Staff Participation in Process

### Performance Reviews

Annual performance reviews have not been performed for full-time MetraPark employees which is not consistent with industry “best practices.” Throughout our interviews, a recurring theme was a lack of overall organizational goal setting and setting of employee expectations. An organization without goals is adrift with no ability to measure performance, organizationally or individually. Our recommendation is to establish a formal performance review process with the county human resources manager. Each employee will have an annual review and a meeting with their supervisor at mid-year to determine if goals are still relevant, achievable, and desired. This additional engagement with the employee can increase accountability, identify training needs, and strengthen the overall relationship as the employee understands there is someone who wants to see them succeed. Appendix D contains an example of a performance review template.



## Training and Professional Development

Employee training and development are crucial for the growth and evolution of a company, as employees are a key component of the fundamental building blocks in determining the success of an organization. Unfortunately, many organizations view employee training and development as optional rather than essential because it is viewed more as an expense than an investment.

Training and development represent the process of enhancing the skills, capabilities, and knowledge of employees for doing a particular job and is the main tool used to develop employees. Training should be considered a continuous and never-ending process. After initial orientation and basic training of employees occur, continued education and training should be available to provide further development options for members of the organization.

Training of employees improves their efficiency and productivity. Well-trained employees show increases in both quantity and quality of performance and can result in reduced needs to engage outside subcontractors to perform certain tasks. There is less waste of time, money, and resources if employees are properly trained. Errors are also more likely to occur if the employees lack knowledge and skills required for a particular job. The well-trained employee has fewer chances of committing accidents on the job. Well-trained employees will also become more acquainted with the job and will need less supervision. Thus, there will be less waste of time and effort, and ultimately the organization will function more efficiently.

Training can help the employee feel a greater sense of job security and job satisfaction, which ultimately leads to better morale and productivity and serves to strengthen the organization's culture. Greater employee satisfaction leads to a greater impression of the work they are doing, and the more they will contribute to organizational success.

While our methodology did not allow us to delve into every aspect or area of training at MetraPark, we offer the following list of training programs for full and part-time staff that should be considered on an annual basis:

- Active Shooter
- ADA and Communicating with People with Disabilities
- Blood Borne Pathogens
- Bomb Threat
- Crowd Management
- Customer Service
- Incident Report Writing
- Emergency and Evacuation Procedures
- First Aid/CPR
- Forklift Certification
- Event Operations and Procedures
- Cleaning Procedures – spill logs
- Hostile Environment
- Radio Usage and Procedures
- Entry Search Procedures and Policies
- Severe Weather
- Sexual Harassment
- Use of Fire Extinguishers
- Violence in the Workplace

## Professional Development

Professional development opportunities exist locally and nationally and can occur internally through training programs such as media training, bomb threat, evacuation, and life safety training. Visiting other venues and observing their operations are great learning opportunities for staff.

Our experience has been that the return on investment in professional development opportunities and a commitment to training pays back many times over for the organization's financial investment in improved staff productivity and enhanced operational efficiencies.

We recommend assistant event managers and select staff have the opportunity to further their professional development annually by attending industry conferences.

The following list includes conferences and organizations that are industry recognized events and visiting comparable venues:

### ❖ Stadium Manager

- International Association of Venue Manager (IAVM) VenueConnect – trade show
- IAVM Senior Symposium
- Certified Facility Executive Certification (IAVM)
- International Association of Fairs and Exposition (IAFE)

### ❖ Operations & Engineering

- Venue Operations Summit (IAVM)
- IAVM Venue Management School
- Building Owners and Managers Association (BOMA) local chapter
- International Facility Management Association (IFMA) local chapter
- IAVM VenueConnect Annual Conference & Trade Show

### ❖ Event Services

- IAVM Oglebay Facility Management School
- IAVM Guest X – Guest Experience & Crowd Management
- IAVM VenueConnect Annual Conference & Trade Show

### ❖ Security

- IAVM Academy for Venue Safety & Security (AVSS)
- National Center for Spectator Sports and Security (NCS4)
- IAVM Guest X – Guest Experience & Crowd Management

❖ Visiting Arenas and Fairgrounds

- Current “best practices”
- Further develop industry contacts

The bulk of professional development at MetraPark involves attending meetings and conferences hosted by the International Association of Venue Managers, the International Association of Fairs & Expositions, Pollstar, and the Rocky Mountain Association of Fairs. This is a good effort, and we recommend incorporating additional opportunities based on the list above in order to develop the staff more fully. Because not all meetings and conferences can be attended every year, we recommend creating a rotation of travel that accommodates the appropriate staff.

Based on our interviews, understanding of personnel backgrounds, and the recent retirement of a long-time general manager, we believe MetraPark could benefit from training that can bring employees closer together and work in a more harmonious manner.

**Culture**

Most businesses can tell you “what we do” and many are clear on “how we do it” yet, research shows that only a small percentage of the workforce understands “why” we do what we do. The “why” is the basis for a Mission Statement: the secret sauce that positions an organization for long-term greatness. Your unique Mission Statement becomes the foundation on which is built a set of guiding principles that define how everyone agrees to work together.

**Leadership**

Proper training in this area develops leaders with immediately actionable strategies. Investing in developing your leaders brings great organizational dividends. While your leaders may have work experience and educational background, they can always learn to lead and perform more effectively. The best training provides leaders with a significantly enhanced understanding of their own leadership behaviors and how these behaviors can positively impact the team and organizational effectiveness.

We suggest researching potential firms who may facilitate this kind of training, and offer three suggestions (Venue Solutions Group is affiliated with the first option):

- VSG Advantage Training (<https://vsgadvantagetraining.com>)
- 7 Star Service (<https://www.7starservice.com>)
- TAME (<https://www.trainevent.com>)

Additionally, for MetraPark managers and supervisors without a deep background in venue management, we recommend the book, “Public Assembly Venue Management: Sports, Entertainment, Meeting, and Convention Venues” published by IAVM (<https://www.iavm.org/textbook>). It is an excellent tool for understanding the breadth of what public assembly venue management encompasses.

## Long Term Capital Planning

Long term capital expense planning is a critical component to properly maintaining and extending the usable life of MetraPark. The capital investment required over the expected useable life of the facilities, in many cases, will exceed the original project cost to construct the facility.

Oftentimes, the appropriate mixes of amenities change should be reviewed continuously to ensure that the complex is meeting the needs of existing customers and remains competitive in the regional marketplace. Advances in video technology and the improvement of the in-home experience require owners and operators to continually plan for improvements and update systems to provide a positive guest experience.

Mechanical, electrical, plumbing and roof systems typically have an expected usable life of 20 to 25 years if properly maintained and require significant investment. Food service improvements are necessary over the life of the facility and typically involve large and small wares replacement, kitchen equipment such as coolers, freezers, ovens, and hoods.

The process for the development of the strategic capital plan should start with understanding the current condition of MetraPark. Understanding the existing conditions will allow for the commissioners to fully understand the efficacy of existing preventive maintenance procedures and determine the expected usable life of the building systems and the costs associated with bringing these systems up to acceptable standards. The baseline conditions and costs will become the foundation for MetraPark's strategic plan.

Capital projects are currently identified on a 5-year capital improvement plan without a priority attached to the "wish list." A detailed capital improvement plan should be organized by discipline with priority and with a life cycle. Below is an example of a mechanical systems capital improvement plan.

Capital Replacement Plan												
Discipline	Item	Priority	Frequency of Repairs & Replacement in Years	Estimated Cost per Occurrence in FY 2018 Dollars	2019	2020	2021	2022	2023	2024	2025	
					Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7	
<b>Major Systems</b>												
Chilled Water System	Chilled Water Pumps	3	17	500,000	-	-	546,364	-	-	-	-	
	Chilled Water Pump VFDs	4	20	150,000	-	-	163,909	-	-	-	-	
Hot Water System	Hot Water Pumps	3	17	255,000	-	-	-	-	295,615	-	-	
	Hot Water VFDs	4	20	47,500	-	-	-	-	55,066	-	-	
Air Handlers	Bowl Air Handling Units	3	15-20	8,000,000	-	-	-	-	-	-	-	
	Air Handling Units	3	20 - 25	1,000,000	-	-	-	-	-	-	-	
	Air Handler VFDs	4	20	50,000	-	-	10,927	11,255	11,593	11,941	12,299	
BAS System	BAS Complete Package	3	15	3,250,000	1,673,750	1,723,863	-	-	-	-	-	
Misc. Airside	VAV Boxes	3	20	620,000	-	-	-	-	-	185,078	190,630	
	Fan Coils	3	25	150,000	-	-	-	-	-	-	-	
	Fans	3	20	150,000	-	-	-	-	34,778	35,822	36,896	
Emergency Power	Generators	3	30+	2,500,000	-	-	-	-	-	-	-	
Fire Alarm	Fire Alarm Panels	3	20	1,000,000	-	-	-	-	1,159,274	-	-	
Lighting	Lighting Control Panels	4	20	2,000,000	-	2,121,800	-	-	-	-	-	
	Sports Lighting	3	20	2,500,000	-	-	-	-	-	-	-	
Plumbing	Plumbing Fixtures (Replacement and/or Repair)	3	Annually	10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	
	Water to Water Heat exchanger	3	15	150,000	-	-	-	-	173,891	-	-	
	Domestic Water Booster Pump	3	15	100,000	-	-	-	-	-	-	-	
	Fire Pump	3	15	100,000	-	-	-	-	-	-	-	
	Bladder Tanks	3	10	20,000	20,600	-	-	-	-	-	-	
					1,704,650	3,856,372	732,127	22,510	1,741,809	244,781	252,124	

If the Perkins & Will masterplan advances to a funded project, we recommend that Yellowstone County have a comprehensive condition assessment performed for MetraPark facilities to fully understand the condition of the physical buildings, major systems, and equipment. The assessments will inform the design team of issues that will need to be addressed during the design process.

A comprehensive condition assessment of MetraPark will identify what infrastructure issues need to be addressed in the near and future term, establish a benchmark for future evaluation and planning of maintenance and operational costs, identify opportunities that will have a positive influence on maintenance planning and execution, and finally, a capital expense matrix that will identify specifically the expected usable life of the facilities' major systems and create a schedule for repair and replacement.

The facilities condition assessment should address the following areas:

1. Architecture & Interiors – a review of the interior spaces to include public spaces, barns, restrooms, directional signage, and finishes.
2. Major Systems – mechanical, electrical, and plumbing systems to include their respective preventive maintenance and how they're controlled.
3. Vertical Transportation – review efficacy of 3<sup>rd</sup> party vendor's preventive maintenance program
4. Structure – a review of the weight bearing walls, slabs, lighting standards and seating bowl.
5. Transportation – roads, parking, and directional signage
6. Technology – the audio and video, television, IT & Wi-Fi, and telecommunication systems are reviewed.
7. Food Service – analyze operations, cleanliness, catering, storage, and equipment
8. Capital Expense Matrix – assist the Center in the budgeting and prioritization of facility management resources.

The condition assessment and resulting capital expense matrix will provide order of magnitude costs based on current conditions, where it is in its life cycle, and the needed or necessary frequency of repair and replacement based on manufacturer recommendations. The life cycle plan or capital expense matrix should be updated quarterly or semi-annually as priorities change or evolve during the year.

## Private Management Primer

*Whether ownership is public or private, privately managed assembly facilities tend to be organized along the lines of dynamic entrepreneurial operations and are less subject to traditionally restrictive government guidelines. Regardless of ownership, privately managed public assembly facilities tend to encounter less resistance to the implementation of competitive business concepts than their publicly managed counterparts. Private management companies tend to be more bottom-line focused, which is often why they are engaged by the facility's ownership or governing body. Private management companies are merely an agent of the owner; however, they may be better equipped to balance the community's needs with improved bottom-line financial results. Finally, private management brings with it a body of intellectual property and combined industry resources that can provide advantages over individually operated facilities.<sup>1</sup>*

This quote from an industry publication accurately summarizes private companies' role in the management and operation of public assembly venues, regardless of ownership. Our work at MetraPark does not include recommending (or not) the use of private management, however we do offer information so that the County and MetraPark may be better informed about private management.

There are a number of reasons why a facility owner may choose to consider private management. They include, in no particular order:

- Free the facility from bureaucracy which can hinder facility operations at several levels
- Desire to improve financial results
- Desire to host a greater number and/or a greater diversity of events, including events with a financial risk component
- The need to better maintain the facility in order to keep it viable in the marketplace
- The need for experienced operators in the face of a new venue or a significantly renovated/upgraded facility

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<sup>1</sup> Mahoney, K., Esckilsen, L., Jeralds, A., & Camp, S. (2020). *Public Assembly Venue Management: Sports, Entertainment, Meeting, and Convention Venues* (2<sup>nd</sup> Edition). Dubuque, IA: Kendall Hunt Publishing.



Utilizing the full services of private management, the owner would subcontract complete responsibility for the ongoing operation of MetraPark, paying a fee (subject to IRS regulations if the facility is constructed with tax exempt bonds) for this service. The subcontractor, also known as a private management company, has a core competency in the management of public assembly facilities, and could be either a for-profit entity or non-profit (for the purpose of this report, we will utilize the “private management company” nomenclature for simplicity). In this scenario, the selected firm would be responsible for:

- Booking, scheduling, and servicing events at MetraPark for the entire grounds. This includes securing and managing the ticketing contract, arranging a food and beverage provider, hiring event and production staff, performing sales and marketing duties, performing bookkeeping, managing parking, and addressing ADA concerns
- Soliciting and employing all full and part-time staff and subcontractors
- Developing fundraising strategies and sponsorship/advertising programs
- Providing maintenance and engineering services (HVAC, electrical, plumbing, pest control, landscaping, painting, cleaning, etc.) for the entire complex
- Implementation of asset management and maintenance policies and procedures
- Managing pedestrian and employee access, general security, and life-safety functions
- Responding to emergencies and other incidents on the property
- Provide city with a long-term capital expense plan

The more opportunities for the private management company to generate additional revenue, the more amenable they may be to the lowering the base management fee. That is, they will prefer to utilize their own food and beverage company or their own ticketing and sales subsidiaries. Additional revenue for these subsidiaries is through sales commissions. Not all firms have such subsidiaries, but enough operate these complementary services that it is important to note.

In addition to annual base fees for managing a venue, private management companies also seek to incorporate a level of incentive fee in the contract. The incentive fee is typically based on a benchmark that is mutually agreed upon, and if the private management company meets or exceeds the benchmark, they will be entitled to an additional fee. Subject to IRS regulations regarding the use of tax-free or taxable bonds, incentive fees can be calculated in a number of ways. It could be based on gross revenue generated, meeting or beating a net income goal, hosting a certain number of events, attracting a certain number of attendees, reducing the operating deficit, or a combination of multiple benchmarks. Certain IRS regulations will cap the incentive fee and/or restrict the benchmark upon which it can be based.

Intense and increasing levels of competition among facilities, coupled with increased pressure from governmental entities for facilities to generate a profit or breakeven, have forced many governments to attempt changes in the fundamental process of managing these kinds of venues. As a result, a number of municipally owned public assembly venues across the country have day-to-day operations contracted to a private

management company. Oftentimes, private management supplies full facility management services (including ticketing, concessions, and sponsorship sales), consulting and project services. Under private management, the facility owner retains all of the rights and privileges of ownership while the private management firm performs assigned management functions. The owner sets policies while the private management firm establishes procedures in order to implement the policies.

A private management company is typically an agent of the hiring body (either a government department or an Authority) and while there a number of ways to generate fees for themselves, the fees are often justified by the potential cost savings the private management company may realize through the implementation and execution of their operating procedures and protocols and sales ability.

If the owner wishes to seek a private management company willing to take financial risk on the operations of the venue, it is likely that such terms would allow for the private management company to assume risk only up to the point of losing the annual base management fee. It is unlikely a private management company would assume an unlimited amount of the financial downside. If agreeing to some risk, the private management company most likely would request a higher incentive fee should the appropriate benchmarks be met.

Management agreements typically stipulate that the management company submits the next fiscal year operating budget to the governing body for approval (3-6 months prior is reasonable). The governing body is responsible for providing the funds necessary to operate the facility. Whether the facility management company assumes risk for operating losses or not, typically the governing body must fund a level of operating expenses in advance.

Private management solutions typically provide various key operational and fiscal functions such as policies and directives, organization structure, leadership, job classifications, operations and maintenance, scheduling and booking, finance and accounting, and keeping the owner apprised of capital repairs. It is important, as well, that someone from the governing body is assigned as a Contract Administrator. This individual will be the liaison between private management and the facility owner (in this case, the County Commission). He or she will ensure the terms of the contract are being fulfilled, will facilitate the budget approval process, and will work in partnership with the building manager to address operational issues as they arise.

Benefits and challenges of private management may include the following:

### **Benefits**

- Internal and external network of knowledge/experience and industry best practices
- Greater operating cost efficiencies (national purchasing power, better negotiating for services like ticketing and foodservice)
- Proven operating policies and procedures
- Greater staffing resources and corporate overhead support
- More flexibility with staff compensation, benefits, and incentives
- In-house training programs (specific to the industry) to develop staff
- Increased flexibility in negotiating vendor contracts
- Potentially faster decision-making process
- Less stringent procurement process
- Ability to risk own funds to produce events
- Streamlined reporting structure to facility ownership; ownership manages one person/one contract

### **Challenges**

- Requires an investment (management fee) of the owner that otherwise could be used for alternate needs
- Potential for ambiguity with regards to contractual responsibility, if not addressed properly in the management agreement
- The needs of the owner and needs of private management can conflict (e.g., hosting community events vs. corporate events)
- The more required of the private management company (i.e., operate at a breakeven or profit), the more control private management will require
- The actions of private management, while directed to operate with greater fiscal responsibility, may conflict with long term, local User groups

It is important to note that not all benefits and challenges will manifest in every instance. The owner must carefully evaluate all terms and conditions suggested by private management, which can include utilizing outside assistance if not already familiar with the privatization process.

## APPENDIX A

Don Jones - County Commissioner  
John Ostlund - County Commissioner  
Denis Pitman - County Commissioner

Dustin Bretz – Facility User  
Lesli Glen – Facility User  
Rick Hamilton – Facility User  
Shel Hanser – Facility User  
Teddi Vogel – Facility User  
Nick West – Facility User  
Jim White – Facility User

Steve Solberg - Advisory Board Member

Kevan Bryan – Yellowstone County Finance Director

Alex Tyson - Visit Billings/Billings Chamber

Tim Goodridge – MetraPark Employee  
Michael Groscop – MetraPark Employee  
Eric Jubinville – MetraPark Employee  
Ray Massie – MetraPark Employee  
Randy Pardis – MetraPark Employee  
Connie Watts – MetraPark Employee  
Mike Schueller - Security/Cleaning Manager, Starplex

Brad and Hannah Anderson - Alcohol Vendor  
Mike Fleming - Alcohol Vender  
Jason Foley - Food Vendor

## APPENDIX B

### Standard Operating Procedure Documents

#### AFTER ACTION REPORT

##### Standard Operations Procedures

Policy No:

Topic: After Action Report

Author:

Approved Date:

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##### Purpose

The After Action report is to ensure that all information from the hosted event is documented by the Event Manager and other applicable departments. This is to establish a cumulative historical database of repeating clients, concert demographics, & past practices at Metrapark.

##### Policy

The After Action report will be completed by the Event Manager within (48) hours from event completion. Once the report is completed it will be distributed to the Metrapark Ops department and placed within with the event folder.

##### Procedure

1. The Event Manager will collect the following information to include in the After Action Report
  - a. MOD Report
  - b. Command Log
  - c. Attendance Scan
2. The Event Manager is responsible for coordinating with other departments to receive departmental notes in a timely manner once the event has finished.
3. The Event Manager has (48) hours upon the completion of the event to complete the After Action report in detail.
4. Upon completion of the document, it is sent out to the Area Operations Team for review, comments and additional insights.
5. Once the team review is done or (48) hours after the email has been sent, a copy of the report is placed into the event folder, share drive, & event booking for future reference by the Event Manager & other team members.

## ***After Action Report***

### **Basic Event Information**

Event Name:  
Event Date:  
Event Time (Scheduled):  
Facility Set Up:  
Expected Attendance:  
Patron Entrance Pattern (Actual):

### **Event Recap Sheet**

Doors (Actual):  
Event Start Time (Actual):  
Event End Time (Actual):  
Report Completed By:  
Actual Attendance (Scan):

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### **Event Information**

Ingress/Egress:  
Entrances Used:  
VIP Entrance:

Temperature	Conditions	Humidity	Wind Speed/Direction

Weather Conditions

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### **Promoter/Client Information**

Promoter:

Office Phone:

Email:

Cell Phone:

Notes:

### **Show Notes**

Load In:  
Load Out:  
Production:



Loading Dock:

Type Of Vehicle	Buses	Box Truck	Trucks	Runner Vans	Show	Personal Vehicles

### BOH Room Use

Space:	Use:	Set:

### Department Notes

Guest Services:

Complaints:

Security:

Box Office

Marketing

Merch

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**Food and Beverage**

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**IT**

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**Cleaning**

---

**Utilities**

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**Finalized Facility Layout: (AutoCAD's, Diagrams, Event Pictures, below)**  
Additional Comments:

**BOMB THREAT CALL FORM**

Date \_\_\_\_\_ Location \_\_\_\_\_ Time \_\_\_\_\_

Stay calm - listen carefully - be polite - do not interrupt the caller. Keep the caller talking; get as many details as possible!

Find out:

What kind of bomb? \_\_\_\_\_

Where is it located? \_\_\_\_\_

When will it go off? \_\_\_\_\_

Why was it placed? \_\_\_\_\_

What group are you with? \_\_\_\_\_

Determine:

Male/Female \_\_\_\_\_ Adult/Teen/Juvenile \_\_\_\_\_

Type of voice: Loud \_\_\_\_\_ Soft \_\_\_\_\_ Articulate \_\_\_\_\_  
Rough \_\_\_\_\_ Deep \_\_\_\_\_ Intoxicated \_\_\_\_\_  
Other \_\_\_\_\_

Speech: Fast/Slow \_\_\_\_\_ Distinct \_\_\_\_\_ Slurred \_\_\_\_\_  
Other \_\_\_\_\_

Pitch: High \_\_\_\_\_ Low \_\_\_\_\_ Varied \_\_\_\_\_

Accent: Y/N \_\_\_\_\_ Local \_\_\_\_\_ Foreign/regional \_\_\_\_\_  
Other \_\_\_\_\_

Style: Angry \_\_\_\_\_ Frantic \_\_\_\_\_ Calm \_\_\_\_\_  
Slurred \_\_\_\_\_ Laughing \_\_\_\_\_ Steady \_\_\_\_\_

Background noises: Machinery \_\_\_\_\_ Office \_\_\_\_\_ Factory \_\_\_\_\_  
Planes \_\_\_\_\_ Trains \_\_\_\_\_ Subway \_\_\_\_\_  
Street \_\_\_\_\_ Cars \_\_\_\_\_ Crowd \_\_\_\_\_  
Bus \_\_\_\_\_ Other \_\_\_\_\_

Former Employee: Yes/No \_\_\_\_\_ Customer \_\_\_\_\_

Other Information:

Employee who received information: \_\_\_\_\_

Listener's/Receptionist's Dialog

After you have listened to the caller and taken notes on the form above and you are no longer talking to the caller, call the **RECEPTIONIST** who will call **EACH** channel on the radio (1-9) and say the following:

**"Clear this channel. Clear this channel. We have a Code Blue. We have a Code Blue. Please go to Channel 1. Please go to Channel 1."**

A predetermined group of employees will meet in the conference room as well as representatives from hockey/football offices and the stagehand union. After a brief meeting, employees will check their pre-assigned areas for suspicious packages and meet at the following places after 15 minutes:

Admin/Finance/Box Office.....VIP Parking Lot light pole A  
Food Service.....Parking Lot "C" light pole  
Operations/Engineering.....Parking Lot "C" light pole  
Housekeeping.....Parking Lot "C" light pole  
Patron Services.....VIP Parking Lot light pole A  
Tenant Staff.....VIP Parking Lot light pole A  
Licensee/Show Staff.....Parking Lot "C" light pole

**RELEASE FOR ACCESS TO ARENA CATWALK**

1. In consideration of being permitted to access the catwalk at the (ARENA NAME), the receipt and sufficiency of which is hereby acknowledged and confessed, I hereby on behalf FULLY AND FOREVER RELEASE, WAIVE, DISCHARGE AND COVENANT NOT TO SUE (insert appropriate entities), and their respective officers, directors, agents, servants, contractors, representatives, and employees (individually and collectively, the "Releasee") from any and all liability, claims, demands, actions, and cause of action of whatsoever kind or nature, either in law or equity, known or unknown, arising out of or related to any loss, damage or injury, including but not limited to personal injury or death and any claims related to any first aid treatment or other service, if any rendered to me that may be sustained by me or a member of the general public or to my property, whether due to the active or passive negligence (whether ordinary or gross) of the Releasees or otherwise, while being present on the ARENA catwalk.
2. I am fully aware of the various risks involved and hazards connected with accessing the catwalk, including but not limited to the risks of physical injury or death, and I hereby elect to voluntarily access the catwalk, with full knowledge this activity may be hazardous to my person and/or my property. I voluntarily assume full responsibility for any risk of loss, property damage or personal injury, including death, that may be sustained by me or a patron, or any loss or damage to my property or a patron's property, as a result of my engagement in such activities, whether due to the active to passive negligence (whether ordinary or gross) of the Releasees or otherwise.
3. Additionally, I hereby agree to indemnify, defend and hold harmless the Releasees from and against any and all causes of action, demands, suits, liabilities, claims, damages, losses, costs and expenses, including but not limited to attorney's fees and court costs that they incur (directly or indirectly) in any way related to or arising out of activities on the catwalk. In such activities, whether caused by the active or passive negligence (whether gross or ordinary) of the Releasees or otherwise.
4. I understand that none of the Releasees maintain any insurance policies on my behalf covering any circumstances related to my access to the catwalk. I am aware that I should secure my own insurance coverage in this regard.
5. It is my intent that this Release shall be binding upon myself, the members of my family, my spouse, heirs, assigns, guardians, and personal and legal representatives, both as to claims which may be asserted by such parties on y behalf and otherwise, and shall be deemed as full and complete release, waiver, discharge and covenant not to sue the Releasees by all such parties. This Release is intended to be as broad and inclusive as permitted by the laws of the State of Louisiana and shall be governed by, construed and Interpreted according to, the laws of the State of Louisiana without regard to the conflicts of laws principles thereof. If any portion of this Release is held by a court of competent jurisdiction to be invalid, it is agreed that the remainder shall, notwithstanding such holding, continue in full force and effect.
6. In signing this Release, I acknowledge and represent as follows: (a) I have read this Release, understand it and I am signing it voluntarily as my own free act and deed; (b) no oral representations, statements or inducements have been made to me in connection with this Release; (c) this Release contains the entire agreement between the parties and the terms of this Release are contractual and not mere recital; (d) I am at least eighteen years of age and fully competent and have executed this Release for full, adequate and complete consideration fully intending to be bound by it; and (e) I agree to bound by the rules and regulations, now existing and from time to time in effect and/or as amended, of SMG or the CenturyTel Center in connection with my access to the catwalk.

IN WITNESS WHEREOF, I have executed this Release in (LOCAITON), on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_.

WITNESS:

PARTICIPANT:

\_\_\_\_\_

\_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: \_\_\_\_\_

## EJECTION POLICY

Eff. Date:	
Rev. Date:	

### ARENA STANDARD OPERATING PROCEDURES

Item	Ejection Policy
Department Implementing	Event Operations
Person Implementing	
Person Approving	

#### **PURPOSE:**

In order to ensure the safety, security and comfort of all guests and employees, it may become necessary to eject guests in certain circumstances. This document outlines a policy for administering ejections. The ejection of a guest should be considered a last resort; however, any person(s) not complying with venue policies may be subject to ejection. Guidelines in this document should be followed if a guest is observed acting in a manner which is contradictory to venue policies.

#### **POSSIBLE REASONS FOR EJECTION:** **(This list should not to be considered exhaustive)**

Disorderly Conduct	Possession and/or use of Illegal substances
Fighting	Under the influence of drugs and/or alcohol
Loitering	Consumption of alcohol by a minor or distribution to a minor
Throwing Objects	Use of a False ID to purchase alcohol
Foul and/or Offensive Language	Reseating-Seat Flopping
Smoking	Reselling of Tickets-Scalping
Foul Language & Gestures	Attire: clothing with offensive language-No Shoes-No Shirt
Code of Conduct Violations	Breaking a Law

#### **EJECTION PROCESS:**

1. Unless it is a serious offense (e.g., violence, criminal activity or activity that endangers others) anyone observed violating venue policy should be verbally advised of the venue policy they violated and politely asked to stop.
  - a. The guest(s) should be warned that if behavior continues they are subject to ejection.
  - b. Be sensitive to the environment. If necessary, politely ask the guest to accompany you to a quieter location and make it clear that you merely want to speak in a quieter location.

2. For serious offenses or when someone continues to act in a non-compliant manner, an Event Supervisor should be called immediately.

3. The Event Supervisor and/or Event Manager will determine if an ejection is warranted and if so process the ejection.

- a. If located in the seating bowl, restroom, club, suite, lounge, etc., the guest should be asked to move to a more discreet location.
- b. Keep guest secure.
- c. Allow guest to secure his/her personal belongings if determined it will not pose danger.

A Guest Ejection Report must be must be completed for all ejections. The report should be filled out with as much detail possible. Unless a determination has been made that, in the interest of the safety of our employees and other guests, the guest should be ejected without any delay; identification should be requested from the guest. If the guest refuses to provide identification, that refusal should be noted in the report.

4. Possible Arrests: In the event of a possible arrest, the guest(s) must be escorted to the 5<sup>th</sup> Floor Event Office for processing.

5. Minors: If the ejection involves a minor, the guest(s) must be escorted to the 5<sup>th</sup> Floor Event Office for processing.

- a. For purposes of an ejection, a minor is anyone under 18 years of age. If the guest appears to be under 18 years of age and refuses to provide identification, they should be treated in accordance with this policy.
- b. The employee processing the ejection must attempt to notify a parent or legal guardian before the minor is ejected from the arena. If the guest refuses to remain in the facility, they should be permitted to leave unless NYPD is present and assuming control over them.
- c. Details of the attempt to contact the parent(s) must be documented on the ejection report, whether or not the attempt was successful.

6. Medical: If the ejection involves someone requiring medical attention, immediately escort them to the closest Medical/First Aid Location available for evaluation and treatment.

7. Make reasonable efforts to assist the guest in getting to his/her next destination safely.
  - a. Inform them of public transit, taxi and car service pick-up locations around venue.
  - b. If they require the use of a phone to contact someone for a ride, make reasonable efforts to provide the use of a phone. If they are incapable of making a phone call on their own but are able of providing a contact name and number, make reasonable efforts to place a call on their behalf.
  - c. In some cases, ejected guests may have been separated from their companions at the event. If an ejected guest is relying on another guest for transportation, make reasonable efforts to connect them.
    - i. If requested, escort the guest who is being permitted to remain in the facility to the ejected guest
    - ii. If requested, allow ejected guest to use a phone to make meeting place arrangements.
    - iii. Suggest meeting locations outside of venue
8. Ejection: After processing for any possible arrest, involvement of a minor or medical evaluation, perform the ejection through the closest exit from venue.

*This policy has been established to assist with the ejection process. Please keep in mind that every incident will not be exactly the same. Use of common sense and good judgment are critical when removing a paying customer from an event. Adherence to this policy will mitigate many unnecessary complications associated with ejection.*



**GUEST EJECTION REPORT:**

**FRONT**

GUEST EJECTION REPORT			
EVENT: _____	DATE: _____	TIME: _____	
GUEST'S NAME: _____	TICKET: _____	LOCATION: _____	
verified with: _____	LOCATION OF INCIDENT: _____		
ADDRESS: _____	HEIGHT: _____	AGE: _____	HAIR: _____
	WEIGHT: _____	SEX: M / F	EYE COLOR: _____
PHONE: _____	DESCRIPTION: _____		
		DID GUEST APPEAR INTOXICATED? YES NO	
		WAS GUEST WARNED PRIOR TO EJECTION? YES NO N/A	
		TICKET ATTACHED: YES NO	
REASON FOR EJECTION: (check all that apply)			
<input type="checkbox"/> DISORDERLY CONDUCT	<input type="checkbox"/> LANGUAGE		
<input type="checkbox"/> FIGHTING	<input type="checkbox"/> RESELLING OF TICKETS		
<input type="checkbox"/> LOITERING	<input type="checkbox"/> RESEATING		
<input type="checkbox"/> THROWING OBJECTS	<input type="checkbox"/> SMOKING		
<input type="checkbox"/> ILLEGAL SUBSTANCES	<input type="checkbox"/> OTHER _____		

**BACK**

DESCRIPTION OF INCIDENT:	
WITNESSES:	
NAME & CONTACT INFO: _____	GUEST / EMPLOYEE
NAME & CONTACT INFO: _____	GUEST / EMPLOYEE
EJECTING SUPERVISOR _____	SUPERVISOR SIGNATURE _____

**APPLICATION FOR VENUE RENTAL**

**Venue  
Address  
City State Zip**

**(Venue) User Application**

APPLICATION FOR LICENSE AGREEMENT FOR USE OF THE **(Venue)** by potential users in the promotion of popular entertainment, private and public events including, but not limited to sports, rock, jazz, soul, folk-rock, country-western, theatrical, spectaculars, conventions, meetings or various combination thereof.

This document is AN APPLICATION ONLY AND DOES NOT BIND EITHER PARTY. (Venue) and the applicant agree that any/all event announcements and/or advertising are strictly prohibited until a formal contractual agreement has been executed by both parties.

ORGANIZATION: \_\_\_\_\_

CONTACT: \_\_\_\_\_ TITLE: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

TELEPHONE: (\_\_\_\_) \_\_\_\_\_

EMAIL: (\_\_\_\_) \_\_\_\_\_

Applicant (Check One): Corporation ☐ Partnership ☐ Individual ☐

In what County and State is Applicant registered or incorporated?

\_\_\_\_\_

NAMES & TITLES OF OFFICERS OR PARTNERS: (all)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

REFERENCES: Attach financial statement to this application.

Bank: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone: (\_\_\_\_) \_\_\_\_\_

Current Dun & Bradstreet Rating: \_\_\_\_\_ (If none, so state)

Event Information

Type of Event: (Concert, Family Show, Sports or Entertainment Exhibition, Trade Show, Convention, Meeting or Other: please specify)

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Title of Event:

---

Name and/or Titles of Participants, Proposed Acts and/or or Performers:

Participants: (Sports Teams or Individuals)/Headline Act: (Names, Address, Telephone & Contact; Agent)

---

Support Act: (Names, Address, Telephone & Contact)

---

Will this be a benefit performance? For whom? Note: we require the appropriate IRS verification information \_\_\_\_\_

Ticket Price Range(s):

---

Anticipated length of event:

---

Additional services needed in the production of the event:

---

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Additional information requested:

- 1) A fact sheet including, but not limited to:
  - a) References from the production and presentation of similar event(s)
  - b) Names and location of similar sized facilities in which you have performed or presented this or other similar events.
  - c) Other information which you consider pertinent or informative to this application.

Rental days (total including load-in/load out and performance days) requested: Please provide preliminary schedule) \_\_\_\_\_

Move-in days: \_\_\_\_\_

Show days: \_\_\_\_\_

Number of performances: \_\_\_\_\_

Move-out days: \_\_\_\_\_

**(Venue)** will require a cash bond/deposit against damage to building, or its contents and to guarantee payment of event related services, incurred by the venue on behalf of the promoter, including but not limited to: security guards, ushers, ticket takers, housekeeping, traffic & parking, stagehands and stadium technical staff etc. Applicant will furnish required certificates of insurance (originals only, no copies will be accepted) and compensation insurance before tickets go on sale.

A minimum of 30 days must be allowed for processing this application. Only after its acceptance will **(Venue)** enter into a discussion of possible dates.

THIS IS **NOT** A CONTRACT FOR SPACE OR DATES

IT IS UNDERSTOOD THAT THIS IS AN APPLICATION ONLY AND **NOT** A CONTRACTUAL AGREEMENT AND THAT **(Venue)** MAY OR MAY NOT GRANT THE REQUEST SET FORTH ABOVE, AT OUR SOLE DISCRETION.

In the event that the application is approved, applicant will execute the standard form of contract with and be subject to all rules and regulations of the **(Venue)**.

APPLICANT: \_\_\_\_\_

NAME: \_\_\_\_\_

DATE: \_\_\_\_\_

TELEPHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

RECEIVED BY **(Venue)**

\_\_\_\_\_  
Date

<b>Event file Checklist</b>	<b>In File?</b>
Fully Executed Agreement	
Co-promotion	
Booking Advisory	
Certificate of Insurance	
Spill/Event Logs	
Accident/Incident Report	
EMT Call Log Sheet	
Pat Down Results	
Ejection/Arrest Report	
On-Sale Memo	
Audits (On Sale)	
Turnstile Reports	
Settlement W/Backup	
Merchandise Settlement	
Income Summary	
News Articles	
Press Releases	
Group Sales Information	
Event Planning Sheet	
Staffing Plan/cost Analysis	
Show Rider/Production Info	
Final Production Map	
Pyro Certificate	

## **Artist Cancellation Order of Events**

8:00 AM – 9:30 AM

- Promoter rep informed me the show might be canceled based on Artist health.
- Per promoter's request informed Director of Finance to gather bills and prep for settlement.
- Informed GM, against rep's request for confidence on the issue.
- Stopped on going operation work with the exception of (turnstiles & main entrance work)
- Put any rental orders on hold.
- Received further confirmation from act management that the show would be canceled.

9:30 AM – 1:00 PM

- Informed operational staff of situation and requested staffing changes be made based on the cancellation.
- Contacted the stagehands and attempted to make arrangements for 1:00 PM load-out
- Scheduled temps to come in for 12:00 PM to break chairs and then work for the stagehands to load out at 1:00 PM. Used fulltime staff to help with the chair break.
- Doris and Janet worked to schedule eleven (11) event staff to work 5 PM – 8 PM for potential crowd arrivals. Also, order four (4) officers for assistance.
- Took pictures and inventory of all designated rooms.
- Contacted rental companies (furniture, plants, equipment, etc) requested early pick-up of items.

1:00 PM – 5:00 PM

- Used existing temps and full timers to begin basic change over needs.
- Posted signage in public areas once official announcement was made regarding the postponement.
- Marketing provides media with relevant, approved information
- Additional staff posted in VIP to aid with patron concerns.
- Show load out complete.

5:00 PM – 8:30 PM

- Event staff posted at all entry points to the property. Flyers with the press release provided and gates locked to prevent others from entering the parking lot.
- Staff instructed not to answer media questions.
- Local PD parked on the sidewalk in front of the main plaza.
- One (1) supervisor provided breaks.





### **Event Engineer's Duties/Responsibilities**

- Check and repair rest rooms before events. Make repairs as needed.
- Change air filters through the building as needed.
- Assist operator during event and non-event with trouble calls and work orders.
- Clean up mechanical spaces, as needed (mechanical rooms, ice plant, and chiller room).
- Assist operators with preventive maintenance to different equipment.
- Change lights throughout the building as needed.
- Inspect exhaust fans monthly, check belts, bearings, and make repairs as needed.
- Take chemical water tests readings. Condenser, hot water and chilled water loop.
- Perform preventive maintenance AHUs, FCUs, etc....
- Check and maintain chill water and condenser pumps.
- Assist food service with kitchen equipment startup and repairs.

### **Power Interruptions**

1. Pre-Event Preparation
  - a. Technical Concerns
    - i. Prior to each event, a microphone capable of operating on an emergency power source will be accessible in the southeast corner of the stage
  - b. Check all systems which operate from emergency power and ensure that they are capable of performing in an emergency.
  - c. Event Staff Responsibilities
    - i. All guest relations representatives will carry flashlights during events
    - ii. Guest Services Manager will insure that all event staff are trained and familiar with the emergency exit procedures.
2. Power interruption
  - a. Should there be a power interruption during an event the Event Manager needs to meet with the Engineers (and IATSE if onsite for the event) to discuss the location of the power interruption, how to fix it, and how long it would take.
  - b. After meeting with the Engineers the Event Manager needs to talk with the Client and relay information to him pertaining to the situation. Once discussed the audience needs to be addressed with information gathered from the client and Engineers.
3. Solutions (in conjunction with the Director of Security and event Promoter)
  - a. If power is capable of being restored address the audience and instruct them to remain calmly in their seats.
  - b. If power is unable to be restored the non-emergency building evacuation plan would be activated.

## **Radio Use & Etiquette**

Here are a few points for staff to remember when using the radio that will make their communication easier and more efficient.

**LISTEN** - Make sure the channel is clear before speaking;

**THINK** - Know what you are going to say before you push the button to speak;

**PAUSE** - Once you press the button to talk, you should pause for one second, and then begin speaking;

**SPEAK**- Speak clearly, in a normal tone of voice, at a normal pace; and remember to release the button when finished; and

**LISTEN**- Listen for a reply from the person you are calling.

### **Basic Radio Protocol**

- Transmissions should be brief (less than 10 seconds is optimal) and to the point. When a longer transmission /conversation needs to take place, ask the receiver to meet up with them or connect by cell, text etc.
- How do you initiate a radio call? (eg. you to Others) "Unit 1 to Unit 2"
- How to you answer a radio call? "Go for John"
- How do you acknowledge you understand the message? "Copy" or "10-4"
- How do you ask someone to wait a moment? "Stand By"
- How do you ask someone to repeat their transmission? "Say again"

### **Remember**

Volume is controlled on the radio; you should be aware that guests may be able to hear the transmission; you should be brief and not shout or whisper; you should be aware that no one else can speak while you are on the radio; you should keep communications short and to the point; you should use the radio only for official business; you should not transmit sensitive or confidential information over the radio; Radio communication may be monitored or overheard by unauthorized persons; you should be polite, and not ever use foul or obscene language; In case of an emergency situation, radios are to be used for emergency traffic only; and you should give as much information, concisely, about the location if directing services to respond.

### **Channel Use**

You should stay on your designated channel unless contacting someone on a different channel. You should return to their channel as soon as possible.

Events are often loud. You should use the appropriate attachments, i.e. remote microphone or earpiece.

## APPENDIX C

### Flash Report

CONCERT FLASH REPORT									
EVENT		***							
DATE		***							
ATTENDANCE									
Paid	4750								
Comp	100								
Total	4850								
Drop	4600 # of Performers	1							
<hr/>									
DIRECT EVENT INCOME		GROSS		ANCILLARY INCOME					
TICKET SALES		189,150.00		Refreshments/Catering		7,327.19			
SEASON AND GROUP SALES		-							
VOUCHERS		-							
SITE FEE		7,125.00		Novelties		7,201.61			
SEAT USE CHARGE		14,818.20		Site Fee		6,052.37			
TAX		0.00		Ticket Rebate		2,958.00			
NET SALES		24,290.00		Other		0.00			
SPACE RENTAL - Less Promoter Rebate of \$5710		-		TOTAL ANCILLARY INCOME		23,539.17			
TENANT CHARGES		-		TOTAL EVENT INCOME		38,819.67			
Advertising		-							
Sponsorship		-							
Labor		0.00							
Changeover/Setup		15,000.00							
Stagehands		0.00							
Security		0.00							
Ushers & Tix Takers		0.00							
Box Office		2,000.00							
Ticketing Service		0.00							
Utilities		0.00							
City Police/Fire		0.00							
Traffic Control		0.00							
EMT/Medical		0.00							
Production Materials		0.00							
Supervisors		0.00							
Cleaning		0.00							
Taxis		0.00							
ASCAP/BMI		0.00							
Insurance		0.00							
License & Permits		0.00							
Group Sales Commissions		0.00							
Telephone		0.00							
Equipment Rental		0.00							
Damages		0.00							
Other Production:		0.00							
Runner		450.00							
Furniture		500.00							
Fire Extinguisher Rental		0.00							
Oxygen		0.00							
Towels		0.00							
Catering		3,000.00							
TOTAL TENANT CHARGES		20,950.00							
ACTUAL EXPENSE		Per Caps							
Advertising		0.00							
Sponsorship		0.00							
Labor - Wages		0.00							
Labor - P/R Taxes/Benefits		0.00							
Contracted Labor		0.00							
Changeover & Setup Wages		500.00							
Changeover & Setup-P/R Taxes/Benefits		50.00							
Contracted Changeover/Setup		15,000.00							
Contracted Stagehand		0.00							
Security - Wages		0.00							
Security - P/R Taxes/Benefits		0.00							
Contracted Security		2,300.00		0.50					
Ushers & T/T - Wages		230.00		0.05					
Ushers & T/T - P/R Taxes/Benefits		460.00		0.10					
Ticket Sellers - Wages		46.00		0.01					
Ticket Sellers - P/R Taxes/Benefits		0.00							
Ticket Service Charge:		242.50							
Ticket Printing		1,900.00							
Credit Card Fees		0.00							
Ticket Supplies		1,380.00		0.30					
City Police/Fire		920.00		0.20					
Traffic Control		0.00							
EMT/Medical		2,990.00		0.65					
Allocated Telephone		0.00							
Production Materials		0.00							
Contracted Cleaning		0.00							
Permits		0.00							
Equipment Rental		0.00							
Damage Expense		0.00							
Other Production:		450.00							
Runner		500.00							
Furniture		0.00							
Fire Extinguisher Rental		0.00							
Oxygen		0.00							
Towels		0.00							
Catering Expense		3,000.00							
TOTAL ACTUAL EXPENSE		29,968.50							
NET SERVICE INCOME (LOSS)		(9,018.50)							
TOTAL DIRECT EVENT INCOME		15,271.50							
Total Staffing Per Caps		1.81							

## APPENDIX D

### Sample Performance Appraisal

#### Performance Appraisal Management and Professional

##### Employee Information

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_

Facility: \_\_\_\_\_

Appraisal Period: \_\_\_\_\_

To: (mm/dd/yy) \_\_\_\_\_ From: (mm/dd/yy) \_\_\_\_\_

Appraiser: \_\_\_\_\_

Name: \_\_\_\_\_ Date Completed: (mm/dd/yy) \_\_\_\_\_

##### Performance Ratings

In assessing performance, the following should serve as guidelines for assigning Evaluation Ratings in each area as well as determining the Overall Rating.

- (A) **Outstanding.** Performance clearly and consistently exceeds expectations with results beyond those required of the position.
- (B) **Exceeds Expectations.** Performance consistently meets and sometimes exceeds expectations so as to exceed the results required in many areas of the position.
- (C) **Meets Expectations.** Performance on balance, meets expectations. Desired results are generally achieved. Employee's work is effective.
- (D) **Improvement Needed.** Performance meets some position expectations, but not in all areas of responsibilities and results are less than required of the position.
- (F) **Unsatisfactory.** Performance is consistently below the requirements of the position. Immediate corrective action is needed.

##### Principal Accountabilities

Rating:	<b>Job Knowledge:</b> Understands job requirements and responsibilities, demonstrates ability to perform necessary tasks and procedures, keeps informed on up-to-date job methods, skills and techniques.	Comments:
Rating:	<b>Quality Service:</b> Provides quality service, works effectively and productively produces high quality results. Performs with accuracy, thoroughness and effectiveness.	Comments:
Rating:	<b>Leadership and Integrity:</b> Provides direction and leadership in a manner that promotes teamwork, organizational unity and encourages personal growth. Provides direction and defines priorities.	Comments:
Rating:	<b>Creativity and Initiative:</b> Explores new ideas, encourages creativity, seeks innovative solutions and adapts well to changes in the work environment.	Comments:
Rating:	<b>Fosters Strong Relationships:</b> Develops strong relationships with clients/customers by understanding their expectations and emphasizing high qualities. Relates well with colleagues at every level.	Comments:
Rating:	<b>Judgement and Decisiveness:</b> Has the ability, skill and vision to analyze the issues and use sound judgement while making balanced decisions. Willing to take chances for the benefit of the organization.	Comments:
Rating:	<b>Result Oriented:</b> Sets goals in alignment with company priorities, organizes work to achieve goals, identifies and solves problems, achieves targeted results, accepts responsibility for own actions.	Comments:

**Summary of Past Year's Performance**

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**Individual's Strengths that Contribute to a Successful Performance**

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**Areas Needing Attention to Strengthen Performance**

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**Overall Performance**

Overall Performance Rating	(A) Outstanding	(B) Exceeds Expectations	(C) Meets Expectations	(D) Improvement Needed	(F) Unsatisfactory
	[ ]	[ ]	[ ]	[ ]	[ ]

**Comments:**

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***Performance Objectives for the Coming Year***

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***Acknowledgement***

Employee Signature\*: \_\_\_\_\_ Date \_\_\_\_\_

Management Signature: \_\_\_\_\_ Date \_\_\_\_\_

Management Signature: \_\_\_\_\_ Date \_\_\_\_\_

\*Note: Employee signature does not necessarily indicate agreement with this appraisal, but confirms that the contents of it have been reviewed and discussed with the employee.

***Presidential Acknowledgement***

President/CEO Signature\*: \_\_\_\_\_ Date \_\_\_\_\_

\* Note: All performance appraisals recommending an overall rating of (A) Outstanding must receive President/CEO approval. All corporate appraisals must receive President/CEO approval.