

INSTRUCTOR'S GUIDE



SAGAMORE
P U B L I S H I N G

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INTRODUCTION

The second edition of *Facility Management for Physical Activity and Sport* is a combination of the best content and chapters from four other texts authored/coauthored/edited by Dr. Sawyer that relate to the facility management field. The chapters have been revised and expanded to make this new edition of *Facility Management for Physical Activity and Sport* the best publication available. This process ensures added value added for both students and instructors. Combining the best chapters from each book, eliminates the need for multiple books to be purchased by students and provides all the best materials in one publication. The authors recognize the need for content to change as the digital revolution continues. This practice will become more prevalent in the future and will help to keep textbooks current and at reasonable prices for the students.

Dr. Sawyer and his coauthors have selected the best chapters from his works and applied them to a specific area such as facility planning, facility management, financial management, and governance. The chapters were then revised and expanded upon before being used to develop the second edition of *Facility Management for Physical Activity and Sport*.

In 2005, the Council on Facility and Equipment (CFE) and Thomas H. Sawyer, editor-in-chief, decided to expand the 11th edition of *Facility Planning and Design for Health, Physical Activity, Recreation, and Sport* to include 10 chapters related to management (Chapter 1, Facility and Event Leadership and Management; Chapter 2, Human Resource Management; Chapter 3, The Planning Process; Chapter 5, Financial Management Process; Chapter 8, Retail Operations: Concessions, Merchandising, and Ticket Operations; Chapter 9, Promotions and Customer Relations; Chapter 10, Public Relations; Chapter 11, Facility and Event Risk Management; and Chapter 13, Volunteers: The Soldiers in Fund-Raising and Event Management). These new chapters that were added came from a book published in 1998 by Sawyer and Smith entitled *Management of Clubs, Recreation, and Sport*. Those 10 chapters were revised and expanded then added to four additional chapters (Policy Development; Marketing, Advertising, Promotions, Personal Selling, and Sponsorship; Programming and Scheduling; and Special Event Management). However, based on user concerns, the 12th edition of the facility planning book eliminated these chapters and inserted them into a new book, *Facility Management for Physical Activity and Sport*, edited by Sawyer, which was published in 2009.

All the chapters used in both of the manuscripts outlined above, except Policy Development and Special Event Management were the content of a book published in 1998 entitled *Management of Clubs, Recreation, and Sport* by Sawyer and Smith. Once that book went out of print, its chapters were revised and expanded then inserted into the 11th edition of the facility planning text as well as the first edition of *Facility Management for Physical Activity and Sport*.

In 2010, it was decided to rework the 1998 manuscript entitled *Management of Clubs, Recreation, and Sport* by Sawyer and Judge. The original book included 15 chapters that have been used in the books outlined above that were revised and expanded. The new text, *Management of Fitness, Physical Activity, Recreation, and Sport*, by Sawyer and Judge published in 2012, coupled those 15 chapters after revising and expanding them, then added them to an additional 18 chapters for a total of 33 chapters.

In 2013, it was decided to use many of the chapters (18) in the second edition of the *Facility Management for Physical Activity and Sport*, specifically Chapter 2, Management Principles; Chapter 3, Organizational Principles and Leadership; Chapter 5, Planning for Success; Chapter 6 Programming for Success; Chapter 8, Managing Human Resources; Chapter 20, Financial Principles; Chapter 21 Purchasing and Inventory Control Principles; Chapter 22, Revenue Generation; Chapter 23, Marketing Principles; Chapter 24, Retail Principles; Chapter 25, Sales, Sponsorships, and Licensing Principles; Chapter 26, Fund-Raising Principles; Chapter 27, Customer Retention Principles; Chapter 28, Facility Design Principles; Chapter 29, Event Planning Principles; Chapter 30, Volunteers the key to successful event management; Chapter 31, Communication Principles; Chapter 32, Media Relation Principles; and Chapter 33, Public Relations.

Further, there are five chapters used from *Financing the Sport Enterprise* by Sawyer, Hypes, and Hypes (2004) that have been revised and expanded: Chapter 7, Purchasing and Inventory Management; Chapter 9, Understanding

the Revenue Streams; Chapter 15, Retail and Sales Operations; Chapter 16, Customer Retention: A Key to Financial Stability; Chapter 23, Volunteers: The Soldiers in Fund-Raising.

Finally, this second edition of the *Facility Management for Physical Activity and Sport* is edited and coauthored by Thomas H. Sawyer, Lawrence W. Judge, and Tonya L. Sawyer.

Note: All the books listed above are published by Sagamore Publishing, LLC.

SAMPLE COURSE OUTLINE

COURSE DESCRIPTION:

This course has been developed to introduce the student to facility management for health, fitness, physical activity, recreation, and sport. It will cover the following aspects regarding management of facilities—organization and management principles, policy and procedure development, ethical decision-making, planning the key to success, human resource management, management of the marketplace, financial management, risk management, programming, volunteer management, and special event planning.

TEXTBOOK:

Sawyer, T. H., Judge, L. W., & Gimbert, T. L. (2015). *Facility management for physical activity and sport* (2nd ed.). Urbana, IL: Sagamore Publishing.

COURSE PREREQUISITES:

Junior standing or permission of the instructor.

NASSM/NASPE/COSMA

Standard 4: Content Area – Management and Leadership in Sport

- Planning and design of a facility
- Venue and event management
- Venue and event operations and maintenance
- Venue and event programming and scheduling
- Public and community relations

Standard 6: Content Area – Marketing in Sport

- Merchandising
- Sport consumer and consumer behavior
- Special events and their use in sports
- The role of the media
- Venue and event marketing

Standard 7: Content Area – Communication in Sport

- Customer service
- Public speaking

Standard 8: Content Area – Budget and Finance in Sport

- Concessions
- Financial Aspects of Facility Management
- Financing Facilities
- For-profit and not-for-profit budgeting

Standard 9: Content Area – Legal Aspects of Sport

- Risk management procedures
- Crowd control and security

Standard 10: Content Area – Economics in Sport
Economic theory applied to stadiums and arenas
Economic impact of venues and events

COURSE GOALS:

Upon completion of this course, the student should be able to demonstrate the following:

- Fundamental understanding of the planning process for facilities (venue) development in parks, recreation, and sports.
- Knowledge of the construction terminology and the roles of the various professional involved in designing and constructing a facility or venue.
- Knowledge of facilities or venue construction standards.
- An understanding and application of the various construction standards established by various governing bodies.
- An understanding of contemporary facility financing strategies.
- Fundamental understanding of the concepts and issues of risk management as applied to the design and operation of park, recreation, and sport facilities or venues.
- Knowledge of principles and practices of safety, emergency action, and risk management in park, recreation, and sport agencies.
- An ability to develop and implement a risk management plan to assure the health and safety of participants and staff.
- An understanding the importance of venue and event management.
- Knowledge of venue and event operations and maintenance.
- An ability to develop venue and event programming and scheduling.
- An understanding of venue and event marketing.
- An ability to plan special events.
- An ability to plan a public and community relations program.
- An understanding of the role of the media.
- Knowledge about the sport consumer and consumer behavior.
- An understanding of customer service.
- Knowledge about public speaking.
- An understanding of concessions operations.
- An understanding of merchandising.
- Knowledge of crowd control and security.
- An understanding of economic theory applied to stadiums and arenas.
- Knowledge of economic impact of venues and events.

COURSE CONTENT:

Lesson (week)	Title
1	Organization, Management, and Leadership in Facility Management
2	Human Resource Management
3	Planning Process
4	Policy Development
5	Programming and Scheduling Process
6	Financial Management Process
7	Understanding Revenue Streams and Facility Financing
8	Operations: Concessions, Merchandising, and Ticket Sales
9	Marketing, Advertising, Promotions, Personal Selling, and Sponsorship
10	Customer Recruitment and Retention
11	Public Relations
12	Facility and Event Risk Management
13	Volunteers: The Soldiers in Fund-Raising and Event Management
14	Special Event Management

Assignments:

(See Sample Projects following the syllabus)

Lecture and Reading Lessons:

There will be 10 L&R Lessons with reading assignments from the textbook. Each L&R Lesson will be worth 100 points each.

Team Project #1 Developing a budget: (200 points)

The student will prepare a set of guidelines for the development of a budget for the Department of Athletics, Mark Twain University (MTU) in Hannibal, MO. Mark Twain University is a coeducational institution with an enrollment of 3,000 students who pay \$29,000 for tuition, room, and board. The “Steam Boaters” belong to the Mississippi Athletic Conference, which is a NCAA Division II conference. There are 20 teams supported by MTU (i.e., Women: basketball, field hockey, golf, lacrosse, soccer, softball, swimming and diving, tennis, track and field, and volleyball; Men: baseball, basketball, football, golf, ice hockey, lacrosse, soccer, swimming and diving, tennis, and track and field).

The budget should include, but not be limited to: income categories, expense categories, justifications required, there should be a five actual years of expenditures, an allocated year, and two projected years. The budget must be balanced. The student will create a spreadsheet (preferably Excel®) for the budget including justifications.

Team Project #2 Facility Financing (200 points)

The City of Hannibal, Mark Twain University, Hannibal Mud Hens (a Double A minor league baseball team), and a group of private investors have agreed to redevelop a large portion of downtown. The project will include two hotels, condominium complex, retail stores, and a minor league baseball complex for the Hannibal Mud Hens. The estimated cost of this project is \$200 million. Your job is to develop a facility financing plan for this project. The hotels will cost approximately \$35 million each, the condominium project nearly \$60 million with over 200 units with one, two, and three bedroom units, retail store spaces \$30 million infrastructure for the entire project (streets, sidewalks, utilities,

etc.) \$10 million, and \$30 million for the baseball complex. You can use a combination of private and public funding over a 20-year period of time. A budget will be developed for the project with a 20-year pay back.

Team Project #2 Booster Club Project (200 points)

The Becky Thatcher College, a medium-sized female institution soon become coeducational, on the outskirts of St. Louis, MO., is in the process of developing a new sports program. The college will need funding for the development of sport facilities and to support the new sport program. The president and dean of the college desire to develop an athletic booster club to support the new athletic program. They have hired you to develop the documents for the new Becky Thatcher College Tiger Athletic Booster Club. This will be a corporation incorporated in Missouri. It will also be a nonprofit 501(c)3 corporation. You will need to prepare all corporate papers (e.g., articles of incorporation, and by-laws for the club) required by the State of Missouri as well as those for the IRS.

Major Project: Oral Presentation (300 points)

A Proposal for Becky Thatcher College to Develop a Sports Program

Situation:

You have been hired as an outside consultant (student #1) by the Dean of Student Affairs (student #2) of Becky Thatcher College (BTC). The dean has been charged by the president to develop a rationale for the development of a sports program for the college. The dean has employed you to assist with the development of (1) the rationale for a sports program (consultant), (2) the sports program presented by BTC athletic director (student #3), (3) a funding plan (BTC athletic director), (4) an implementation timeline (consultant), (5) a comparison to two others similar institutions with athletic programs presented by their athletic directors (student#4 and #5), and (6) the presentation of the rationale, comparisons, and plan to the board of trustees (dean).

Facts about Becky Thatcher College

- Founded in 1865
- A female institution
- Liberal arts institution (with teacher education)
- Enrollment 950
- Tuition \$24,000
- Large recreation complex (gymnasium, wellness center, aquatics area) with adjoining recreational sports fields
- Residential campus with a strong distance education program with over 1,200 full-time students
- Catholic
- Located south of Chicago

Project:

The project has the following components:

- Sports program rationale (mission, values, and vision)

- Sports program design (sports listed for both men and women)
- Financing plan for the sports program (budget included like project #1)
- Facility needs
- Implementation timeline of the proposed sports program (minimum 10-year period)
- Prepare a presentation for the board of directors (all students need to be involved in the presentation)
- Prepare a PowerPoint™ for the presentation
- Present the speech (20–25 minutes) to the board of directors

This is a professional presentation; therefore, students will dress the part (i.e., no jeans, running shoes, baseball caps or other head gear, etc.). Additionally, students will prepare a Powerpoint© presentation to aid in the overall presentation, and a handout to accompany the talk. The presentation should last between 20–25 minutes.

The presentation should cover the following:

- Why should the college have a sports program? (i.e., value, benefits, need, etc.)
- Rationale for a sports program
- Comparison to two other similar institutions with athletic programs
- Mission of the sports program
- Vision of the sports program
- Core values of the sports program
- Outline of the sports program
- Financing for the sports program
- Financial value to the college
- Facilities to be developed
- Implementation timeline for the sports program
- Powerpoint™ make sure you develop slides that are a mixture of graphics and text.

ATTENDANCE POLICY:

Instructor's Prerogative

LATE ASSIGNMENTS:

Instructor's Prerogative

INCOMPLETE GRADE POLICY:

Instructor's Prerogative

COURSE GRADE DETERMINATION:

If you are not satisfied with your grade on any of the assignments, you may re-submit the assignments after corrective modifications have been made. The GREATER the detail provided for each question, the better the grade.

The common pitfalls that result in lower lesson and project grades are as follows:

- Lack of detail
- Poor writing
- Lack of documentation
- Poor grammar
- Lack of conclusions
- Spelling errors
- Lack of organization
- Lack of recommendations

SAMPLE GRADING POLICY:

The following grading scale will be used for each lesson:

- A+ = Outstanding
- A = Exceptional
- A- = Excellent
- B+ = Good
- B = Above Average
- B- = Satisfactory
- C+ = Limited performance
- C = Average
- C- = Below Average
- D+ = Poor
- D = Very Poor
- D- = Exceptionally Poor
- F = Failure

Outstanding performance (A+)

This indicates complete and comprehensive understanding of the subject matter, genuine mastery of relevant skills, demonstration of an extremely high level of interpretative and analytical ability and intellectual initiative, and achievement of all major and minor objectives of the subject, participates regularly and appropriately in discussions, supports peer learning.

Exceptional performance (A)

This indicates complete understanding of the subject matter, genuine mastery of relevant skills, demonstration of an extremely high level of interpretative and analytical ability and intellectual initiative, and achievement of all major and minor objectives of the subject, participates regularly and appropriately in discussions, supports peer learning.

Excellent performance (A-)

This indicates a very high level of understanding of subject matter, development of relevant skills to a very high level, demonstration of a very high level of interpretative and analytical ability and intellectual initiative, and achieve-

ment of all major and minor objectives of the subject, participates regularly and appropriately in discussions, supports peer learning.

Good performance (B+)

This indicates a solid understanding of most of the basic subject matter, partial development of relevant skills although errors detract from quality of work, adequate interpretative and analytic ability and achievement of all objectives of the subject, failure to achieve some minor objectives, participates in discussions, supports peer learning.

Above Average performance (B)

This indicates above average understanding of most of the basic subject matter, partial development of relevant skills, some evidence of interpretative and analytic ability, failure to achieve most major objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Satisfactory performance (B-)

This indicates an adequate understanding of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Limited performance (C+)

This indicates a limited understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Average Performance (C)

This indicates an average understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Below Average Performance (C-)

This indicates a below average understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Poor Performance (D+)

This indicates a poor understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Very Poor Performance (D)

This indicates a very poor understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Exceptionally Poor Performance (D-)

This indicates an exceptionally poor understanding of most of the basic subject matter, failure to develop relevant skills, insufficient evidence of interpretative and analytic ability, and failure to achieve major and minor objectives of the subject, does not participate regularly or appropriately in discussions, does not support peer learning.

Failure (F)

This indicates a total lack of understanding of the basic subject matter, lack of relevant skills, lack of interpretative and analytic ability, and lack of achievement toward major and minor objectives of the subject, failure to participate regularly or appropriately in discussions, does not understand the concept of peer learning.

COVER PAGE REQUIREMENTS:

Each assignment must have a cover page that includes the course number and name, assignment number, and student's name, address, phone number, and e-mail address. The assignment will not be accepted without a proper cover page attached.

ACADEMIC HONESTY STATEMENT:

The _____ is committed to academic integrity in all its practices. The faculty value intellectual integrity and a high standard of academic conduct. Activities that violate academic integrity undermine the quality and diminish the value of educational achievement.

Cheating on papers, tests, or other academic works is a violation of _____ rules. No student shall engage in behavior that, in the judgment of the instructor of the class, may be construed as cheating. This may include, but is not limited to, plagiarism or other forms of academic dishonesty such as the acquisition without permission of tests or other academic materials and/or distribution of these materials and other academic work. This includes students who aid and abet as well as those who attempt such behavior.

ADA STATEMENT:

Indiana State University seeks to provide effective services and accommodations for qualified individuals with documented disabilities. If you need an accommodation because of a documented disability, you are required to register with Disability Support Services at the beginning of the semester. If you will require assistance during an emergency evacuation, notify your instructor immediately. Look for evacuation procedures posted in your classrooms.

COPYRIGHT STATEMENT:

Students shall adhere to the laws governing the use of copyrighted materials. They must ensure that their activities comply with fair use and in no way infringe on the copyright or other proprietary rights of others and that the materials used and developed at _____ contain nothing unlawful, unethical, or libelous, and do not constitute any violation of any right of privacy.

RIGHT TO REVISION

The _____ reserves the right to change any statements, policies, or scheduling as necessary. Students will be informed promptly of any and all changes.

IMPORTANT

If anything is at all unclear about the content of this syllabus, please don't hesitate to contact me. If you encounter problems during the semester, come and see me. Do not wait until the last week of classes!!! Please, take advantage of various centers on campus that provide assistance to students wishing to enhance their academic performance and/or maintain balance in their lives.

SAMPLE PROJECTS

SAMPLE FACILITY FINANCING

The City of Hannibal and the Mark Twain Entertainment and Sport Group proudly present:

McShowman Square



The financing plan for the new facility located in Hannibal, Ohio, that will not only be the home to the Hannibal Mud Hens minor league baseball team but include two Marriot hotels, retail shopping, condominiums, a twelve screen movie theater, and a city park.

History

The Hannibal Mud Hens are a Class A minor league baseball team, affiliated with the Cincinnati Reds, from Hannibal, Ohio. The team plays in the Midwest League. The team's inaugural year in Hannibal was 1983, as the Hannibal Suns, a Pittsburgh Pirates farm team that replaced the Pirates' previous Midwest League farm team, the Danville Suns. The following year, the team was given the more traditional name "Mud Hens." The Mud Hens' first home park, built in 1965, was Lucas Field, near the University of Cincinnati campus. The team moved to a new park in downtown Hannibal, Fixerhosen Field, on May 13, 1988. The facility that is currently being constructed in Hannibal will include the Mud Hens new field as well as other facilities that will be used by the City of Hannibal. The new facility is McShowman Square, which is the name of the new field. The mascot that represents the Mud Hens is Nasty McShowman who has a baseball head, carries a baseball bat, and rides a Harley.

Development of McShowman Square

Mayor Jones announced that the City of Hannibal has reached a definitive agreement with the Mark Twain Entertainment and Sport company and is in final negotiations for the development of McShowman Square. Definitive agreements are documented for construction to begin. They represent a significant milestone toward realizing the project. Agreements will be presented to the Hannibal Redevelopment Commission for consideration. The Redevelopment Commission is the sole entity responsible for approving the agreements. McShowman Square will assist us in retaining and gaining jobs and bringing new business opportunities to the area. McShowman Square demonstrates sound fiscal management and the commitment of respected private investors that want to be key partners in revitalizing downtown. An investment in downtown is a positive investment for our community's future.

Summary highlights of the definitive agreement are as follows:

- Ballpark/Condominiums/Retail
- City of Hannibal retains Mark Twain sport to manage the ballpark in a manner consistent with modern Class A professional baseball stadium management standards and practices.
- City will construct the ballpark for an amount not to exceed \$30 million with Hardball contributing \$10 million toward the infrastructure of the facility.
- City will participate in naming rights and ticket revenues with the proceeds going into a capital maintenance fund.

Smith Estate will construct at a cost of not less than \$60 million for a condominium complex.

Smith Real Estate is a dynamic and multifaceted commercial real estate firm specializing in project development, marketing, and management. Smith has an award-winning track record with an affinity for mixed-use projects in urban areas. Mark Twain Entertainment and Sport is a company that invests in and operates baseball-related businesses. It is the owner of the Hannibal Mud Hens.

The retail store spaces will not exceed \$25 million. We will have high-end retailers in these store fronts who will lease out the space.

Hotels/Movie Theater/City Park

The City of Hannibal has contracted with Marriott Hotels to bring a Courtyard and a Springhill Suites Hotel to McShowman Square. The construction of each hotel will not exceed \$30 million.

The movie theater complex that includes 12 screens will be a Kerasotes theater. The cost of this project will be \$10 million.

The city park will not exceed a budget of \$2 million. In this park, we will have a grand fountain as well as seating, flowers, trees, and paths. It will be a space that can be enjoyed on game days, as well as throughout the year by the entire community.

Additional McShowman Square updates:

Hannibal City Plan Commission: A public hearing on zoning map amendments. Certain properties within the McShowman Square development are being requested to be rezoned to commercial status.

City Council: An ordinance outlining the bond financing for the McShowman Square development will be discussed. City Council is being asked to approve a lease for certain land and public improvements between the Hannibal Redevelopment Authority and the Hannibal Redevelopment Commission. The lease provisions are the same as those that have already gained approvals from the Redevelopment Authority and Redevelopment Commission. Final approval on the bond financing could come at the same City Council meeting.

Construction

Mark Twain Entertainment and Sport has been hired to design a new \$30 million minor league baseball park in the city of Hannibal, Ohio. The Hannibal Redevelopment Commission has reportedly approved a \$2 million contract with the company for the new stadium. The new ballpark will be the home of the minor league Hannibal Mud Hens from 2009 and will serve as a centerpiece to Hannibal's downtown McShowman Square development.

On January 2, 2007, the first of the concrete was poured for the ballpark at McShowman Square in downtown Hannibal. The future home of the Hannibal Mud Hens is scheduled to be completed in time for Opening Day of the 2009 season. The initial concrete will make up the outfield wall.

Financing

This project will be financed by public and private sources. The funding for the entire project will be accomplished as follows:

City of Hannibal will issue a general obligation bond (supported by parking revenue, 2% restaurant tax, and 4% bed tax in Dawson and surrounding counties) for \$54 million to cover a majority of its expenses and utilize \$10 million of redevelopment funds to purchase the ten businesses and 17 houses that will need to be cleared from the property and complete the necessary infrastructure development for the complex. The funds for this project are included in the \$54 million general obligation bond.

The City of Hannibal will establish a TIF zone around the McShowman Square area to generate additional tax revenue for the area.

The remaining \$136 million of the \$200 million will come from private sources. Prestige Worldwide, a Chicago-based company, is contributing to the City of Hannibal \$10 million toward the \$30 million city-owned stadium and will operate for the city. Smith Real Estate, a commercial real estate firm, will construct at a cost no less than \$20 million a condominium and real estate plaza and 24,000 square feet of first-floor retail space. Finally, two 250-room hotels (\$60 million two hotels by Marriott) will be constructed by Cincy Lodging Services. The remaining funds have come from donations and trusts from the citizens of Hannibal who would like to improve their city and bring more visitors to their city.

The naming rights for the baseball complex will be \$500,000 for a 20-year period (total \$10 million). The revenue from the 16 suites will be used to repay the debt. Further, the increased marketing inventory highlighted by the 40-foot video board will significantly increase the sponsorship revenues which will also be used to reduce the debt on the private side.

The Facilities



Retail Shops and Condominiums



McShowman Field



The City Park located in McShowman Square



One of the two hotels in McShowman Square



The Movie Theatre Complex

SAMPLE BOOSTER CLUB PROJECT

Sawyer-Twain College

Bull Dog Athletic Boosters Club



Constitution, By-Laws, and Standard Rules

CONSTITUTION

ARTICLE I – NAME

Section 1. This organization shall be known as the Sawyer-Twain College Bull Dog Athletic Boosters Club, hereinafter referred to as the Club.

ARTICLE II – PURPOSE

Section 1. The purpose of this organization shall be to support the new Sawyer-Twain Bull Dog Athletic Club deems favorable to further the cause of athletic programs in the Sawyer-Twain College.

Section 2. This shall be a nonprofit organization and shall not take part in any political activities, directly or indirectly.

Said organization is organized exclusively for charitable, religious, and educational, purposes, including, for such purposes, the making of distributions to organizations that qualify as exempt organizations under section 501 (c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code.

No part of the net earning of the organization shall inure to the benefit of or be distributable to its members, trustees, officers, or other private persons, except that the organization shall be authorized and empowered to pay reasonable compensation for services rendered and make payments and distributions in furtherance of the purposes set forth in the purpose clause hereof. No substantial part of the activities of the organization shall be the carrying on of misinformation or otherwise attempting to influence legislation and the organization shall not participate in or intervene in any political campaign on behalf of any candidate for public office. Notwithstanding any other provision of this document, the organization shall not carry on any other activities not permitted to be carried on by an organization exempt from federal income tax under section 501 (c) (3) of the Internal Revenue Code, corresponding section of any future federal tax code or by an organization, contributions to which are deductible under the Internal Revenue Code section.

Section 3. Article II Section of the Constitution shall not prohibit the club from taking a stand on millage and/or bond issues concerning the Sawyer-Twain College. Political presentations, candidates for office and/or materials shall be prohibited from all meetings of the Club and its work places. This includes school board candidates and/or members.

ARTICLE III - MEMBERSHIP

Section 1. The membership shall consist of any persons not enrolled in the, Sawyer-Twain College who will support the purpose and objectives of this Club.

Section 2. Race, creed, sex, or ethnic origin shall not bar any person from membership in this Club.

Section 3. A member shall be considered to be a person whose dues are paid for the current year.

Section 4. All members are encouraged to solicit their friends and neighbors within the Sawyer-Twain College to join and/or support the Bull Dog Athletic Boosters Club Members do not need to have children enrolled in the college to gain membership.

ARTICLE IV - MEMBERSHIP MEETINGS

Section 1. General meetings shall be held on the third Monday of each month. Should such a meeting be impracticable or impossible, the President shall set the meeting date, time, and place and the membership notified by the Secretary at least 72 hours in advance.

Section 2. Special meetings may be called at the discretion of the President with approval of the Executive Council. A majority vote of the Executive Council requires such a meeting be held.

Section 3. A quorum for membership meetings shall be a minimum of ten members of which three shall be members of the Executive Council.

ARTICLE V - GOVERNING BODY

Section 1. The Officers of the Club shall consist of the elected President, Vice-President, Secretary, and Treasurer.

Section 2. The four Officers: President, Vice-President, Secretary, and Treasurer together with the Chairperson of the Membership committee shall be the Executive Council of this Club and shall have the authority to exercise all powers of the Club between regular meetings.

Section 3. Any Officer or Committee Chairperson shall have the privilege of resigning their office at any time. They shall present their resignation in writing to the Executive Council and if their records are in order, the resignation shall be accepted.

Section 4. Any Special meeting of the Executive Council shall require a majority of the Executive Council be present. Minutes shall be recorded at such meeting and read at the next regular membership meeting of the Club.

Section 5. All Executive Council voting will be decided by a majority vote.

ARTICLE VI - NOMINATION & ELECTION OF OFFICERS

Section 1. The President, Vice-President, Secretary, and Treasurer of this Club shall be elected by plurality vote of those members present at the regular May meeting.

Section 2. The President, together with the Vice-President, shall appoint a three member Nominations and Elections Committee in the month of March.

Section 3. The Nominations & Elections Committee shall recommend candidates for office at the regular April meeting. Nominations shall also be accepted from the floor.

Section 4. Any member in good standing may be nominated for office, including those members currently holding office, unless such member declines the nomination. No more than one family member on any one committee.

Section 5. The Nominations & Elections Committee will conduct an election by paper ballot, with spaces provided for write-in candidates, at the regular May meeting, and announce the results at this meeting.

Section 6. Any member having a prior commitment that would prohibit his attendance at the time of elections must contact the Chairperson of the Nominations & Elections Committee for an absentee ballot. Such ballot must be

returned to the Chairperson, in a sealed envelope, prior to the election. Any such ballot will then be counted with the ballots collected at the election.

Section 7. Special elections shall be held at any time a vacancy occurs, after proper notification to the membership.

Section 8. The term of office shall be for one year, from July 1 through June 30, or until such time as their successors are duly elected.

ARTICLE VII - CLUB COMMITTEES

Section 1. Standing committees shall be Membership, Publicity, and Volunteer Coordination. Additionally, Special Committees shall be formed as needed.

Section 2. If a need arises, the President along with the Vice-President may appoint special committees, with the approval of the membership.

Section 3. The President shall assign duties for such committees.

Section 4. Persons appointed to such committees shall serve no longer than one-year or until such time as the need terminates within the year and the committee is disbanded.

ARTICLE VIII - RULES AND REGULATIONS

Section 1. This Constitution, together with these by-laws and written Standing Rules, shall govern the actions of this Club and its members.

Section 2. Any member or members who shall abuse the usage of this Club or who shall be found guilty of any offense against this Club or its membership may be suspended or expelled from the Club.

ARTICLE IX DISSOLUTION OF THE ORGANIZATION

Section 1. Upon dissolution of the organization, assets shall be distributed for one or more exempt purposes within the meaning of section 501 (c) (3) of the Internal Revenue Code for a public purpose. Any such assets not disposed of shall be disposed of by the Court of Common Pleas of the county in which the principle office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said court shall determine, will best accomplish the general purposes for which the dissolved organization was organized.

BY-LAWS

ARTICLE I - DUTIES

Section 1. The President shall:

- A. Have general supervision of the Club and preside over all meetings when present.
- B. Preserve order and insist on proper decorum when the Club meetings are in session.
- C. Execute any and all contracts the Executive Council may authorize.
- D. Be ex-official member of all Club committees.
- E. Have the power, with the approval of the Club, to appoint all Chairpersons and majority of all committees.
- F. Have the power to call special meetings as provided in Article IV of the Constitution.
- G. Convey to their successor all unfinished business and property of the Club.

Section 2. The Vice-President shall:

- A. Assume the duties and responsibilities of the President in the event of the President's absence.
- B. Be the custodian of the Constitution, By-laws, and Standard Rules of the Club.
- C. Appoint, with the approval of the Club, the minority of all committees.

Section 3. The Secretary shall:

- A. Be responsible for recording the proceedings of this Club and shall submit the same for approval at meetings of the Club.
- B. Be the custodian of all records of the Club, except financial and membership.
- C. Send and properly receive all correspondence of the Club.
- D. Perform any such other duties as are usual and incidental to the Office of Secretary.
- E. Upon expiration of their term of office, turn over to their successor all records, books, documents, and supplies or equipment belonging to this Club that was in their custody.

Section 4. The Treasurer shall:

- A. Receive all revenues of this Club and deposit them in the Club's account(s) at a financial institution approved by the Executive Council.
- B. Be responsible for prompt payment of all the authorized debts of this Club.
- C. All checks must require any two signatures of the four officers.
- D. Be the custodian of all financial records of the Club and make a report of the same, for approval, at meetings of the Club.
- E. Perform such other duties as are usual and incidental to the office of Treasurer.
- F. Upon expiration of their term of office, turns over all finances and records belonging to the Club to their successor after an audit by the Executive Council.

Section 5. Standing Committee Chairperson(s): (Membership, Publicity, Volunteer Coordinator)

The Membership Chairperson and Committee are responsible for signing up new members and keeping the membership roster current. The Chairperson of the Membership Committee shall perform duties as assigned by the President.

The Publicity Chairperson and Committee are responsible for dissemination of information or promotional material as a means of gaining public attention or support.

The Volunteer Coordinator recruits Event Captains to coordinate Booster events. Event Captains solicit and organizes volunteers to work events.

The Chairperson shall keep the President aware of their Club activities by giving a regular report at each meeting and when requested by the President.

Section 6. Executive Council

- A. The Executive Council shall be responsible for all actions of this when Membership meetings are not in session.
- B. The Executive Council shall determine which officer will co-sign all vouchers with the Treasurer.
- C. The Executive Council shall authorize an appropriate financial institution(s) for the Clubs funds.
- D. They shall audit the Treasurers finances and records upon expiration of the Treasurers term(s) of office.
- E. They shall be responsible for the fulfillment of the aforementioned duties of all the officers.

Section 7. Members

A. No member may assume any duties, collect, receive or transfer any funds, or act in, or under, the name of this Club, without having been duly assigned and/or entitled to such action.

B. Under no circumstances shall a non-member be permitted to do any of the above, without having been duly assigned and/or entitled to such action.

ARTICLE II - DUES

Section 1. The annual dues of the Club shall be \$10.00 FALL AND SPRING year.

Section 2. Dues shall be payable through the Membership Chairperson who will forward the dues to the Treasurer for proper disposition.

Section 3. Membership Chairperson shall compile a membership list. List shall be made available to all members.

Section 4. Members shall pay their annual dues no later than the end of each semester. Dues should be paid in advance, anytime from August to December in the Fall and January to May in the Spring.

ARTICLE III - VOTING PROCEDURES

Section 1. Motions made at a meeting shall follow parliamentary procedure.

Section 2. Motions to hold a secret ballot of the members present shall supersede any regular motion. Motions for a secret ballot of members present needs to be passed by a majority of those members present.

Section 3. A motion by any member for a vote of the entire membership shall supersede any other vote and will also require being passed by a majority of those members present. If passed, the Secretary shall mail such motion(s) to all members for their vote and specify a date by which this vote must be returned.

Section 4. All requests for Booster funds other than Booster Club projects i.e., supplies, sweat suits, etc., shall be made by filling out request forms available from the Athletic Director or Athletic Booster President and presented IN PERSON at a regular Boosters meeting. Emergency requests will necessitate an emergency meeting of Executive Council members.

Section 5. Presentations for fund raising or request for funds or support of this Club shall first be presented to the President for review by the Executive Council (and appropriate Committee if any) before such presentation is given to the membership.

Section 6. All attempts shall be made to evenly distribute support from this Club to schools with like grade levels.

ARTICLE IV - ORDER OF BUSINESS

Section 1. The Order of Business at any meeting of the Club shall consist of the following:

- Reading of the Minutes
- Financial Reports
- Communications
- Report from Executive Council Members
- Report from Committees
- Unfinished Business
- New Business
- Adjournment

ARTICLE V - STANDARD RULES

Section 1. There shall be a written set of rules, to be known as Standard Rules, available to each member of this Club.

Section 2. Together with these Constitution and By-Laws, the Standard Rules will govern this Club and its members.

ARTICLE VI – PARLIAMENTARY

Section 1. Except as provided in these Constitution and By-Laws, “Roberts Rules of Order, Revised” shall govern the conduct and deliberations of the meetings of this Club.

ARTICLE VII - AMENDMENTS

Section 1. Any alterations or amendments to the Constitution, By-Laws, and Standard Rules shall be made by a majority vote of those members present at any regular meeting of this Club.

Section 2. Any proposed amendment must be presented in writing to the Secretary for review by the Executive Council, (and Constitution and By-Laws Committee if one exists) after being read for the first time to those members present at the meeting which they are presented.

Section 3. The Executive Council must present any such proposed amendment for a vote of those members present at the next regular meeting.

Section 4. All changes to the Constitution and By-Laws or Standard Rules shall be dated and recorded by the Secretary and inserted in its appropriate place.

Section 5. Each member shall be entitled to a copy of the Constitution, By-Laws, Standard Rules, and any changes thereafter.

STANDARD RULES

No person, except those scheduled to work an event, will be allowed in the Club’s work areas Exceptions may be allowed by contacting the event’s Team Captain who may permit additional members in these work areas to work if the Captain sees a need.

Food items subject to spoilage shall not be kept for the next event. The event Team Captain may determine an appropriate time such item(s) may be sold at the current event at an amount lesser than the scheduled price. At the conclusion of the current event, the Team Captain may dispose of such items as he see fit.

Members assigned to work events should arrive at the proper designated time. If they are unable to attend, they should notify the President and/or event Team Captain of their absence as soon as possible.

Members are encouraged to let the event Team Captain and/or the President know of their presence at an event should they be needed to assist in the Club’s activities.

Due to the limited space in the Club’s working areas, non-workers at an event shall not use these working areas to store their clothing or personal items. Should the need arise for security of a valuable item, the event Team Captain may grant permission.

Members shall use the proper designated storage areas for their personal belongings.

There is no smoking, use of alcohol, or use of drugs allowed in the Booster booths at the schools or football fields.

Members must attend 3 meetings and work 6 events in a year (3 each semester) to qualify for the discounted annual family athletic pass. Each spouse working at event counts as 2 individuals working. However, both spouses attending a meeting count as one meeting.

Club members driving their personal vehicle on Club business (getting supplies, etc.) shall be reimbursed by the club for accumulated mileage at the current rate as Sawyer-Twain College pays for employee personal vehicle usage.

PART 1

FUNDAMENTALS OF MANAGEMENT

1

MANAGEMENT PRINCIPLES

INTRODUCTION

Sport, in its broadest sense, refers to all recreational and competitive sports, physical activity, fitness, and dance. Sport has become a dominant influence in many societies. No single aspect of any culture receives more media attention than sport. Sport is big business and continues to grow at a phenomenal rate globally. It provides the visibility for its star participants to enter the political arena or become broadcasters or movie stars or entrepreneurs.

Further, recreational participation in sport continues to grow in popularity each year driven by increased time for leisure activities and discretionary income to spend on exercise and fitness pursuits. This increase in growth has required development of new undergraduate programs to prepare a new type of sport and fitness managers. This new sport/fitness manager needs to understand the management process in order for the demands of the fitness and sport businesses to be successful.

Finally, management is critical in keeping any organization operating smoothly and efficiently. A facility that is well maintained and managed is one of the best public and consumer relations tools in an organization's arsenal. An organization's facility manager must become involved in many tasks, including, but not limited to, leadership, facility and event management, crowd control, security, emergency operations, facility maintenance, operational policies and procedures, and human resources to name a few.

Instructional Objectives

The instructional objectives for this chapter include:

- The student will be able to define management.
- The student will be able to discuss why management is needed by a sport organization.
- The student will have a generally understanding of the history of management and the various management theories.
- The student will begin to understand what a manager is and what a leader is and why both are necessary for an organization to be successful.
- The student will understand the various branches of management.
- The student will begin to understand the philosophical parameters of business administration and management perspectives.
- The student will understand the functions of management.
- The student will understand the various planning terms.
- The student will understand the characteristics of a control process, the design of an effective control system, and the dysfunctional consequences of control.

Experiential Learning Opportunities

- Have the student interview five sport leaders in the community to determine the leader's management style.
- Have the student shadow four different types of sport leaders for a day to receive a better understanding what the position is all about.

Internet Exercises

- Have the student use the Web to find management and leadership definition.
- Have the student use the Web to find contemporary management theories.

SUMMARY

This chapter attempted to provide the following content to the reader:

- A definition of management
- An explanation why management is needed by a sport organization
- A brief history of management and the various management theories
- An explanation of what a manager is, what a leader is, and why both are necessary for an organization to be successful
- A description of the various branches of management
- An understanding of the philosophical parameters of business administration and management perspectives.
- An explanation of the functions of management
- A description of the various planning terms
- The student will understand the characteristics of a control process, the design of an effective control system, and the dysfunctional consequences of control.

2

ORGANIZATIONAL PRINCIPLES AND LEADERSHIP

INTRODUCTION

Managers who oversee sport and recreation facilities face many decisions each day. They are charged with being responsive to changes in the marketplace while maintaining a degree of consistency and stability overtime within the organization. Policies and procedures play an important role in the operation of sport and recreation facilities because they are the means by which the agency's mission is put into motion. They reflect the manner in which the agency's strategic goals are integrated into day-to-day management decisions. Policies and procedures provide a common understanding of workplace operations, clarify managerial instructions, and serve as a resource to quickly resolve problems.

The successful operation of a sport and recreation facility also depends on an effective system of internal controls. A valid control system can assure that baseline operations are being implemented as required and can warn facility managers of changes in the environment that requires a new set of commands. A system of policies and procedures allows for the efficient use of all human and financial resources because it reduces intentional and unintentional errors and permits the agency to meet its strategic objectives.

Instructional Objectives

The instructional objectives for this chapter include:

- The student will be able to define and discuss an organization.
- The student will be able to define and discuss organizational behavior.
- The student will be able to define and discuss organizational culture.
- The student will be able to define and discuss organizational structure.
- The student will understand the components of an organizational chart as well as the relationships captured in the chart.
- The student will understand what is met by chain of command.
- The student will understand the key principles and concepts of delegation of authority.
- The student will understand the difference between line organization and line and staff organization.
- The student will be able to discuss intelligently policy based management.
- The student will be able to develop and use a policy and procedure manual.
- The student will understand how to write policies and procedures.
- The student will be able to discuss the differences between leaders and managers and why they are both critical for an organization.
- The student will be able to discuss and compare McGregor's Theory X and Theory Y as well as the Leadership Grid concept.

Experiential Learning Projects

The following are examples of experiential learning projects that could be used with the students:

1. Students will shadow a sport administrator for a day to see what the job is like. The students will prepare a report about what they learned during this experience.

2. Students will interview 3 to 5 sport managers to determine the leadership style of each manager interviewed and prepare a report outlining their findings.

Internet Exercises

The following are examples of internet exercises students could be involved in to gather more information about leadership, management, or policy and procedure development:

- Use Google or some other search engine and gather more information regarding
 - Organizational culture
 - Organizational structure
 - Leaders vs. managers
 - Leadership theories
 - Leadership styles
 - Organizational theories
 - Organizational behavior
 - Chain of command
 - Lined and staff relationships

Case Study

As director of a recreation baseball program you are faced with a controversy over how to handle cutting players from the travel team. The problem is that there are too many players to participate. The coach was asked to develop a procedure to cut players from the travel team. A sound plan was developed but not accepted by the parents.

There were 17 players on the team and the amount of playing time had been greatly reduced for all players, in order to allow all players to play. The average number per team in the league was 12-14. This number provided a good balance of playing time for all participants.

The issue of cuts is always a touchy one. In this case the recreation committee, after losing three coaches last season because of the issue, wants to develop an acceptable policy relating to cutting participants from teams.

SUMMARY

This chapter attempted to provide the following content to the reader:

- A definition of an organization, organizational behavior, and organizational culture.
- Information regarding the organizational structure of an organization as well as an organizational chart and the various relationships found within the chart.
- A discussion relative to delegation of authority.
- An analysis of policy based management.

- A discuss regarding the role of an organizational structure.
- An outline of components of an organizational chart as well as the relationships captured in the chart.
- A discuss relative to the function of the chain of command.
- An understanding of the difference between line organization and line and staff organization.
- An understanding of the importance of the development and use of a policy and procedure manual.
- A description of how to write policies and procedures.
- A discussion relative to the differences between leaders and managers and why they are both critical for an organization.
- A discussion and comparison of McGregor's Theory X and Theory Y as well as the Leadership Grid concept.

3

PLANNING FOR SUCCESS

INTRODUCTION

Planning is the process of determining the organization's goals and objectives and selecting a course of action to accomplish them within the environment and within and outside the organization. Its primary purpose is to offset future uncertainties by reducing the risk surrounding the organization's operations. It requires the organization to review its internal accomplishments (strengths) and challenges (weaknesses) and external opportunities and threats. During this process, the organization will develop a SWOT chart (i.e., the depiction of internal strengths and weakness, and external opportunities and threats of the organization and identify connections within the organization as well as externally that will allow the organization to become strategically competitive in the future. This process is best facilitated by the use of brainstorming.

Instructional Objectives

The following are the instructional objectives for this chapter:

- The student will understand how to use a SWOT analysis and the importance of such a tool in the planning process.
- The student will understand how to implement a brainstorming session.
- The student will understand how to conduct a needs assessment survey and prepare a needs assessment report.
- The students will be able to identify and explain the common steps in a planning process.
- The students will appreciate the value of the various classifications of plans.
- The students will be able to explain the differences between a policy and a procedure.
- The students will understand the process for the development of policies and procedures.
- The students will be able to develop a strategic plan and understand the various components within a strategic plan.
- The students will be to discuss the differences between goals and objectives.
- The student will be able to write a goal and an objective for specific goals.
- The student will be able to prepare a mission statement, vision statement, and values for an organization.
- The students will be able to discuss the common pitfalls in the planning process.
- The students will be able to discuss the common steps in benchmarking.
- The students will be able to develop a planning team.
- The students will be able to develop a policy and procedure manual.

Experiential Learning Experiences

The following are experiential learning experiences for the students:

1. Students become involved assisting a local nonprofit agency to develop strategic plan.
2. Students work with a local nonprofit to complete a brainstorming session as well as completing an SWOT.
3. Students work with a local nonprofit to develop and implement a needs survey.

Internet Exercises

The following are Internet exercises for the students:

- Do a Google (or some other search engine) search for additional information relating to:
 - SWOT
 - Situational analysis
 - Brainstorming
 - Needs survey
 - Goals
 - Objectives
 - Mission statements
 - Vision statements
 - Values

Case Study

The following is a case study related to this chapter:

Situation:

Los Angeles, New York, Philadelphia, Dallas, Chicago, and many other communities have banned soda, candy, and high-sugar snacks from school vending machines. St. Louis has proposed to do the same for its schools. Moreover, a Midwestern recreational sports district wants to take it a step further. It has asked all guardians to stop bringing snacks to the recreational sponsored athletics events. It seems that too many adults are bringing chips, soda, juice, candy, and cookies to the games. It was a unanimous vote by the seven-person recreation sports board and applies to about 5,000 children who play basketball, baseball, football, soccer, softball, and volleyball.

The recreational sport district is trying to change the mindset of the youth who are taught from an early age to associate sport activity with caloric intake. The district would like to change the mindset of the parents related to junk food. The district would like the parents and student-athletes to start thinking more healthy.

There will be an attempt to enforce the rule at a recreational sport district events, but, parents and guardians worry about depriving their children and youth of a snack after so much running and jumping. One parent indicated the district has worked really hard, and does not see a problem giving kids snacks after a hard fought game. The parent thinks the kids deserve a little reward.

Discussion Questions:

As the recreational sport director, you are responsible for developing the procedures for this new policy. How would you go about developing these procedures? Who would go about developing these procedures? Who would you include in this process? How do you intend to enforce this new policy? What if parents and guardians strongly oppose this new policy and the enrollment drops in these sporting events? What are the pros and cons of this new policy? Do you fear for your job if the parents complain too much? How will you persuade the community that this is a good policy?

Summary

The chapter has been designed to prepare the student to complete the following tasks:

- to use a SWOT analysis and interpret the findings,
- to implement a brainstorming session,
- to conduct a needs assessment survey and prepare a needs assessment report
- to identify and explain the common steps in a planning process,
- to understand the various classifications of plans,
- to explain the differences between a policy and a procedure,
- to development of policies and procedures,
- to develop a strategic plan and understand the various components within a strategic plan,
- to discuss the differences between goals and objectives,
- to write a goal and an objective for specific goals,
- to prepare a mission statement, vision statement, and values for an organization,
- to discuss the common pitfalls in the planning process,
- to discuss the common steps in benchmarking,
- to develop a planning team, and
- to develop a policy and procedure manual.

4

MANAGING HUMAN RESOURCES

INTRODUCTION

The most important asset in any organization is its human resources. People are the key to a business's success or failure. The goal is to obtain competent employees and provide the means for them to function optimally. Sport organizations are service-oriented operations. Therefore, the management of human resources, whether it be a manager of the human resource department in a large organization or the owner or manager of a small organization, plays a primary role in the organization. Further, the human problems of management are often the most complex because of the variability of human nature and behavior. This makes the management of human resources of the organization a key to its success.

Management of human resources involves all the policies and procedures developed for employees to interact with the organization both formally and informally. The common components of human resource management include:

- hiring competent and qualified employees,
- assigning and classifying employees effectively,
- motivating employees to perform optimally,
- stimulating employees' professional growth and development,
- evaluating and compensating employees fairly,
- rewarding employees for their efforts, and
- providing in-service education opportunities.

Instructional Objectives

The instructional objectives for this chapter include:

- Students will understand the process of hiring competent and qualified employees,
- Students will learn how to assigning and classifying employees effectively,
- Students will appreciate the value of motivating employees to perform optimally,
- Students will understand the value of stimulating employees' professional growth and development,
- Students will learn how to evaluate and compensate employees fairly,
- Students will appreciate the value of rewarding employees for their efforts, and
- Students will learn how to provide in-service education opportunities.

Experiential learning Opportunities

The following are examples of experiential learning projects that could be used with the students:

- Students should be assigned to interview a human relations director in a sport organization, nonprofit organization, college or university, or government agency.
- Students should be assigned to interview a sport agent.
- Students should be assigned to interview volunteers working with sporting agencies.

Internet Exercises

The following are examples of internet exercises students could be involved in to gather more information about:

- Students should be assigned to do an internet search for volunteer employment manuals.
- Students should search the internet for collective bargaining agreements of the four major professional leagues and compare at least five components from rookie salaries to retirement clauses.
- Students should search the internet for examples of sexual harassment policies within sporting organizations.

Case Study

Sexual Harassment: Pool Side

Problem Situation:

You are the director at the Wind Valley YMCA. Brandon Smith is an 11-year veteran employee with a history of excellent evaluations. Last week during a Red Cross lifeguard training session, a participant accused Brandon of sexual harassment.

The participant, Mary Jones, claimed that during a blackboard rescue, Brandon Smith touched her inappropriately while fastening the board's chest strap. Although this procedure is part of the requirements of a proper rescue, Ms. Jones has issued several complaints, including those to the American Red Cross, the Wind Valley YMCA aquatics director, and the YMCA Board of Directors. She has contacted local authorities.

Police reports indicate that Mary Jones's reaction was understandable but unable to be justified. There were no witnesses who came forward for Ms. Jones, and nobody appears to want to get involved with the incident.

The Wind Valley YMCA has a reputation as one of the best facilities in the area. There has never been a previous case of sexual harassment claims. Brandon Smith has a clean record that shows nothing less than being a professional. Some participants in the class have begun withdrawing from the rest of the training because of their uneasiness with the situation. Rumors are spreading in the locker rooms and at other activities now. The issue is dividing your staff at the YMCA, and employee morale has obviously decreased. He is more withdrawn lately and tends to avoid speaking to others. The latest gossip implies that there is a petition being sent around the agency asking that the accusations be investigated further at an agency level.

Discussion Questions:

Should Brandon be fired even though he has never been in trouble before? Would suspending him be helpful in keeping this agency running smoothly for the duration of the training? Should the police be involved again though the case has been dismissed?

On the other hand, should Mary's membership be suspended for harassing the staff and keeping rumors alive? Will a staff meeting be enough to clarify the situation and stifle any developing rumors? Will ignoring the issue and letting it all "pass over" work in this situation?

Describe what you might do to protect this agency, its programming, and most important, its members and staff.

SUMMARY

This chapter attempted to provide the following content to the reader:

- hiring competent and qualified employees,
- assigning and classifying employees effectively,
- motivating employees to perform optimally,
- stimulating employees' professional growth and development,
- evaluating and compensating employees fairly,
- rewarding employees for their efforts, and
- providing in-service education opportunities.

5

LEGAL AND RISK MANAGEMENT PRINCIPLES

INTRODUCTION

The threat of malpractice suits against sport professionals is a real one. The chances of exercise-related accidents and death are widely recognized. These risks are often misunderstood and, even if recognized, not always appreciated. Legal risks to the professional are genuine and ever changing. The legal risks will increase as the number of older adults involved in an active physical activity program rises. As more people participate and as the number of accidents increases, the legal system will become involved to resolve the problems that arise out of the exercise programs.

Since the early '60s, our society has become increasingly predisposed to solving problems through the courts. Today, medical malpractice is common, while 20 years ago, it was virtually unknown in this country. Just a decade ago, lawyers were rarely if ever sued for their own negligence. Today, verdicts rendered by judges and juries in law suits against physicians, attorneys, and other professionals have dramatically increased. It is clear that we are more knowledgeable about the legal process.

It is only a matter of time before this "litigation epidemic" affects the sport professional. The importance of preparing for this eventuality must be obvious. The first exercise-related death of an older American in a program supervised by a health/fitness/recreation/sport professional that results in suit and national media attention may very well open the flood gates to a major increase in litigations. One must anticipate this development unless it is assumed that negligence in this field is highly unlikely. Such an assumption has no basis in experience, especially given the relative infancy of the sport field, as related to the older population, with its rapidly changing knowledge base and technical content. Operating on such an assumption promotes a false sense of security and renders personnel insensitive to operational conditions that are susceptible to legal challenge and, perhaps, liability.

The coach providing exercise services needs to understand the legal risks attendant to facilities and equipment as well as to the operating policies and procedures utilized for various clientele. The risks, obviously, increase with the number and severity of the special medical considerations inherent in the clientele; therefore, the precautions and safety measures utilized must grow in complexity to maximize safety for those categories with the poorest health status. Moreover, the support facilities and equipment, the expertise of the staff, and the environmental setting are linked to clientele health status and program practices.

In any case, policy and procedure should be developed and implemented only after consultation with a legal advisor. Proceeding without careful legal advice is foolhardy. Attention to this matter should be regarded as no less important as the medical advice needed to specify the participant screening requirements or clinical contraindications to be utilized in a given program. What follows can serve as a useful guide for such individualized professional advice.

Instructional Objectives

- Students will understand the law of torts.
- Students will comprehend the concept of negligence.
- Students will appreciate what a professional's duties are.
- Students will recognize the defenses for negligence.
- Students will realize what supervision entails.
- Students will understand how to develop a safety plan.
- Students will comprehend the concepts of an exculpatory agreement.
- Students will appreciate the value of a warning.

- Students will be able know the type of facility users.
- Students will understand the value of contracts and their components.
- Students will realize the function of a lease.
- Students will understand the concepts related to risk management.
- Students will appreciate the value of consulting a lawyer.

Experiential Learning Opportunities

1. Visit a fitness, physical activity, recreation, or sport facility and conduct a risk audit and complete a detailed report for the operator.
2. Visit a fitness, physical activity, recreation, or sport facility and conduct interviews with personnel and develop a risk management plan for the facility.
3. Visit a fitness, physical activity, recreation or sport facility and review the facilities risk management plan and make recommendations for modification.

Internet Exercises

The following are examples of Internet exercises students could be involved in to gather more information about:

1. Search the Internet for current law cases related to fitness, physical activity, recreation, and sport.
2. Search the Internet for risk audit forms related to fitness, physical activity, recreation, and sport programs and facilities.
3. Search the Internet for risk management plans related to fitness, physical activity, recreation, and sport.
4. You are the new Director of Campus Recreation of a small, private college. Currently there is no comprehensive risk management plan in place for the recreation facilities. Search the Internet for further information in developing such a plan. After gathering all the necessary information, develop a risk-management plan for the campus recreation facilities.

Internet Links

<http://athleticbusiness.com/articles/article.aspx?articleid=1307&zoneid=42>

<http://athleticbusiness.com/articles/article.aspx?articleid=3532&zoneid=33>

Case Study

Bruce Griem et al. v. Town of Walpole

Ellen Griem and Douglas Griem.

Docket Number: 04-00726

SUPERIOR COURT OF MASSACHUSETTS, AT NORFOLK

21 Mass. L. Rep. 402; 2006 Mass. Super. LEXIS 399

On the afternoon of September 29, 2002, 10-year-old Douglas Griem and his parents, Bruce and Ellen Griem, attended a youth football game at the Walpole high school football field. Douglas left his seat in the bleachers in order to play with friends. Under the bleachers, there was a walkway that had limited headroom due to the angle of the bleachers' support beams. As Douglas was running down the path, under the bleachers, he turned his head to see if his friends were following. As he did so, he crashed into one of the angled support beams, sustaining a severe neck injury.

The bleachers were constructed in the 1960s, and by the 1990s they needed to be replaced. Other children had been injured in a manner attributable to the condition of the grandstand. As early as 1998, the Walpole Board of Selectmen, which is responsible for Walpole's policy-making, considered renovating or replacing the bleachers. However, Walpole faced a variety of hurdles in securing funding and necessary permits, which delayed action until 2005.

Problem:

- Would a risk management plan have identified the danger related to the support beams, why or why not?
- Was the Town of Walpole negligent in this case, why or why not?
- What risk management steps could have been taken to avoid this injury?

Case Study

Should Alcohol be permitted in the Park?

Problem situation

You are the director of a public parks and recreation park district in an eastern city of 100,000. Two groups have approached the park district board about changing your liquor laws on the park grounds. One group wants alcohol allowed for "special occasions" such as weddings and reunions. The other group wants to allow alcohol at all times, especially for tailgate parties before softball games. The current policy forbids alcohol within the park premises.

One board member proposes that liquor can be served provided that the group obtains a \$50 permit from the park for the evening. "This will make sure they are serious about wanting to have alcohol there. We shouldn't make it easy, but we should make it possible."

Another board member disagrees, "we've really had to clamp down on people tailgating before or after softball games. To be fair, we can't allow anybody to drink, regardless of the occasion."

A third board member suggests a compromise. “If they want to have a private party to celebrate a wedding or family reunion, for example, we should let them. That’s a whole lot different than people tailgating before and after a game.”

Discussion questions

Should drinking alcohol be allowed in the public parks? Why or why not? Is there a difference between drinking as a wedding and tailgating. Explain the difference. How would you enforce your drinking policy? Is a permit system justified? If so, how should the money that is collected be spent? Create a drinking policy for the park?

SUMMARY

This chapter attempted to provide the following content to the reader:

- law of torts,
- concept of negligence,
- what a professional’s duties are,
- the defenses for negligence,
- what supervision entails,
- how to develop a safety plan,
- exculpatory agreement,
- the value of a warning,
- know the various type of facility users,
- value of contracts and their components,
- the function of a lease,
- concepts related to risk management, and
- the value of consulting a lawyer.

Facility risk management is an organized effort to avoid or control loss to a sport facility arising from lawsuits. The “loss” can be in the form of time, reputation, or money, that can significantly interfere with the achievement of a facility’s mission. The most effective way to avoid loss is to design and implement a Risk Management Plan (RMP) that identifies those situations in which legal or financial difficulties may arise and then provide corrective action that will either eliminate the exposure, significantly reduce the chances of the situation from occurring, or reduce the impact of the happening should it occur. “Input” from key personnel will greatly enhance the effectiveness of the RMP. RMP development steps include the following:

- Identify applicable areas of concern (public liability excluding negligence, business operations, property exposures, and public liability caused by negligence).
- Identify specific risk exposures in each category.
- Estimate the probable impact of the risk and classify.

- Select the optimum method of treating the risk.
- Implement a plan to carry out the selected method, monitor, and evaluate.

In addition to an overall RMP, the above steps should be used to develop event Specific risk-management plans. Event specific plans should be a part of the overall facility RMP. Special attention should be given to: pre-event venue preparation and safety audits, a crowd management plan (if a large crowd is expected), event insurance, and transportation and parking. This will enable the planner to identify the unique needs of each event.

Crowd management is another important consideration of an event risk-management plan. This is especially important if a large crowd is expected. Suggested components of a crowd-management plan include the following: 1) trained and competent staff; 2) crisis management and emergency action plans to prevent and reduce the consequences of crises such as bomb threats, tornado, or other inclement weather, fire, and medical emergency; 3) procedures for dealing with unruly or intoxicated patrons; 4) communications network; and 5) effective signage.

6

SECURITY MANAGEMENT

INTRODUCTION

Since 9/11, security in and around sport facilities has become a flashpoint for managing those facilities. It has had a major financial impact upon facility operations in general. This has been followed by a dramatic increase multiple shooting that have taken place in public facilities such as schools, colleges and universities, and private facilities including movie theaters, and retail complexes. These incidents have made security a major concern by sport facility managers worldwide.

Sport facilities managers are responsible for ensuring that a proper security system is in place in and around the building premises including parking lots and garages. Security includes, but not limited to: alarm systems (e.g., aquatic area alarm, fire alarm, intruder alarms, steam room and sauna alarms, etc.), sprinklers systems, and emergency escape plans in case an evacuation is necessary. In addition to these responsibilities, the sport facility manager needs to have trained emergency/security personnel available at all public assembly events.

Instructional Objectives

- Students will understand what security is all about.
- Students will appreciate what is meant by security management.
- Students will recognize the various areas that should have policies, procedures, and protective measures.
- Students will realize that there are five common areas protective security measures should be developed.
- Students will comprehend that security and/or safety staffing is the key component to any security, safety, and risk management plan.
- Students will understand what is meant by risk assessment.
- Students will appreciate what a hazard is.
- Students will realize what a risk level is.
- Students will recognize the 20 most common claims in law suits against facilities.
- Students will appreciate the challenges that the sale of alcohol brings to facility management.
- Students will recognize the issues related to crowd management.
- Students will realize the issues related to crisis/emergency management planning.

Experiential Learning Opportunities

- Arrange a class tour to a public assembly facility and have the management explain what it does related to security and safety of spectators.
- Arrange a class tour to a local high school and have the athletic director explain what is done related to security and safety of spectators.
- Have students visit various nonprofits (e.g., Boy's & Girl's Club, YMCA, YWCA, etc.) to determine what is done related to security and safety of customers.

Internet Exercises

The following are examples of Internet exercises students could be involved in to gather more information about:

- Search the Internet to secure information about security and safety management plans for public assembly facilities.
- Search the Internet for risk audit forms related to sport facilities.
- Search the Internet for risk management plans related to sport facilities.
- You are the new athletic director of a small, private college. Currently, there is no comprehensive security and safety plan in place for the sport facilities. Search the Internet for further information in developing such a plan. After gathering all the necessary information, develop a security and safety plan for the campus sport facilities.

Case Study

Joan, her best friend, and her parents had tickets to attend a NBA basketball game. Joan had won the tickets in a raffle. They were seated in the upper deck near the aisle. Joan was five seats in from the aisle. There were 20 rows behind them. Prior to the beginning of the game, they were talking and having a good time. Without their knowledge, another fan (male, 6'5", 327 lbs) was climbing the steep stairs to his seat approximately 12 rows above Joan. His seat was the fourth seat in from the aisle. There were very few people seated above Joan. The male fan (who had a few beers ingested as well as one in his hand) lost his balance and fell over the seats and ended up on Joan's head, neck, and back. Joan had neck and back injuries from the fall. There was only one usher on duty and a roving security person. They provided assistance to the male who left the arena without leaving his name and contact information. Joan was treated and left her contact information. She attempted to secure the man's name and contact information but was told it was unavailable. She sued the arena later on since she could not sue the man who caused the injuries she sustained.

After reading about this situation answer the following questions:

- Is the arena liable for Joan's injuries? If no, why? If yes, why?
- Is Joan liable for any of her own injuries? If no, why? If yes, why?
- Is the man liable for Joan's injuries? If no, why? If yes, why?
- What should have the facility done in this situation?
- How would you have prevented this situation from happening?

SUMMARY

This chapter attempted to provide the following content to the reader:

- What is security?
- What is security management?
- Security planning
- Security staffing and training
- Facility risk assessment audit
- Claims most common in lawsuits related to facilities
- Alcohol management
- Crowd management
- Crowd management planning
- Crisis/emergency management planning

PART 2

COMMUNICATION AND MEDIA RELATIONS

7

COMMUNICATION PRINCIPLES

INTRODUCTION

Communication is something that we all do. It is a dynamic process that involves everything from what we say, what we write, the use of silences, to the way we look. Communication occurs at various levels throughout an organization. The sport manager communicates with supervisors, peers, employees, clients, sponsors, vendors, and the public in general. Effective communication involves more than simply talking. It also involves listening, speaking, delivering, selling, giving and receiving information. To be an effective manager, a person must be able to maximize communication. Communication has been identified as both an art and a science and is a critical skill for the sport manager.

Instructional Objectives

- Understand the characteristics of communication models and definitions.
- Comprehend the functions of communications.
- Know the barriers of communication.
- Understand how to develop a communications presentation.
- Comprehend the primary functions of a committee.
- Know communications in the 21st century.
- Understand social networking.

Experiential Learning Opportunities

1. Have the students prepare a five-minute elevator speech on the value and benefits of either youth sports or interscholastic athletics or intercollegiate sports.
2. Have the students (individually or in a group) prepare a communication plan for either a nonprofit youth organization or high school sports program.

Internet Exercises

1. Search for sport communication plans to determine how they are developed and used.
2. Search for the functions of communication to better understand the functions of communications.
3. Search for the common barriers to communication to better understand the barriers to communication.

SUMMARY

This chapter attempted to provide the following content to the reader:

- The characteristics of communication models and definitions.
- The functions of communications.
- The barriers to communication.

- How to develop a communications presentation.
- The primary functions of a committee.
- Communications in the 21st century.
- Understand social networking.

8

MEDIA RELATION PRINCIPLES

INTRODUCTION

In today's modern society, consumers are bombarded by millions of words, pictures, videos, and publications. This often leads to information overload and missed messages. For those who are not familiar with mass communications, the media may appear to be no more than a source of information and entertainment. An organization's relationship with the media must be built over time and include trust, respect, and honesty. Three terms not often associated with mass media.

There exists a conflict between physical activity organizations and the media. The media want news and the organization wants publicity. This basic tenant often sets up an adversarial relationship between the organization and the press. It has been suggested that each group has a predisposition about the wants and needs of the other.

Mass communications organizations must seek programming that is new, appealing, and of interest to their audiences. Their job is to sell subscriptions, advertising, or time in this highly competitive business. For the news to be interesting and effective, it must contain human interest stories, personal items of success and failure, new programs, and reports on rare or unusual events. Therefore, the manager must be creative enough to develop stories that meet the needs and wants of the mass media.

Instructional Objectives

- Understand the characteristics of sport journalism.
- Comprehend the role of the media relations director.
- Know how to prepare a press release.
- Understand the value of a press conference.
- Comprehend the importance of media relations.

Experiential Learning Opportunities

1. Have students prepare press releases for a sport team at the local high school.
2. Have students prepare a mock press conference.
3. Have students interview a sport information director or sport media director.

Internet Exercises

1. Gather more information about sport journalism.
2. Gather more information about press releases.
3. Gather more information about press conferences.
4. Gather information about sport information directors' professional association.

Case Study

Situation:

One of New Zealand's largest and oldest life insurance companies had undertaken research that showed it lacked visibility in its largest potential market—Auckland. Having recently undergone a name change, there was a clear need to supplement the usual means of communication through advertising, direct mail, and media activity, with sponsorship of a major sporting or cultural event. The new chief executive asked the Consultancy to assist in obtaining sponsorship rights to New Zealand's biggest fun run, Round The Bays, and if successful, to manage the promotion and public relations program for the company.

The Program:

We wrote the proposal to the organizing committee, which secured this sought after sponsorship ahead of two multinational companies. By this time, the event itself was only five months away, half the normal time frame usually available to organize a program for an event of such magnitude. The race organizers had also decided to add a new element to the event, a competitive section, which had also to be explained to the public.

We recommended a launch function at which the new logo would be unveiled and to attract media attention, preceded by a novelty race down the main city shopping thoroughfare. The race consisted of teams of four athletes from various groups and organizations, pulling harness racing sulkies which were driven by the five mayors of the major cities in the region, plus two media personalities and the chief executive of the sponsoring company. This occurred two months before race day proper.

In the lead up to the event we organized regular weekly news releases about the race, covering aspects of the organization, personalities involved, new elements that needed explanation and general information. Six radio stations were involved in promoting the event. In the seven days before the race, regular phone-outs were organized with three stations to increase the flow of information.

We recommended and organized the building of a lighthouse, the company's symbol, which was towed to promotional sites by trailer for display purposes; a huge banner for draping across the frontage of the company's Auckland office block to promote runner registration; banners to be hung on lighting poles and on other high density traffic routes around the city promoting registration and the date of the event; special T-shirts to be printed; a video of the launch event to be shown to staff at other cities and towns to enthuse them about the event; crisis management when a story broke in the media that barbed wire may be used to control athletes at the start; coordinated placing of signs at the finish and presentation sites.

On the day of the event, two consultants assisted with media liaison, cooperated with organizers, minor sponsors and VIPs, and directed still and video photographers. After the event, we coordinated the release of results and photographs to media outside Auckland.

The Results:

A survey conducted by the client company showed that awareness of the company in its target market had risen by 50%, while awareness of the company as the sponsor of the race stood at 15%. Given the long history of association of previous sponsors; this was regarded as most satisfactory. Staff in the Auckland region expressed their pleasure at being involved in a community event.

Most importantly, registrations increased by over 12,000 on the previous year and the nominated charity received a check for \$180,000, being the proceeds from registrations, the highest amount ever in the Round The

Bay's 20-year history.

What would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The characteristics of sport journalism.
- The role of the media relations director.
- How to prepare a press release.
- The value of a press conference.
- The importance of media relations.

9

PUBLIC RELATIONS

INTRODUCTION

A public relations program is designed to influence the opinions of people within the targeted market through responsible and acceptable performance based on mutually satisfactory two-way communication. It has been noted that Abraham Lincoln once said, “Public sentiment is everything. With public sentiment, nothing can fail; without it, nothing can succeed.” In order to gain public sentiment, programs must familiarize not only customers/clients but the public in general with all aspects of the services, products, and programs offered. An effective public relations program will open communication lines with the various publics and effectively utilize the media in a manner that competently presents the objectives of the organization to the public at large. Further, it will modify the attitudes and actions of the public through persuasion and integrate them with those of the organization.

Instructional Objectives

- Understand the characteristics of public relations.
- Comprehend the steps in developing a public relations plan.
- Know the effect of publicity.
- Understand the principles of good publicity and media relations.
- Comprehend the value of media relations.
- Know what is necessary for preparing public service announcements.
- Understand the essentials of a great communicator.
- Know the legal aspects of public relations.
- Comprehend the common concerns in seeking a public relations agency.

Experiential Learning Opportunities

1. Have the students (individually or in groups) develop a public relations plan for a sport entity.
2. Have the students (individually or in groups) develop a publicity campaign for an athletic department for a sport season.

Internet Exercises

1. Research five to ten public relation agencies to see what they do for their clients.
2. Research public relation plans for sport entities.
3. Research publicity campaigns for sport entities.

Case Study

Challenge

In 1984, the Chinese Women’s Volleyball Team (CWVT) was the toast of the nation following its triumph at the Olympics. But in the following 20+ years, the team’s image had suffered from a series of lackluster performanc-

es. And volleyball itself, once enormously popular among Chinese youth, was now seen by as a game primarily for “older people.” Because our client, adidas is both a CWVT sponsor and a partner with the 2008 Beijing Olympics, the goal for Ogilvy PR was to make Chinese ages 14 through 24 once again see women’s volleyball as an entertaining and exciting game.

Our work

We began by reviewing the qualitative findings of All China Strategic Research, which revealed three key points. We needed to create star power for the team, because China’s youth culture is heavily influenced by star players and sports icons. We needed to showcase the power of the game—its speed and ferocity—to boost its coolness factor. And because our youth target audience is driven by a desire for ownership and participation, we needed to drive youth involvement.

With 18 million Chinese high school students using the Internet—and with the overall rate of Internet use among Chinese young people growing daily—digital media were seen as key to boosting the profile of the CWVT.

- Blogging plus makeovers equaled a major media play. There was little general knowledge of individual team members, so we sought to open a dialogue and bring fans closer to the players by creating the first-ever Chinese Olympic team blog. Each player was also given a professional makeover, captured in glamour shots. We debuted their photos on the blog, which not only drove traffic, but also resulted in instant pick up by major print media.
- Viral films showed the power of the game. We wanted to make volleyball edgy, dangerous, and exciting to a young audience increasingly in love with basketball. So we promoted six viral films that used creative stunts to show the games’ speed and power. For example, a volleyball spike reaching a speed of 92 kilometers per hour was shown alongside water gushing from a fire hydrant at the same speed and hitting a passerby.
- The volleyball chant competition spiked youthful involvement. adidas became the sponsor of China’s first chant competition, which invited the public to create a national chant, cheer, or jingle that volleyball can own. The forms a “cheer” could take were very wide ranging—including hand motions and dance moves related to volleyball moves. Participants uploaded their chants to the CWVT minisite and could vote on the entries of others.

Results

- Post-launch research showed that the target audience who defined CWVT as “cool” increased by as much as 16% within several months. The *Shanghai Times* noted that fans were impressed with the team’s “never-before-seen sexiness.” CWVT members were even featured in youth lifestyle magazines, such as *Easy and Touch*.
- The blog attracted nearly 161,000 unique visits in the first three months, while the chant competition site logged nearly 400,000 unique visits in the same time period.
- More than 5.5 million visitors clicked through and viewed the viral films within the first three months of release.
- 73% of viewers said the films were “innovative” and stimulating, while 78% of viewers forwarded them to friends.

The impact of the campaign on the team itself was summed up by Chief Coach Chen Zhonghe, who said, “adidas brought the girls closer to their fans, which is helping to boost the team’s morale and their performance ...”

What would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The characteristics of public relations.
- The steps in developing a public relations plan.
- The effect of publicity.
- The principles of good publicity and media relations.
- The value of media relations.
- What is necessary for preparing public service announcements.
- The essentials of a great communicator.
- The legal aspects of public relations.
- The common concerns in seeking a public relations agency.

PART 3

FINANCIAL AND MARKETING FUNDAMENTALS

10

FINANCIAL PRINCIPLES

INTRODUCTION

The term *finance* can mean different things to different people. Often, those not trained or educated in finance will include any activity that deals with dollars or dollar production in the definition. This sweeping brush stroke could include everything that occurs within an organization since our decisions, more often than not, have a monetary impact. Those trained and educated in finance have a more focused scope that addresses the concepts and techniques that we use to make organizational decisions. According to Longley (2008), finance generally refers to two primary activities of an organization:

1. How an organization generates the funds that flow into an organization,
2. How an organization allocates and spends these funds once they are within the organization.

Therefore, the concept of finance is not so much about where money enters the organization but how it is allocated to insure maximum return. The revenue generated should optimally aid the organization in generating additional revenue.

Managers of physical activity organizations have many tools and resources available to assist them in making decisions. Sound financial decisions require information from a wide variety of sources such as staff, accountants, consultants, sales representatives, boards of directors, and customers. There are several financial tools that managers can use to aid in the decision making process beginning with documents used on a daily basis, such as balance sheets and profit and loss statements. Utilizing financial data, management must develop a financial plan that will provide the basis for a successful operation for the next fiscal period. That financial plan is the operating budget.

In addition to the operating budget, another budget that must be prepared is the capital development budget. This is a budget plan that prioritizes what the organization intends to acquire or build that is nonrecurring in nature and generally has a life span of at least 10 years. Examples of capital budget projects would be expanding existing physical activity spaces through building expansion, renovating the watering system on a golf course, purchasing new vehicles, or purchasing land for future expansion purposes.

This chapter will review financial principles that address the budget process, preparation of budgets, revenues and expenditures, as well as sound financial planning.

Instructional Objectives

- Understand the dynamics of financial planning.
- Know about the financial manager and the role he/she plays.
- Recognize the role of financial analysis.
- Understand forecasting sales.
- Know and understand financial risk management.
- Appreciate the value of building a financial plan.
- Understand the value of accountability.
- Recognize the value and need for revenue generation.
- Know about expenditures, capital budgets, and cash planning.
- Appreciate the value of cash flow and profit planning.
- Understand the value of budgeting and the budget process.

- Know about long-term planning and short-term financing.

Experiential Learning Opportunities

1. Have students develop a financial plan for a sport facility development.
2. Have students develop a financial plan for a new program to be offered.
3. Have students prepare an internal financial audit.

Internet Exercises

1. Do an Internet search for additional information regarding financial planning.
2. Do an Internet search for additional information regarding financial auditing internal and external.

Case Study

Dribbling Indoor Soccer wants a new facility

Dribbling Indoor Soccer is the only indoor soccer facility in the Wingback County area. The population of Wingback County is 240,000 residents. Dribbling Indoor Soccer has two professional-style, lighted fields, (73' x 140') featuring Field Turf®, for fast-action, fun soccer. No matter what the weather conditions are, day or night, soccer players will find a safe, clean, and friendly atmosphere for soccer enjoyment.

Several divisions for youth, men, women, and coed provide all players, from beginners to highly skilled, the right environment for recreational yet competitive soccer. League play is continuous year round. All league participants are required to become members of Dribbling Indoor Soccer. The annual fee is \$40. Team registration per session is \$700. Each session has 10 games with championship awards being given to the first place team.

In addition, skills clinics are available for beginning adults and those wishing to polish their skills. The two fields can also be rented for practices, birthday parties, corporate events, preseason and post-season team parties, camps, clinics, school grad nights, fund raising tournaments, organized lacrosse and field hockey leagues and more. A soccer store is on site to provide leading soccer brands to players, teams, leagues and schools. The facility will also have a small cafe that will serve drinks, sandwiches, and pastry.

Dribbling Indoor Soccer projects that the center will have more than 1,000 members, 30 adult teams and 30 youth teams by the end of year one.

1.1 Objectives

The objectives for Dribbling Indoor Soccer are the following:

- Build facility membership to more than 800.
- Register 30 adult and 25 youth teams by the end of first year of operation.
- Develop facility potential to be rented for special events.

1.2 Mission

The mission of Dribbling Indoor Soccer is to provide Wingback County residents with a state-of-the-art soccer facility that will enable both youth and adults to enjoy the sport of soccer year round.

Your task:

You have been hired as a facility consultant to plan and develop an indoor soccer facility. Outline exactly how you would approach this task.

SUMMARY

This chapter attempted to provide the following content to the reader:

- The dynamics of financial planning.
- The financial manager and the role he/she plays.
- The role of financial analysis.
- Forecasting sales.
- Financial risk management.
- The value of building a financial plan.
- The value of accountability.
- The value and need for revenue generation.
- Expenditures, capital budgets, and cash planning.
- The value of cash flow and profit planning.
- The value of budgeting and the budget process.
- Long-term planning and short-term financing.

11

PURCHASING AND INVENTORY CONTROL PRINCIPLES

INTRODUCTION

The purchase of sports equipment and supplies involves an intricate process that is generally controlled by institutional or organizational policies and regulations. The ultimate goal of the purchasing process is to provide the organization with the best product at the best price. Purchasing may be controlled through a central purchasing office or by independent agencies.

The purchasing process involves: 1) the selection process, 2) needs assessment, and 3) procurement. The selection of sport equipment and supplies is one of the most important responsibilities of a sport manager. The selection process is an integral component for the organization to provide quality programs and facilities.

A needs assessment should be completed to determine the needs of the program that begins with a simple overview of the situation. Is the program new or pre-existing? Is the program educational, recreational or competitive? In each circumstance, it is important to understand the scope, variety and nature of the program(s) to be offered.

The procurement process provides a means to provide consistency in the selection and purchase of equipment and supplies. The procurement process usually begins with a purchase request and ends with a purchase order, delivery and payment of the invoice.

The institution or organization should establish a process that ensures that equipment and supplies that are purchased will 1) meet program needs, 2) provide quality, 3) be acquired following an organizational established procedure, 4) be properly accounted for, and 5) be maintained for future safe use.

Equipment is identified as items that are non-consumable, which implies they will be used over a period of years. Supplies, on the other hand, are consumable materials such as paper, pens, and athletic tape.

Instructional Objectives

- Understand the role of purchasing.
- Know the guidelines for purchasing equipment and supplies.
- Recognize the value of evaluating equipment before purchasing.
- Understand the procurement process.
- Know the bidding process.
- Appreciate the value of scheduling the purchase of equipment and supplies.
- Understand the process of purchasing fitness and strength equipment.
- Recognize the value of used equipment.
- Know about equipment labeling systems.
- Appreciate the value of a management system for an equipment room.

Experiential Learning Opportunities

1. Have the students (individually or in groups) develop a purchase order to purchase sport team uniforms.
2. Have the students (individually or in groups) develop a purchase order to purchase strength training and fitness equipment.
3. Have the students (individually or in groups) develop a management system for the equipment room.
4. Have the students (individually or in groups) develop a labeling system for the equipment room.

5. Have the students (individually or in groups) develop an inventory system for the equipment room.

Internet Exercises

1. Go to <http://www.nocsae.org> and gather additional information about equipment standards.
2. Go to <http://www.acsm.org> and gather additional information about equipment standards.
3. Go to <http://www.astm.org> and gather additional information about equipment standards.
4. Go to <http://www.aema.org> and gather additional information about standards.

Case Study

A key element of NIKE, Inc.'s corporate responsibility strategy is integrating knowledge and values across our organization. It's a marathon, not a sprint. One example of integration comes from Global Procurement, which sources nonproduct suppliers for Nike (processes for selecting and monitoring product suppliers are described in the Workers and Factories section).

Over the past five years, Global Procurement has partnered with several NIKE, Inc. functions to increase the sustainability of the goods and services they buy. The team leverages NIKE, Inc.'s purchasing power by communicating sustainability objectives to suppliers and potential suppliers, and challenges them to deliver innovative goods and services to meet our objectives.

We think this is an important way to help build markets for more sustainable— and affordable—choices. We saw this dynamic play out in a multi-year project to shift toward more environmentally friendly materials and processes in Nike's retail bag program in the United States. Building on this and other lessons learned, we began evaluating the CR performance of current and prospective suppliers.

A better bag

When we began looking into improving the sustainability of retail bags, we first awarded business only to printers that were third-party certified by the Forest Stewardship Council (FSC). At that time, FSC-certified paper was available but too costly. We encouraged printers to work on Nike's behalf to find acceptable FSC-certified materials.

Four years have passed since this process started, and we now source bags using 100% FSC-certified paper printed at FSC-certified printers using soy-based inks and distributed by an FSC-certified fulfillment company. The complete chain of custody allows Nike to use the FSC certification number and logo on all retail bags in North America and Singapore. We will roll other regions into the program as materials and providers are available.

We aim to tackle every addressable area to improve sustainability, including looking at angles not commonly assessed or addressed. In FY07-09 some areas we have improved include reduced energy waste in retail stores by adopting remote lighting management, reduced traffic and miles traveled by implementing a pooled distribution network and reducing long-distance shipping by finding a body form supplier who uses sustainable materials and delivers from manufacturing plants located near Nike centers.

A better process

Through these projects, we learned that one of our biggest challenges has been a lack of common indicators to evaluate potential suppliers. Though each category and project has unique attributes, we needed a consistent

process for ranking suppliers' sustainability performance in order to fairly and systematically integrate sustainability as a factor in our procurement process.

To achieve this goal, we developed a supplier scorecard to assess the match between Nike's CR values and those of existing and potential suppliers. Several yes/no questions ask about the policies, metrics, goals and performance on relevant topics, including: compliance, Considered, climate, community and competition. The competition section, for example, asks about employee and supplier diversity practices.

Questions are universal enough to apply to all suppliers and are provided online, enabling us to review each supplier's profile and establish baselines for peer groups and our overall supply base.

This process is helping us to establish a baseline of Nike's current non-product goods and services suppliers, evaluate potential new suppliers against that baseline, and analyze and learn from the collected data to inform future purchasing decisions.

Through FY09, we had requested more than 100 suppliers to complete the survey. To date, responses have showed wide variation in the effort on the part of suppliers and reveal significant differences between large and small companies. Only one large company indicated they had no corporate responsibility strategy or plan, compared to half of the small suppliers.

Moving forward, we expect to establish a minimum acceptable corporate responsibility standard required for suppliers to do business with Nike. We also plan to establish a supplier partner forum to share innovations and solutions, and to work with smaller suppliers, developing a set of tools to help companies that do not have the resources or the knowledge to make a strategic approach to building their corporate responsibility capabilities.

After reviewing this case study, what would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The role of purchasing.
- The guidelines for purchasing equipment and supplies.
- The value of evaluating equipment before purchasing.
- The procurement process.
- The bidding process.
- The value of scheduling the purchase of equipment and supplies.
- The process of purchasing fitness and strength equipment.
- The value of used equipment.
- Equipment labeling systems.
- The value of a management system for an equipment room.

12

REVENUE STREAMS SUPPORTING FACILITY CONSTRUCTION AND OPERATIONS

INTRODUCTION

Sport entities that are successful year after year have a variety of revenue streams. The good manager understands how to develop new revenue streams, manage the revenue streams, and retain all the revenue streams that have been secured. The revenue is generated through three common sources including public sources, private sources, and joint public and private ventures. This chapter will focus on understanding the revenue streams available to sports managers.

Instructional Objectives

- Understand the various aspects of public revenue streams.
- Know the various aspects of private revenue streams.
- Understand private and joint public and private funding.
- Comprehend broadcast rights.
- Appreciate the value of a financial team approach.

Experiential Learning Opportunities

1. Have the students visit a professional franchise to learn more about stadium or arena financing.

Internet Exercises

1. Search the Internet for additional information regarding “Stadium and Arena Financing” by Googling “Stadium and Arena Financing” or “Public Funding of Stadiums and Arena.”

Case Study

Hometown Fans:

What local officials did to secure financing for two stadiums in Seattle, after local voters rejected proposal.

When Seattle voters rejected a proposal to fund a new baseball stadium in 1995, local officials feared the Mariners would relocate to another city and the local football franchise, the Seahawks, would follow suit. State officials found the financing for the construction of two new stadiums - drawing from a collection of taxpayer funds, the creation of new revenue streams, and the generous support of local ownership. Now, both the Mariners and Seahawks will have stadiums that rank among the finest in the nation.

On July 15, 1999, the Seattle Mariners opened a beautiful new stadium on the shores of Puget Sound. On that night, cost overruns and political wrangling were the last things on anyone’s minds. Instead, the 44,607 in attendance watched their team take the field under blue skies (or any skies for that matter) for the first time in club history.

Both the Mariners and Seattle’s professional football team the Seahawks, had previously played all their games in the Kingdome, a gray concrete dome has been a city landmark since it was completed in 1976 at a cost of

\$67 million. The Kingdome disappeared from the Seattle skyline on March 26, 2000 as 5,800 separate explosions brought the 50,000-ton concrete structure in a heap of rubble.

The process for getting a new stadium actually began in 1994, when ceiling tiles in the Kingdome came crashing down into several empty seating sections hours before a Mariner's game. The damage was severe enough so that the team had to play on the road for the balance of the season.

Within a matter of days, King County Executive Gary Locke appointed a citizen's task force to develop recommendation for stadium alternatives. The task force recognized benefits that modern baseball stadiums could provide, including a generous number of seats with good sight lines of the playing field—the newer ballparks being built around the nation featured 20,000 of these seats while the Kingdome offered only about 10,000 seats. The newer ballparks also have more amenities for fans, such as broad concession choices and abundant restrooms, and more opportunities to produce revenue for the teams, such as suites and club seats.

In January, 1995, after nine months of intensive study, the Stadium Alternatives Task Force delivered its recommendations. They concluded that a new outdoor ballpark was essential to the successful economic future of major league baseball in the Pacific Northwest. The report called for a public-private partnership, a long-term lease with the Mariners, and operation of the ballpark by the Club under contract with an owning authority.

Armed with the Stadium Alternatives Task Force report, King County and the Mariners petitioned the Washington State Legislature in 1995 to provide a funding mechanism for a new baseball park. The Legislature approved a bill that allowed King County to place on the ballot a countywide sales tax of one tenth of one per cent for a ballpark that included natural turf and a retractable roof and required a \$45 million contribution by the Mariners.

Meanwhile, the Mariners were involved in their first-ever run for the pennant. Community enthusiasm for the team was at an all-time high, and it kept building as the Mariners moved into championship play. The team made it known that some course of action had to be determined by the end of October or the team would be put up for sale. Pro-stadium groups along with the local papers, hailed stadium projects as reflecting the best interests of the city. One pro-stadium group, Home Town Fans, garnered over a million dollars in donations from local business groups, downtown advocates, and large corporations (Boeing, Microsoft, etc...) but couldn't overcome a public sentiment against the creation of new taxes brought about when several other costly ballot proposals, including an initiative to build an expansive downtown park, shared the ballot. The ballot measure failed with only 49.9% of the vote.

Only a few weeks after the election loss, Governor Mike Lowry called a Special Session of the Washington State Legislature. The Legislature granted authority and provided the necessary funding mechanisms for the creation of a public facilities district to site, design, construct and operate the Ballpark. Markedly different from the defeated sales tax measure, this funding package recognized the economic value of baseball to the state and that it would add state revenues to a variety of county funding sources.

On October 24, 1995, the Metropolitan King County Council voted to implement the taxes authorized by the State and to create a Public Facilities District (PFD). The estimated cost for the stadium was \$498 million, but cost overruns pushed the final tally to approximately \$517 million. Some of the funding mechanisms used include:

- Sales tax credit: State-authorized, county-imposed .017% sales tax, which is offset against the sales tax now collected by the state in King County. (This results in no sales tax increase to the general public).
- Proceeds from sale of baseball stadium commemorative license plates.
- Proceeds from sale of two to four sports theme lottery scratch games (\$3 million is guaranteed from this source).
- A special stadium sales tax of .5% on restaurants, bars and taverns in King County as well as a special stadium sales tax of 2% on rental cars were also created.
- The Mariners contributed \$75 million. Cost overruns exceeding \$100 million have yet to be settled.

In June 1997, Washington state voters approved a statewide referendum to construct a new, world-class football/soccer stadium and exhibition center for the community. The new stadium will be home to the Seattle Seahawks, and the new exhibition center already houses the many consumer shows that previously took place in the Kingdome. Additionally, a new parking garage opens up more than 2,000 more parking spaces at the facility. The new football/soccer stadium and exhibition center will be owned by the public and funded by a private-public partnership. Private contributions will total at least \$130 million, while the public will contribute up to \$300 million through a new lottery and a variety of taxes generated by events in the stadium/exhibition center.

After maintenance and operation costs have been met, any profits generated each year by these facilities will be divided three ways. A portion will go to the Seahawks football team. Another portion will be placed in a reserve fund to cover any unanticipated revenue shortfalls. And the final portion will be used to build youth playfields across the state, in addition to the \$10 million Paul G. Allen has already guaranteed for youth playfields. The stadium, like all other new public facilities, adhere to King County's "One Percent For Art Program" and devote 1% of the construction budget, which would amount to \$4 million for in and around the new facility.

How would you have done this differently? What was the key to the success of this example?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The various aspects of public revenue streams.
- The various aspects of private revenue streams.
- Private and joint public and private funding.
- Broadcast rights.
- The value of a financial team approach.

13

MARKETING PRINCIPLES

INTRODUCTION

Marketing consists of all activities designed to generate and facilitate any exchange intended to satisfy human needs or wants. More simply put in business terms, activities designed to plan, price, promote and distribute products or services to target markets. Further, marketing is a fact of life. There are so many businesses in so many categories, how will you persuade potential customers to come to you?

Marketing is a total system of interacting business activities designed to plan, price, promote, and distribute programs, products, and services to meet the needs of present and potential customers. Marketing is comprised of all activities designed to meet the needs and wants of consumers through an exchange process. Sport marketing has developed into two major thrusts: the marketing of products and services directly to consumers (e.g., a professional team, college/university team, fitness club) and marketing of other consumer and industrial products and services (e.g., automotive companies, a beer company, or cola companies) through the use of sport promotions (Mullin, Hardy, & Sutton 2007).

Sport consumers are involved in sport through playing, officiating, watching, listening, reading, and collecting (Mullin, Hardy, & Sutton 2007). Through the marketing planning process, we will be able to determine how to best meet the variety of consumer needs.

Advertising is a form of communication that typically attempts to persuade potential customers to purchase or to consume more of a particular brand of product or service. Many advertisements are designed to generate increased consumption of those products and services through the creation and reinforcement of “brand image” and “brand loyalty.” For these purposes, advertisements sometimes embed their persuasive message with factual information. Every major medium is used to deliver these messages, including television, radio, cinema, magazines, newspapers, video games, the Internet and billboards. Advertising is often placed by an advertising agency on behalf of a company or other organization.

Promotions is a catch-all category for any one of a variety of marketing efforts designed to stimulate consumer interest in, awareness of, and purchase of the service, product, or program. Promotion is the vehicle that (1) carries the message about the services, products, and programs; (2) positions them in the market; and (3) develops the appropriate image for the services, products, and programs. Promotions include the following forms of marketing activities: (1) advertising, (2) personal selling (i.e., any face-to-face presentation), (3) publicity, (4) sales promotion (i.e., a wide variety of activities including displays, trade shows, free samples, introductory free classes, coupons, giveaways, and exhibitions), and sponsorships.

Sponsorship is a form of advertising in sports, music, broadcasting, and the arts. Sponsorship became a major source of finance for sports in the 1970s, and takes several forms. Many companies sponsor sporting events, while others give money to individuals who wear the company’s logo or motifs while performing. Advertisers also commonly sponsor concerts, although some performers refuse in principle to endorse a product in this way. Large companies will also sponsor museum exhibitions, a form of corporate funding for tax deductions.

In the United States, radio broadcasts were sponsored by consumer goods and television companies. This sponsorship continued as television programs became the prime mode of home entertainment. Sponsors often seek to associate the name of their product with a particular show, event, or personality, thus enhancing the product’s image.

Instructional Objectives

- Understand the Ps of marketing.
- Know the managing of the strategic marketing process.
- Recognize basic marketing principles.

- Understand the exchange process.
- Know what the sport product is.
- Appreciate market segmentation.
- Understand advertising and the functions of advertising.
- Know how to develop an advertising budget.
- Recognize how to create advertisements.
- Understand promotions.
- Know how to determine the promotional mix.

Experiential Learning Opportunities

1. Have students develop a marketing plan for a local high school athletic program or nonprofit recreation and/or sport agency.
2. Have students develop a promotional strategy for a local high school athletic program or nonprofit recreation and/or sport agency.
3. Have students develop an advertising strategy for a local high school athletic program or nonprofit recreation and/or sport agency.

Internet Exercises

1. Go to <http://www.sportmarketingassociation.org> to learn more about sport marketing.

Case Study

Sports marketing is a huge field, accounting for billions of dollars in advertising and other promotional fees each year. And one of the most fascinating stories in the sports marketing industry is that of NASCAR, which, in only a few years, has graduated from a regional weekend pastime to a national phenomenon, creating personalities with rock-star popularity and causing those you'd least suspect to plant themselves in front of their televisions on weekends to watch their gear-head heroes compete in "the chase."

Among those you'd least suspect: women. Of NASCAR's 75 million fans, 40% are women. Women will spend \$250 million this year on NASCAR-licensed products, and most experts believe this segment of the market will continue to grow in coming years. The interesting thing about those statistics is that NASCAR never set out to attract women to the sport; instead, the sports entity created something with infectious enthusiasm and "buzz," and relied on its rabid fans to pull others into the fold. As a result, the entire line of NASCAR marketing products now includes pink shirts and stiletto heels because a portion of the fan base—affectionately referred to as the "race mommas"—demands them.

In a cover story on NASCAR in late 2005, *Fortune* magazine called it "the fastest-growing, best-run sports business in America—with the emphasis on business." Many experts in sports marketing believe NASCAR can be a model case study for those wishing to enter the field.

NASCAR is the nation's No. 1 spectator sport, and 17 of the top 20 most attended sporting events in the country are NASCAR events. It is the second most watched sport in the United States, after the NFL. In addition to the huge number of female fans, more than 21% of fans are minorities, and more than 50% of the nation's young people, ages 7 to 17, report they are NASCAR fans.

NASCAR fans are among the most loyal. They will switch brands to be supportive of their favorite drivers or to protest other drivers. Nearly two-thirds of them willingly spend more to buy a NASCAR sponsor's product. They see it as a way to support the sport as well as the sponsor. Female fans report they would buy non-racing-related items, such as detergent, if they had NASCAR logos on the packaging.

The keys to NASCAR's success are many, but one is the manner in which it has learned to manage the brand. Marketing executives realize that stock car racing is more than a sport; it's a lifestyle. They share the life stories of drivers, crew chiefs and pit crew members as part of their promotional strategy. They have learned to capitalize on the "common man" down-to-earth personalities of the drivers, and they have combined that with the drama of a truly life-threatening activity that is clean, family friendly and patriotic. They leverage the fact that no NASCAR driver has been caught up in moral controversies, tested positive for steroids or been embroiled in public family disputes.

New technologies allow fans to follow the race intimately, from inside the car and via communication between drivers and their crews. NASCAR commentators are informed, seasoned professionals with long careers either following or participating in the industry. They are likable, approachable folks who can translate the technology of driving into something that nearly anyone can understand.

A key marketing strategy was NASCAR's decision last year to partner with Harlequin romance novels to support the publication of three NASCAR-theme books, featuring NASCAR drivers on the covers. Even our local NASCAR hero, Carl Edwards, consulted with the author of those books to ensure she created a true-life representation of a driver for her steamy stories.

Driver websites are some of the most popular on the Internet. In recent months, many drivers have started blogs, resulting in tremendous fan response. For example, at one recent count, there were nearly 20,000 posts on Dale Earnhardt Jr.'s blog, even though he had posted only a handful of times.

Another online technology regularly trolls message boards, podcasts, social networking sites and blogs for sponsors to look for mentions of drivers. This gives sponsors an assessment of many factors, including how well a driver is connecting with fans. This "listening" technology is invaluable to sponsors, who often invest upward of \$15 or \$20 million per year in a racing team. The technique shrewdly capitalizes on a recent trend marketers are learning more about: the greater tendency than ever before for consumers to rely on the opinions of peers in making buying decisions. The Internet has become "word-of-mouth" marketing through a megaphone. And sports marketers, as well as their colleagues in other industries, are getting the message.

For example, marketing firms and potential sponsors have closely tracked the Internet traffic around Earnhardt's departure from DEI and joining of Hendrick Motorsports to learn the implications of that transition from the fans' perspective. Among other things, it has allowed them to gauge how many fans will follow Jr., regardless of sponsor or number.

The dollars wrapped up in this kind of market research are enormous. But that's nothing compared to \$239 for stilettos sporting NASCAR logos.

What the lessons learned with NASCAR marketing? Could they have done anything more? What would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The Ps of marketing.
- The managing of the strategic marketing process.
- Basic marketing principles.
- The exchange process.
- What the sport product is.
- Market segmentation.
- Advertising and the functions of advertising.
- How to develop an advertising budget.
- How to create advertisements.
- Promotions.
- How to determine the promotional mix.

14

RETAIL OPERATIONS PRINCIPLES

INTRODUCTION

Sport organizations have known for years that retail operations can generate a significant and consistent revenue stream. If the retail operations are run well and selling the right products at competitive prices, they should be turning a handsome profit and saving the clientele money.

The most dramatic change for the food and beverage concession industry came in 1987 with the opening of Joe Robbie stadium. Joe Robbie Stadium started the luxury suites and club seats era. The owners of Joe Robbie Stadium offered its customers a new level of service never before available in a sports facility: waiter and waitress service at their seats and a fully air-conditioned and carpeted private concourse featuring complete buffets from gourmet sandwiches to homemade pasta and freshly carved prime rib. A new level of culinary expertise would now be required of the concessionaire and the concessionaire's skill would be instrumental in the success of the customer's total entertainment experience at the sport's venue.

Successful retail operations accomplish the following: (1) feature prominent locations that require clientele to pass through the various sites, (2) offer personalized service and competitive pricing, (3) print catalogues for clients to share with friends, (4) merchandise their goods/products (i.e., displaying goods/products in an appealing way), (5) consider themselves retail outlets, (6) sell innovative goods/ products, (7) concentrate on apparel, accessories, beverages, and food, (8) stock regularly needed convenience supplies, and (9) sell licensed merchandise.

The box/ticket office is the heart of a sport enterprise that fields teams. Its management is the key to financial success. Selling tickets to events is a major financial resource for any sporting team whether at the interscholastic, intercollegiate, or professional level. It is vital for sport managers to book a well-rounded schedule of events to satisfy the desires of the market and to ensure a major portion of the annual operating revenue.

Instructional Objectives

- Understand retail operations.
- Comprehend concessions operations.
- Know about alcohol management.
- Understand parking concessions.
- Comprehend mercantile operations.
- Appreciate the common mistakes made by retailers.
- Understand financial risk management.
- Comprehend ticket sales and box office operations.

Experiential Learning Opportunities

1. Have students observe a concessions operation at a number of different sporting events.
2. Have students observe a merchandise operation at a number of different sporting events.
3. Have students observe a parking concession at a number of different sporting events.

Internet Exercises

- Go to the following addresses to learn more about concessions:
 - <http://www.nacc-online.com>
 - <http://www.naonline.org>
 - <http://www.nicainc.org>
 - <http://www.nationalconcession.com>
 - <http://www.concessioncentral.com>
- Go to the following addresses to learn more about ticket sales:
 - <http://www.eventbrite.com/tickets>
 - <http://www.stubhub.com>
 - <http://www.ticketliquidators.com>
 - <http://www.ticketmaster.com>
 - <http://www.livenation.com>
 - <http://www.tickets.com>

Case Study

The situation

As the largest sporting goods retailer in the country, The Sports Authority needed a program that would reduce operating costs while improving the in-store quality. Prior to a recent make-over by SYLVANIA LIGHTING SERVICES, a Sports Authority store in Clifton, N.J. used (240) 400-watt metal halide lamps to light a 43,891 square foot facility. The average level of light on the sales floor was less than 45 foot-candles and energy costs were upwards of \$54,000 a year.

On August 4, 2003, The Sports Authority, Inc. and Gart Sports Company, the largest and second largest U.S. sporting goods retailers, respectively, completed a merger that created the nation's preeminent full-line sporting goods chain. The combined company, now known as The Sports Authority, Inc., is headquartered in Englewood, Colorado.

The Sports Authority, Inc. operates approximately 385 stores in 45 U.S. states under The Sports Authority®, Gart Sports®, Sportmart® and Oshman's® names. At the time of its merger with Gart Sports Company, The Sports Authority was the largest full-line sporting goods retailer in the United States, and had 205 stores in 33 states. The Sports Authority enlisted the assistance of SYLVANIA LIGHTING SERVICES to survey their properties, starting with the Clifton, N.J. retail outlet, and provide a program that would fulfill their need for an energy efficient and aesthetically pleasing retail space.

The solution

How would you solve this situation?

SUMMARY

This chapter attempted to provide the following content to the reader:

- Retail operations.
- Concessions operations.
- Alcohol management.
- Parking concessions.
- Mercantile operations.
- The common mistakes made by retailers.
- Financial risk management.
- Ticket sales and box office operations.

15

SALES, SPONSORSHIPS, AND LICENSING PRINCIPLES

INTRODUCTION

Sales are the lifeblood of any organization as well as sport entities. Sport entities sell advertising, club seats, luxury suites, merchandise, media rights, signage, and sponsorships. The word sales or the term salesperson often equates to images of hucksters, who are people using persuasion to talk to customers into buying products they might not want at prices they sometimes cannot afford.

Sales generate the revenue streams to keep the doors open and the sport entity profitable. The components of sales include salesperson, sales department, sales-oriented organization structure, telemarketing, direct mail, personal selling, customer retention, and lifetime value.

Over the past two decades, the amount of money spent on sport and special-event sponsorships has grown in number and dollars dramatically. Sponsorships include a wide variety of activities associated with communications process that is designed to use sport and lifestyle marketing to send messages to a targeted audience.

License products are those items of clothing or other products bearing the name or logo of a popular sport organization. The value of licensing to a sport organization has grown by leaps and bounds. It has become a significant revenue stream for most sport organizations.

This chapter has been designed to assist the prospective sport manager in understanding the importance of sales, sponsorships, and licensed products on the sport entity. Further, it will provide an introduction to each of these very significant revenue streams for most sport organizations. Finally, the reader will begin to understand the impact and relationship of these three linked marketing tools.

Instructional Objectives

- Understand what sales encompasses.
- Realize what makes a good sales person.
- Recognize the items commonly known to be sport products.
- Understand what telemarketing is all about.
- Realize what direct mail entails.
- Recognize what personal selling is all about.
- Understand what the lifetime value of a consumer is.
- Comprehend how to retain customers.
- Know what promotional licensing is all about.
- Understand the value and benefits of sponsorships.
- Comprehend how to develop a sponsorship.

Experiential Learning Opportunities

1. Have students prepare a sponsorship program for a fund-raising project for a nonprofit recreation and sport organization.
2. Have students develop a promotional licensing program for a local high school.

Internet Exercises

1. Go to the Sport Marketing Association website to gather more information on sales, sponsorships, and licensing <http://www.sportmarketingassociation.org>

Case Studies

Coke Auction

Coke auction first took place in Aug-Dec 2000, in partnership with QXL, with the set up of www.cokeauction.co.uk. It involved consumers (primarily teen targeted) bidding for items using credits. Instead of credit cards

Consumers got 500 free credits just by registering at the website and could accumulate further credits by buying promotional cans of Coke and sending the ring-pulls and bottle labels from the same to Coca Cola GB. Coke tied up with brands like Nike and Sony to offer auction items ranging from CDs and games software to WAP phones and MP3 players. Consumers could also bid for makeovers or tickets to England World Cup qualifiers.

The promotional was very successful with more than 100,000 registrations, more than 800,000 user impressions and the average user session lasting 12 minutes per visit. The campaign's banner ad alone generated close to 10,000 participants.

One consumer collected 16,800 ring-pulls and the highest number of items won by one individual was 124. The promotion positioned Coke as a progressive, exciting, and relevant teenage brand and got Coke the Revolution Award for Digital Economy in Great Britain. Definitely a successful Sales promotion.

What did they do correct? What did they do that was not as effective? What would you have done differently?

Adidas: Bonded by blood

In 2006, Adidas launched a marketing campaign to bring fans closer to New Zealand's hugely popular All Blacks Rugby Team- a little too close! All the 40 team members donated their blood, which was thereby mixed into the in used to make a poster of the team. The poster was given to fans who bought a \$70 All Blacks jersey made by Adidas. Each of the 8,000 posters came with a certificate of authenticity.

The promotion was promoted through advertising on radio, outdoor and online media.

The objective of the campaign was to create an emotional bond between the All Blacks Rugby squad and their fans and grow sales of All Blacks apparel by 15%. It ended up with a total sell out of all posters and a 24% increase in sales.

The campaign won the Grand Prix at the Cannes Lion Awards 2007.

What did they do correct? What did they do that was not as effective? What would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- What sales encompasses.
- What makes a good salesperson.
- What items are commonly known to be sport products.
- What telemarketing is all about.
- What direct mail entails.
- What personal selling is all about.
- What the lifetime value of a consumer is.
- How to retain customers.
- What promotional licensing is all about.
- The value and benefits of sponsorships.
- How to develop a sponsorship.

16

FUND-RAISING PRINCIPLES

INTRODUCTION

All organizations have the need for additional funds beyond the normal revenue sources (i.e., membership fees, ticket sales, guarantees, postseason opportunities, radio and television contracts, concessions [food, merchandise, and parking], franchising, licensing agreements, sponsorships, etc.). There are, of course, many legitimate and logical reasons why additional funding is needed to support programs, such as program expansion, facility renewal or expansion, inflation, changing priorities, increase in unemployment with markets, and a decrease in the purchasing power of the consumers within the markets. Without successful fund-raising programs, exciting promotions, and an excellent public relations program, the organization could be forced to reduce or eliminate marginal programs and sport teams, layoff personnel, reduce hours of operation, or close facilities. Therefore, it is imperative for sport managers to develop strong programs in fund-raising and promotions. An effective, efficient and successful fund-raising program will allow the organization to grow and prosper in today's very competitive financial environment. Fund-raising is the art of soliciting money for charitable organizations, schools, colleges/universities, political parties, and many other worthy projects and organizations. Many organizations define fund-raising as anything that increases revenue, including: concessions, deferred giving, donations, grants, merchandising, licensing, promotions, and sponsorships.

Instructional Objectives

- Understand fund-raising.
- Comprehend the key components for a successful fund-raising program.
- Appreciate fund-raising support groups.

Experiential Learning Opportunities

1. Have students shadow university fundraisers to see what they do daily.
2. Have students develop a fund-raising plan for a local nonprofit agency.

Internet Exercises

1. Do an Internet search to find more information about fund-raising.
2. Go to <http://www.afpnet.org> to learn about fund-raising professionals.

Case Study

The American Heart Association and AAHPERD's Hoops for Heart is a successful national fund-raising program that focuses on educating children about the dangers of heart disease while raising funds for cardiovascular research, stroke research, and health education. Participating students and their schools raise money through a variety of basketball-related activities, and the funds raised are used to promote awareness and research around cardiovascular issues. Sponsor schools also receive a portion of the donated funds to enhance their own physical education programs.

Hoops for Heart came about as a type of offshoot from the popular Jump Rope for Heart program. Two physical education teachers in New Mexico came up with the idea in 1989 when a planned Jump Rope for Heart event

failed to attract the interest of their students. They felt that if they could center the event on basketball rather than jumping rope that their students would be more intrigued and, therefore, more involved. The event proved successful within a year, and Hoops for Heart had its start. The success of Hoops for Heart goes hand in hand with the success of Jump Rope for Heart. The American Heart Association showed great flexibility and creativity in re-purposing this event to keep it current and effective. The AHA was able to maintain relevance and increase participation by widening the scope of its events, while maintaining proven fundamentals.

The primary focus of either a Jump Rope for Heart or Hoops for Heart event is on the children, both as eager participants and students. Through conscientiously involving young children in its philanthropic mission, AHA is increasing the odds that these same children continue to support the event and stay involved in the future. The AHA's strategy provides a dual approach to success, both by securing a short-term recurring revenue stream and investing in the long-term future of the organization.

The American Heart Association has shown thought leadership by having the initiative build on its prior success and broaden the reach of the organization as a whole. Many organizations find success through a single avenue and are unable to replicate success; however, the AHA has shown an understanding of fundamental success drivers by migrating the event to new markets and populations. This type of fund-raising model should serve as an inspiration for both participants and organizations alike. The AHA proves that organizations can engage their donors in more than one format without losing focus on its mission.

Using this example develop a fund-raising event for a nonprofit organization.

SUMMARY

This chapter attempted to provide the following content to the reader:

- Fund-raising principles.
- The key components for a successful fund-raising program.
- Fund-raising support groups.

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CUSTOMER RETENTION PRINCIPLES

INTRODUCTION

Retaining current customers is the key to success. Customer retention minimizes the emphasis on securing new customers that must take place to be profitable and establish a stable base that can help attract new customers through referrals. Finally, customer retention maximizes the customer's lifetime value to the organization.

The following are the factors that affect the retention of ticket-plan purchasers for entertainment and sporting events:

- Customer service
 - Feeling valued by the organization
 - Appreciated by the organization
 - Quality of customer information
 - Problem resolution
 - Ease of problem resolution
- Performance of the team
- Satisfaction with seat location
- Demand for tickets in the marketplace
- Satisfaction with beverage and food concessions
- Satisfaction with merchandise and souvenirs
- Enjoyment in attending the games
 - Game programs
- Satisfaction with the price/value relationship of the purchase
 - Ease of use of the benefits and amenities included in their purchase
- Convenience factors relating to attending in person
 - Ease of parking
 - Expense of parking

Instructional Objectives

- Understand customer retention principles.
- Comprehend how to retain memberships.
- Know the costs of recruiting new customers.
- Appreciate a customer profile system.

Experiential Learning Opportunities

1. Have your student research and develop a customer retention program for a local health/fitness club, YM-CAS, YWCA, or Boys & Girls Club.

Internet Exercises

1. Go to <http://www.medallia.com/download-free-guide> to learn more about customer retention guides.
2. Go to <http://www.nisacards.com> to learn more about customer retention tools.

Case Study

Is your contract up with your cellular carrier? Don't renew it, cancel it.

That's how you can get the best deal from your current provider. At least, that's what I learned when I attempted— unsuccessfully— to renew my contract with Sprint, my now former cellular carrier.

The lesson unintentionally taught me is that consumers get a much better deal from the retention department of a large subscriber-based corporation than they do from the sales department. It's not just Sprint, but they were the company that taught me these things. It turns out to be the case not only from mobile service providers, but other entities, such as ISPs, AOL is notorious in this regard.

We are also former customers of credit card provider Capital One, for the very same reasons: The deal they offered to the public was unavailable to us as customers. Over the years, their rates crept up on my (triple A credit) wife's Master Card to 15%. They advertise a 10% card all the time. When they wouldn't offer the same deal to us, it was bye-bye Capitol One (we got the preferred rate elsewhere). I suspect it's true for a slew of other subscriber services.

I learned valuable lessons, and I share them with you, dear reader, in the belief that you will profit from my experiences. I also harbor the irrational hope that just maybe someone from one of these outfits will see this, and wise up.

But I am ahead of myself. Our story begins Christmas 2002, when we purchased a pair of Samsung N400 phones from Amazon. \$200 each, plus a \$200 rebate. (You may recall that I wrote how rebates sucked, and after much huffing and noise, we eventually got our cash. But that experience soured me on rebates, and I swore off rebates forever. I have stayed true to that oath).

Anyway, our contract expired in January. We got a marketing letter from Sprint to re-up. However, the deal they offered us, as their present customers, was far, far less attractive than the one they seemed to be spending billions of dollars advertising more or less nonstop on every media outlet available to everyone who is not their customers.

This is rather annoying. Perhaps they thought that we, as their existing customers, wouldn't see those ads. It really didn't matter, because they are competing with everyone else, who runs of their competitive services. (That's called competition in the marketplace).

Over the ensuing months after the contract lapsed, our phone bills went up: My wife never uses her minutes, and I (who occasionally use the phone for business) often do. It was apparent our present plan had become inadequate.

Between the expiration of the contract and yesterday, we made repeated attempts to renew with Sprint. The problem was that their offerings to us (as current customers) were lousy, vastly inferior to the parade of deals we saw advertised every day.

Now, before anyone from Sprint wants to call me up and tell me how wonderful their network is, let me stop you in your tracks: All cellular networks are more or less the same to me. Mobile telecom has become a commodity product. Even if the network were an issue, in the NY/LI region, Verizon has the best reputation.

No matter. The issue at hand is customer retention. You might think that as a customer, you could get a better deal to stay a customer— zero acquisition costs!— than the marketed offers made to potentially new customers.

But, alas, you would be wrong.

Here's how the bizarre modern world of corporate customer retention/churn works: When you speak with just about any service provider as a current customer, you get routed into either a service or a sales process. The structure appears to be based upon profitability first (margin), and customer retention last.

As a month-to-month customer, one would think that retention was a priority. Forget it: Despite the fact that you are a present patron of the firm, it appears (at least in my experience) that you get offered much less competitive deals than what total corporate strangers get offered.

This is, in my opinion, bad business. It is a short-term approach; I suspect it contributes to “churn;” It certainly lowered the total customer experience, as far as me as a consumer was concerned. So for me, Sprint is now finite, a write off, kaput. I doubt I would ever use them again— at least, not until I have been alienated by all the rest of the carriers (a process I expect will take about 10 years).

Now here's where things start to get interesting: Call up and cancel your account. You will get transferred to a “retention specialist.” The woman I spoke with at Sprint was very nice; She offered us all sorts of lovely deals to stay a Sprint customer.

“Too late,” I told her. We had just switched that morning from Sprint to Cingular -- despite my repeated attempts to stay with Sprint (if for no other reason than I loved the N400 Samsung phone). We had already gone to Cingular, ordered the new service, got new phones, and went merrily on our way.

“Well,” she asked, “what sort of deal did you get from Cingular for the two lines?”

I told her we got two Motorola V220 camera phones for \$29 (I could have gotten them for free— \$200 plus a \$200 rebate, but you already know my thoughts on THAT).

Our plan is 850 Minutes @ \$60 /mo for the 1st line, 10 bucks for the second. No roaming or long distance charges, free nights and weekends, free mobile phone to phone calls, and our unused minutes rollover to the next month. Overages at 35 cents a minute. (Did I mention no roaming? You guys kill us with roaming all the time).

Sprint then offered a plan that was comparable—not quite as good, but close—figure 90% or so. Had they offered that to me prior to the switch, we would have, in all likelihood, stayed with them.

Oh well, too late. We had already invested an hour or so in Cingular, plus I was halfway through the Motorola manual. Cingular actually transferred my Samsung address book to the new Motorola phones (imperfectly, I may add, but it was a big leg up).

There are lessons to be learned here, for both customers and carriers: What are they?

SUMMARY

This chapter attempted to provide the following content to the reader:

- Customer retention principles.
- How to retain memberships.
- The costs of recruiting new customers.
- Customer profile system.

PART 4

**FACILITY DESIGN, EVENT MANAGEMENT, AND
FACILITY OPERATIONS AND MAINTENANCE**

18

PROGRAMMING FOR SUCCESS

INTRODUCTION

The term *program development* as used in this chapter refers to the total learning experiences provided to consumers to achieve the objectives of health, fitness, physical activity, recreation, and sport. It is concerned with the component parts of all the programs in each of the five areas as well as with the resources (e.g., facilities, financial, human, and technological) involved in implementing those learning experiences. The overwhelming trend in American society today is to provide carefully planned programs based on the following considerations:

- the abilities, needs, and wants of the customer/client,
- the needs of society in general,
- the practical usefulness of the various knowledge bases and physical skills,
- the social-psychological aspects of society that influence learning, and
- the marketability of the products or services developed to meet the needs and wants of the customer/client.

Instructional Objectives

The instructional objectives for this chapter include:

- The student will understand the process of program development.
- The student will understand common program approaches.
- The student will understand how to assess and evaluate programs.
- The student will understand the process used for expanding, reducing, or eliminating a program.
- The student will understand the process in order to master scheduling.
- The student will understand the process for booking events.
- The student will learn how to design tournaments for competition.

Experiential Learning Opportunities

The following are examples of experiential learning projects that could be used with the students:

- Have students work with various nonprofit sport leagues or campus recreational sports to assist in drafting the regular season schedule and the tournament schedule.
- Have students work with the program directors at the local Boys & Girls Club or YMCA or YWCA to assist in planning out the 12 month program schedule.

Internet Exercises

The following are examples of internet exercises students could be involved in to gather more information about:

- Have students use the Web to find other components of the planning process beyond what is discussed in the textbook.
- Have students use the Web to determine an evaluation process for reviewing programs.

Case Study

Do late-night games prevent youth crime?

Problem Situation

You are the superintendent in charge of overseeing seven public parks and community recreation centers. One of the programs that you decide to try at an inner-city center is a basketball league for teenagers. You have learned about the “Midnight Madness” program at a recent conference and would like to try it in your community. The goal of the league is to keep young men and women off the streets and on the basketball courts between the peak crime time hours of 10 p.m. and 2 a.m. Players practice two nights per week and play games on two other nights during the week. The league has 16 teams with names taken from the National Basketball Association (NBA) and the Women’s National Basketball association (WNBA).

As you evaluate the program by watching a game, the community center director scans the players and spectators, pointing out which people belong to which gangs. “I’d guess that about one-third of the players are in gangs. It’s very strange; the gangs are getting along very well. I can’t explain it.”

After each game, players are required to attend workshops on subjects such as job training, drug abuse, and parenting. Role models talk to the young men and women. Although the sport director does not have actual proof of the success of the program, she makes a public statement that the program is benefitting the community—namely, that crime is decreasing in the area.

Discussion Questions:

What sort of concrete evidence could the director give to support her “gut feeling” that the program works? Should community recreation centers be “gang hangouts”? Should members from the same gang be allowed to play on the same team, or does this cause more “us” versus “them” feelings? What security precautions can you take to prevent gang fights?

Is it fair to insist that the players attend workshops after the ball game? Are the workshops’ topics appropriate? What other topics would you include? How long should the workshops be? What sort of teaching methods should be used? Who is qualified to teach these workshops?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The process of program development
- The common program approaches
- How to assess and evaluate programs
- The process used for expanding, reducing, or eliminating a program
- The process in order to master scheduling
- The process for booking events

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FACILITY DESIGN PRINCIPLES

INTRODUCTION

Successful building projects have most likely undergone thorough pre-development reviews and well-designed site selections and development processes. Projects without these elements are doomed to failure from the outset.

Anyone who has been involved in facility planning and development understands that errors are common during the planning and development process. The challenge is to complete a facility project with the fewest number of errors. Before becoming too deeply involved in the planning and development process, it is important to review some of the common errors that have been made in the past. These errors include, but are not limited to (a) failure to provide adequate and appropriate accommodations for handicapped persons throughout the facility; (b) failure to provide adequate storage spaces; (c) failure to provide adequate janitorial spaces; (d) failure to observe desirable current professional standards; (e) failure to build the facility large enough to accommodate future uses; (f) failure to provide adequate locker and dressing areas for both male and female users; (g) failure to construct shower, toilet, and dressing rooms with sufficient floor slope and properly located drains; (h) failure to provide doorways, hallways, or ramps so that equipment may be moved easily; (i) failure to provide for multiple use of facilities; (k) failure to plan for adequate parking for the facility; (l) failure to plan for adequate space for concessions and merchandising; (m) failure to provide for adequate lobby space for spectators; (n) failure to provide for an adequate space for the media to observe activities as well as to interview performers; (n) failure to provide for adequate ticket sales areas; (o) failure to provide adequate space for a loading dock and parking for tractor trailers and buses; (p) failure to provide adequate numbers of rest room facilities for female spectators; (q) failure to provide adequate security and access control in to the facility and within the facility; (r) failure to provide adequate separation between activities (buffer or safety zones) in a multipurpose space; (s) failure to provide padding on walls too close to activity area, padding and/or covers for short fences, on goal posts, and around trees; (t) failure to plan for the next 50 years; (u) failure to plan for maintenance of the facility; (v) failure to plan for adequate supervision of the various activity spaces within the facility; and (w) failure to plan to plan.

Instructional Objectives

- Understand planning for facilities/venues.
- Comprehend the development of a master plan.
- Recognize the composition of the design team.
- Understand the steps in selecting an architectural firm.
- Comprehend pre-design review.
- Understand the design development phase.
- Appreciate the need for specifications.
- Comprehend the bidding process.
- Understand the construction phase.

Experiential Learning Opportunities

1. Have the students prepare a program book for a sport facility for a high school or nonprofit organization.
2. Have students visit the director of facilities at the University to understand what his operation does on a daily basis.

Internet Exercises

1. Go to <http://www.aia.org> to gain a greater understanding about architects and their firms.
2. Go to <http://www.agca.org> to gain a greater understanding about contractors.

Case Study

Board/staff/community involvement and planning issues

Before faculty members are involved in the process of helping to program a school, I have learned that it is very important to teach them about the entire process, including the six phases of planning and construction which will take place: programming (development of educational specifications), schematic design (location of rooms and program areas), design development (handling code issues and other specifics), development of contract documents, bidding, and construction. The typical teacher wants to approach the process with his or her own sketches, blueprints, and personal biases about facility design. Instead, teachers must be coached and directed to deal at the conceptual level. If the faculty does not get this coaching before educational programming begins, there will be a huge amount of misunderstanding and considerable conflict during the planning process.

Clear lines of communication between appropriate personnel must be established early in the project. A single representative from the architectural/engineering firm must be designated to communicate with the school board. Likewise, a single representative of the school board must be designated to be communicated with the architectural firm. On some occasion, it may be appropriate for both of these individuals to communicate with others in the opposite group, but those occasions should be rare and must include contact with the proper organization representative.

Through these strict lines of communication, we have been very successful in minimizing confusion, side deals, and conflict which can emanate from a school board representative attempting to direct the general contractor or his subcontractors. We have also prevented problems that could arise from representatives of the architectural/engineering firm contracting department chairs, teachers, coaches, and others within the school district.

By law, the board of education must approve change orders to the contract. A critical step is presenting the board with enough information for it to understand the change conceptually and the reasons for associated costs. The school board representative must be able to present the material to the board in layman's language.

It is important for the board of education and the superintendent to understand in advance the need for change orders. School buildings are of such magnitude that individual change orders can easily reach into the tens of thousands of dollars. Board members, attempting to exercise their responsibility to monitor the expenditure of public funds, can become very concerned about change orders unless they are well schooled in the need for, magnitude of, and frequency of occurrence of change orders.

No amount of technology will be useful if teachers are not comfortable with it or do not understand how it can be employed effectively in the classroom. In the same vein, it is important for board members and citizens of the district to understand the value of technology in the teaching/learning process so that parents and board members might accept the cost of building it into educational facilities.

Planning the media center

We struggled with the issue of separating or joining print and non-print media activities. We concluded that they are different enough to justify different locations. In our case, we have a middle school and a high school

under the same roof, but students from the two schools will not interact with each other. Therefore, it is necessary to put a print media center in each school. We decided to put an electronic media center between the buildings to act as the “alpha and omega” for all signals moving in and out of the building.

Even had we been building only one school under a single roof, I think it is very likely we would have separated the print and non-print media centers. The activities of a television studio or a mini/mainframe computer facility are very security conscious, quite active, and would in most cases be inappropriately located in a print media center.

What are the first steps to be taken? How would you develop the plan? Are too many people involved in this process?

SUMMARY

This chapter attempted to provide the following content to the reader:

- Planning for facilities/venues
- The development of a master plan
- The composition of the design team
- The steps in selecting an architectural firm
- Pre-design review
- The design development phase
- The need for specifications
- The bidding process
- The construction phase

INTRODUCTION

Event planning and management pose many challenges to the event planner. Capell (2013), Goldblatt (2010), Kilkenny (2011), Lawrence and Wells (2009), Malouf (2012), Raj (2013), and Saget (2012) suggest the following are the common questions that event planners need to ask prior to placing any event:

- What type of event should be held?
- What is the purpose of the event?
- How can the theme and creative aspects enhance the core event?
- Why does this event have potential to be successful?
- Where will the event be held?
- What are the strengths and weaknesses of the event?
- What are the advantages and disadvantages of the event?
- What is the definition of success for the event?
- How will technology to be used internally and externally in the management of the event?
- What is the budget?
- What contracts are important to consider?
- Which marketing strategies are the best fit for the event?
- What role will sponsorship play in the event?
- Is there a need for participant registration?
- Will tickets be sold – how, when, and at what price?
- How will media be leveraged to ensure the event earns as much coverage as possible?
- How will the event manager ensure event is safe and secure?
- What emergency planning is needed?
- What planning documents are needed?
- How will the event be staffed?
- How will staff be motivated to work hard?
- What is needed for the event day operations?
- What equipment is needed?
- How will the event flow?
- What happens when the event is over?

Instructional Objectives

- Understand the characteristics of a special event.
- Know the categories of special events.
- Understand the need for venue transportation management plan deployment.

- Realize the importance of an event-planning team.
- Recognize the value of interagency coordination.
- Understand risk assessment.
- Know the value of insurance for event planning.
- Understand crowd management.
- Know what creates a poor event.
- Understand the steps creating an event.

Experiential Learning Opportunities

1. Have students assist in the creation of a special event for a nonprofit sport organization.

Internet Exercises

1. Go to <http://www.iaam.org> to learn more about the International Association of Auditorium Managers.
2. Go to <http://www.ises.org> to learn more about the International Special Event Society.
3. Go to <http://www.ifea.org> to learn more about the International Festivals and Events Association.

Case Study

Challenge

The National Institutes of Health (NIH) supports more than 300,000 scientists in universities and research institutions across the United States and abroad. The NIH Office of Extramural Research (OER) provides assistance to scientists applying for research funding — an essential step to achieving medical discovery. The process through which funding is attained is built on numerous federal policies and procedures. Each year, OER hosts two NIH Regional Seminars on Program Funding and Grants Administration. At each seminar, in the course of three days, more than 30 NIH and HHS staff members are brought to a central location to educate, share and listen to hundreds of administrators, graduate students, and anyone interested in the grants administration process.

The seminar serves as a venue to demystify the funding application process and clarify federal regulations and policies. Since 2008, Ripple Effect has provided project management and coordination support for five NIH Regional Seminars.

Solution

Ripple Effect utilized our comprehensive event management approach to coordinate all of the moving pieces of these events. The four phased approach involves:

- Phase 1: Development – Initial concept design; define purpose, objectives, format and overall vision for the event. Develop event specifications guide.
- Phase 2: Pre-Event Coordination – Agenda development, budget creation, site research and selection, web-site development, speaker management, communication/outreach, and materials design and printing.

- Phase 3: On-site Coordination – Venue set-up, vendor/exhibitor set-up, registration/information desk, program execution, volunteer coordination and dismantle process.
- Phase 4: Post-Event Coordination – Budget reconciliation; distribute thank you letters, final report and evaluation.

We identified OER's operational and programmatic objectives, and gathered the event specifications. With this information we were able to create an event work plan, including the event time line and tasks list, to achieve the event objectives. We held regular planning meetings with OER leadership, and coordinated logistics and communications with speakers, exhibitors, volunteers, and attendees.

How would you go about solving this challenge? Was the solution above the best solution? What would you have done differently?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The characteristics of a special event.
- The categories of special events.
- The need for venue transportation management plan deployment.
- The importance of an event-planning team.
- The value of interagency coordination.
- Risk assessment.
- The value of insurance for event planning.
- Crowd management.
- Creates a poor special event.
- The steps creating an event.

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VOLUNTEERS THE KEY TO SUCCESSFUL EVENT MANAGEMENT

INTRODUCTION

Prior to 1970, relatively little was known about the scope and size of the volunteer sector. Since then, several major national surveys have provided information useful in drawing a profile of the volunteer corps in America. In youth, interscholastic, and intercollegiate sports, volunteers are very important to the successful operations of these programs. The volunteers are often ticket sellers, ticket takers, ushers, swimming and track and field officials, youth sports coaches, and fund-raisers. If volunteers failed to be involved in these programs, these programs would not exist. Not-for-profit youth organizations would never be able to employ adequate numbers of paid personnel to operate the various youth sports programs. This chapter will outline everything the sports manager will need to know about volunteers and how to manage the volunteer corps.

Before beginning to understand what a manager should put into place regarding the management of volunteers, it is important to understand the characteristics of volunteers. Further, the manager needs to consider the characteristics below when dealing with volunteers. These characteristics have been identified including:

- The 25% rule = 25% of the volunteers will do nearly all that is asked of them.
- The 20% rule = refers to those individuals who are truly effective, who are the real producers and “result-getters.”
- Volunteers have feelings, so make them feel valuable and wanted, treat them with respect, and provide them with special privileges to reward them for their contributions.
- Volunteers have needs and wants. Satisfy them.
- Volunteers have suggestions. Seek their input.
- Volunteers have specific interests. Provide options and alternatives for them.
- Volunteers have specific competencies. Recognize these skills and do not attempt to place square pegs in round holes.
- Volunteers are individuals working with other individuals. Encourage them to work as a team, not as competing individuals.
- Volunteers are not (usually) professionals within the organization or profession. Treat them with a special understanding and empathy.

Instructional Objectives

- Understand the characteristics of volunteers.
- Comprehend the role of volunteers.
- Know how to recruit volunteers.
- Understand to develop job descriptions for volunteers.
- Comprehend how to retain volunteers.
- Know how to develop a volunteer in-service.
- Understand the volunteer personnel management system.
- Know the importance of recognizing volunteers.

Experiential Learning Opportunities

1. Have students develop a volunteer system for a local high school or nonprofit sport organization.
2. Have students develop an awards ceremony for volunteers at local nonprofit sport organizations.

Internet Exercises

1. Go to <http://www.volunteermatch.org> to learn about this organization that attempts to match volunteers to opportunities.
2. Go to <http://www.volunteerinternational.org> to learn about this organization that attempts to match volunteers with international opportunities.
3. Go to <http://www.voa.org> to learn about Volunteers of America.

Case study

A volunteer's view

This volunteer took action to get what she wanted out of her placement in a busy campaigning organization. "I wanted to move my career in a different direction, and thought the organization could give me relevant work experience. I was interviewed after the placement was advertised in the national press, and was offered the position. We agreed that I would volunteer for three days a week for four months. I attended an induction session, and was given information about general office procedures.

"My first day was quite chaotic. When I arrived in the office, there was no one to brief me. There was also confusion as to where my desk was to be, and I found out that I wouldn't have my own computer, but would have to move around and share where possible. I felt that the organization wasn't really expecting me and my presence was a bit of a nuisance. At the beginning there wasn't any particular structure to my role, and I was asked to help out whoever was the busiest. I felt that the organization hadn't really taken time to consider what my role would be or take account of my skills. The tasks that were given to me weren't particularly demanding; I wasn't learning anything new, and I didn't feel that my skills were being used. The experience has made me more skeptical about voluntary organizations that involve volunteers, but I think I have managed to get something out of the experience.

"I quickly became disenchanted with the organization. After a few weeks, however, I did explain to my manager that I wanted my work to be better planned. The situation did improve and I was given higher level projects to work on. With hindsight, my expectations were probably too high, and the organization was ill prepared for managing volunteers. The volunteer policy existed more on paper than in practice. The experience has made me more skeptical about voluntary organizations that involve volunteers, but I think I have managed to get something out of the experience."

Comment

It's important to make volunteers feel they have a place in the organization, particularly on their first day. Volunteers are more likely to stay if they are given satisfying tasks, rather than just acting as assistants to paid staff. The manager in this case should have picked up on the problem and been more proactive. Not all volunteers would have been willing or sufficiently confident to take the initiative to improve the situation.

How would you have solved this situation? What was done well in this situation?

SUMMARY

This chapter attempted to provide the following content to the reader:

- The characteristics of volunteers.
- The role of volunteers.
- How to recruit volunteers.
- Develop job descriptions for volunteers.
- How to retain volunteers.
- How to develop a volunteer in-service.
- The volunteer personnel management system.
- The importance of recognizing volunteers.

INTRODUCTION

Most maintenance managers will agree that maintenance requirements are almost never given adequate consideration when facilities are designed. Even when some consideration is given to maintenance during the design phase, changes in design during construction often nullify the original plans. The construction contractor is most usually concerned with completing the building in the manner that will generate the most profit, and as such, is not usually concerned with maintenance and repair requirements once the warranties expire. Further, there is a natural tendency on the part of architects to focus on the visual aesthetics of the design, often at the expense of more utilitarian concerns such as cost efficiency in operations (Sawyer, 2009; 2013).

Given that the largest cost of a sports facility is borne through the many years of operation following construction and commissioning, maintenance professionals (typically the designated facility maintenance manager) need to participate in the design process. These maintenance professionals should remain involved until the project is completed. So while there should be no question at this point that the maintenance manager can have a lot to offer in terms of the planning of the facility, further discussions are in order as to the practical considerations for operations and maintenance (O&M) in the project planning. This chapter looks at some of the design requirements for the sports facility from the perspective of the maintenance manager. The first part relates specifically to maintenance and support areas and the second to general “generic” maintenance concerns for the facility as a whole.

Instructional Objectives

- Students will understand that there needs to be written plans and procedures for facility operations and maintenance.
- Students will recognize that all facilities have safety concerns.
- Students will appreciate the need for regular inspections of the facility.
- Students will realize the importance of fire safety.
- Students will grasp the need for building safety.
- Students will value the importance of design considerations for operations and maintenance.
- Students will see the need for a central custodial complex as well as satellite locations.
- Students will appreciate the need for maintenance workshops.
- Students will value the need for storage spaces.
- Students will understand the needs of a facility laundry facility.
- Students will understand the logistical challenges related to maintenance issues with a facility.

Experiential Learning Opportunities

1. Arrange a tour of the college or university facilities management spaces.
2. Arrange for the facility director of the college or university to be a guest speaker in class.

Internet Exercises

1. Search the internet for facility operations policies and procedures

2. Search the internet for maintenance operations policies and procedures
3. Search for OSHA guidelines describing facilities operations

Case Study

You have been hired at a soon to be opened facility director for operations and maintenance at a newly opened public assembly facility. Your first task is to develop a policies and procedures manual for the operation and maintenance at the new facility. Follow the steps within this chapter to develop a draft manual.

SUMMARY

This chapter attempted to provide the following content to the reader:

- Written plans and procedures for facility operations and maintenance
 - Emergency and evacuation procedures
 - Disclaimer
- Safety concerns and inspections
 - Preventative measures
 - Fire safety
 - Building safety
 - Electrical safety
 - Chemical storage safety
- Design considerations for operations and maintenance
 - Central custodial complex
 - Maintenance workshops
 - Storage
 - Sports equipment storage and repair
 - Janitorial closets
 - Laundry room
- Generic concerns for building maintenance
 - Standardizing building fixtures and equipment
 - Logistical concerns
 - Utilities
 - windows