

# CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT

April 29 – May 3, 2013

Training Syllabus



William Penn Mott Jr. Training Center



# Memorandum

**Date:** April 1, 2013  
**To:** Supervisor  
**From:** Joanne Danielson, Acting Department Training Officer  
William Penn Mott Jr. Training Center  
Department of Parks and Recreation  
**Subject:** Employee Attendance at Formal Training

An employee from your office will soon be attending the formal training program described in the attached. Please insure that the employee is fully prepared to attend the session and that the groundwork is laid for the employee's implementation of the training upon returning to work. You can assist with capturing the full value of the training by taking the following steps:

### Prior to Training

1. Make sure that **specific** employee needs are identified and, if necessary, called immediately to the attention of the Training Coordinator.
2. Review with the employee the reason for the employee's attendance.
3. Review objectives and agenda with the employee.
4. Discuss objectives and performance expected after the training.

### Immediately Following Attendance

1. Discuss what was learned and intended uses of the training.
2. Review the employee's assessment of the training program for its impact at the workplace and review the due date of the Post-Training Evaluation form.
3. Support the employee's use of the training at the work place.

### Prior to Three Months Following Training

1. Employee after discussion with the supervisor login to the Employee Training Management System (ETMS) to complete the Post-Training Evaluation form.
2. Supervisor evaluates the effectiveness of the training on the employee's job performance and login to the ETMS to complete the Training Effectiveness Assessment form.

Thank you for your assistance in seeing that the full benefit of training is realized.

Attachment

cc: Participant

## TABLE OF CONTENTS

Formal Training Guidelines .....	1
Program Attendance Checklist.....	6
Pre-Training Assignments .....	7
Post-Training Assignment .....	8
Agenda.....	9
Program Outline .....	13
Program Objectives.....	14
Location Map.....	15

***Mission Statement  
Training Section***

***The mission of the Training Section is to improve  
organizational and individual performance and  
productivity through consulting, collaboration,  
training, and development.***

## TRAINING SECTION STAFF

Joanne Danielson ..... Acting Department Training Officer  
Juventino Ortiz..... Academy Coordinator  
Pat Bost ..... Office Manager  
Chuck Combs ..... Training Specialist  
Sara M. Skinner ..... Training Specialist  
Dave Galanti ..... Training Specialist  
Karyn Lombard ..... Training Specialist  
Matt Cardinet ..... Cadet Training Officer  
Dan Kraft..... Cadet Training Officer  
Nicole Shannon ..... Cadet Training Officer  
Dan Raducanu ..... Cadet Training Officer  
Pamela Yaeger ..... Assistant Program Coordinator  
Edith Alhambra ..... Assistant Program Coordinator  
Ellen Dewsnap..... Assistant Program Coordinator  
Socorro Wallace ..... Program Assistant  
Joanne Ciccone ..... Program Assistant  
Ginger Henry ..... Program Assistant  
Rogers Williams..... Program Assistant

## THE MISSION

*of California State Parks is to provide for the health, inspiration, and education of the people of California by helping to preserve the state's extraordinary biological diversity, protecting its most valued natural and cultural resources, and creating opportunities for high quality outdoor recreation.*



## FORMAL TRAINING GUIDELINES

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Welcome to formal training, an essential component in your career development.

Since 1969, our Department has been providing a continuously changing number of diverse training programs at its main training facility, the William Penn Mott Jr. Training Center and other locations including Marconi Conference Center. The Department strives to enhance your learning and job performance with formal training of the highest quality.

Our Department's dedication to training is only one aspect of its commitment to you and to the public. This commitment is costly and represents an important investment in you and your career. You and the Department realize a return on that investment by your positive participation in formal training itself and post training follow-through.

The program you will be participating in is described in this training syllabus, which outlines what you can expect from this training and what is expected of you. This syllabus details what you should do before you leave for training; what to do when you arrive; what you will be doing while in training; and, importantly, what you should be able to do when you return to your work site. Specifically:

1. **SYLLABUS:** The syllabus is now accessible on the Employee Training Management System (ETMS). You should print a copy of the syllabus to bring with you to class. Your copy of this syllabus is an important part of your training experience and should be brought with you to training. Read it before you arrive and review it following the program along with material you received at training.
2. **PRE-TRAINING ASSIGNMENTS:** Your completion of pre-training assignments is essential to the success of your training. You are responsible for all reading assignments in preparation for classroom sessions. Time will be provided during working hours to accomplish any assignments which involve either individual or group efforts and resources.
3. **TRAVEL:** Arrange your travel to and from the training through your District or Office. (No reimbursement for travel expense - including per diem costs - will be approved for travel not specifically authorized in advance by the District Superintendent.) Individuals may

claim reimbursement for incidental expenses incurred as outlined in DAM 0410.6. The Mott Training Center does not have the capability to provide transportation to/from Monterey Airport.

The cost of your travel (air fare, mileage, rental car, etc.) is paid by your District or Office **to** and **from** the location of the training.

4. **LOCATION AND HOUSING:** This training is being offered at the Mott Training Center. Housing will be assigned to you on a shared-room basis and will be available from 3:00 p.m. on the date of arrival to 12:00 noon on the date of departure. The Department provides your room and board expenses at the Mott Training Center only. No per diem allowance will be authorized for living off-grounds. This does not preclude living off-grounds at your own expense. Please advise the Department Training Officer no later than one week before your scheduled arrival if you plan to live off-grounds. No animals are permitted in Asilomar housing. In the event of an emergency, staff must know your room assignment, therefore, you may not switch rooms without staff approval. Overnight guests are not allowed in the buildings unless registered beforehand at the front desk in Asilomar's Administration Building. Quiet hour for lodge living areas is 10:00 p.m.

**Please Note:** You may be assigned a room at a motel while attending training. If so you may be asked to present a valid credit or debit card while checking in to your room. Many motels require a credit card to cover charges incurred such as telephone calls, damages to rooms and/or furnishings, fees to clean rooms that have been smoked in that are not designated as smoking rooms, etc. Please be prepared to handle this appropriately.

5. **ENROLLMENT OR HOUSING CANCELLATION POLICY:** To cancel participation in a course, the participant must have their District Superintendent or Section/Office Manager send an email to the Training Specialist assigned to the course requesting to remove the participant. If you do not need lodging or must change or cancel your reservation for lodging, you must contact the Mott Training Center or Training Specialist assigned to the course at least 72 hours prior to your date of arrival. Lodging, registration, and associated fees will be charged to the employee's District or Section/Office if a training cancellation is received with less than 72 hours notice.

**The Training Section is committed to ensuring that the reservation that has been made for you is accurate and needed.**

6. **OFF-GROUNDS ACCOMMODATIONS:** When authorized to stay off-grounds by the Department Training Officer, the Training Section will pickup the cost of your room and meals at the current DPR Asilomar rate. If you stay off grounds and have meals on grounds, the Training Section will authorize only what the Department pays Asilomar for lodging.
7. **MEALS:** Meals will be provided, semi-cafeteria style, from dinner on the date of arrival through lunch on the date of departure. Meals will be served at 7:15 a.m. for breakfast, 12:00 noon for lunch, and 6:00 p.m. for dinner. Hot or box lunches may be provided on some days. If you require a special diet, notify the Asilomar Chef at 831-372-8016 no later than one week before your scheduled arrival.

In order to assist participants with limited mobility, Asilomar provides a shuttle to and from the dining hall. Please contact either Asilomar staff upon check in, or Mott Training Center staff upon your arrival, for instructions on arranging a transport.

8. CLOTHING AND CONDUCT: Field uniforms as found in "Description of Required Field Uniforms", DOM Chapter 2300, Uniform Handbooks, not including optional items, will be worn daily by all uniformed employees during formal training sessions **unless otherwise specified in the Program Attendance Checklist**. Non-uniformed employees shall wear apparel normally worn on the job. Appropriate attire includes apparel suitable for professional office dress. It does not include such items as shorts, t-shirts, tank tops, or sandals.

Because we are on the conference grounds with many other groups, and the image we project as State Park employees is important not only during working hours but off duty hours as well, your informal sportswear should be appropriate.

9. ROOM SAFES: Two safes have been installed in each of the lodge rooms used by the Mott Training Center (Live Oak, Tree Tops, and Deer Lodge). These safes are a type that allows the user to input their own combination of numbers to facilitate opening and closing. The Mott Training Center has a master key for emergency entry. Safes are to be left in the open position when checking out of your room.
10. WEAPONS: Weapons are permitted in rooms under the following conditions. Authorized firearms and magazines stored while at the Mott Training Center shall be in a safe condition and stored in one of the following locations: your room safe in Live Oak, Tree Tops, or Deer Lodge, one of the Mott Training Center's safes in the Whitehead Room or secured in your vehicle.
11. ALCOHOLIC BEVERAGES: Participants shall not possess or consume alcoholic beverages in common areas (living room) while on the Asilomar Conference Grounds unless provided and hosted by Concessionaire ARAMARK.
12. SMOKING: Smoking is not permitted in the Mott Training Center or in any lodge or guest room on the Asilomar Conference Grounds.
13. TRAINING CENTER: The Mott Training Center is located on Asilomar Conference Grounds, a part of Asilomar State Beach. The Conference Grounds are operated for our Department by a concessionaire, and all lodging and food services are provided to us by employees of the concessionaire. Constant efforts are made to maintain a sound, harmonious working relationship between the Department and concessionaire. None of us can expect preferential treatment for any reason and, as a departmental employee, you will be expected to join in our continuing effort toward an effective relationship with each Asilomar concession staff member. On occasion, non-departmental groups may be staying in the same lodges. It is imperative that you represent the Department well on and off duty.
14. REGISTRATION: When you arrive at Asilomar Conference Grounds, go directly to the front desk at the Asilomar Administration Building for your room key and dining room ticket. If you require vegetarian meals, notify the front desk representative and your meal ticket will be marked accordingly.

15. **COURSE LEADERS:** The formal training you will attend is developed and, for the most part, conducted by experienced State Park employees in field and staff positions. Some courses will be conducted by qualified instructors from other agencies and educational institutions. Your course leaders have proven their ability and knowledge in their profession, and provide a level of expertise difficult to match.
16. **TRAINING SECTION STAFF:** Dave Galanti is your Training Specialist and has been assigned the responsibility for your training group. That staff member usually serves as a Course Leader as well as a Coordinator. During the program, you may be asked to assist Training Section Staff in the logistics of your training program (organizing field trip transportation, supervising classroom breaks, etc.). Training Section Staff will do all within their power to make your training experience pleasant and meaningful.
17. **TRAINING MATERIALS:** May be made available to you at both your unit and the Mott Training Center. Handout materials issued at your unit should be brought to training for possible use. A conference binder or notebook will be issued to you at the training session for note taking and convenience in handling materials. Copies of DAM and DOM will be available to you for self-study. Bring your own pens and pencils.
18. **ATTENDANCE:** Regular attendance is a critical course requirement and your participation is important to the success of this training. An absence of more than 10% of the course hours constitutes grounds for dropping a participant from the course. The Department Training Officer may modify this requirement based upon participant knowledge level and/or the portion of the course missed. All absences, except those of an emergency nature, must be approved in advance by the Training Specialist.
19. **VEHICLES:** All vehicles should be parked in the lots adjacent to the Mott Training Center. Any questions regarding use of a State vehicle while at the Mott Training Center should be discussed with your supervisor prior to your departure for training, or with your Program Coordinator while at the Mott Training Center.
20. **BICYCLES:** If you bring your bicycle, store it in the bicycle shed next to the Mott Training Center. Bicycles may not be brought into any building nor chained to lamp posts, trees, etc. The Mott Training Center has a limited number of bicycles available for your use. Prior to your use, you are required to complete a safety inspection and sign a waiver which is posted in the bicycle shed.
21. **MAIL:** Mail forwarded to you during your time at the Center should be addressed to you in care of:

Department of Parks and Recreation  
WILLIAM PENN MOTT JR. TRAINING CENTER  
P. O. Box 699, Pacific Grove, CA 93950
22. **CELL PHONES:** As a courtesy to your fellow participants and course leaders ensure that your cell phone is turned off during classes. Participants should not be receiving or making cell phone calls during class time. Please limit those calls to your breaks.
23. **FAX:** The Mott Training Center's FAX number is (831) 649-2824.
24. **TELEPHONE:** Limit phone calls during classroom hours to urgent business or emergencies. Anyone wishing to contact you by telephone during working hours should

call the Center at (831) 649-2954. Calls after 5:00 p.m. or during weekends should be made to (831) 372-8016, Asilomar Conference Grounds, and the caller should tell the switchboard operator you are with a California State Parks training group. **Please Note: There are no longer pay telephones outside of the Mott Training Center. There are pay telephones located at the Asilomar Administration Building.**

25. LAUNDRY AND DRY CLEANING: May be taken care of by you at one of several local establishments.
26. RECREATION: Facilities available on grounds include a heated swimming pool, ping-pong and pool tables, and a volleyball court. The Monterey area offers horseback riding, golf, tennis, racquetball, deep sea fishing, and many historical landmarks and scenic sights to explore.
27. POST-TRAINING ASSIGNMENTS: In connection with formal training are to be completed under the direction of your supervisor. See "Program Attendance Requirements" in this syllabus.
28. COFFEE BREAK REFRESHMENTS: Will be available throughout each session. You will be asked to contribute to the "Hospitality Fund" to defray expenses. Please bring your own coffee cup.



## PROGRAM ATTENDANCE CHECKLIST

To assist you in your preparation for formal training session at the Mott Training Center, the following list is provided:

- \_\_\_\_\_1. Arrange travel through your District Office.
  
- \_\_\_\_\_2. Pre-Training Assignments
  - Information on pre-training assignments, if any, will be sent to each participant prior to the first day of class. Please bring all required pre-training assignments with you to the training location.
  
- \_\_\_\_\_3. Remember to bring the following with you to training:
  - Program syllabus.
  
  - Reusable water bottle, coffee cup, pencils, pens, etc.

If you have any questions or need assistance, contact Training Specialist Dave Galanti, [dgalanti@parks.ca.gov](mailto:dgalanti@parks.ca.gov). Email is best and usually the fastest way to obtain the assistance you seek.

## **PRE-TRAINING ASSIGNMENTS**

Information on pre-training assignments, if any, will be sent to you separately via email.

**Please complete all pre-training assignments prior to the first morning of the class.**

## **POST-TRAINING ASSIGNMENT**

Prior to ninety days after the completion of this program, the employee and his/her supervisor should sit down and discuss the impact and assess the effectiveness this program has had on the employee. Then both the supervisor and employee should login to the Employee Training Management System (ETMS) and complete the Post-Training Evaluation form (an email will be sent to both employee and supervisor notifying them that the evaluation needs to be completed).

The post-training evaluation process is intended to provide a bridge between classroom instruction and the on-the-job application of training. The information obtained through this process will assist the training participant, supervisor, and Mott Training Center in providing a return on the investment the Department has on training.

**CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT GROUP 1 - AGENDA**  
**April 29 – May 3, 2013**

**Sunday**  
**April 28**

1500–

**CHECK-IN:** Check-in at the Asilomar Administration Building (out-of-town participants who must travel more than four hours one-way only)

**Monday**  
**April 29**

**NO MORNING CLASS – CLASS BEGINS AT 1:00 P.M. (1300)**

1200–

**Check-in:** Check-in at the Asilomar Administration Building (out-of-town participants who did not check-in on Sunday)

1200–1300

*Lunch (Crocker Dining Hall)*

1300–1330

**Welcome/Introduction**

Galanti

1330–1400

**Participant Introductions**

Mott/Gerson

1400–1500

**The Big Picture** (*Executive Perspective*)

Fuzie

1500–1515

*Break*

1515–1615

**Concessions Program Overview**  
(*Roles/Responsibilities Field-Headquarters*)

Montijo

1615–1700

**DPR Property Use Overview**  
(*Lease, Special Event, Concession, OA, Illegal Operation*)

Montijo

**Tuesday**  
**April 30**

0800–0815

**Welcome Back**

Galanti/Gerson

0815–0930

**Which Property Use Works Best?**

Montijo

**CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT GROUP 1 - AGENDA**  
**April 29 – May 3, 2013**

**Tuesday**

**April 30 (continued)**

0930–0945      *Break*

0945–1200      **Pre-Concession Basics**      Donaldson/  
*(Negotiated vs. RFP, Studies, BCPs)*      Renner

1200–1300      *Lunch (Crocker Dining Hall)*

1300–1400      **Pre-Concession Basics (continued)**      Donaldson/  
Renner

1400–1500      **Insurance and Bonds**      Harwell/Mott

1500–1515      *Break*

1515–1600      **Contract Language Development**      Montijo/  
Concession  
Team

1600–1700      **Contract Development Exercise**      Montijo/  
Concession  
Team

**Wednesday**

**May 1**

0800–0815      **Welcome Back**      Galanti/Gerson

0815–1000      **Monitoring Performance Intro**      Harwell/  
Poudrette

1000–1015      *Break*

1015–1200      **Monitoring Performance – Site Visit**      Harwell/  
Poudrette

1200–1300      *Lunch (Crocker Dining Hall)*

1300–1500      **Monitoring Performance (continued)**      Harwell/  
Poudrette

**CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT GROUP 1 - AGENDA**  
**April 29 – May 3, 2013**

**Wednesday**

**May 1 (continued)**

1500–1515      *Break*

1515–1545      **Fiscal Reporting and Revenue**      Pine

1545–1615      **Special Contract Considerations**      Donaldson

1615–1700      **Tools of the Trade**      Donaldson

**Thursday**

**May 2**

0800–0815      **Welcome Back**      Galanti/Gerson

0815–1000      **Partnership Agreements Intro**      Novack/Montijo

1000–1015      *Break*

1015–1130      **Partnership Agreements (Match)**      Novack/Lynch

1130–1200      **Partnerships Q & A**      Novack/Lynch

1200–1300      *Lunch (Crocker Dining Hall)*

1300–1400      **Concessions ADA**      Martin

1400–1500      **Contract Compliance and Breach**      Lynch/Montijo

1500–1515      *Break*

1515–1700      **Real Life Scenarios and Solutions  
Question and Answer Brainstorming**      Lynch/  
Concessions  
Panel

**Friday**

**May 3**

0800–0815      **Welcome Back**      Galanti/Gerson

0815–0930      **Revenue Generation and Partners**      Reed

**CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT GROUP 1 - AGENDA**  
**April 29 – May 3, 2013**

**Friday**

**May 3 (continued)**

0930–0945      *Break*

0945–1100      **Concessionaire’s Perspective**      Concessionaire  
Panel

1100–1200      **Wrap-up**      All

1200–      *Lunch (Crocker Dining Hall) and Depart*

**PROGRAM OUTLINE**

**CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT**

	<b><u>HOURS</u></b>
PROGRAM ADMINISTRATION .....	0.5
Welcome, Registration, Introduction	
VISION AND MISSION .....	1.5
The Philosophy and Role of Concessions	
CONCEPT/IDEA TO CONTRACT (Part I).....	4.0
From Concept to Evaluating Options	
Budgets and Concession Operations	
Revenue Generation and Concessions	
NEGOTIATED CONTRACT OPTIONS (Part II) .....	2.0
CONCEPT/IDEA TO CONTRACT (Part III).....	5.0
RFP Process from Development to Award	
Contract Terms and Language	
OPERATING AGREEMENTS AND PARTNERSHIPS.....	3.0
MANAGEMENT TO TERMINATION (Part I) .....	6.0
Concession Performance and Monitoring	
Partnerships and Accessibility	
Special Considerations	
MANAGEMENT TO TERMINATION (Part II) .....	6.0
Insurance and Bonds	
Revenue Tracking and Accountability	
MANAGEMENT TO TERMINATION (Part III).....	4.0
Legal Issues and Contract Termination	
Panel Q & A	
Program Wrap-up and Evaluation	
<b>TOTAL HOURS .....</b>	<b>32</b>



## **CONCESSIONS AND OPERATING AGREEMENT MANAGEMENT** **PROGRAM OBJECTIVES**

This course provides ongoing training to field staff throughout the Department consistent with strategic initiatives and efforts to establish and monitor concessions projects and other partnerships which facilitate and/or enhance visitor services. This training seeks to improve the effectiveness, consistency, and quality of the management of concession contracts and operating agreements throughout the State Park System. The training program provides a forum for learning, collaboration, networking, inspiration, and planning.

Under the supervision of several instructors, the students will:

1. Discuss the importance of concessions in relation to the Department's vision and mission statements.
2. Define the roles and responsibilities for managing concession operations.
3. Identify the laws and policies that guide concessions from concept to implementation.
4. Demonstrate an understanding of the Department's policies and procedures as they relate to the preparation of Request for Proposals and/or negotiated contracts.
5. Discuss the Budget Process as it relates to concessions.
6. Identify performance monitoring and contract compliance.
7. Describe the impact of legal issues and the Americans with Disabilities Act.

Training Center, 837 Asilomar Blvd., Pacific Grove, CA 93950

