Illinois Association of Park Districts and Illinois Parks and Recreation Association

User Resource Guide in PowerDMS

The Illinois Association of Park Districts (IAPD) and the Illinois Parks and Recreation Association (IPRA) have teamed up with PowerDMS to provide IAPD / IPRA Distinguished Standards in an electronic format through PowerDMS Standards. These are ***recommendations*** and, if followed, can enhance the review process for both the agency and IAPD / IPRA Evaluation Teams.

The IAPD / IPRA Standards Manual

Your IAPD / IPRA Standards Manual must be downloaded to your PowerDMS site. This is a two-step process. You must download the manual before you can build your first assessment.

Step 1:

a. Navigate to your Administrative Menu, located in the "Welcome, Name" drop down menu.

b. Locate "Standards Manual Communities" in the list of items in the Administrative Menu.

c. Click "Standards Manual Communities" and locate IAPD / IPRA Distinguished Standards Manual (you may need to navigate through the pages. All accrediting bodies are in alphabetical order).

d. Click "Request Membership"

A representative from PowerDMS will approve your access request to the IAPD / IPRA Standards Manual, which will trigger an email informing you that your request for membership has been approved. Please allow up to 24 hours or the next business day for completion of Step 1.

Step 2:

a. Navigate to Your Administrative Menu, located in the "Welcome, Name" drop down menu.

b. Locate "Standards Manual Communities" in the list of items in the Administrative Menu.

c. Click "Standards Manual Communities" and locate IAPD / IPRA Distinguished Standards Manual (which will now be at the top of the list on the first page)

d. Identify the green and white arrow to the right of the manual, and click on it

e. Click "Subscribe" next to the manual you wish to download.

Please allow at least an hour for the manual to download to your PowerDMS site.

Click HERE for a Video on Subscribing to your Standards Manual or HERE for an article.

Click HERE for how to open a new assessment.

Naming of Assessments

When naming your assessment, add the manual acronym and the start *and* end month/year of your assessment cycle.

Examples: IAPD / IPRA Initial Assessment 07/2020 – 01/2022

IAPD / IPRA Reaccreditation 07/2020 – 07/2026

Naming Conventions, Definitions, and Labels

1. Attachments

All attachments should have a prefix and a brief description of the document. Prefixes act as "keywords" that benefit you as you build your assessment. First, they inform your evaluation team about the type of document they are reviewing. Second, they simplify searching, filtering, and copying attachments from one review cycle to the next. Agencies should select a prefix for their documents that guide practices (i.e., policy and procedures) and a prefix for those documents that prove compliance to the standards (i.e., annual report). The key is to be consistent in how you use prefixes throughout your assessment. To assist you, IAPD / IPRA have developed the following attachment prefixes:

- PRO – Protocol (see definition below)
- EOC – Evidence of Compliance

Prefixes for Simple Notes make searching, filtering, and copying these simple notes easier. IAPD/IPRA recommend using the following prefixes for Simple Notes:

- INT – Interview
- OBSV – Observe
- NO – Non-occurrence
- NA – Not Applicable by Size / Function

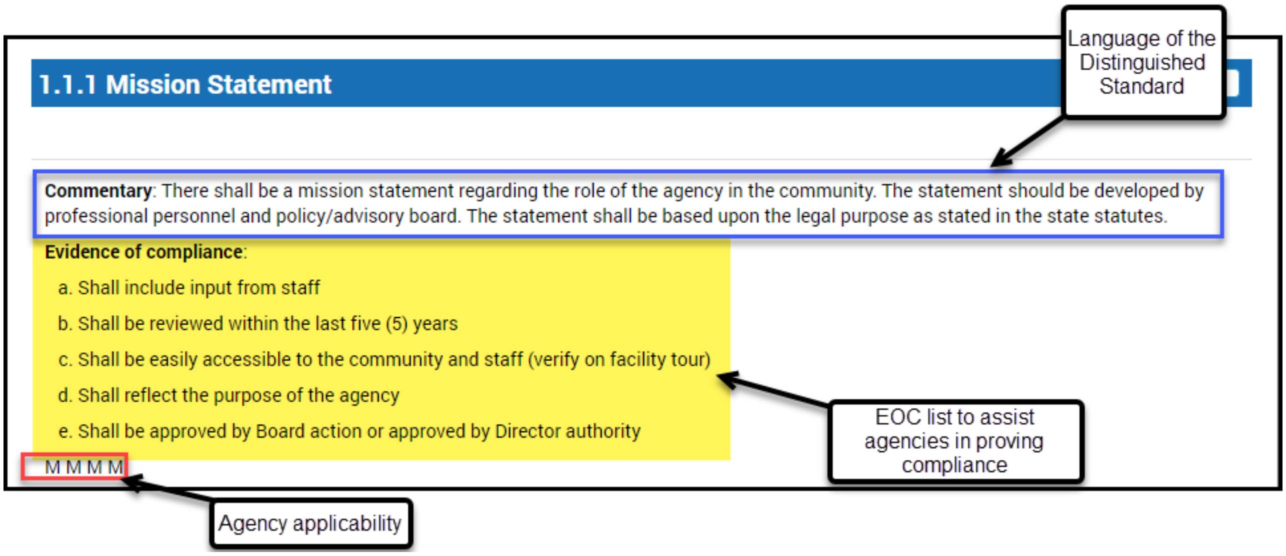
2. Definitions

- <u>Commentary</u> – In PowerDMS, the commentary contains the language of the distinguished standard.

- <u>Evidence of Compliance</u> – An evidence of compliance may be Intra-departmental memoranda, computer printouts, screen shots, job descriptions, letters from citizens, photographs, videos, rosters, forms, investigative reports, newspaper clippings, budget documents and logs, etc. Care should be taken to redact confidential names, date of birth, social security numbers, and other sensitive information. The evidence of compliance list is provided for each distinguished standard and is located below the commentary.

- Protocol – A protocol can be a policy, plan, procedure, rule or regulation, general or special order, training directive, contracts, City / County personnel rules, local, state, and federal laws, or other document that is binding upon agency personnel. The form of a protocol must meet the requirements of the distinguished standard.

- Time Sensitive Standard – A time-sensitive standard requires documentation on a routine cadence and is applicable to all agencies seeking reaccreditation. For example, if a standard requires annual reports, then the agency would provide the most recent three consecutive year reports as evidence of compliance.



3. Order of Presentation

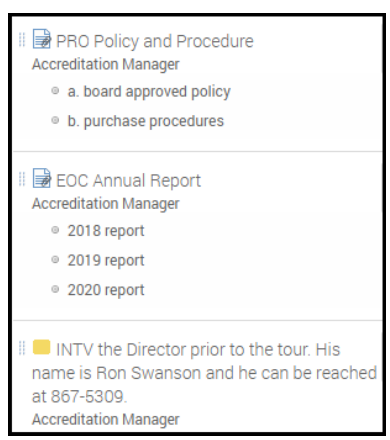
The order of presentation should be in a logical order in terms of attachment types *then* any time-sensitive standards during reaccreditation cycles.

TIP: IAPD / IPRA recommend combining all Protocols into a single document as well as all evidence of compliance documentation into a single document. Combining documents into a single document will keep the attachment list clean and concise.

*Present **PRO** documentation first then **EOC** then **Simple Notes.***

Order of Document Presentation

1. Protocols
2. Evidence of Compliance
3. Simple Notes



4. Labels

- Label attachments with the agency's preferred prefixes and a brief description of the document. You will use the highlight labels to distinguish between bullet letters of multi-dimensional standards.

  Example of a Protocol:

  PRO Policy and Procedure
  Accreditation Manager
  - a. board approved policy
  - b. purchase procedures

- Labels for evidence of compliance should include a brief description of the document. If the standard is multi-dimensional, you will use the highlight label to indicate the bullet letter.

  Example of an evidence of compliance (for a time-sensitive standard)

  EOC Annual Report
  Accreditation Manager
  - 2018 report
  - 2019 report
  - 2020 report

  Example of an evidence of compliance (with bullet letters):

  EOC Agency Record
  Accreditation Manager
  - a. Board approval
  - b. Purchase agreement

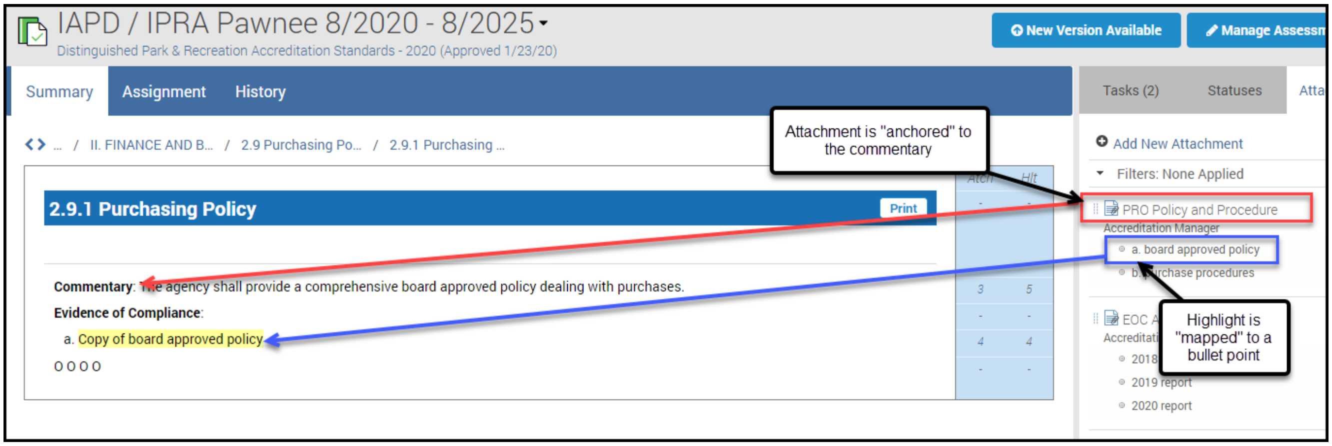
- Label highlights with language that informs the assessor what information is contained in the highlighted material. For multi-dimensional standards, include the bullet letter in the highlight label.

- Label Simple Notes with a prefix identified above and any justifications or additional information that the assessor may need.

  OBSV The location of the mission statement during the on-site
  Accreditation Team

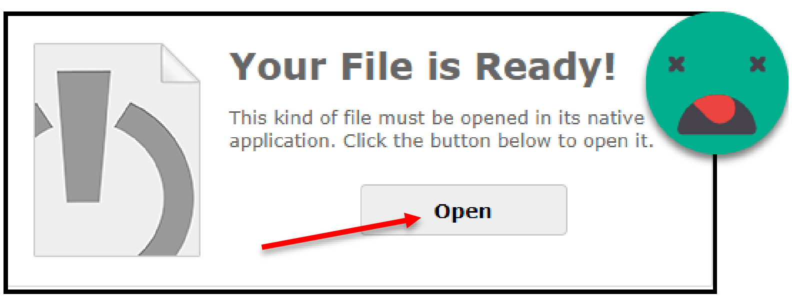
5. Multi-dimensional (Bulleted) Standards

PowerDMS recommends attaching a document ***only once*** to the standard. When you add the attachment, you will see checkboxes next to the standard root *and* each bullet point. You must select at least one box to “anchor” the attachment to the standard. PowerDMS recommends anchoring the document to the commentary. Map highlights to specific bullet points where applicable.



6. Best Practice for Attaching Uploaded Files

PowerDMS allows for any file type (i.e., Word, Excel, PowerPoint, PDF, PNG, etc.) to be attached to a standard as an “Upload File” attachment type. However, Word, Excel, and PowerPoint file types will not be viewable as documents in the assessment. In fact, your evaluation team will see:



Clicking the “open” button will launch the computer’s Word, Excel, or PowerPoint application and open the document. You will not be able to use PowerDMS’ highlighting tool, and you risk the evaluation team members downloading your proprietary and possibly confidential document.

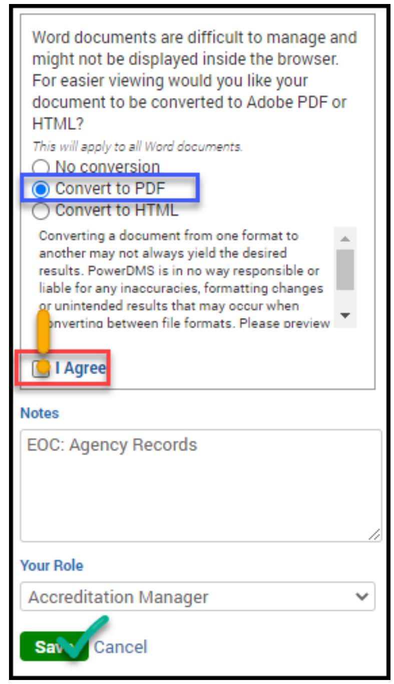
PowerDMS and IAPD / IPRA recommend you convert these file types to a PDF format as you attach them to the assessment by following these steps.

1. Click “Add New Attachment”

2. Select “Upload File” from the dropdown list

3. Select the file by browsing your computer files or dragging and dropping the file into the box indicated

4. If a Word, Excel, or PowerPoint file is uploaded, a pop-up box appears. Select “Convert to PDF” as seen in the pop-up box below. When you select “Convert to PDF,” the box will expand and “I Agree” appears at the bottom in blue lettering. You MUST select “I Agree” to continue.



5. Select “I Agree”

6. If the title of the document needs editing to adhere to the IAPD / IPRA recommended practices for prefixes and labeling, edit the text that appears in the **NOTES** field, directly below the conversion pop-up box.

7. Ensure the uploaded file is attached to the standard statement (see section 5. [Bulleted Standards]).

8. Click “**Save**”

Your Word, Excel, or PowerPoint document will now display correctly and allow you to use the PowerDMS highlight tool.

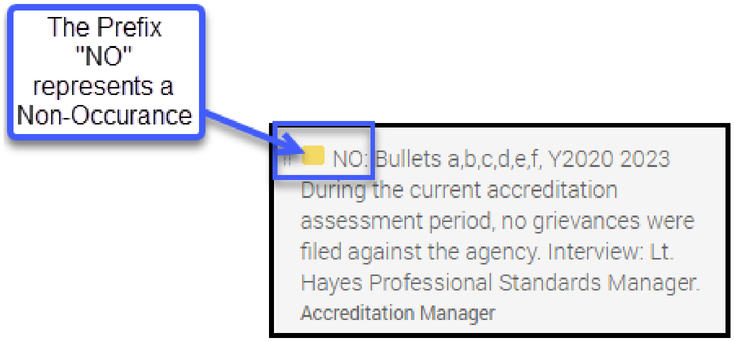
7. Best Practices for Simple Notes

In PowerDMS, a simple note is an attachment type that can be used to provide IAPD / IPRA evaluation teams with additional information about the PRO or EOC used to document compliance with the standard.

IAPD / IPRA approves the use of Simple Notes in lieu of Memoranda for:

- Not Applicable by Function
- A Non-Occurrence of the standard during an assessment cycle
- Guidance for IAPD / IPRA Evaluation Teams on Interviews (i.e., phone numbers / email addresses)
- Guidance for IAPD / IPRA Evaluation Teams on key Observations during the onsite visit

Simple notes allow accreditation managers to explain, justify, or detail anything they wish to communicate to the evaluation team. If a standard is Not Applicable by Size or Function or a Non-Occurrence, the accreditation manager must provide a full explanatory justification why the prefix (NA/NO) was selected.



8. Helpful Links

- How to Highlight documents
- How to Archiving past assessments
- How to Copy attachments and tasks to a new assessment

Best Practice for Assessment Roles

PowerDMS has five Roles for use in an IAPD / IPRA assessment: Accreditation Manager, Accreditation Team, Mentor, Evaluation Team, and Accreditation Review Board. These Roles provide you with the ability to create "show or final files" and "working or dummy files" in a single location and allow for mentors to review evidence of compliance and provide feedback. When you add attachments to your assessment, you MUST select a Role before PowerDMS will save the attachment. We do this so you can control which attachments you want your evaluation team to review during your assessment.

Note: Roles are not job titles or agency job functions! A good way to understand assessment roles is to think of them as a set of files. Each role is an imaginary set of files that you build for your assessment (i.e., show files, working files).

When you assign users, mentors, evaluation teams, or yourself to an assessment, you select a Role and participation rights to that Role. This means you are granting these individuals permission to either add or observe attachments in that Role.

To assist you with understanding Roles, we have provided the following definitions:

1. Accreditation Manager Role ("show" or "final" files): Attachments made to the Accreditation Manager role are attachments that you want your evaluation team to review during a on-site assessment.

2. Accreditation Team (working files): Attachments to this role are not reviewed by the evaluation team, but act as a repository for compliance documentation that ***may*** be used to show compliance during the assessment. Below are some reasons to use this role:

a. You have other people collecting documentation for you and you will need to review the compliance document before approving it for the assessment,

b. You collect extra documentation for your final assessment, just in case an evaluation team member asks for another evidence of compliance,

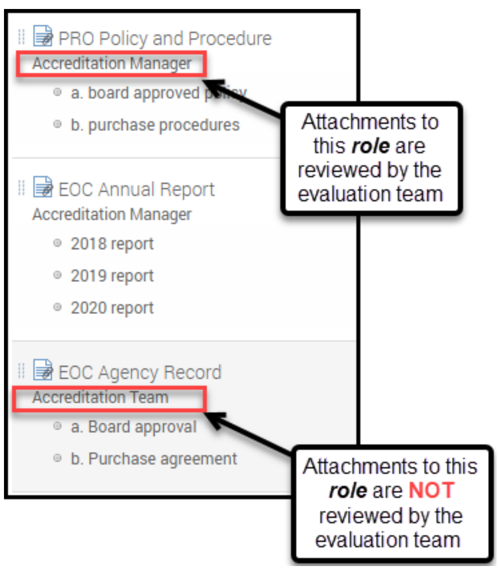
c. You do not want other users assigned to the assessment to access the documentation your evaluation team will review.

Ultimately, the use of Roles is your choice. However, PowerDMS recommends the following:

1. Select *Accreditation Manager* role for all written directive attachments you want your evaluation team members to review.

2. Only assign agency users who are responsible for the agency's assessment to the *Accreditation Manager* role to participate. You may wish to give Observe rights to other agency personnel so they can see which attachments will be shown to the evaluation team. Your evaluation team members MUST have observe rights to the *Accreditation Manager* role.

3. Have agency users who help you collect documentation add attachments to the *Accreditation Team* role. Once you review the attachments and approve them for the assessment, change the role of the attachment to the *Accreditation Manager* role.



Preparing for Assessments

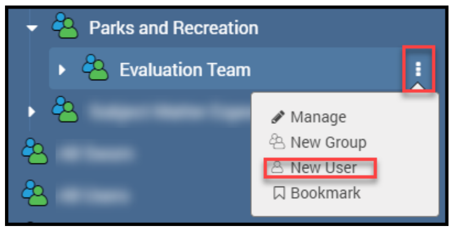
To prepare for your IAPD / IPRA review, you will need to add your evaluation team members to your PowerDMS assessment. You will need to add the people assigned to your evaluation team to your PowerDMS site. In PowerDMS, it is recommended you use groups to manage your users, even users that will be in your site temporarily (i.e., evaluation team members).

To add individual evaluation team members as users:

- Create a group for your evaluation team (if one has not been created already). The name of the group is your agency's decision. Navigate to the **NEW** create dropdown menu at the top of your homepage and select ***Group***. Give the Group a name and click SAVE.

  Example: Evaluation Team

- Using the triple dot menu to the right of the group's name, select *Add User* from the dropdown menu.

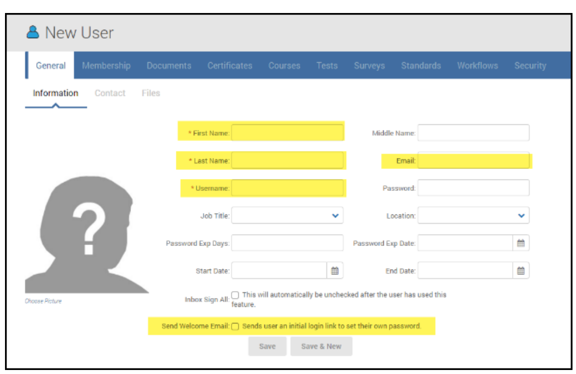


- Complete the required fields on the New User page. Required fields include First Name, Last Name, and Username.

- You do not need to create a password for your evaluation team member. You may select the "Send Welcome Email" check box directly above the "Save" button. As long as you provide the member's email address, PowerDMS will take care of sending your SITEKEY and username to the user then allow that user to create his or her password. If you choose, you may create a password for your evaluation team members. If you create the password, be sure to email your SITEKEY, the username and password to your team members.

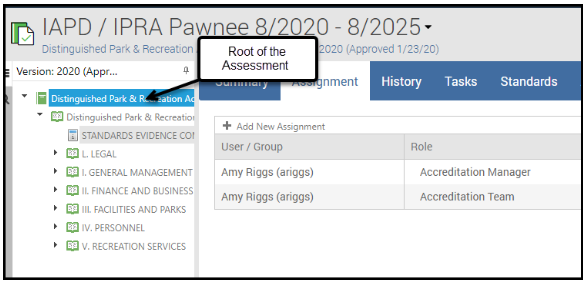
- You also have the option of entering an END DATE. The end date will archive the user automatically, freeing up a user license once the file review is complete.

- These steps will create the user directly into the appropriate group.



The following steps outline best practices for adding your evaluation team to your assessment. These best practices are necessary to ensure the evaluation team members can review your evidence of compliance while having the ability to add simple notes and set a final compliance status to your assessment.

Step 1: Navigate to your assessment and click on the root of the manual.



Step 2: Click on the “Assignments” tab

Step 3: Click ***Add New Assignment***

Step 4: In the **User / Group** dropdown field, type the group name you created for your Evaluation Team and select the group from the dropdown menu to populate the field.

Step 5: In the **Role** dropdown field, select *Evaluation Team* from the list.

Step 6: In the **Responsibility** dropdown field, select *Participate* from the list.

Step 7: Click **SAVE**

Step 8: Click ***Add New Assignment***

Step 9: In the **User / Group** dropdown field, type the group name you created for your evaluation team and select the group from the dropdown menu to populate the field. This is the *same* group you added to the *Evaluation Team* role in steps 4 – 6 above.

Step 10: In the **Role** dropdown field, select *Accreditation Manager* from the list.

Step 11: In the **Responsibility** dropdown field, select *Observe* from the list.

Step 12: Click **SAVE**

+ Add New Assignment

User / Group	Role	Responsibility	
Amy Riggs (ariggs)	Accreditation Manager	Participate	
Evaluation Team	Accreditation Manager	Observe	
Amy Riggs (ariggs)	Accreditation Team	Participate	
Evaluation Team	Evaluation Team	Participate	

Your evaluation team MUST have the ability to participate in the *Evaluation Team* role to set status, clear tasks, and add simple notes. Your evaluation team MUST have the ability to OBSERVE the role all your attachments are in, which is the *Accreditation Manager's* role.

For more information on adding your evaluation team to your assessment is found in the article, *Preparing for Mock and Final Assessments*, located within the PowerDMS Success Community.

Archiving the Assessment

Do not archive the assessment until the final report is delivered from IAPD / IPRA. If your agency has only one assessment license, consider using your folders to house your compliance documents until you can archive your assessment and open a new assessment.

To Archive and Assessment refer to the article, *Archiving your Assessment*, in the PowerDMS Success Community.

Tips for Empowering Assessment Continuity

One of the most difficult job functions within an agency is to establish continuity for an accreditation program. As agency accreditation managers change, the accreditation process used to achieve an award of accreditation changes. PowerDMS has the tools, regardless of the modules your agency purchased, to establish continuity for your accreditation process. Use the PowerDMS features below as suggestions to maintain continuity for your agency's accreditation program.

1. **Folders.** You have the freedom to build a folder structure not only to house your policy manual but also to house your proofs of compliance. Housing your proofs of compliance within PowerDMS serves many functions to promote accreditation program continuity. Below are a few examples:
    a. Encourage agency personnel upload the proof as a document into an assigned folder in lieu of email or using a shared drive. *ALL* PowerDMS agencies have access to house as many documents as desired in PowerDMS!
    b. Create historical records for your compliance documentation using folders. This will enable users to reference previous compliance documentation without providing administrative rights to an archived assessment.

2. **Certificates**. Use this versatile feature to track equipment, driver's license, fleet vehicles, etc. Or use them as a reminder to document a time sensitive standard.

3. **Review Workflows**. Review workflows not only remind policy writers to review documents for validity but also remind accreditation managers of time sensitive

standards.

4. **Courses**. Accreditation Manager training can be built specific to an agency's accreditation program using PowerDMS courses. These courses may be assigned to any user. You can also create trainings on how to upload a proof to a folder and how to identify a good proof of compliance.

5. **Survey**. Surveys are great instruments for gathering input for policy development.

6. **Tests**. Tests may be attached to a policy to test document knowledge. Tests promote policy knowledge and are another step for agency indemnification when faced with complaints or legal action.