

GLENCOE PARK DISTRICT

Strategic Plan 2018 to 2023





ACKNOWLEDGMENTS

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Consulting Support

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INTRODUCTION



The Glencoe Park District Strategic Plan provides strategic direction for the next five years, 2018 through 2023. The Strategic Plan’s intent is to:

- Create a roadmap for the future direction of the District
- Confirm the vision, mission, and values
- Identify the strengths, weaknesses, opportunities and threats facing the District
- Provide Commissioners and staff with the ability to focus on strategic direction
- Unify the organization around a common vision
- Create action toward accomplishment, including measurement of progress
- Align with the Comprehensive Master Plan to continue forward progress

The Board of Commissioners, administrative staff, and employees were engaged in the process. The previously completed Comprehensive Master Plan results were reviewed to ensure that resident feedback informed the process. Whereas the Comprehensive Master Plan focused on the District’s physical assets, the Strategic Plan focuses on the leadership system.



The Glencoe Park District Strategic Plan includes major areas as follows:

- Revised Mission, Vision, and Values Statements
- Review of Demographics
- Focus Group Summary
- Strategic Themes
- Strategic Objectives
- Strategy Map
- Key Performance Indicators
- Strategic Initiatives
- Guidelines for Implementation
- Strategic Plan Definitions

The sequence of steps involved in the development of strategy included the following:



The rest of the Plan details each of these steps, including a summary of the focus groups, demographics and household survey analysis, the results of the SWOT analysis (strengths, weaknesses, opportunities, and threats), and mission/vision/values review. Next, the strategic themes, objectives, and initiatives for the next five years are detailed. The last step of the process includes a listing of key performance indicators (KPIs) that relate to the Strategic Objectives.

Additionally, included in the Plan is a set of guidelines and definitions that will assist the District in operationalizing the Strategic Plan, making it a living document for the next five years.



DEMOGRAPHICS REVIEW

The following section reviews key demographic information for Glencoe. According to information from AreaVibes, an organization that identifies best places to live through a livability score and demographic review, population characteristics are as follows:

- According to AreaVibes, the estimated current population is 8,870
- Median age of 44. The median age compares to an Illinois median age of 37.4, and a national median age of 37.7
- Seventy-eight percent of residents are married
- Size in square miles is 3.7

According to the demographics section of the 2015 Comprehensive Master Plan, the Glencoe Park District's age distribution and trends mirror that of the nation. The source of population information for the Plan was Environmental Services Research Institute. According to the information, the community is aging, evident in the increase in median age from 44.6 (2013) to 45.5 (2018 estimated). The largest increase will be in the active adult and senior age group, or 55 and older. Specifically, the fastest growing age group will be in the 65 to 74 age group. This increase in the active adult and senior population is also seen nationally, as the 65 and older population reached more than 40 million or about 39% of the nation's population according to the 2010 census.

The 35 to 54 age group is trending downward. This group will experience a decrease of almost three-percent. Youth age groups or 0-19 will remain consistent for the next five years. This age group will remain a viable customer base and will need to remain a focus of the District.

Also from the Comprehensive Master Plan, relating to race and ethnicity, Glencoe is approximately 94% white. The largest minority population is Asian at 2.9% of the population. Other races present within the community are Black (1.3%), American Indian (0.1%), some other race (0.5%), and two or more races (1.6%). Almost three-percent of the population are Hispanic origin and this is expected to increase slightly to 3.3% through 2018.

The Village of Glencoe recently completed a Strategic Visioning process that included six strategic theme areas: financial sustainability, infrastructure replacement, community engagement, commercial vitality, operational effectiveness, and organizational development. Many of these areas are consistent with the Park District's future strategic direction. References to sustainability, infrastructure, engagement, and organizational development are referenced in the strategic recommendations.

Key areas mentioned in the State of the Village Report, 2017 Strategic Planning include:

- Glencoe's population has remained constant since the 1990s.
- Glencoe's area of 3.78 square miles is completely built out and is comprised primarily of single-family homes.
- Glencoe's built environment is aging.
- The State is considering a number of policy changes that could impact revenues, including a property tax freeze, additional fees for local tax collection services, changes to pension funding requirements and various unfunded mandates.
- Technology has radically changed the way that governments communicate with constituents.
- Sustainability appeals to current and potential new residents, especially millennials, who want their community to reflect their values and to be a leader on one of the most important issues of our time.

SURVEY INFORMATION FROM THE COMPREHENSIVE MASTER PLAN

As part of the Comprehensive Master Plan process, a statistically valid household survey was completed. The survey results were reviewed to inform the development of the Strategic Plan. Several key findings of the survey included:

- Walking and biking trails were the most used amenity, which indicates the need to continue efforts in making walkable and biking connections throughout Glencoe.
- The two most important areas residents are willing to fund are: preserve open space/natural areas and develop new multi-purpose trails/connect existing trails 44%.
- Ninety-five percent of households rate the overall condition of all the Glencoe Park District parks and outdoor facilities they have used as either excellent or good.
- Ninety-one percent of households rate the quality of recreation programs as excellent or good.
- The greatest household need for a program area include fitness and wellness programs, followed by general adult programs. Fitness and wellness programs are specifically called out as an area of priority for the District.
- The Program Guide is the most important way for residents to find out about the District's program and service offerings.

- Forty-two percent of households participated in a recreation program during the previous year. This compares to a national average of 32% from the survey firm, ETC Institute's database.
- The most prevalent reason for non-participation is a desired program or facility is not offered, which speaks to the need to continue to partner with neighboring park districts.

Strategic initiatives for the District include reference to these areas, as noted in the strategic recommendation section of the report.





FOCUS GROUP SUMMARY

In addition to reviewing the community survey results, it was also important to engage Board members and staff in the process. As a result, a series of focus groups were facilitated. The following information provides a summary of the focus group results.

ORGANIZATIONAL STRENGTHS

Key areas of strength include the building of a good staff group, the teamwork that it has generated among staff, the quality of the Board, and overall good leadership. Employees enjoy their working environment and appreciate the District's interest in employees maintaining a healthy work/life balance. There is a feeling the District is headed in the right direction.

An important strength has been the District's ability to build trust with the public and develop a great brand and image in the community. The District listens to its residents. The District maintains a good relationship with its community partners.

Comments about the variety of programming was also mentioned as something the District does well. The District has been doing a good job taking care of physical assets and has invested in improving the infrastructure. Clear direction exists in priorities for capital investment.

AREAS OF NEEDED IMPROVEMENT

Issues related to staffing levels were the most frequently mentioned area, particularly in the Park Maintenance group. As the District continues to grow and demand continues to increase, there is not a correlating growth in staffing. Also, there is concern about employee turnover and the ability to attract and retain good part-time staff. Efforts should be made to create ways for part-time employees to feel more connected to the organization. Additionally, there is a need to continue to build organizational knowledge, which has been challenging as a result of turnover.

Another frequent comment related to the competitive environment, and the need to be aware of other providers of services in the marketplace. There may be some opportunities with public/private partnerships. Marketing is considered a strength, but there are always opportunities to improve and provide more outreach to the community. The population is aging, and that is an important dynamic that will influence programs and service delivery.

Many staff mentioned the challenges associated with serving residents with high expectations. Yet, staff members also feel they need to provide services at a reasonable cost. Strategic direction should take into account the demographic changes in the community.

There are opportunities to expand programming for adults.

Employees frequently mentioned internal communication as an area needing improvement. There are some silos in the organization, and while relationships among Departments are generally good, there are areas needing improvement. There are opportunities for the various Departments to have a better understanding of what other employees do.

Technology was generally seen as a strength, though there is a need to be more data-driven as an organization, or more evidence-based decision making.

MAJOR ISSUES

Each focus group participant was asked to identify what they consider to be the major issues facing the District in the next three to five years. Most frequent responses included a possible property tax freeze and increase in the minimum wage rate, which will be impactful as a result of the District relying so heavily on part-time and seasonal staff. Will the District be prepared if financial difficulties result from these dynamics, particularly in a community with such high expectations for excellent services? Attracting and retaining part-time staff will continue to be a significant issue.



This is also true for full-time staff looking to work with larger districts. How do we retain excellent staff? Staffing levels again was mentioned as a major issue and the ability to keep up with high demands from residents.

Continued reinvestment in the infrastructure will continue to be an issue as capital needs are greater than the amount in the capital budget.

PARTNERSHIPS

Overall, Board members and staff feel the Park District does a very good job in being an effective partner with other community organizations. Other comments included:

- We should continue to enhance partnerships with the School District, Library and Village
- With so many community groups, in Glencoe it is hard to prioritize resources and time.
- A development professional would benefit the District

COMMUNICATION WITH RESIDENTS

At the Board level, there was discussion about residents not understanding the difference between the Park District and the Village of Glencoe. The Park District could do more to educate the residents about the difference of responsibilities and missions of the two agencies.

Overall, the consensus is the District does a very good job communicating with residents. One person commented, “It’s never been better.” Although it is recognized as being good, this is an area that needs continuous improvement. It was noted how difficult it is to get good resident feedback. Suggestions were made about pursuing online engagement platforms as another way to get feedback.

The mission and vision statements have been helpful in communicating what we aspire to and what we are in the business of doing.

SOCIAL/SOCIETAL/ RECREATION TRENDS

There were a variety of responses to this question.

Responses included:

- Yoga classes
- Offer more sports classes for girls
- Develop security for all facilities and programs; what is the state-of-the-art? Should we have more cameras?
- Offer more programs for new residents from the city with both parents working and looking for camps and childcare
- Offer more specialty camps, as they are a huge opportunity
- Offer more after school programs that are affordable
- Develop and expand a fine arts program with established instructors
- Promote and encourage bike use among facilities

- Promote the use of the ice rink during the off-season
- Extend the beach season in September
- Stay informed of erosion and environmental issues
- Embrace technology when it becomes available
- Pursue philanthropic or cause-related marketing
- Provide staff with an opportunity to do one-day volunteer jobs, either in Glencoe or where an employee lives

DISTRICT’S ABILITY TO CHANGE AND INNOVATE

The employee focus groups were asked about the District’s ability to change and innovate. The employees feel that the District’s ability to be innovative, overall, is good. However, there are some areas of the organization that are not as willing to change the way things are. This was mentioned in multiple focus groups. Employees mentioned the need to be more included in the planning phase of events and work projects.



INTERNAL SUPPORT SYSTEMS

Employees were asked about the effectiveness of internal support systems. These include areas of the District that provide services to employees, or internal customers, including services such as park maintenance, finance, human resources, technology, marketing, etc. Most employees feel internal support systems work effectively, overall.

Though there is variation in satisfaction, depending upon the staff members that are involved. There are some areas of needed improvement, such as the relationship among all departments. One solution to improve internal support was offered. The suggestion was to provide ways for employees to have a better understanding of others' job roles. An automated work order system and time clocks will help.

SUCCESSFUL IMPLEMENTATION OF THE PLAN

All the groups were asked for their ideas about how to ensure successful implementation of the Strategic Plan. The Commissioners mentioned there is a process in place for the Master Plan, and, as a result, they have confidence in leadership's ability to deploy the Strategic Plan. It was noted the importance of staff and the Board's commitment to the Plan and create accountability for completing the strategic recommendations. The community needs to be connected to the Plan.

Employees appreciated the opportunity to participate in the process. A suggestion was made to have a team of employees involved in the plan's implementation. Everyone in the District should have some level of involvement with the plan's implementation. It would be most effective if the plan were visual and available for everyone to see.

MISCELLANEOUS COMMENTS

All of the groups were asked if they had any additional comments. The following are the responses:

- Implement small pieces
- Communication plan would be good
- What is the impact of global warming/climate change on operations?
- Walking and jogging are most important
- Many parks are geared to kids; they should attract a broader audience
- Passive use of parks is really important too
- We should be able to connect to the Green Bay Trail to our parks



ORGANIZATIONAL SWOT

Developing an organizational SWOT, or identifying the District's strengths, weaknesses, opportunities and threats are an important component to the development of strategic direction. Questions related to these attributes were included in the focus group work. A summary of the ideas generated from Board members and staff included the following:

STRENGTHS

- Reinvestment in the infrastructure
- Community support
- Park District leadership
- Overall workforce competency
- Programming variety
- Teamwork
- Organizational trust

WEAKNESSES

- Low Staffing levels
- Internal communication
- Part-time staff retention
- Identification and benchmarking of service levels
- Lack of global view at the service level
- Low employee morale in some areas
- Low enrollment in adult programming areas
- Lack of understanding of the competitive recreation environment

OPPORTUNITIES

- More communication with residents
- Staying ahead of changing demographics
- Creating new markets
- Technology advancements; fully utilizing software capabilities and cloud based solutions
- Fitness and wellness programs
- Adult programming opportunities
- Wellness programs for adults
- Music lessons for youth
- Nature based play
- STEAM classes
- Low impact sports for adults (pickle ball, bocce...)
- Continued partnerships with other park districts
- Youth leadership program

THREATS

- Property tax freeze
- Minimum wage legislation and its impact on the budget
- Ability to attract and retain part-time staff
- Political environment
- Tax Cuts and Jobs Act of 2017 and impact on property tax deductions
- Leadership and board changes

MISSION, VISION, AND VALUES

A good starting point for strategy is a review and development of mission and vision. This was achieved in successive Board and staff workshops. Mission statements define the business or purpose of the organization. Vision statements are more aspirational; what do we hope to become? The essence of strategic planning asks these three basic questions:

- **Where are we now?**
- **Where do we want to go?**
- **How will we get there?**

In a staff and Board review of the mission and vision, the consensus of the groups was to continue using the existing mission and vision, with minor changes in language to make the statements more memorable and inspirational.

MISSION STATEMENT

To enrich lives, build community, and create memorable experiences through exceptional parks, programs and facilities

VISION STATEMENT

We aspire to be the most innovative, customer-driven, and financially and environmentally sustainable park district for current and future generations

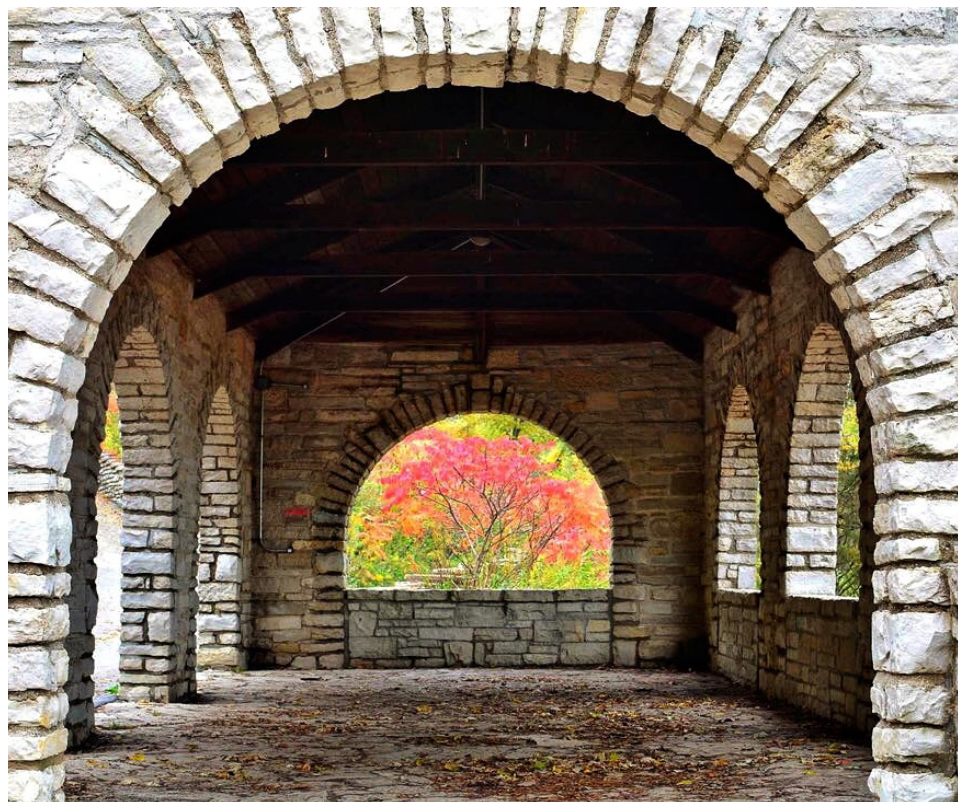
VALUES (SPIRIT)

The values define the important tenets of the way employees work together. They remained essentially the same with minor changes from the time they were developed as part of the Comprehensive Master Plan process.

The values are:

- Safety Driven
- Passionate
- Integrity Focused
- Responsive
- Innovative
- Team-oriented

The values will be reinforced in hiring and promotional processes, staff orientation, ongoing operations, recognition systems, and the performance appraisal process.





BALANCED SCORECARD

The Glencoe Park District Strategic Plan is based on the Balanced Scorecard, a strategy framework that emphasizes the cause and effect relationships among distinct yet interrelated perspectives: customer, financial performance, internal support processes, and organizational learning and growth needs. The Scorecard focuses on the key drivers of success that lead to the achievement of mission and vision.

The Balanced Scorecard framework includes four themes:

- **Customer:** To achieve our mission and vision, how should we seek to meet our customer needs?
- **Financial:** To succeed financially, how do we show evidence of our financial stewardship to our taxpayers?
- **Internal Business:** To satisfy our customers, which business practices must we do extremely well?
- **Learning and Growth:** To achieve our mission and vision, how will we sustain our ability to change and improve, and develop leaders among the staff and Board?

Descriptions of the elements of the themes are outlined more specifically below.

Customer

- Product/service attributes such as price, quality of programs, availability and accessibility of services
- Customer interactions and relationships
- Service qualities such as access mechanisms, service standards, customer requirements and encounters
- Partnerships
- Brand and image

Financial

- Revenue growth
- Productivity
- Financial results
- Cost recovery
- Efficiency
- Tax versus non-tax revenue percentages

Internal Business

- Operations Management (maintenance practices, program development, park design)
- Customer management processes (support systems and technology)
- Innovation processes and systems
- Regulatory and social processes (safety and environmental)

Learning and Growth

- Human capital (workforce competencies)
- Information capital (organizational knowledge)
- Organization capital (culture, work environment, leadership)

STRATEGIC PLAN HIERARCHY

The Plan includes a hierarchy of elements that starts with the most macro level of strategy and moves to a more micro level (moving from strategic to tactical). The starting point for any strategic planning process is the review of the mission, vision, and values. The mission and vision statements were reviewed, and the values were re-confirmed. Subsequently, Strategic Themes and Objectives were developed. After the development of the themes and objectives, Strategic Initiatives were developed. Each successive element of strategy more specifically details the premise of the five themes.

The Balanced Scorecard hierarchy is presented by the pyramid shown in the following figure.



STRATEGIC THEMES

In using the scorecard, the District has developed Strategic Themes that are broad-brushed organizational descriptions that provide direction, following the four Balanced Scorecard themes of: Customer, Financial, Internal Business Support, and Learning and Growth.

The Themes include:

Customer: Customer Connections

Financial: Financial Stewardship
Internal Business: Operational Effectiveness and Efficiency

Learning and Growth: Team Development

Following the development of the Themes, Strategic Objectives were developed. The Objectives are aligned with the Themes and demonstrate how the District will work toward its strategic direction. Objectives are more specific elements of strategy the District must do well in support of the four Themes listed above.





STRATEGIC OBJECTIVES

The following section lists the Strategic Objectives in support of the Strategic Themes. These definitions were created to ensure common understanding of the intended meaning of each objective.

CUSTOMER: COMMUNITY CONNECTIONS

Objective 1: Reduce Barriers

We want to ensure our customers can easily participate in services and programs. By streamlining operations and reducing barriers, we will create a positive customer service experience. This includes continuously reviewing and improving access mechanisms such as the program guide, website, front desk interactions, and registration system. We will continuously evaluate our access mechanisms through customer feedback.

Objective 2: Develop Customer Feedback Systems

We will deploy a system-wide approach to measuring customer satisfaction, including parks, programs, and services, using a variety of methods, from program evaluations and surveys, to customer interviews and focus groups. In addition, we will implement improvements based on results of the feedback tools. The intent is to capture actionable information to use in exceeding customer expectations and securing long-term customer engagement.

Objective 3: Partnership Opportunities

We shall continue our effective relationships with our partner government organizations, non-profits, community organizations, and the corporate sector. Our intent is to ensure there is an equitable relationship with each of our partners. Furthermore, we desire to be a good partner and will assess our partners' satisfaction toward working with the District.

Objective 4: Analyze and Adapt to Community Needs

As part of the Master Plan process, a needs assessment survey was distributed to determine recreation and park needs of the community. This process will be completed again in 2020 to benchmark customer opinions and identify changes to the community. We will ensure flexibility in our programs and services by making sure our offerings are aligned with trends in the marketplace. In addition, we will continuously analyze the competitive market for similar services as a way to best position and strengthen our services.

FINANCIAL STEWARDSHIP

Objective 1: Reinvest in the Infrastructure


Maintaining our infrastructure is a significant area of importance for our organization and the community, based on the household needs assessment survey results. Subsequent to the approval of the Master Plan, there has been a strong commitment to reinvestment in existing assets. The investment in our infrastructure will be balanced with the additional need to invest in new parks, facilities, and programs.

Objective 2: Strengthen Revenue Sustainability

We will rely on earned revenue opportunities such as sponsorships, grants, donors, foundations, etc. to augment services without reliance on tax revenue. In addition, core service and program areas will be analyzed to determine ways to reduce any existing operating deficits as well as optimize financial performance of those areas that do not require any level of tax subsidy.

Objective 3: Develop Overall Financial Stability

Our financial stewardship role is significantly important. This includes the continual analysis of financial results, identifying ongoing operations and maintenance costs for new capital projects, and developing information about true costs of services. In addition, the District will identify core service priorities



in the event of a decrease in tax support or unplanned operating expense increases, such as increases to minimum wage or health care costs.

OPERATIONAL EFFECTIVENESS AND EFFICIENCY

Objective 1: Leverage Technology to Operate More Effectively

We will rely on technology to improve the external customer experience and internal effectiveness/efficiency. A significant focus of this objective is to develop a strategic technology plan that will provide an overall framework for technology use, including a review of the existing technology provider as well as migrating technology from on-premise software to cloud-based solutions. We will provide staff with knowledge of current and future uses of technology in order to improve services and make data-driven decisions.

Objective 2: Embed Innovation

The successful delivery of park and recreation services is dependent upon our ability to continuously improve/ adapt services that meet and exceed customer requirements. In order to value innovation as part of the organizational culture, the leadership system will espouse employee engagement, show trust in employee knowledge, encourage staff's ability to experiment with new approaches to services, and

ensure that systems and processes evolve with ongoing changes in business operation sophistication.

Objective 3: Develop A Strategic Approach to Environmental Sustainable Practices

Our intent is to be a community leader in environmental sustainable practices. It is our job to educate the community about our sustainability efforts as well as provide information about how residents can reduce their carbon footprint. A framework for sustainable efforts will be developed through a sustainability plan.

Objective 4: Evaluate Systems

In order to continuously improve systems, we will identify key processes, both internal and external, and evaluate their efficiency and effectiveness. This includes an analysis of staffing levels, a review of internal support processes, and a strategic approach to marketing.

TEAM DEVELOPMENT

Objective 1: Strengthen Agency Learning and Growth Opportunities

Strategically, we will need to identify future organizational and individual employee competencies, identify current organizational and individual skill set gaps, and design training and development opportunities to close any gaps in competency areas. Another significant part of this objective is to strengthen part-time

staff employment including recruitment, hiring, and retention.

Objective 2: Define Agency Culture

The SPIRIT values will continue to be reinforced throughout our District in all systems, including recruitment, performance appraisal, and recognition systems. In addition, the values will be emphasized through a strengthened on-boarding process for new full-time and part-time staff.

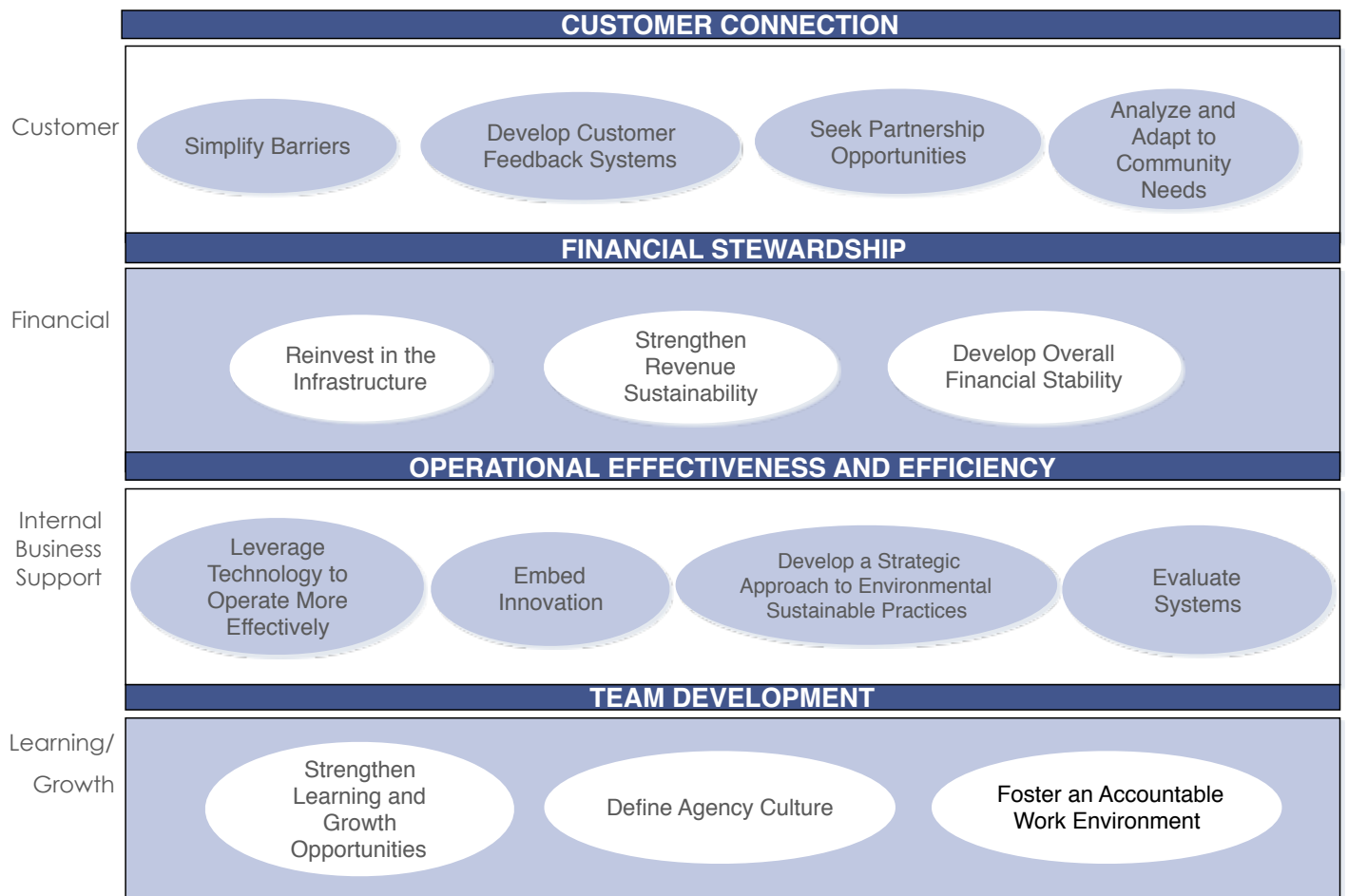
Objective 3: Foster an Accountable Work Environment

High performance organizations require elements of accountability in the way they operate. One key area of accountability relates to the development and oversight of financial performance. As a result, there will be assigned responsibility for the development, management, and monitoring of budget performance. In addition, we will strengthen our skills in the use of data to ensure more evidence based decision making.

STRATEGY MAP

The following diagram shows the information listed above, the Strategic Themes and Objectives, in a Strategy Map.

Glencoe Park District Strategy Map



KEY PERFORMANCE INDICATORS

Another important element of the Balanced Scorecard is the development of Key Performance Indicators (KPIs). These measures are aligned with the Strategic Objectives. Below is a chart listing the Strategic Themes and Objectives and the corresponding KPIs for each Objective. A separate spreadsheet will be developed that will provide detail about each of the measures, including the definition of the measure, data source, the frequency of the measurement, the baseline result and a target for performance.

STRATEGIC THEMES AND OBJECTIVES	KEY PERFORMANCE INDICATORS
Customer Connection	
Reduce Barriers	Customer Satisfaction toward the Registration Process
Develop Customer Feedback Systems	Development of Park Report Card
Partnership Opportunities	Annual Partnership Report
Analyze and Adapt to Community Needs	Program Success
Financial Stewardship	
Reinvest in the Infrastructure	Capital Project Financial Performance
Strengthen Revenue Sustainability	Alternative Revenue Growth
Develop Overall Financial Stability	Ratio of Tax to Non-Tax Revenue
Operational Effectiveness and Efficiency	
Leverage Technology to Operate More Effectively	Quantified Process Improvement
Embed Innovation	Baseline Innovation Assessment
Develop a Strategic Approach to Environmental Sustainable Practices	Completed and Adopted Plan
Evaluate System	Identify Systems in Greatest Need of Improvement
Empowered Team	
Strengthen Learning and Growth Opportunities for Board and Staff	Employee Satisfaction Benchmark Survey
Define Agency Culture	Onboarding Process Satisfaction
Foster an Accountable Work Environment	Cost Center Performance

STRATEGIC THEMES, OBJECTIVES, AND INITIATIVES

The following are the Themes, Objectives, and Initiatives for the next five years, 2018-2022, beginning in May, 2018 and ending February 2023. Initiatives are aligned with the Strategic Themes and Objectives and provide greater specificity of how they will be implemented. Before each year begins, the initiatives for the year will be reviewed and tactics supporting the initiative will be detailed by the staff involved in completing the initiative. The tactics are not included within the Strategic Plan as the approach to completing each Initiative should be developed at the time the work on the Initiative is begun. The timeframe for completion of the initiatives are categorized according to four time periods as follows:

- **Short Term Initiatives:** Initiated and completed during 2018 through February 2020
- **Mid Term Initiatives:** Initiated and completed during March 2020 through February 2022
- **Long Term Initiatives:** Initiated and completed in March 2022 through February 2023
- **Ongoing Initiatives** are repeated continuously during the next five years

CUSTOMER CONNECTIONS

Reduce Barriers

1. Evaluate and create a more efficient and responsive registration process. Short term
2. Create greater awareness and understanding of the District's value and our role in the community. Short term

Develop Customer Feedback Systems

1. Research and implement a resident feedback system for parks/maintenance issues. Short Term
2. Research the use of a parks report card system. Short term
3. Develop and implement a District-wide customer satisfaction measurement system for programs and services. Mid term

Seek Partnership Opportunities

1. Develop a strategic approach to partnerships that results in establishing a mutually beneficial relationship for the District and its partners. Ongoing

Analyze and Adapt to Community Needs

1. Develop a stronger presence in the fitness/wellness/health program and services market. Short term
2. Develop District external communication guidelines. Short term
3. Complete a community-wide needs assessment in 2020. Mid term
4. Develop a process to perform a similar provider analysis for key programs and facility operations. Mid and Long term (completed twice)
5. Create customer on-demand programming as it relates to changing needs. Ongoing

FINANCIAL STEWARDSHIP

Reinvest in the Infrastructure

1. Identify and prioritize new capital projects as a result of availability of new/non-referendum bonding authority. Mid term

Strengthen Revenue Sustainability

1. Analyze deficit operations in special facility operations and develop recommendations for improvement. Mid term
2. Grow alternative revenues (donors, grants, sponsorship, optimized pricing). Ongoing
3. Develop and formalize Commissioner role in growing alternative revenues. Ongoing

Develop Overall Financial Stability

1. Create a dashboard and data visualization of financial results. Short term
2. Create core service priorities in the event of diminishing tax resources. Mid term
3. Develop Cost Benefit Analysis of time and resources reporting for key program/services, to determine true costs of service, including indirect costs. Mid term
4. Identify ongoing operations and maintenance costs for any new capital project/service/program. Ongoing

OPERATIONAL EFFECTIVENESS AND EFFICIENCY

Leverage Technology to Operate More Effectively

1. Re-evaluate the Strategic IT Plan. Mid term

Embed Innovation

1. Complete an assessment of organizational innovation and develop recommendations for improvement. Mid term

Develop A Strategic Approach to Environmental Sustainable Practices

1. Develop and fund an environmental sustainability plan. Short term
2. Develop an education component of sustainable practices to foster interest among community residents. Mid term
3. Work with the Village and other partners in expanding connectivity throughout Glencoe and promote biking and walking to facilities and parks. Ongoing

Evaluate Systems

1. Develop a strategic approach to marketing. Mid term
2. Evaluate, promote, and strengthen internal processes. Begin Mid term and Continue Long term
3. Manage a comprehensive human resources review including staffing level analysis, office space evaluation, compensation review and analyzing part-time versus full-

- time positions. Begin Mid term and Continue Long term
4. Create an internal customer service satisfaction measurement system. Long term

TEAM DEVELOPMENT

Strengthen Learning and Growth Opportunities for Board and Staff

1. Evaluate and identify methods to strengthen part-time staff recruitment, hiring, and development. Short term
2. Identify significant Board competencies and create training and development opportunities for existing and new Board members. Short term
3. Identify organizational/individual skill set gaps and provide training and development opportunities to reduce gaps in needed competencies. Long term
4. Develop succession planning for key leadership positions. Long term

Define Agency Culture

1. Improve the onboarding process for full-time and part-time staff. Mid term

Foster an Accountable Work Environment

1. Strengthen the use of data in measuring organizational performance. Mid term
2. Develop accountability for cost center budget projections and management of budgets. Mid term

IMPLEMENTATION GUIDELINES

The following is a listing of suggestions for successful implementation of the Strategic Plan. It represents the commitment and discipline required to integrate the process into daily operations.

- The Plan becomes the guidepost for the District. When decisions or responses to the community are needed, the Plan becomes the reference point for decision-making and whether or not new issues or responses to the community are of higher importance than what's been established as existing direction.
- Strategic Plan information should be included as part of the new Board member and employee orientation program.
- Post a summary or shortened version of the Plan on the Website and track results on the site as well. This will assist in providing the community with information about the District's strategic direction and its commitment to results. It may also be helpful to print a short summary of the Plan's progress to distribute to interested partners and community members.
- A staff person or team should have responsibility of being the project manager or "champion" of the Plan's implementation to ensure success. This staff person is responsible for monitoring the Plan's progress and works with staff to effectively integrate the Plan with operations.
- A leader will be assigned to each strategic initiative. Each initiative generally requires a team of employees to work on completing the initiative through a cross functional team and is headed by someone who is responsible for the initiative's completion.
- Regular reporting of the Plan's progress should occur. Break the Plan into separate fiscal years and report one year at a time, as an ongoing annual work plan. Each initiative for the year should include a list of tactics that support its completion. The tactics are developed prior to each year for the upcoming list of initiatives and are developed by the staff members involved in completing the initiative. It is the project leader's responsibility to report on his/her initiative, included in a monthly or quarterly report. A suggestion is to input each year's data on a spreadsheet or strategic planning software that lists the Themes, Objectives, and Initiatives start date and completion date, and which staff person is responsible for the Initiative's completion.
- At the end of the year, perform an annual review of the Strategic Plan and document any changes to initiatives to reflect any changes in priorities. This process can be included at an annual review meeting in which successive years' initiatives are discussed as part of the annual budget process. Initiatives should tie into the budget process.
- After each year of the Plan, the staff should review the Plan's process and re-tool any parts of the process that need improvement.
- The District's scorecard represents measures at the objective level, not the initiative level. To supplement the District's dashboard, the leader of each initiative should develop measures of success for the initiative he/she is responsible.
- Track the measures on a quarterly basis. Provide an annual narrative about the results. Review the inventory of measures on an annual basis and make adjustments as necessary to ensure the measures continuously add value to decision making. At an organizational level, there should be approximately 12-20 measures.
- Update major stakeholders on the Plan's implementation and results on an annual basis.



- Conduct staff meetings on a quarterly or semi-annual basis to review the Plan’s progress and results and report the Plan’s progress on a quarterly basis.
- The staff and Executive Director evaluation process and the Board self-evaluation process should reflect the completion of the Strategic Plan Initiatives as an evaluation criterion. Also, performance criteria should be aligned with guiding principles of the District such as innovation, accountability, and excellence.
- Post a chart of each year’s initiatives on office walls in administrative areas with a check-off column designating completion as part of a visual management program. Staff meetings should regularly include discussion of strategy. This will help to emphasize the Plan’s importance and the District’s commitment to execution.
- The Plan is an organizational approach to strategy. Following a year of experience with adapting strategy with the organizational culture, the strategic themes and objectives should then cascade to the department level. Each department would then have their own unique set of initiatives. These initiatives will be aligned with the organizational strategy.
- If there are ideas for new strategies that arise throughout the year, include them on a written “parking lot” and review them as part of the annual just-in-time review to determine if they supplant any existing initiatives.





DEFINITIONS

The following list of key words describes the definition of the terminology used for the Strategic Plan. They are listed according to how they fall within the hierarchy of strategy, to the most macro to the most micro elements.

Mission—describes the business of the organization. The mission also defines the core purpose of the organization and why it exists.

Vision—desired future of the organization. The vision should be a “stretch” for the organization, but possible to achieve in approximately five years. It should state a measurable achievement.

Values—describe the way the District operates. These are meaningful expressions of describing what is important in the way we provide our services to the community.

Balanced Scorecard Perspectives—the four perspectives include Customer, Financial, Internal Business Process, and Learning and Growth. The perspectives demonstrate cause and effect relationships in the completion of strategy. All of the Strategic Initiatives are aligned with these perspectives.

Strategic Themes— broad brushed, macro-oriented organizational sense of direction that relates to the four Balanced Scorecard perspectives of customer, financial, internal business, and growth and development.

Strategic Objectives—concise statements describing the specific elements an organization must do well in order to execute its strategy.

Key Performance Indicators—the indicators are a measurement system that support the Strategic Objectives. The Measures are normally quantitative indicators and capture numbers, dollars, percentages, etc. Measures assist the staff with the ability to determine organizational performance.

Strategic Initiatives—the specific programs, activities, projects, or actions an organization will undertake in an effort to meet performance targets. The strategic initiatives are specifically detailed with specific tactics.

Tactics—Tactics are not included as part of the Plan. The development occurs after the Plan’s implementation. Tactics are subordinate to the initiatives and detail the steps necessary to complete an initiative. Staff members will identify the tactics for the initiatives before the start of each fiscal year.

