

# Carol Stream Park District



CAROL STREAM  
**Park District**

## Strategic Plan 2009-2012

PREPARED BY:



MAY 2009



### Acknowledgements

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## CHAPTER ONE - INTRODUCTION

The vision of the Carol Stream Park District is: *To be known by residents as the best parks and recreation provider.* In order to achieve that vision, the Park District needs to identify staff proficiencies and develop methods to deliver on those proficiencies in an excellent manner. The intent of the Strategic Plan is to guide the District in its ongoing pursuit of its vision. One of the most important organizational competencies is the development of a strategic planning process that becomes institutionalized and is deployed throughout the entire organization. The greatest gift leaders can provide an organization is to develop a sustainable culture of leadership, including excellence in strategic planning.

In the absence of planning, an organization drifts randomly among competing projects that may or may not have organizational significance. The presence of a disciplined strategic planning process creates a better sense of order and provides a focus on what is truly important for the organization.

Strategic planning is a systematic approach to defining longer term business goals and identifying the means to achieve them. This plan represents the direction and focus of the Carol Stream Park District from 2009-2012. It provides the organization with the ability to channel resources in a direction that yields the greatest benefit to resident taxpayers and other customers.

This strategic planning process occurred during the months of November through April, 2009. The process began with two focus groups of employees to get their perspectives on the future of the Carol Stream Park District. This was followed by a workshop with the board and District staff members. In this workshop, organizational performance was discussed, in the form of a SWOT, or “*strengths, weaknesses, opportunities, and threats*”. Strategic themes were developed at this meeting. Subsequently, two staff workshops were facilitated to develop objectives, initiatives, and measures for the plan.

Included in this plan are a list of strategic themes, objectives, measures and initiatives to accomplish over the next four years. This information relates to initiatives at an organizational level. Additionally, each department will, in subsequent years, develop their own strategy map, aligned with the organization’s direction.

## CHAPTER TWO - STRATEGIC PLANNING FRAMEWORK

The Carol Stream Park District has adopted Kaplan and Norton's Balanced Scorecard as the framework for creating a strategy focused organization. The Balanced Scorecard was developed during the early 1990s as a performance measurement system. The scorecard will allow the Park District to concentrate on what really matters and to focus on the key drivers that lead to the achievement of mission and vision.

The framework of the Balanced Scorecard includes four perspectives:

- **Customer:** To achieve our mission and vision, how should we appear to our customers?
- **Financial:** To succeed financially, how should we appear to our taxpayers?
- **Internal business:** To satisfy our customers, which business processes must we do extremely well or excel?
- **Learning and growth:** To achieve our mission and vision, how will we sustain our ability to change and improve and develop leaders among the Board and staff?

In using the scorecard, the Carol Stream Park District has developed Strategic Themes that are broad-brushed organizational descriptions that provide direction. These Themes follow the four perspectives outlined above. They include:

- Dazzle the Customer (customer)
- Financial Security/Sustainability (financial)
- Be the Bar (internal business)
- Developing an Expert Team (learning and growth)

The perspectives and Strategic Themes are not only geared toward the employees of the organization, but the Board members as well, given the Board's role in organizational strategy.

The remainder of the strategy outlined in this plan represents four years of organizational initiatives, from 2009 through 2012. As mentioned before, in order to ensure departmental alignment with organizational strategy, each of the District's departments will subsequently establish a scorecard, which is referred to as cascading the scorecard.

## CHAPTER THREE - STRATEGIC PLAN HIERARCHY AND DEFINITIONS

The Carol Stream Park District Strategic Plan has a hierarchy of elements included in the Plan. The starting point for any strategic planning process is the review of the vision and mission. From there, the most-macro level element is the strategic themes. At a more micro-level are the initiatives to support the strategic themes. Below is a list of elements included in the Strategic Plan, starting with the broadest elements to the most specific.

**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.

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

**Values**—state what an organization stands for and believes. Values are principles to be observed in meeting the mission and vision.

**Balanced Scorecard Perspectives**—the Balanced Scorecard consists of the following four perspectives.

- **Customer Perspective** includes ways to enhance value, improve service attributes, or expand services
- **Financial Perspective** includes identifying ways to grow revenues or efficiently allocate resources
- **Internal Business Process Perspective** relates to support processes needed to support innovation, increasing customer value, and improving work methods
- **Learning and Growth Perspective** includes the development of proficiencies, development of an effective work culture, and the best use of human capital

**Strategic Themes**—broad brushed, macro-oriented organizational sense of direction that relate to the four Balanced Scorecard perspectives listed above.

- **Dazzle the Customer** (customer)
- **Financial Security/Stability** (financial)
- **Be the Bar** (internal business process)
- **Developing an Expert Team** (learning and growth)

**Strategic Objectives**—a concise statement describing the specific things an organization must do well in order to execute its strategy.

**Measures**—a standard used to evaluate and communicate performance against expected results. Measures are normally quantitative indicators and capture numbers, dollars, percentages, etc.

**Strategic Initiatives**—the specific programs, activities, projects, or actions an organization will undertake in an effort to meet performance targets. The strategic initiatives are then more specifically detailed with specific tactics, which are not included within the body of the Strategic Plan, but will exist in supplemental documents.

**Cascaded Balanced Scorecard**—the cascaded scorecard “drills deeper” into the organization, at the departmental or business unit level. This ensures alignment between organizational and departmental direction. The strategic themes are repeated at a departmental level. The departmental scorecards can then be followed by individual employee scorecards.

## CHAPTER FOUR - VISION, MISSION AND VALUES

### 4.1 VISION STATEMENT

To be known by residents as the best parks and recreation provider

### 4.2 MISSION STATEMENT

To enrich our community by fulfilling our needs for healthy, accessible, quality recreation activities, parks and facilities, and to be responsible stewards of our community resources

### 4.3 VALUES

#### 4.3.1 INNOVATION

We will look for creative and innovative ways of managing and expanding programs and services and improving processes.

#### 4.3.2 FAIRNESS AND EQUITY

Policies and procedures fair to all; our services will be accessible; we will provide affordable programming; and will assure programs are available to all.

#### 4.3.3 TOTAL CUSTOMER COMMITMENT

We will continually learn what our external and internal customer s' needs and expectations are and strive to exceed them.

#### 4.3.4 POSITIVE ATTITUDES

We will strengthen staff motivation, morale and sense of being valued. We will affirm our "can-do" spirit and look for ways to make it work.

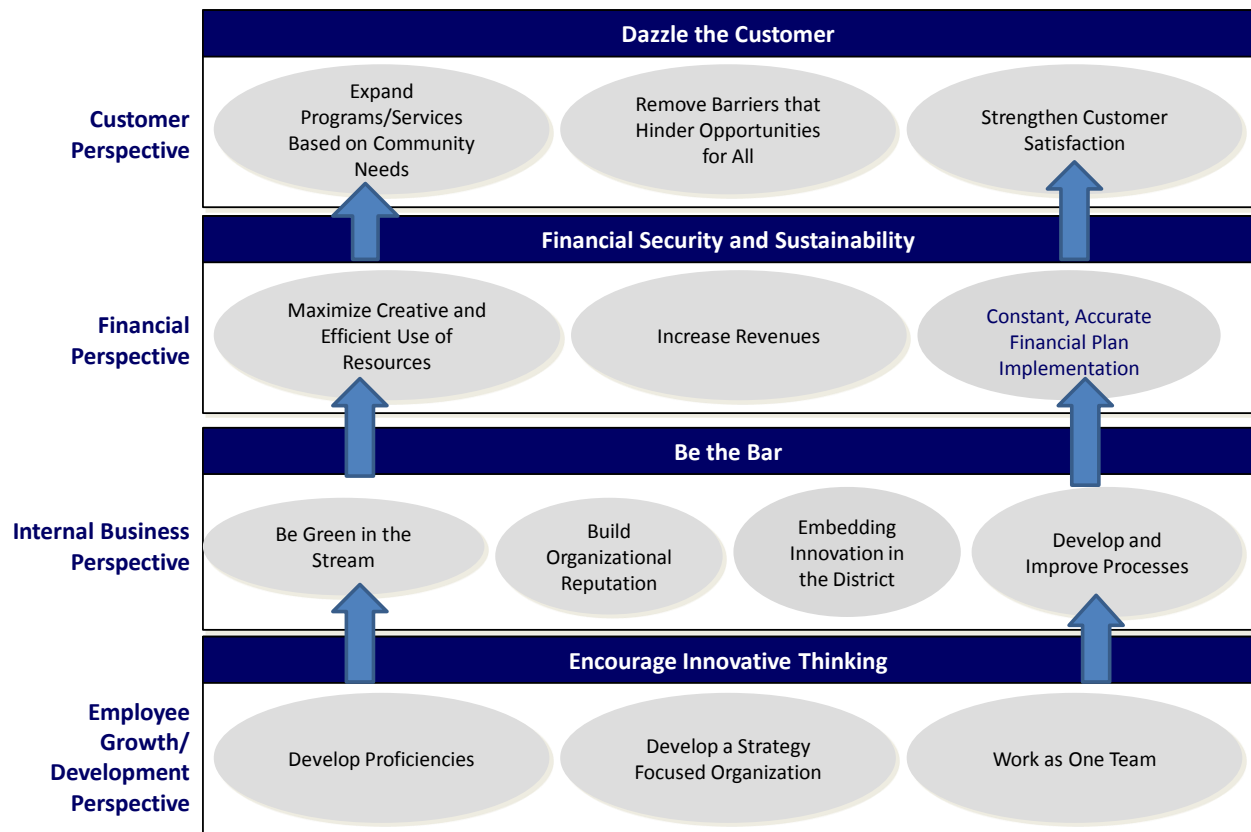
#### 4.3.5 TRUST IN CAROL STREAM PARK DISTRICT TO DO WELL

We will earn trust with our hard work to deliver more than we promise. We will provide facilities that accommodate the demand for community recreation. We will be effective stewards of the community's resources.

## CHAPTER FIVE - STRATEGY MAPS

The following two strategy maps graphically depict the Strategic Themes, Objectives and Measures. The first map shows the Themes and Objectives. The upward arrows reflect the cause and effect relationships among the Objectives. The second map again shows the Themes and Objectives, with the addition of Measures.

### Carol Stream Park District Strategy Map



## Carol Stream Park District Strategy Map

**Vision:** To be known by residents as the best parks and recreation provider

**Mission:** To enrich our community by fulfilling our needs for healthy, accessible, quality recreation activities, parks and facilities, and to be responsible stewards of our community resources

	Themes	Objectives	Methods of Measurement (q=quarterly; a=annually)	Targets
Customer	Dazzle the Customer	<ul style="list-style-type: none"> <li>• Expand Recreation Programs/ Services, Based on Community Need</li> <li>• Remove Barriers that Hinder Opportunities for All</li> <li>• Strengthen Customer Sat.</li> </ul>	<ul style="list-style-type: none"> <li>• Overall Customer Satisfaction (q)</li> <li>• Customer referral (q)</li> <li>• Customer retention (q)</li> <li>• Number of program registrations (q)</li> </ul>	To be developed in 2010
Financial	Financial Stewardship/ Sustainability	<ul style="list-style-type: none"> <li>• Maximize Creative and Efficient Use of Resources</li> <li>• Increase Revenues</li> <li>• Constant, Accurate Financial Plan Implementation</li> </ul>	<ul style="list-style-type: none"> <li>• Program and facility revenue (q)</li> <li>• Alternative revenue amount (q)</li> <li>• Non-tax revenue percentage (q)</li> <li>• Program cost recovery (q)</li> <li>• Revenue/ recreation staff (a)</li> </ul>	
Internal	Be the Bar	<ul style="list-style-type: none"> <li>• Be Green in the Stream</li> <li>• Build Organizational Reputation</li> <li>• Embedding Innovation</li> <li>• Develop and Improve Processes</li> </ul>	<ul style="list-style-type: none"> <li>• Number of innovations implemented (q)</li> <li>• Internal customer satisfaction (a)</li> <li>• Efficiency savings (q)</li> <li>• Key processes documented (q)</li> <li>• Partner Satisfaction (a)</li> </ul>	
Employee Learning & Growth	Encourage Innovative Thinking	<ul style="list-style-type: none"> <li>• Develop Proficiencies</li> <li>• Develop a Strategy Focused Organization</li> <li>• Work as One Team</li> </ul>	<ul style="list-style-type: none"> <li>• Employee satisfaction (a)</li> <li>• Employee turnover percentage (q)</li> <li>• Percent competencies developed (a)</li> <li>• Percent strategy initiatives complete (a)</li> </ul>	

## CHAPTER SIX - STRATEGIC INITIATIVES

The initiatives listed below support the accomplishment of the strategic objectives. The initiatives are specific work projects that are scheduled for completion between 2009 and 2012. Each of the following initiatives has a year designated for completion. Some of the initiatives require individual effort to complete. However, most of them require a group of employees to complete the work. A few of the initiatives will be repeated each year, or take multiple years and are designated as “ongoing.”

### 6.1 DAZZLE THE CUSTOMER

#### *C 1. Expand Programs and Services Based on Community Needs and Interests*

- a. Develop new programs in each area per season *Ongoing*
- b. Increase the number of adult programs *Ongoing*
- c. Develop partnerships to share local resources *2010*
- d. Improve indoor recreation space *2011*
- e. Add amenities to parks to make them more usable *2011*

#### *C 2. Remove Barriers that Hinder Opportunities for All*

- a. Address time/schedule issues *2009*
- b. Increase the capacity of the most profitable programs *2010*
- c. Develop an “over 50” program line through WDSRA *2010*
- d. Determine the extent of transportation issues as a barrier to participation *2011*
- e. Determine the extent of prices as a barrier to participation *2011*

#### *C 3. Strengthen Customer Satisfaction*

- a. Improve the quality of program instruction *Ongoing*
- b. Improve the facility booking process *2009*
- c. Develop customer requirements for key programs/facilities/parks *2010*
- d. Improve the customer feedback system *2011*
- e. Improve responsiveness to customers (voice mail, email, etc.) *2011*

### 6.2 FINANCIAL SECURITY/SUSTAINABILITY

#### *F 1. Maximizing Creative and Efficient use of Current and Future Resources*

- a. Implement cost saving measures *2010*
- b. Maximize the use of facility space *2011*
- c. Explore joint or combined purchasing opportunities *2012*

*F 2. Increase Revenues*

- a. Increase net revenues 2009/2010
- b. Increase sponsorships and grants 2010
- c. Develop ways of increasing program registrations and rentals 2010
- d. Explore non-traditional revenue opportunities 2012
- e. Establish a parks foundation 2012

*F 3. Responsible Management of the Financial Plan*

- a. Develop consistent financial reporting methods 2010
- b. Resolve inconsistencies between CLASS and Invision 2010
- c. Develop a financial plan with goals 2010
- d. Enhance staff and board knowledge and understanding of organizational and department financial plans 2011

**6.3 BE THE BAR**

*B 1. Be Green in the Stream*

- a. Improve and quantify the recycling program, internal and external 2009
- b. Revive the interdepartmental green Team 2009
- c. Identify and work with green partners 2010
- d. Develop standards for environmentally-friendly practices 2011
- e. Develop green education/environmental programs 2012

*B 2. Build Organizational Reputation*

- a. Complete branding roll-out 2009
- b. Identify and seek opportunities for community involvement 2010
- c. Identify, promote, and improve our visibility in town 2011

*B 3. Embedding Innovation throughout the District*

- a. Invite all recreation staff to create recreation programming 2010
- b. Develop a training calendar to create a culture of learning 2010
- c. Establish an innovation recognition and reward program 2011
- d. Develop a Carol Stream magazine search 2011

*B 4. Develop and Improve Processes*

- a. Identify key processes for improvement 2009/2010
- b. Develop cross functional process teams in process reviews 2010
- c. Perform an annual process review of key processes 2011

- d. Map key processes every 18 to 24 months 2012

## 6.4 DEVELOPING AN EXPERT TEAM

### *E 1. Develop Proficiencies*

- a. Improve internal communication 2009
- b. Implement Phase II of the orientation program 2009
- c. Identify needed proficiencies by position 2010
- d. Conduct staff training in being green 2010
- e. Develop innovation training 2010
- f. Develop educational incentives 2011

### *E 2. Develop a Strategy Focused Organization*

- a. Develop a process for on-going strategy communication 2010
- b. Link departmental, team, and individual performance to strategic initiatives 2010

### *E 3. Work as One Team*

- a. Build better staff-board communication 2009
- b. Develop cross training and cross scheduling for staff 2009/2010
- c. Develop inter-departmental teams 2010

## CHAPTER SEVEN - IMPLEMENTATION GUIDELINES

In order to successfully deploy the Strategic Plan, the following steps should occur:

- All employees and Board members should receive a copy of the plan or electronic access to the plan.
- Regular reporting of the plan's progress should be completed. Break the plan into separate fiscal years and report one year at a time. At the beginning of each year, assign a staff member or a staff team to be responsible for each initiative. Each initiative for the year should include a list of tactics that support the goal's completion. It is the project team leader or project leader's responsibility to report on his/her goal, included in a monthly report.
- Progress reports for Strategic Plan initiatives for each year should be updated monthly. At the end of the year, each initiative should have an annual update, included in an annual report.
- Update major stakeholders on the plan's implementation and results on an annual basis.
- Have staff meetings on a quarterly or semi-annual basis to review the plan's progress and results.
- The performance appraisal process should reflect the completion of Strategic Plan goals as an evaluation criterion.
- Track the measurement system on a quarterly basis. Some of the measures will be measured annually. 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.
- After completion of the first year of the Strategic Plan, targets should be developed for the measurement system, after a baseline of information is developed.
- There should be an annual just-in-time review of the next year's initiatives to determine if priorities have changed. This can be included in an annual retreat in which successive year Strategic Plan initiatives are discussed as part of the annual budget process. Strategic Plan Initiatives should tie into the budget process.
- It is good practice to have visual evidence of the progress being made in the strategic initiatives. Post a chart of each year's initiatives on office walls in administrative areas with a check off column, designating completion.
- For good government transparency, the plan should be posted on the Web site and regular discussion included in Park Board meetings.
- Include a Strategic Plan review during new employee orientation.

- After the District has successfully executed the first year of the plan, the District should then cascade the Strategic Plan Maps to the various Departments, in order to align their efforts with the organization. This includes developing Strategy Maps for each of the Departments. Department Strategic Themes will be the same as the District's Strategic Themes. Departmental Strategic Plan objectives will closely mirror the District's objectives. Departmental initiatives will have some relationship to the District's initiatives, but will be specific to each area of responsibility. Subsequent to the departmental strategy work, individual employee initiatives can be developed.
- After each year of the Plan, the staff and Board should review the Strategic Plan process and re-tool any parts of the process that need improvement.
- Throughout the year, staff should develop a parking lot for ideas that are generated and need to be incorporated in successive years.