
E L M H U R S T P A R K D I S T R I C T
B O A R D O F P A R K C O M M I S S I O N E R S
M E M O R A N D U M

DATE: February 27, 2023

TO: Board of Park Commissioners

FROM: James W. Rogers, Executive Director
Laura Guttman, Director of Strategy & Planning

RE: COMPREHENSIVE AND STRATEGIC PLAN UPDATE FIRM FEE PROPOSAL

ISSUE

At the February 13, 2023 Board meeting, the Board concurred that BerryDunn is a good fit to conduct the Comprehensive and Strategic Plan Update process and directed staff to review BerryDunn's fee proposal and discuss with the firm potential adjustments to their scope of work that might reduce their fees. With BerryDunn, staff has reviewed the firm's proposed project fee and work plan and is recommending the District engage with the firm. Conducting the Comprehensive and Strategic Plan process is addressed in the District's Administrative Policy and Procedure Manual in Chapter 1: Sections 1.1 - Strategic Plan, 1.2 - Comprehensive Plan, and 1.4 - Needs Assessment.

DISCUSSION

Background

Since the District uses a qualifications-based selection process to hire professional services consultants, the Board did not open BerryDunn's sealed fee proposal envelope until reaching consensus on if the firm is the right fit for the project and District. After the Board interviewed BerryDunn on February 13, 2023, Commissioners concurred the firm is a good fit for the project and District and then directed the Executive Director to open and read the firm's sealed fee proposal to the Board to determine if the fee is appropriate for the project scope of work.

The Executive Director opened and read the fee proposal in Attachment A (submitted on January 13, 2023), including the individual proposed budget for the five project phases and the total proposed project budget of \$157,284. Since BerryDunn is offering the District two firm alternatives for conducting the statistically valid community survey, he also read the proposed fees for ETC Institute (\$12,500-\$18,000 depending on a respondent sample size of 300 or 400) and aQity Research (\$26,400 based on a respondent sample size of 400). The scope of services of the two survey firms also differs slightly, impacting their proposed budgets.

The Board approved \$65,000 for the planning project in the 2023 Budget, which is \$92,284 lower than BerryDunn's proposed project fees (excluding fees for the scientifically valid community survey). Due to the timing of 2023 budget development occurring prior to having a complete understanding of post-pandemic related financial impacts, staff proposed a conservative project budget based on a reduced scope for the planning process and in response to the Board's

concern about the amount of consulting funds in the 2022 budget. During the RFP process, other firms shared they did not submit a proposal based on the amount of the project budget as compared to their fees for providing the necessary planning services to complete the requested scope of work. Since BerryDunn's proposed fees are higher than the approved project budget, the Board directed staff to review with the firm their scope of services and proposed budget to discuss and assess potential adjustments and share this information with the Board at the February 22, 2023 Board meeting.

Project Scope of Services and Budget Review

BerryDunn and District staff thoroughly reviewed the scope of services and project budget, including which services are essential or could be modified or reduced while still meeting the goals and objectives of the project successfully. Based on this review, both staff and the firm agree that any significant revisions to the scope and budget will sacrifice and affect the quality of the final project deliverables and likely lengthen the project timeline into 2024.

In the bullets below, staff provide a summary of potential adjustments to the scope provided by BerryDunn (by project phase), the impact of these reductions to the project budget for each project phase, and why the majority of these changes are not recommended by staff and BerryDunn.

- Phase 1: Initial Project Planning (potential total fee reduction - \$3,962)
 - Reduce four Steering Committee meetings to three, keeping one as a mid-project board update meeting. While there is potential savings, this approach would reduce ongoing transparency and Board member involvement.
- Phase 2: Engagement (potential total fee reduction - \$6,290)
 - Reduce meetings with internal leaders and staff from four to two, resulting in less staff involvement and potential project buy-in.
 - Reduce firm analysis time by eliminating or minimizing the Social Pinpoint website tools that allow for qualitative (language based) feedback. Berry Dunn recommends at a minimum one qualitative tool be utilized along with surveys with quantitative (numbers based) responses, FAQs, a project timeline, a project document repository, etc.
 - Reduce six in-person stakeholder focus groups to four. BerryDunn does not recommended dropping below four based on the community size.
 - Switch from BerryDunn staff working at event booths to District staff (provided with tools/training from BerryDunn).
- Phase 3: Analysis (potential total fee reduction - \$14,296)
 - Eliminate Perkins&Will's intended portion of conducting a comparison between 2017 and 2023 offerings to measure improvements from previous years (which is part of the recreation program assessment);
 - Eliminate the demographic analysis for a small savings (only conduct a trend analysis for the needs assessment gap analysis);
 - Scale back slightly the work performed by BerryDunn for the recreational program analysis (they do not recommend staff conduct these types of analyses independently as they are more susceptible to bias).

- Complete the financial and funding needs and strategies assessment in-house or eliminate from scope of work (BerryDunn recommends maintaining an external perspective).
- Scale back on the depth of the operational and management structure analysis.
- Eliminate the facility distribution map and complete data in-house for other maps and charts (e.g., acreage/amenity chart, facility type chart, park and facility (quality) investment charts and maps).
- Phase 4: Visioning II (potential total fee reduction - \$1,500)
 - Reduce indoor facility strategy outline development to only the three items that have yet to be addressed in the Vision 2020 Plan (improved and expanded Wagner Center, indoor sports facility and indoor facilities in fair condition with room to improve) as compared to completing them for all facilities (including Courts Plus, Sugar Creek Golf Course Maintenance Facility, etc.).
- Phase 5: Draft and Final Plan (no proposed fee reductions recommended)
 - The firm does not recommend staff be responsible for preparing any sections of the draft and final reports to maintain consistency throughout the document and the integrity of their recommendations and analysis.
- Travel Budget: Reduce the travel budget by \$2,850 based on a review of BerryDunn staff travel needs throughout the project

The chart below illustrates the initial fee proposal by project Phase (column A), the potential fee reductions summarized in the bullets above (column B), and the total proposed fees if the Board approves the fee reductions (column C).

| Project Phase | A. Initial Fee Proposal | B. Potential Fee Reductions | C. Difference (proposed fee after reductions) |
|-----------------------------------|--------------------------------|------------------------------------|--|
| Phase 1: Initial Project Planning | \$11,594 | (\$3,962) | \$7,632 |
| Phase 2: Engagement | \$25,379 | (\$6,290) | \$19,089 |
| Phase 3: Analysis | \$61,200 | (\$14,296) | \$51,710 |
| Phase 4: Visioning II | \$32,552 | (\$1,500) | \$31,052 |
| Phase 5: Draft and Final Plan | \$26,559 | (\$0) | \$0 |
| Travel Fee Reductions | | (\$2,850) | (\$2,850) |
| Total Project Budget | \$157,284 | (\$28,898) | \$128,386 |

After making these adjustments, the firm and staff arrived at a potentially revised BerryDunn project budget of \$128,386, which is a reduction of 18.4% (\$28,898) as compared to the original proposed budget. This budget excludes the statistically valid survey fee proposals (with a cost range of \$12,500 to \$26,400) as staff recommend waiting until the project work plan is developed to determine which survey firm is the best fit for the project based on survey data needs and analysis.

Staff Project Budget Recommendation and Impact on District Financial Health

Staff does not recommend any of the cost reductions except to the travel budget for \$2,850 (reducing the project budget to \$154,434). Comprising only a small portion of the project cost, the other reductions will significantly impact meeting the District's goals and objectives for the project as noted in the bullets on pages 2-3. These impacts include the following:

- reducing engagement opportunities for the community, Board and staff;
- lessening portions of the data and analysis for the comprehensive needs assessment and potentially introducing bias; and
- short-changing the development of comprehensive future strategies for District facilities.

Also, shifting some tasks to staff will negatively impact their ability to complete 2023 work plans and extend project timelines along with reduce the objectivity and additional expertise the firm provides, especially during the critical analysis phase of the project.

Since 2022 year-end financials are well-above initial projections, approving the additional cost over the approved project budget of \$65,000 will not jeopardize the District's financial health or the ability to complete other projects in 2023 and future years. Overall, this project is projected to account for approximately 0.59% of the District's 2023 total operating budget.

RECOMMENDATION

That the Board of Park Commissioners approve engaging BerryDunn for comprehensive and strategic plan professional services for a total cost of \$154,434, authorizing the Executive Director to execute a contract with the firm.

Thank you.

Attachments:

- A. BerryDunn Proposed Project Budget - January 13, 2023
- B. BerryDunn Proposal - January 13, 2023



COST PROPOSAL TO THE
**Elmhurst Park District,
Illinois**

TO PROVIDE A
**Comprehensive and
Strategic Plan Update**

BerryDunn
2211 Congress Street
Portland, ME 04102
207.541.2200

Chad Snow, PMP®
Principal-in-Charge
csnow@berrydunn.com

Danielle (Dannie) Wilson
Project Manager
dwilson@berrydunn.com

Proposal Due Date:
January 13, 2023 at 5:00 pm

PROPOSED PROJECT BUDGET

BerryDunn’s proposed project scope outlines what we recommend as the most effective approach to achieve the District’s desired outcomes. In our professional experience, an update to existing planning efforts involves as many tasks as a full planning process.

We understand the District to be a high-functioning, forward-thinking agency whose internal resources could potentially conduct planning efforts independent of a consulting team. To that end, we would like to clearly express our desire to work with the District to confirm a scope and corresponding project budget that will effectively meet the District’s needs. For example, project components could possibly be adjusted to:

- Reduce the breadth and depth of community engagement
- Conduct light data analysis in lieu of in-depth analysis
- Adjust consultant-led tasks and workshops to staff-led
- Shift from in-person to virtual meetings

As stated in the RFP, the District desires to select “the most qualified vendor.” We welcome the opportunity to continue to demonstrate why we feel the BerryDunn team is the best- and most-qualified vendor available. The following cost proposal is intended to demonstrate the all-in cost to conduct a full comprehensive and strategic plan update process, excluding the survey vendor fee. The only a la carte items currently proposed is the choice between statistically-valid survey vendors. BerryDunn does not bill for reimbursable expenses.

Table 1 presents our proposed costs for completing the District’s requested scope of work. We developed our costs based on the following factors:

- ▲ Our detailed work plan narrative presented in our proposal
- ▲ Our staffing plan and resource allocation, which provides the District with the appropriate number of resources and the ideal level of expertise to complete the tasks defined in the RFP
- ▲ Our experience conducting projects of similar scope and size

Table 1: BerryDunn’s Proposed Fees

| | Phase | Cost |
|---|-----------------------------------|------------------|
| 1 | Phase 1: Initial Project Planning | \$11,594 |
| 2 | Phase 2: Engagement* | \$25,379 |
| 3 | Phase 3: Analysis | \$61,200 |
| 4 | Phase 4: Visioning | \$32,552 |
| 5 | Phase 5: Draft and Final Plan | \$26,559 |
| | Total | \$157,284 |

*The survey vendors’ proposed pricing is \$12,500-\$18,000 for ETC and \$26,400 for aQity, which would be an additional cost to the fees presented above.



PROPOSAL TO THE
**Elmhurst Park District,
Illinois**

TO PROVIDE A
**Comprehensive and
Strategic Plan Update**

BerryDunn
2211 Congress Street
Portland, ME 04102
207.541.2200

Chad Snow, PMP®
Principal-in-Charge
csnow@berrydunn.com

Dannielle (Dannie) Wilson, Prosci® CCP
Project Manager
dwilson@berrydunn.com

Proposal Due Date:
January 13, 2023 at 5:00 pm

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INTRODUCTORY LETTER

January 13, 2023

Elmhurst Park District
Laura Guttman, Division Manager – Strategy and Planning
375 W. First St.
Elmhurst, IL 60126




Dear Laura Guttman and Members of the Selection Committee:

Thank you for the opportunity to submit this proposal responding to the Elmhurst Park District's (District's) Request for Proposals (RFP) to update the District's Vision 2020 Comprehensive and Strategic Plan. We appreciate the prospect of assisting the District in this important initiative. Our proposal is a firm and irrevocable offer valid for 120 calendar days from the proposal due date of January 13, 2023. We have no conflicts of interest in completing this plan. We have not received any addenda as of the submittal date.


Berry Dunn McNeil & Parker, LLC (BerryDunn) is dedicated to providing innovative consulting services at every level of the public sector nationwide, including Illinois. Our Parks, Recreation, Libraries Practice specializes in supporting initiatives related to comprehensive and strategic planning, financial analysis, and organizational development. A key aspect of every planning engagement we lead is a balance of attentive project management, creativity, vision, and practitioner experience.

We are proud to introduce our subcontracting partners: Perkins&Will and ETC or aQity. Perkins&Will is a full-service architecture and landscape architecture firm with extensive experience with the District. Perkins&Will's project manager, Cassandra Rice, was an instrumental leader on the project team that completed the Vision 2020 Plan and has extensive knowledge, insights, and experience to help guide this update.

We understand that the District would like a statistically-valid survey integrated into this planning process. As part of our customized approach for the District, our team presents two options from which to choose: ETC or aQity Research and Insights. The two approaches are included within our proposal. As previous District consultants and practitioner colleagues, our project team is very familiar with the area. We will use our knowledge and insights to create realistic and implementable Comprehensive and Strategic Plan updates.



**Your Mission:
We enrich
lives while
having fun.**



**Your Vision:
To be a national
leader in providing
memorable parks
and recreation
experiences in our
community**

How Our Skill Sets Can Help You

We are confident that we are best suited to assist the District with this comprehensive and strategic planning effort. That said, we ask that you consider the following reasons why BerryDunn would be the ideal partner on this initiative.

- ▲ **We understand how to innovate within public-sector parameters because we have held similar positions.** Each of our proposed team members has decades of experience working in government park and recreation agencies. We leverage these experiences to provide best practices and coaching related to developing high-performance teams, delivering remarkable customer experiences, improving and maintaining level of service, and more.
- ▲ **Our team has been assembled specifically to meet your needs.** Several of our key project team members reside near Elmhurst and know the community well. Project Manager Dannie Wilson has more than 18 years of experience in parks and recreation and resides locally. Dannie and others on our team offer the District deep expertise in areas such as community engagement, feasibility studies, needs assessment, operational analysis, recreation program development, park and facility growth, visioning, and implementation and strategic development. Collectively, we will actively guide the District in this process and deliver superior services in this comprehensive and strategic planning effort.
- ▲ **We offer a proven approach.** Our team members have completed multiple similar projects across the country. We will work closely with you and members of your community to develop realistic and implementable recommendations. Our team will integrate information from previous planning efforts to help you efficiently run your parks and recreation system while maintaining high-quality levels of service to Elmhurst Park District residents and visitors.

As a principal in BerryDunn's Local Government Practice Group and chief operating officer of the Consulting Services Team, I am authorized to bind BerryDunn to the commitments made in the proposal, and I confirm the availability of key personnel. If you have any questions related to this proposal, please contact me using the information provided below.

Sincerely,



**Charles (Chad) Snow, PMP® | Principal
Chief Operating Officer, Consulting Services**
2211 Congress Street | Portland, ME 04102
207.541.2294 | csnow@berrydunn.com



1. FIRM/TEAM MEMBER QUALIFICATIONS

1.1 Firm Overview

BerryDunn an independent management and consulting firm with a Consulting Services Team dedicated to serving state, local, and quasi-governmental agencies. We are a Limited Liability Company (LLC) formed in 1974 with 54 principals and 29 owners, each holding equal share of the firm's ownership. We have experienced sustained growth throughout our 49-year history, and began providing consulting services in 1986.

We offer our clients deep industry expertise in parks and recreation built upon decades of experience working in and with agencies on strategic planning, comprehensive planning, needs analysis, cost recovery, financial analyses, and quality assessments.

All our Parks, Recreation, Libraries consultants are former industry practitioners and seasoned advisors. We apply that experience directly to all our consulting services and leverage this experience to help municipal parks and recreation agencies achieve their management and planning goals.

Collectively, our 20-member Parks, Recreation, Libraries team has completed over 625 parks, recreation, and open space planning projects, working with local, state, and national government agencies, as well as with private sector organizations.

Each of our client engagements are defined by supporting our clients' vision, focus, and continuous improvement by looking beyond the industry. We strive to help ensure quality by understanding your expectations up front, developing a reasonable and achievable project approach, gaining concurrence on project tasks and timing, and using appropriate staff for each engagement.

COMPANY NAME:
Berry Dunn McNeil & Parker, LLC (BerryDunn)

FOUNDED:
1974

HEADQUARTERS:
2211 Congress Street
Portland, ME 04102
207.541.2200

INCORPORATED:
Maine

LOCATIONS:
Maine
Massachusetts
New Hampshire
Connecticut
West Virginia
Arizona
Puerto Rico

BUSINESS TYPE:
Limited Liability Company

EMPLOYEES:
800+ nationwide

WEBSITE:
www.berrydunn.com

How do we share ideas?

Our Parks, Recreation, Libraries team members regularly speak at industry conferences and events, including at the Illinois Park and Recreation Association (IPRA) and National Recreation and Parks Association (NRPA) Annual Conferences. BerryDunn is an active participant in IPRA and NRPA, which enables us to stay apprised of trends and best practices to share with our clients. We have also led several sessions at conferences and through IPRA's sections, including:

- "How do we compete? Finding & Retaining Talent When the Competition & Circumstances are Fierce"
- "Trends Seekers"
- "Measuring Operational Performance"
- "A Racially Just Future: 2021 NCAA Basketball Final Four Talks"
- "Successfully Implementing a Strategic Plan"



EXPERIENCE

Related Experience

Experience With Governmental Agencies

The majority of our projects have been performed for public clients. Collectively, the BerryDunn team offers a comprehensive set of skills built on a foundation of excellent verbal and written communication abilities. Our experience allows us to effectively manage our time while producing plans that are detailed, customized, and implementable.

BerryDunn team members have **direct experience working for parks and recreation agencies** across the country as senior level administrators. Having worked as individuals on “your side of the table,” we know how important it is for consultants to be accessible. We also understand the importance of your daily responsibilities.

Our Commitment to the State of Illinois

Our Illinois-based team are active members in the IPRA, volunteering to lead Safe Zone Conversations, facilitating workshops, and on their Board of Regents. This experience allows BerryDunn to approach your initiative with awareness and insight into the state’s regulations and community trends.

With experience as directors for parks and recreation agencies in the State and work on the following projects, BerryDunn has developed a strong understanding of the public-sector landscape in Illinois, and the Chicagoland metropolitan area in particular.

Northbrook Park District

Community Activity Center Development Support

St. Charles Park District

Indoor Space Needs Study

Illinois Park and Recreation Association

Strategic Plan

Village of Downers Grove

Park District Master Plan Revision

Wilmette Park District

Comprehensive and Strategic Plans

Wheeling Park District

Comprehensive Plan

Arlington Heights Park District

Healthy Communities Research Group

City of Bloomington

Parks and Recreation Master Plan

Forest Preserve District of Cook County

Recreation Master Plan

Lisle Park District

Parks, Recreation, and Open Space Master Plan and Cost Recovery Study

Oswegoland Park District

Master Plan

Cost Recovery Study

Plainfield Park District

Comprehensive Master Plan

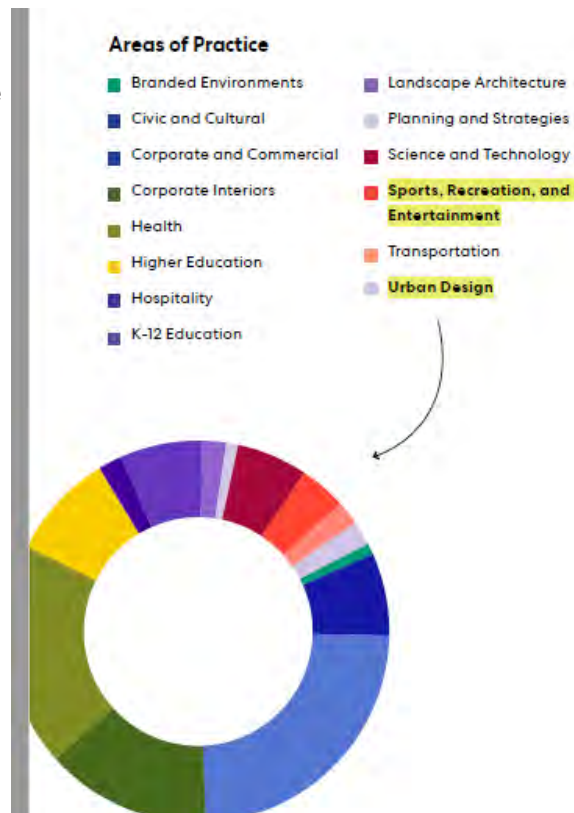
Prospect Heights Park District

Comprehensive Master Plan

1.2 Sub-Consultant Firms

Perkins&Will believes that design has the power to make the world a better, more beautiful place. That's why clients and communities on nearly every continent partner with them to design healthy, happy places in which to live, learn, work, play, and heal. They're passionate about human-centered design, and committed to creating a positive impact in people's lives through sustainability, resilience, well-being, diversity, inclusion, and research. In fact, Fast Company named Perkins&Will one of the World's Most Innovative Companies in Architecture. Their global team of creatives and critical thinkers provides integrated services in architecture, interior design, landscape architecture, and more.

Perkins&Will has 28 studios worldwide including an office in Chicago.



SURVEY FIRMS

To support our customized approach, BerryDunn is offering the District two alternatives for the statistically-valid survey. We understand that both providers have led community surveys for the District in the past few years and invite the District to be involved in the selection of its preferred provider:



ETC Institute is recognized as a national leader in the design and administration of market research studies for local government organizations. Since 1982, ETC Institute has completed research projects for organizations in 49 states. ETC Institute has designed and administered more than 2,500 statistically-valid surveys and its team of professional researchers has moderated more than 1,500 focus groups and panels and over 2,000 stakeholder interviews. ETC Institute also uses the most up-to-date and innovative analytical tools that will help the District understand and use their survey data.



aQity is a full-service survey and market research firm based in Evanston, Illinois. aQity provides in-depth qualitative and quantitative research and analysis to help clients make informed business decisions. Since opening its doors in mid-2015, aQity has received a perfect +100 NPS score from its clients. With over 30 years of experience, aQity tailors its methodology to individual clients. They conduct research by phone, online, or by mail, using the mode that best suits your needs.

BerryDunn has experience working with both providers and would be pleased to work with either. Each firm's potential scope has been outlined in our approach.

1.3 Proposed Project Team

Our team members bring valuable perspectives from their experiences leading parks and recreation agencies, as well as supporting agencies through master planning, strategic planning, and cost recovery projects. The following table illustrates our team organization and leadership.

Figure 1: Project Team Organization



1.4 Roles, Responsibilities, and Qualifications



DANNIELLE WILSON,
Prosci® CCP,

Project Manager

**EDUCATION AND
CERTIFICATIONS**

MS, Recreation Administration,
Indiana University

BS, Recreation and Leisure
Studies, Winona State University

Prosci® Certified Change
Practitioner (CCP)

NRPA Revenue Development and
Management School Graduate

**PROFESSIONAL
AFFILIATIONS**

National Recreation and Park
Association

Illinois Parks and Recreation
Association

Park Board Commissioner,
Oswegoland Park District

As **project manager**, Dannielle (Dannie) Wilson will serve as the District's primary point of contact for this project. She will be responsible of organizing and directing all aspects of the project, leading public engagement, and developing the final report.

Dannie has spent more than 18 years in positions of progressive responsibility in parks and recreation agencies, or as a consultant to these agencies nationwide. She currently focuses on providing consulting support for master planning, strategic planning, and recreation program assessments. Dannie is a strategic thinker who encourages the utilization of technology and data to progress the field of parks and recreation.

PROJECT EXPERIENCE

Recreation Facilities and Programs Comprehensive Master Plan, City of Iowa City, IA — Project Manager

Parks and Recreation Master Plan, City of Shawnee, KS — Project Manager

Strategic and Business Development Plan, Washington Township Recreation Department, OH – Recreation Analyst

Comprehensive and Strategic Plans, Wilmette Park District – Project Manager

Parks and Recreation Master Plan; City of Parkland, FL — Recreation Analyst

Parks, Recreation, and Open Space Master Plan, Jackson County, MS – Recreation Analyst (Prime firm: Lose Design)

Glenview Park District, Illinois (with Heller and Heller) — Recreation Analyst

OTHER RELEVANT EXPERIENCE

West Chicago Park District: During her tenure as Superintendent of Recreation, Dannielle ensured the recreation department's successful provision of programs and services through the leadership of 7 full time and 185 part time staff. Guided operations of a recreation center, outdoor water park, and preschool facility. Managed over \$4 million budget; doubled recreation fund net revenue

in first fiscal year. Implemented an electronic budgeting process whereby staff were educated and empowered to manage their own budget areas; restructured preschool program to increase capacity and financial potential; budgeted to reduced net loss of water park by nearly 50% in first year.

Carol Stream Park District: Dannielle held progressively responsible positions including Service Team Supervisor, Service Team Superintendent, Strategic Initiatives Facilitator, Recreation Director, and Superintendent of Administrative Services. She led cross-departmental teams including those for strategic planning, recreation software conversion, recreation center launch team, and IAPD Distinguished Accreditation team.



ELSA FISCHER, CPRP

Engagement Manager

EDUCATION AND CERTIFICATIONS

MS, Recreation Administration,
Aurora University

BS, Leisure Studies, University of
Illinois, Champaign

Certified Park and Recreation
Professional (CPRP), National
Recreation and Park Association
(NRPA)

NRPA Rocky Mountain Revenue
Management School

PROFESSIONAL AFFILIATIONS

IPRA Professional Development
School

National Recreation and Park
Association

As **engagement manager**, Elsa Fischer will oversee the project, assisting with quality control and project oversight. Elsa is a manager in BerryDunn's Parks, Recreation, and Libraries Practice. She brings more than 30 years of experience in parks and recreation, a majority of which was in senior leadership roles. Her comprehensive experience in recreation programming, facility management, fiscal management, collaboration, and capital project involvement infuses itself into all aspects of her consulting project work.

PROJECT EXPERIENCE

Comprehensive and Strategic Plan, Wilmette Park District — Recreation Analyst

Parks and Recreation Master Plan, Town of Manchester, CT — Project Manager

Recreation and Parks Masterplan Update, City of Norwalk, CT – Recreation Analyst (Prime firm: Kimley-Horn)

Strategic and Business Development Plan, Washington Township Recreation Department, OH – Recreation Analyst

Sport Facility Feasibility Study, Town of Scarborough, ME— Project Manager

Parks and Recreation Master Plan, City of Parkland, Florida — Recreation Analyst

Parks and Recreation Master Plan, City of Lauderdale Lakes, Florida — Recreation Analyst

Parks and Recreation Master Plan, City of Tampa, FL – Recreation Analyst (Prime firm: AECOM)

Parks, Recreation, and Open Space Master Plan, Jackson County, MS – Recreation Analyst (Prime firm: Lose Design)

Parks and Recreation Needs Assessment and Master Plan, City of Lynchburg, VA — Recreation Analyst (Prime firm: Lose Design)

OTHER RELEVANT EXPERIENCE

Glenview Park District, IL: As superintendent of leisure services, Elsa was responsible for successful operations of the 169,000 square-foot Park Center (including fitness center, group exercise spaces, senior center, preschool wing, cultural arts wing, 3 gymnasiums and indoor pool), The Grove National Historic Landmark (includes Interpretive Center, the Kennicott Museum, Program Barn, Archives Building and the Redfield Estate), Wagner Farm, Schram Memorial Chapel, Air Station Prairie, and Roosevelt & Flick outdoor pools and respective concessions areas.

Northbrook Park District, IL: As director of leisure services for over eight years, Elsa participated in planning and execution of Northbrook's \$2 million capital improvement plan. She played a critical role with the 2014 Feasibility Study conducted during the evaluation and consideration of the Northbrook Park District's purchase of the Five Seasons Family Sports Club. She also oversaw operations of a 41,000 square-foot community center including a 278-seat theatre, an 89,000 square-foot ice arena, two outdoor pools, a dog park and a Velodrome.



NIKKI GINGER, CPRE, SHRM
– SCP
Senior Consultant

EDUCATION & CERTIFICATION

MA, Educating Adults, DePaul University

BA, Marketing & Psychology, DePaul University

Certified Park & Recreation Executive (CPRE), National Recreation and Park Association (NRPA)

NRPA Directors School, 2019

Society of Human Resource Management-Senior Certified Professional (SHRM-SCP)

PROFESSIONAL AFFILIATIONS

National Recreation and Park Association

Illinois Park & Recreation Association

As **supporting consultant**, Nikki Ginger will assist Dannie with onsite engagement and other aspects of the project. Nikki is a Senior Consultant for BerryDunn’s Parks, Recreation, Libraries Practice. With nearly 13 years of experience at the Chicago Park District, she brings a wealth of experience in urban parks and recreation. She has a diverse background in organizational and professional development, employee engagement, and staff training, and was a key member on achieving CAPRA accreditation and the National Gold Medal for the Chicago Park District.

She joined BerryDunn an eye toward helping agencies around the country engage and support staff and communities. She is a regular speaker at both national and state conferences and created the nationally recognized CPRP training program.

Nikki is the outgoing chair of the National Recreation & Park Association Program Committee & current Directors School Faculty. She also is on the Illinois Park & Recreation Association Programming Committee and is an Education Road Show Regent. In addition, Nikki was raised in the neighboring community of Villa Park, where her parents reside today.

HIGHLIGHTED EXPERIENCE

Strategic Plan, Wheeling Park District, IL

Comprehensive and Strategic Plan, Wilmette Park District

Parks and Recreation Master Plan, Crestwood, MO

Parks, Recreation, and Open Space Master Plan, Pflugerville, TX

Parks Modernization Study, Vermont State Parks

Strategic Plan, Western DuPage Special Recreation Association

Chicago Park District: Prior to joining BerryDunn, Nikki worked with the Chicago Park District. While there, she partnered with executive leadership to develop the Workforce Development team and structure to support the entire staff from onboarding through retirement.

KEY FOCUS AREAS

Leadership: Nikki led a team to develop and facilitate Innovation Sessions to gather and summarize operational information with executive leadership. She created and deployed staff engagement strategy through online resources, regular communications, and social support tools. Additionally, she designed, developed, and launched a professional development program for over 3,100 staff. She also acted as key contributor in CAPRA and state accreditations and NRPA Gold Medal Award applications.

Equity and Professional Development: Nikki led a team to develop diversity, equity and inclusion tools including racial and resilience townhalls, and educational offerings. She formalized university relations, oversaw development of internship program, and led team to negotiate educational discounts of up to 25% for CPD staff. Nikki directed development of new employee interview process to increase employee retention and ensure alignment of the right candidate to the right position





BARBARA HELLER, MPA

Subject Matter Expert

EDUCATION AND CERTIFICATIONS

MPA, American University

BS, Recreation and Parks, Pennsylvania State University

PROFESSIONAL AFFILIATIONS

National Recreation and Park Association

American Society for Quality

MA Recreation and Park Association

Lincoln Foundation for Business Excellence, based on Malcolm Baldrige National Quality Award

Faculty, National Recreation and Park Association Director's School

As **subject matter expert**, Barbara Heller will bring her extensive knowledge of the District and her comprehensive and strategic planning background to the team helping inform recommendations. Barbara offers deep industry expertise built upon 40 years of experience working in and with agencies on strategic planning, needs analyses, master planning, financial analyses, cost recovery, and quality assessments. She leverages this experience to help municipal and county parks and recreation departments achieve their management and planning goals.

PROJECT EXPERIENCE

Strategic Plan — Wheeling Park District, IL

Master Plan and Strategic Plan — Glenview Park District, IL

Parks and Recreation Master Plan — Glencoe Park District, IL

Strategic and Business Development Plan, Washington Township Recreation Department, OH — Project Manager

Strategic Operational Performance Assessment, Roseville Department of Parks, Recreation, and Libraries — Project Manager

Organizational Assessment, Metro Parks Tacoma, WA — Project Manager

Sport Facility Feasibility Study, Town of Scarborough, ME— Engagement Manager

Five-Year Strategic Plan, Pottstown Area Regional Recreation Committee — Project Manager

Parks and Recreation Master Plan, City of Parkland, Florida — Engagement Manager

Parks and Recreation Master Plan, City of Lauderdale Lakes, Florida — Engagement Manager

Parks and Recreation Master Plan, Town of Manchester, CT — Engagement Manager

Parks and Recreation Master Plan, DeKalb County, GA — Recreation Consultant (Prime firm: Lose Design)

Parks and Recreation Master Plan, City of Shawnee, KS — Project Manager

Youth Sports Strategic Plan, Maryland National Capital Park and Planning Commission (M-NCPPC) — Engagement Manager

KEY FOCUS AREAS

Project Management and Leadership: Barbara is an established expert in the parks and recreation industry, having led dozens of master planning projects with her own firm Heller and Heller Consulting, with Sasaki Associates as Director of Parks Planning, and with PROS Consulting as a principal consultant.

Parks and Recreation Direction: Barbara also spent decades in the public sector, working for organizations like Naperville Park District, IL; Elk Grove Park District, IL; Arlington Parks and Recreation Department, TX; and the Maryland National Capital Parks and Planning Commission.

Brent Ross, AIA, LEED AP® BD+C, WELL AP, Fitwel Ambassador

SRE Practice Leader / Architecture Lead

Brent believes in a client-centric design process that focuses on assessment, technology, and vision to bring value to our clients and community. He strives to create meaningful architecture that has a lasting impact on the people, places, and organizations involved. He prides himself on his ability to listen and put the wants and needs of the client ahead of all other project criteria.

Brent's deep technical background has served his clients well, but has recently been challenging himself, his teams, and his clients to think more broadly. His projects make innovative leaps by thinking holistically around issues of sustainability and wellness. Incorporating elements of biophilic design, daylighting, and material health impact the operations and occupant health of buildings. Diverse offerings and services contribute to social cohesion and support. Brent believes all these elements can reinforce each other, achieve harmony and lead to remarkable outcomes.



Education

Bachelor of Architecture, Cum Laude, 2006
Illinois Institute of Technology

Registrations

Architect
Illinois

Accreditations

LEED AP® BD+C
U.S. Green Building Council®

WELL AP
International Well Building Institute

Fitwel Ambassador
The Center for Active Design

Project Experience

Park District of Oak Park
Community Recreation Center
Oak Park, Illinois

City of Brooklyn Center
Comprehensive Community Center Master Plan
Brooklyn Center, Minneapolis

City of Bettendorf
Recreation Needs Assessment and Feasibility Study
Bettendorf, Iowa

DC Department of General Services
Fort Dupont Ice Arena
Washington, DC

City of Columbus
NexusPark
Columbus, Indiana

City of West Lafayette
Wellness and Aquatic Center
West Lafayette, Indiana

Palatine Park District Facilities Needs Assessment
Palatine, Illinois

University of Notre Dame

- Rockne Memorial Renovation Study
 - Athletics Master Plan
 - Basketball Practice Facility
 - Track & Field Stadium (Phases 1 & 2)
 - Joyce Center Renovation
 - Tennis Pavilion Study
 - Sports Medicine Expansion / Strength & Conditioning Relocation Study
- South Bend, Indiana

University of Northern Iowa

- UNI-Dome Renovation Study
 - West Gym Facility Assessment
 - Dancer Hall Study & Renovation
 - Confidential Project
- Cedar Falls, Iowa

Saint Louis University

- Hermann Stadium Improvements
 - Student Athlete Champions Center
- St. Louis, Missouri

Western Illinois

- Hanson Field Scoreboard
 - Western Hall Floor Replacement
- Macomb, Illinois

City of Hutchinson

Hutchinson Sports Arena Renovations & Additions
Hutchinson, Kansas

Rutgers University

- Athletic Performance Center
 - RAC Master Plan
 - Athletics Master Plan
- Piscataway, New Jersey

Central Michigan University

Campus Master Plan
Mount Pleasant, Michigan

Beat the Streets

Wrestling Hall Concept
Chicago, Illinois

West Chicago Park District

The ARC (Area Recreation Center)
West Chicago, Illinois

Cassandra Rice, PLA, AICP, ASLA

Urban Designer

Cassandra’s work and interests lie at the intersection of planning, policy, and place in collaboration with the people it impacts. Her work spans a variety of scales and project types—from park and neighborhood master plans to design guidelines and strategic planning. She aims to synthesize environmental, economic, and cultural influences to shape communities and create systemic change.

As a leader in participatory planning and design, Cassandra brings exciting and innovative public outreach strategies to each endeavor. She believes strongly in the idea of “designers as facilitators”, and aims to design with, not for, the communities she serves. She is a skillful listener, adept collaborator, and passionate advocate for community-centered processes.



Education

Bachelor of Landscape Architecture
Ball State University

Registrations

Registered Landscape Architect
Illinois

American Institute of Certified Planners (AICP)
Official Certification of the American Planning Association

Project Experience

31st Street Framework Plan
Chicago, Illinois

Fox Lake Parks and Recreation
Comprehensive Plan
Fox Lake, Illinois

Vision 2020 Comprehensive and Strategic Plan
Elmhurst, Illinois

Downers Grove Comprehensive Plan
Downers Grove, Illinois

Glencoe Park District
Comprehensive Plan
Glencoe, Illinois

Skokie Park District
Comprehensive Plan
Skokie Illinois

Frankfort Park District
Comprehensive Plan
Frankfort, Illinois

Lombard Park District
Comprehensive Plan
Lombard, Illinois

Palatine Park District
Comprehensive Plan
Palatine, Illinois

Grand Forks Park District
Comprehensive Plan
Grand Forks, North Dakota

Margate Parks and Recreation
Comprehensive Plan
Margate, Florida

Northbrook Park District
Comprehensive Plan
Northbrook, Illinois

Schaumburg 90NDW Park
Schaumburg, Illinois

Blues Water Run
Calumet City, Illinois

Manhattan Park District
Comprehensive Plan
Manhattan, Illinois

Normal Parks and Recreation
Comprehensive Plan
Normal, Illinois

Cary Park District
Comprehensive Plan Update
Cary, Illinois

Round Lake Area Park District
Comprehensive Plan
Round Lake, Illinois

Bartlett Park District
Comprehensive Plan
Bartlett, Illinois

The Galena Territory Amenity Master Plan Member Engagement
Galena, Illinois

Frankfort Park District
Recreation Center Feasibility Study
Frankfort, Illinois

Mahomet Recreation Center
Feasibility Study
Mahomet, Illinois

Conservation Foundation Acquisition Mapping
DuPage County, Illinois

Village Park Playground
Romeoville, Illinois

Kalk, Shelton, and Central Parks
Glencoe, Illinois

* Completed prior to joining Perkins&Will

Andrew Broderick, AICP, LEED AP

Senior Associate, Urban Design Practice Leader

Committed to transformative place-making, Andrew leads the urban design practice at Perkins and Will, where he is responsible for client engagement, business development, staffing, and creative thought leadership. As an urban planner, he focuses on helping higher education, local governments, real estate developers, and economic development organizations make important decisions that impact their future built environment. As a certified urban planner, he thinks comprehensively about issues such as demographics, capital investment, land/space use, sustainability, urban design, social and racial equity, resilience, public open space, transportation, and infrastructure. His work includes long-range, large-scale campus master plan and urban district projects as well as individual building projects. He values his role as a ‘tip-of-the-spear’ thinker when it comes to strategically advising clients on future space programs and place-making strategies. He embraces complex and multidisciplinary projects, an iterative and engaging process, and actionable project outcomes.



Education

Master of Urban Planning, 2010

University of Michigan

Bachelor of Science in Architectural Studies, 2006

University of Wisconsin
– Milwaukee

Registrations

American Institute of Certified Planners (AICP)

Official Certification of the
American Planning Association

Accreditations

LEED AP®

U.S. Green Building Council®

Project Experience

City of Chicago - Department of Planning and Development

Invest South\West Soul City
Development Plan
Chicago, Illinois

City of Chicago - Department of Planning and Development

Invest South\West Two-Year
Update
Chicago, Illinois

City of Chicago - Department of Planning and Development

Central Area Recovery
Roadmap
Chicago, Illinois

Chicago Urban River Edge Ideas Lab Exhibit (2017), “Third Nature: A Concept to Extend the Chicago Riverwalk”

Chicago, Illinois

Chicago Architecture Foundation, Between States Exhibit (2017-2018), “The Portage Walking Museum”

Chicago, Illinois

Chicago Housing Authority/ Chicago Public Library/ Evergreen LLC.: Northtown Mixed-Use Library/Housing Project

Chicago, Illinois

City of Detroit

Greater Corktown
Neighborhood Framework Plan
Detroit, Michigan

Walnut Capital LLC

Oakland Crossings Concept
Development Master Plan
Pittsburgh, Pennsylvania

Wake Forest Health

Wake Forest Innovation
Quarter Master Plan
Winsten-Salem, North Carolina

Wexford Science and Technology LLC

uCity Master Plan Update
Philadelphia, Pennsylvania

Confidential Client

Urban Redevelopment Project
on Chicago River Competition
Chicago, Illinois

North River Commission

Confluence: Gateway to
Albany Park Concept
Chicago, Illinois

Friends of Downtown

South Grant Park Charrette
Facilitation
Chicago, Illinois

Traverse City Downtown Development Authority

Healthy 8th Street Framework
Traverse City, Michigan

Russell Place of Promise/City of Louisville

30th and Madison Street
Redevelopment Concept Plan
Louisville, Kentucky

Qing Dao Beer City

Urban Development Master
Plan Competition
Qing Dao, PRC

Cassie Branum, AICP, LEED AP®

Managing Principal, Principal

Cassie designs for the human experience at the human scale, bringing together her expertise in the fields of interior design, architecture, city planning, and graphic design. She is drawn to the “knot” of city building because the scale of the city makes for the messiest challenges and the greatest impact. Cassie’s exceptional breadth of experience gives her versatility and agility as a designer.

In 14 years of practice, she has built an impressive portfolio, ranging from urban regeneration and blurred use environments to innovation districts and stadium neighborhoods. Working from North America to Europe to the Middle East, she moves comfortably across cultures and between roles as designer, strategist, project manager, and planning consultant. Her strength lies in guiding the process. In any given project, she can spot where consensus is forming and build the plan on that foundation. She is consistently able to choreograph plans toward implementation. As the co-leader of Urban Design at Perkins&Will, Cassie prioritizes collaboration and partnership and works closely with her colleagues to advance urbanism at every scale.



Education

Master of Science in Architecture, Urban Design, 2010

Georgia Institute of Technology

Master of City and Regional Planning, 2010

Georgia Institute of Technology

Master of Architecture, 2008

Georgia Institute of Technology

Bachelor of Science, Interior Design, 2004

Florida State University

Registrations

American Institute of Certified Planners (AICP)

LEED AP®

U.S. Green Building Council®

Project Experience

Atlanta BeltLine, Inc.

- BeltLine Corridor Design and Eastside Trail

- BeltLine Sub-Area 10 Master Plan
Atlanta, Georgia

Lowe

Union Pier Master Plan
Charleston, South Carolina

New City / LAMB Properties

760 Ralph McGill Master Plan
Atlanta, Georgia

The CIM Group

Centennial Yards
Atlanta, Georgia

Confidential Client

New Headquarters
Vestavia Hills, Alabama

Third & Urban / FCP

Westside Paper
Atlanta, Georgia

Madison Marquette / Urban Atlantic

Armed Forces Retirement Home Redevelopment
Washington, DC

Portman Holdings

- 660 Irwin
- Amsterdam Walk
- Patterson Life Science/Office
Atlanta, Georgia

Trammell Crow Company

Technology Enterprise Park Master Plan and Phase 1A
Atlanta, Georgia

Georgia Institute of Technology

Technology Enterprise Park Feasibility Study & Master Plan
Atlanta, Georgia

RMR Group

- Corporate Square Repositioning
- One Georgia Square
Atlanta, Georgia

Dr. Phillips Foundation

Packing District Master Plan
Orlando, Florida

Gainesville Community\ Redevelopment Agency

Power District Redevelopment
Gainesville, Florida

Thunderbird Development Team

Scranton Peninsula Waterfront Master Plan
Cleveland, Ohio

GID

98 14th Street
Atlanta, Georgia

Confidential Client

New Headquarters
Birmingham, Alabama

MARTA

Five Points and Arts Center Station Rehabilitation
Atlanta, Georgia

ESTHER CAMPBELL

Project Manager

ETC Institute
 725 W. Frontier Circle
 Olathe, KS 66061
 esther.campbell@etcinstitute.com
 (913) 254-4528
 (913) 326-0301



EDUCATION

B.S., Biology, Pittsburg State University

SUMMARY OF EXPERIENCE

Ms. Campbell has over six years of experience in survey administration, development, supervision, and research analysis. Throughout her tenure at ETC Institute Ms. Campbell has had the pleasure of working on survey projects that cover a wide variety of topics, including household studies, parks and recreation, community planning, customer satisfaction, transportation, employee, library, comprehensive planning, parks and recreation master plans, water and utility, and business development. Her current role at ETC Institute includes quantitative and qualitative research, report writing, benchmarking research, survey development, and statistical analysis. Ms. Campbell has also held a supervisory role within the firm. In her previous role she planned, coordinated, and supervised the administration of large-scale household transportation studies on multiple projects in the State of Texas. Over the past four years, Ms. Campbell has worked on projects for over 150 state, county, local, and private sector clients. Below are some examples of the clients Ms. Campbell has conducted needs assessments for within the past two years.

PROFESSIONAL EXPERIENCE

- Addison Park, IL
- Algonquin, IL
- Andover, KS
- Apex, NC
- Atlanta, GA
- Auburn, AL
- Auburn, IN
- Badin, NC
- Benicia, CA
- Berea, KY
- Bernardsville, NJ
- Blue Valley Recreation District, KS
- Boone County, KY
- Bozeman, MT
- Bristol, CT
- Brookings, SD
- Broward County, FL
- Buchanan, WI
- Carthage, MO
- Cedar Hill, TX
- Chandler, AZ
- Charleston, SC
- Chino, CA
- Columbia, MO
- Columbus, IN
- Corpus Christi, TX
- Corte Madera, CA
- Cuyahoga Falls, OH
- Dallas, TX
- Delaware County, OH
- Des Moines, WA
- DeSoto, TX
- Detroit, MI
- Dolton, IL
- Edgerton, KS
- El Paso County, TX
- Ferguson, MO
- Fort Collins, CO
- Fort Lauderdale, FL
- Frankfort, KY
- Fremont, CA
- Gainesville, FL
- Gallatin, TN
- Garden City, KS
- Gilroy, CA
- Grand Prairie, TX
- Granite Quarry, NC
- Green, OH
- Groveland, FL
- Gwinnett County, GA
- Henderson County, NC
- Heron Bay, FL
- Hilliard, OH
- Holly Springs, NC
- Hollywood, FL
- Johnson County, KS
- Joplin, MO
- Kansas City, MO
- Kechi, KS
- Kent, OH
- Kentwood, MI
- Lake County, CO
- Lake Wales, FL

- Las Vegas, NV
- Lauderdale Lakes, FL
- Lawton, OK
- Lee County, NC
- Lexington, MA
- Loudoun County, VA
- Manchester, CT
- Mecklenburg County, NC
- Memphis, TN
- Meridian, ID
- Missouri City, TX
- Montrose, CO
- Nashville, NC
- Nassau County, FL
- Norfolk, VA
- North Kansas City, MO
- Northbrook Park District, IL
- O'Fallon, MO
- Oklahoma City, OK
- Olander, OH
- Olympia, WA
- Orange Township, OH
- Ormond Beach, FL
- Oro Valley, AZ
- Parkland, FL
- Pinehurst, NC
- Pitkin County, CO
- Prince George's County, MD
- Provo, UT
- Pueblo, CO
- Richmond, MO
- Riviera Beach, FL
- Rolla, MO
- Roseville, CA
- Scotch Plains, NJ
- Shoreline, WA
- Si View Metro Parks District, WA
- South Fulton, GA
- Spring Hill, KS
- St. Charles, IL
- St. Lucie County, FL
- Stow, OH
- Tampa, FL
- Vancouver, WA
- Virginia Beach, VA
- Washington Township, OH
- Washougal, WA
- West Des Moines, IA
- Wilmington, NC
- Winterset, IA
- Zionsville, IN



Jeff Andreasen
Lead Survey Designer

For the past 25 years, Jeff Andreasen has designed, executed, analyzed, and consulted on needs assessment and community surveys for multiple park agencies and forest preserve districts in Illinois. He has also co-authored chapters in two books on Chicago mayoral politics and articles to several publications, including Public Opinion Quarterly. Jeff will serve as the District's primary contact for the statistically-valid survey. He will be directly involved in the sample and questionnaire design, and in the analysis and presentation of the survey findings.

Highlighted Experience:

- Wilmette Park District Community Survey
- Glen Ellyn Park District, IL
- St. Charles Park District, IL
- Batavia Park District, IL
- Naperville Park District, IL
- Oak Park District, IL

- Morton Grove Park District, IL
- McHenry Park District, IL
- Mt. Prospect Park District, IL

Education:

Urban and Regional Planning
University of Illinois at Urbana





LOCAL

1.5 Previous Project Experience



GLENVIEW PARK DISTRICT, ILLINOIS

Master Plan and Strategic Plan

Reference:

Jim Warnstedt
Assist. Director of Public Works
51 Raupp Blvd.
Buffalo Grove, IL 60089
jwarnstedt@vbg.org
847.459.2545

Barbara Heller led a strategic planning process with the Glenview Park District and supported the Hitchcock Design Group in the completion of the master plan. Support for the master plan included the public input process, recreation program and service assessment, visioning and action plan recommendation review, and trend narrative. Barbara Heller led the strategic planning process which included a review of mission, vision, and values, development of organizational strategy, development of key performance indicators, and a detailed action plan. Dannie Wilson completed the recreation assessment.





IOWA CITY, IOWA

Recreation and Facilities Master Plan

Reference:

Juli Seydell Johnson
Director of Parks & Recreation
City of Iowa City
220 S Gilbert St.
Iowa City, IA 52240
319-356-5104
juli-sjohnson@iowa-city.org

BerryDunn led the development of Iowa City's next Recreation and Facilities Master Plan in which the city hoped to prioritize resources to provide aquatic and recreation facilities along with community recreation programming that is equitable, accessible, and responsive to the community. Building upon the vision outlined in Iowa City Parks System Master Plan, the plan presented a path forward to help the City address short- and long-term challenges. The scope also required an evaluation of the existing facilities and programs and an assessment of future needs, through a lens that kept the customer experience, fiscal sustainability, and economic and cultural value top of mind throughout the process. This planning process involved working with stakeholders with a wide array of interests to construct an inclusive vision.



CITY OF SHAWNEE, KANSAS

Parks and Recreation Master Plan and Strategic Plan

Contact:

Tonya Lecuru
13817 Johnson Drive
Shawnee, KS 66203
913-742-6402
tlecuru@cityofshawnee.org

This planning process not only included a parks and recreation master plan but also a city strategic plan. The Strategic Plan process included a series of community engagement, city council workshops, and staff meetings. The plan culminated with the development of five key theme areas of strategic vision for the City.

The Parks and Recreation Master Plan project included elements such as a community engagement process, statistically-valid community survey, demographics, park and trails inventory and analysis, level of service recommendations, recreation and event assessment, capital listing of project improvements, and a 10 year series of recommendations, based on short-, mid-, and long-term goals and objectives.

The City was most interested in having a thorough review of recreation programs, as well as improvement ideas to parks, trails, connectivity, and facilities. These objectives were met through the development of detailed improvements for each park, with ranges of necessary capital costs detailed as part of the list of recommendations.

The biggest challenge during the process was the two plans occurred during the time of a community vote against the development of a community center.

Vision 2020 Comprehensive Strategic Plan

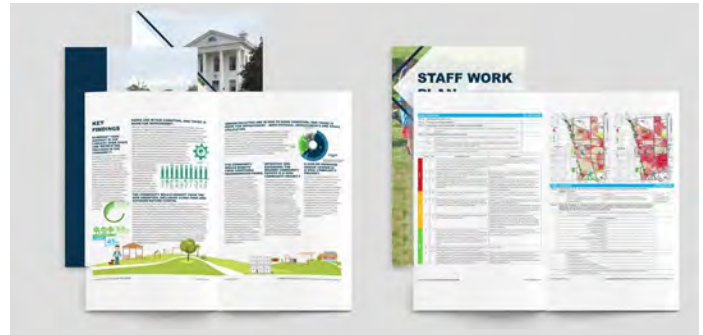
Elmhurst, Illinois

Client: Elmhurst Park District

Size: N/A

Completion Date: 2017

Vision 2020 directed long-range planning, decision-making, and resource allocation for the Elmhurst Park District by defining a clear vision for its future. This Plan, led by Cassandra Rice while at The Lakota Group, provided a foundation for building credibility and establishing consensus on important community issues about parks, facilities, and programs. Nearly 3,000 community-based touchpoints were engaged during this process and the means and methods used to communicate the final Plan document helped foster a culture of transparency and establish trust in the District's spending and actions. Because of the level of engagement in the process, the plan won a 2017 ILASLA Honor Award for Communications.



Ronan Park Gateway

Chicago, Illinois

Client: North River Commission, Chicago Park District

Size: 5 acres

Completion Date: December 2022 (concept design)

Ronan Park is an existing riverfront park in Chicago's Albany Park neighborhood. Perkins&Will lead the community engagement (with support from Chicago Mobile Makers) and conceptual design turning the park into a re-imagined neighborhood gateway anchored by a multi-use pavilion. Improved connections (to the water and the neighborhood) is one of many responses to community input received.

The pavilion explores the relationship between the city, the forest, and the river. This idea became a space that formed a three-sided stage, opening to each of these forces. The character of each perspective shapes the qualities of the pavilion, personifying these elements.

Celebrating the historical diversity of the site is critical to the implementation of the project, using a variety of strategies on-site to create high-quality spaces. The park devotes its attention to on-site improvements and programming that will have a lasting impact on the neighborhood, bringing opportunities to the future generations of Albany Park residents and businesses alike.



Perkins&Will

Vision 2020 Comprehensive Strategic Plan

Elmhurst, Illinois

Client: Elmhurst Park District

Size: N/A

Completion Date: 2017

Vision 2020 directed long-range planning, decision-making, and resource allocation for the Elmhurst Park District by defining a clear vision for its future. This Plan, led by Cassandra Rice while at The Lakota Group, provided a foundation for building credibility and establishing consensus on important community issues about parks, facilities, and programs. Nearly 3,000 community-based touchpoints were engaged during this process and the means and methods used to communicate the final Plan document helped foster a culture of transparency and establish trust in the District's spending and actions. Because of the level of engagement in the process, the plan won a 2017 ILASLA Honor Award for Communications.



Ronan Park Gateway

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Celebrating the historical diversity of the site is critical to the implementation of the project, using a variety of strategies on-site to create high-quality spaces. The park devotes its attention to on-site improvements and programming that will have a lasting impact on the neighborhood, bringing opportunities to the future generations of Albany Park residents and businesses alike.





APPROACH

2. PROJECT APPROACH

2.1 Project Understanding and Vision

In the five years since completing the Vision 2020 Plan, the Elmhurst Park District has made some significant achievements to implement the plan's recommendations. The District has developed Centennial Park and added acreage to help address unmet needs identified during the Vision 2020 planning process. Many projects are currently underway, including dog park planning and construction, park and facility maintenance and improvements, and adding full-time positions.

This Comprehensive and Strategic Plan update will allow the District to assess its progress to date while addressing potential gaps in the system that still exist or have arisen in the past five years. The Vision 2020 Plan was built on the following six themes:

- ▲ Parks
- ▲ Facilities
- ▲ Programming
- ▲ Communications
- ▲ Finance
- ▲ Internal Operations

This update would address these themes, celebrate accomplishments since the previous plan, and identify potential new gaps. It will reflect the District's current and potential future operating, economic, and political environment.

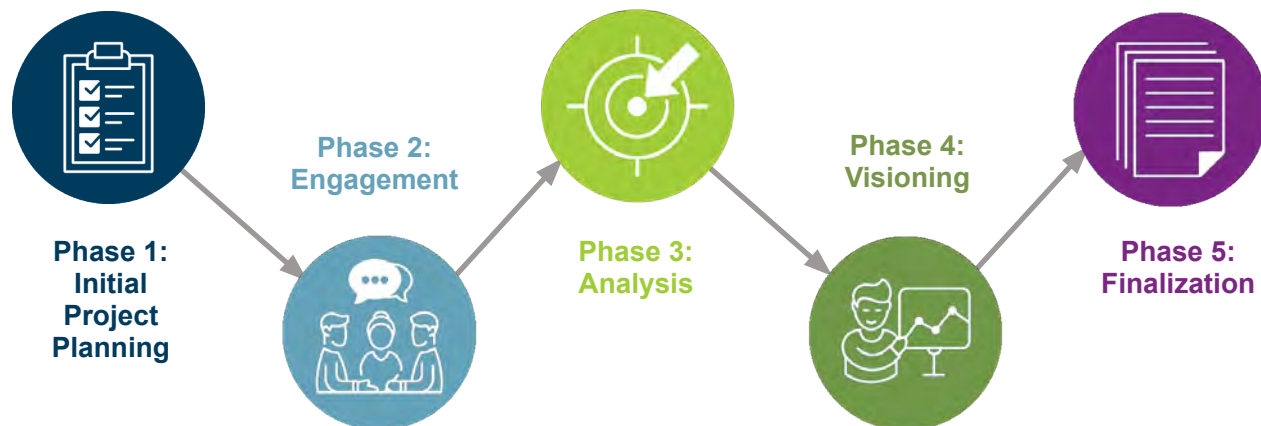
This video highlights why BerryDunn would make the best team for your project.

Our Vision for Your Project

Success on BerryDunn projects means trusted partnerships with clients, meaningful and memorable community input, data-driven analysis, action-oriented implementation, and, most of all, visionary planning. We see the following critical opportunities:

- ▲ **Roadmap for Action** – The plan must provide a clear vision for where the District is going, described through a graphic framework and actionable steps.
- ▲ **A Healthy, Connected Future** – The Elmhurst Park District plays a vital role in community health and wellness, and this plan will help ensure that the District can continue to do so in the future.
- ▲ **Model Innovative, Inclusive Engagement** – Public parks and open space is essential to creating connection. To adequately assess community needs, resident and staff engagement is essential and we will draw in as many voices as possible, building on the District's existing engagement efforts.

2.2 Project Approach



Below and on the following pages, we outline our process to complete the District's Comprehensive and Strategic Plan update.

Phase 1: Initial Project Planning

1.1 Conduct an Initial Planning Call. We will conduct an initial project planning and discovery session with the District to identify stakeholder groups, project team members, and project milestones and to set expectations. We will discuss our proposed project schedule, project work plan, project parameters and roles and responsibilities. We will discuss whether the District would like to include a project steering committee, and if so, its member composition.

We will follow up with the District's project team to refine our process and timeline and prepare for next steps.

1.2 Develop a Work Plan and Schedule. BerryDunn will develop the Project Work Plan and Schedule, which will outline our communication and scope; review a timeline to schedule project meetings; and identify stakeholder groups. In addition, the Project Work Plan will incorporate agreed-upon procedures between BerryDunn and the District related to project control, including quality management and deliverable submission/acceptance management.

**Deliverable 1:
Project Work Plan and Schedule**

1.3 Facilitate a Kickoff Meeting. We will conduct an on-site project kickoff presentation with the District project team and the Park Board that will serve as an opportunity to introduce team members, discuss goals, present our project approach and methodology, review the final schedule of key project dates, and answer questions. While on-site, we will also tour areas of the system and relevant parks, recreation, trails, and open space sites/resources. This tour will give us a grounded exposure to physical resources, user experience, and staff environments.

1.4 Conduct the first Steering Committee Meeting. If desired, we will work with the District to form a Steering Committee consisting of various representative stakeholders. We would hold the first Steering Committee meeting during Phase 1 to outline goals and expectations for this plan.

Phase 2: Engagement

2.1. Develop a Detailed Engagement Strategy. In response to the District's desire for a robust community and stakeholder engagement process for this Comprehensive and Strategic Plan Update, we will collaboratively develop a detailed engagement strategy. Social equity is a pillar on which the District operates as outlined in Vision 2020. To meet this goal, we aim to create opportunities for the entire community to participate in the engagement process.

Our team believes in creating an in-depth, efficient, and cost-effective citizen-focused community process throughout all public agency management and planning. We will build upon previous work to acquire knowledge of local issues and concerns that will assist us in obtaining useful and pertinent community feedback – both as information and engagement for buy-in and outcomes.

To reach a broader section of community members, we have proposed a hybrid approach for the comprehensive planning engagement: one that combines an online project website, with in-person and virtual engagements. We chose this approach for the following reasons:

- An interactive, virtual project site can give residents a “home base” to give opinions and check on ongoing events. This consistent access to project communication will support our stated goal to engage the community, in multiple languages, throughout the project.
- In-person events will play a key role in reaching disconnected community groups, or groups with limited access to technology.
- Multiple channels of engagement will support efforts to include users and non-users within the District’s system.
- Connecting with local organizations and community groups will help BerryDunn engage parts of the population who are typically harder to reach with traditional engagement channels.

As we develop a Detailed Engagement Strategy with the District, we will discuss both virtual and in-person options, identify and describe methods of community involvement, identify key stakeholders, create a schedule for public input events and surveys, develop a schedule for the promotion and coordination of stakeholder input events, and identify specific stakeholder interview and focus group questions.

Deliverable 2: Detailed Engagement Strategy

2.2 Engage Internal Leaders and Staff.

Internal engagement with the District will include interviews and focus groups with leadership, management, and staff to conduct fact-finding activities.

We have planned for five meetings with:

- District leadership
- Staff
- Representatives from the Park Board
- Other City of Elmhurst staff as needed

Internal stakeholders will have an opportunity to provide their input regarding the future direction of the parks and recreation facilities improvements and needs. Staff perspectives are extremely important, and our approach intentionally involves staff throughout the entire process, as they will have responsibility for implementing the recommendations.



2.3 Develop Project Website and Engagement Portal.

We will work with District staff to create a project Social Pinpoint site that will keep the community informed of the project and provide citizens a means to share valuable input. Using this interactive online tool can strengthen the District's relationship with its stakeholders, resulting in a diverse collection of feedback that will inform better planning outcomes.

We will collaboratively determine which Social Pinpoint tools will best serve the desired outreach outcomes. We anticipate that the District will see value in utilizing Social Pinpoint's online questionnaire, mapping, forums, and ideas wall, and look forward to discussing and customizing the District's website to reflect its needs and desires, goals and objectives, and community culture.

Note: Our team will plan to maintain the project website throughout the planning process in an effort to keep residents and staff up to date on project progress and promote any participatory events.

2.4 Facilitate Public Input Sessions. Our team will facilitate up to six in-person public focus groups to collect input from community leaders from the District, Park Board representatives,

partner organizations, sports groups, friends groups, alternative providers, and other groups or individuals as identified, and the community.

Furthermore, we will reach out to representatives of identified under-represented population groups and engage them in the assessment and recommendations development process, helping to ensure an inclusive and equitable engagement process.

Accessibility

Our team aims to anticipate obstacles to participation, which might include technology barriers, special needs, childcare, language barriers, and work schedules. During our strategy development, we will work with the District to organize input opportunities that are kid-friendly; physically accessible for those with hearing, vision, or mobility challenges; and scheduled at a variety of times to widen attendance.

Additionally, we will leverage Social Pinpoint's language feature to provide multiple language options on the project site.

2.5 Host Pop-Ups at Community Events.

We will host up to four pop-up events featuring "booths" for community interaction. We expect to seek out creative, innovative, and fun locations to



The Wilmette Park District is planning for the future of our parks and facilities, recreational activities and operations to best meet future needs of the Wilmette community, and we need YOUR help! Residents will be asked to provide feedback throughout the process, and the input will help create a clear vision for parks, facilities and recreation so that the Park District can best meet the needs of residents for play, health, wellness, open spaces and nature places. The end result will be a strategic and comprehensive plan.

Sample Social Pinpoint home page for the Wilmette Park District.



engage the communities throughout the District and connect with residents. The layout and makeup of each client with which we work has informed the types of activities that are best suited to the residents involved in the planning process.

During Vision 2020, the project team conducted intercept surveys at various locations in the District to solicit feedback from people where they were already gathered. Our team is using a similar approach for other strategic planning efforts. We can conduct these intercept surveys along with pop-up booths. Examples include, but are not limited to:

- Pop-up booths with interactive elements at:
 - o Social events, such as concerts or family movie events
 - o Regular gatherings, such as public markets
 - o Widely accessed sites, such as parks, community centers, or public libraries
 - o Neighborhood walks

2.6 Conduct a Statistically-Valid Survey.

Two firms are presenting their qualifications for conducting the statistically-valid survey for the district. A brief summary follows.



ETC Institute. If selected for this project, ETC Institute will provide the following services.

Task 1: Design the Survey and Prepare the Sampling Plan. Task 1 will include the following services:

ETC Institute will work with the project team and District staff to develop the content of the survey. ETC Institute will meet with the Project Team and

District staff via phone or video call to discuss the goals and objectives for the project. To facilitate the survey design process, ETC Institute will also provide the District staff with sample surveys created for similar projects. It is anticipated that 3-4 drafts of the survey will be prepared before the survey is approved by the District. The survey will be up to six pages in length, and will include the following activities:

- Participating in meetings by phone or video call to develop the survey.
- Conducting a pilot test of the survey to help ensure the questions are understood. Based on the results of the pilot test, ETC Institute will recommend changes (if needed) to the survey.
- Selecting a random sample of residents to be contacted for the survey. The sample will be address-based.

Deliverable Task 1. ETC Institute will provide a copy of approved survey instrument.

Task 2: Administer the Survey. Task 2 will include the following services:

- ETC Institute will administer the survey by a combination of mail and online.
- ETC Institute will mail the survey and a cover letter (on official letterhead) to a random sample of households in the District's service area. Only one survey per household will be sent.
- Postage-paid envelopes will be provided by ETC Institute for each respondent. The District will provide a cover letter for the mailed survey. The cover letter will contain a link to an online version of the survey. Residents who receive the survey will have the option of returning the printed survey by mail or completing it online.
- Approximately 10-12 days after the surveys are mailed, ETC Institute will follow up via email and/or text with households that received a mailed survey. ETC Institute will continue following up with households until reaching 300 or 400 completed surveys.

- o A sample of 300 completed surveys. A sample size of 300 completed surveys will provide results that have a margin of error of +/-5.6% at the 95% level of confidence.
- o A sample of 400 completed surveys. A sample size of 300 completed surveys will provide results that have a margin of error of +/-4.8% at the 95% level of confidence.

ETC Institute will monitor the distribution of the sample to ensure that the sample reasonably reflects the demographic composition of the study area with regard to geographic dispersion, age, gender, race/ethnicity, and other factors. ETC Institute will weight the data as needed if one or more demographic groups is over/underrepresented relative to recent census estimates for the District's population.

Deliverable Task 2. ETC Institute will provide a copy of the overall results for each question on the survey.

Task 3: Analysis and Final Report. ETC Institute will submit a final report to the Project Team Parks and Recreation Department. At a minimum, this report will include the following items:

- Formal report that includes an executive summary of the survey methodology and a description of major findings.
- Charts and graphs that show the overall results of each question on the survey.
- Cross-tabulations that show the results for different demographic groups and other variables as desired by the District.
- Importance-Satisfaction Analysis and Priority Investment Analysis that will identify the areas where the greatest opportunities exist to enhance overall satisfaction with parks and recreation services.
- Tabular data that shows the results for each question on the survey, including open-ended questions.
- A copy of the survey instrument

Deliverable Task 3: ETC Institute will submit the survey findings report in an electronic format (PDF). ETC Institute will also provide the raw

data in an Excel database, or other format as requested by the District.



aQity Research. If selected to work with the District, aQity will

customize the survey design to align with the specific goals and information needs for the District. This will include trending on key questions tested in previous District surveys to identify shifts in residents' opinions and priorities.

Along with the customized approach, we will include key metrics that align with aQity's 2022 statewide survey (conducted on behalf of the Illinois Association of Park Districts) so that we can provide benchmark comparisons with park agencies statewide and, more importantly, with neighboring agencies close to Elmhurst.

Among these key metrics are questions about diversity, equity, and inclusion (DEI) efforts from the local park agency. We are aware that diversity and inclusion initiatives are a priority for the District and other local agencies in Elmhurst. Our insights on the community's assessment of these efforts will further help inform priorities and actions for the District as it develops plans for the next several years.

Consistent with our past surveys for the District, we recommend:

- A minimum sample of n=400+ randomly selected households within the District boundaries.
- Weighting the respondent sample to align with 2020 census demographic data for the community to help ensure the survey results are accurate and representative of the community (in terms of region, age, presence of children under age 18, race and ethnicity, and gender identification).
- This approach will also help ensure an appropriate representation of residents who are non-users of District parks, facilities, programs, etc. – an important subgroup to understand to identify unmet needs and opportunities for further program/membership growth.

- aQity will work closely with BerryDunn and the District in the development of the questionnaire, based largely on discussions with the District as well as community feedback obtained in focus groups, engagement events, and other feedback channels provided by BerryDunn.
 - Assume two-to-three drafts before a final survey is approved, and a 13- to 15-minute questionnaire.
 - We recommend including three-to-four open-ended questions allowing respondents to provide feedback in their own words and allow the opportunity to obtain insights that the aQity/BerryDunn/District team had not considered.
- Sampled respondents will be able to complete the survey by mail, online, or phone, whichever option they prefer. aQity will be responsible for all survey programming, mailing (sending printed questionnaires with pre-paid return envelopes), and phone interviewer training (and providing a toll-free number for residents to call).
- aQity will send postcard invitations and questionnaires to the sampled households and will follow-up with email and postcard reminders to non-respondents to reach our minimum target sample size. Email invitations will also be sent to a de-duped sample of the District's resident (user and non-user) email database.
- aQity will be responsible for all data cleaning, processing, analysis, and reporting. Given our proximity to Elmhurst, aQity will also provide two in-person presentations (e.g., an initial review with District staff and the BerryDunn team, and a follow-up presentation to the District Board). We will also remain on-hand for unlimited follow-up phone consultation afterward to answer questions, provide additional analysis on key topics, collaborate with BerryDunn on survey insights as part of the Comprehensive and Strategic plan update, etc.

Final deliverables will include:

- Questionnaire design (specific to District goals and priorities)

- A topline summary report providing overall results to each question (about one to two weeks after data collection is completed)
- A thorough report on the overall findings, including an executive summary on key takeaways, and detailed analysis of each question
- A summary of the research methodology
- A cleaned, formatted Excel file with survey responses for the entire sample, including verbatim comments in response to open-ended questions

2.7 Create an Engagement Feedback Summary.

Following the conclusion of the engagement process, we will prepare an Engagement Feedback Summary for the District detailing findings from each task.

Deliverable 3: Engagement Feedback Summary

2.8 Conduct Steering Committee Meeting.

Following the conclusion of the engagement process, we will convene the Steering Committee for a virtual meeting to review engagement results.

Phase 3: Analysis

3.1 Conduct a Park, Facility, and Open Space Inventory and Analysis.

Perkins&Will will conduct a park facility and level of service assessment to evaluate the District's open space and indoor program facility through a lens of equity of access, offerings, and investment.

Deliverable 4: Park, Facility, and Open Space Inventory and Analysis

3.2 Analyze Levels of Service. Our team will create a maps for each park and open space site showing the inventory of facilities, photos of current conditions, level of quality assessment, value, key issues, strategies, and recommendations with budgetary costs.

We will update the facility inventory matrix and maps from the Vision 2020 plan and identify areas of service standards and deficiencies.

This will include:

- Park Level of Service Analysis
 - o (Access) Park Distribution, map
 - o (Quantity) Acreage, chart
 - o (Quantity and Quality) Amenities, chart and map
 - o (Quality) Investment, chart and map
- Facility Level of Service Analysis
 - o (Access) Facility Distribution, map
 - o (Quantity) Square Footage/Program Capacity, chart
 - o (Quantity) Facility Type, chart and map
 - o (Quality) Investment, chart and map

Additionally, Perkins&Will will complete a comparison between 2017 and 2023 offerings to measure improvements from previous years.

Deliverable 5: Level of Service Analysis and Mapping

3.3 Review Background Data. One of the most important elements of this process will be our team’s ability to gain a breadth of knowledge about plans, structure, operations, and systems, as well as staff and the community. As mentioned previously, one member of our team was intimately involved in the Vision 2020 plan and has a thorough understanding of the community and the District. We will build additional knowledge across the team by becoming familiar with previous plans and updating them to reflect current conditions and needs.

This includes, but is not limited to:

- Vision 2020 plan
- 2019-21 year-end and 2022 mid-year Vision 2020 Progress Reports
- 2023 Budget
- 2023-32 Long-range Capital Plan
- 5-Year Parks and Recreation Master Plan

- Work plans and funding plans utilized by the District to facilitate the comprehensive coordination of direction and recommendations

3.4 Create a Demographics and Trends Analysis.

Our team will complete an analysis of demographics for the City of Elmhurst and the surrounding area for the next 5 – 10 years. We will use Esri’s population projections, along with U.S. Census Bureau data to complete this task. Esri is the largest research and development organization dedicated to geographical information systems and specializing in population projections and market trends.

We will prepare a trends analysis to help evaluate demographic shifts and their impact on future parks, recreation facilities, and programs. This analysis helps identify regional interest and participation levels for a variety of activities; how services are provided through both administrative and planning trends; and how parks and recreation, amenities, programs, and events compare to national and regional trends.

Deliverable 6: Demographics and Trends Analysis

3.5 Analyze Recreation Programs. We will develop an inventory of existing programs and subsequently compare the inventory to feedback collected during the engagement process. This will help ensure program offerings are aligned appropriately with community needs. The program and services inventory will be matched up to the parks and open space inventory and analysis to help ensure there are appropriate spaces for the future program menu.

We will also compare current program offerings with identified community needs expressed in the engagement process.

The analysis process will begin with an interactive workshop with District staff to review issues, challenges, strengths, and weaknesses of programs and services. An inventory of core



programs will be developed and analyzed according to program life cycle distribution and age segment analysis. Other areas of review may include:

- Listing of the program inventory for the most recent year
- Program alignment with community need
- Programming trends within offerings as well as regional and national trends
- Assessing an equitable distribution of programs
- Developing key performance measures based on national best practice approaches

Our team will provide a working MS Excel template for analysis of recreation services and programs and will provide a brief training to staff that allows your agency to track location and geo-coding, participation, and various other characteristics not only for the District's programs, but also for relevant alternative providers (non-profit and for-profit associations and businesses, churches, surrounding municipalities, etc.). From this we will provide summary analysis of program supply within the District's service area.

In this analysis, we will offer recommendations for the best possible providers of recreation programs within the District as well as programs and services that could be modified, eliminated, or outsourced.

The resulting Recreation Programs Assessment report can serve as evidence for the CAPRA accreditation process.

Deliverable 7: Recreation Programs Assessment Report

3.6 Analyze Financial and Funding Needs.

We realize that recommendations mean nothing without examining the financial resources necessary to move forward. We will consider the implications and possibilities at all stages. BerryDunn will conduct an overview analysis of existing funding to understand how the District is meeting current needs and, based on recommended improvements, determine if current funding sources are sufficient for both capital and operational costs.

Based on the strategic recommendations that arise out of the needs assessment, we will identify probable operating, maintenance, and capital costs and recommendations for potential funding sources and mechanisms for the next ten (10) years.

3.7 Assessing Economic Environment and Financing Strategies.

BerryDunn will utilize its expertise in financial structures to review the District's current economic environment and identify funding alternatives and strategies for future improvements, such as grants, donor programs, and/or partnerships. Our project team will identify key partners in the area through the planning process and can provide management recommendations to enhance this potential funding area. Note that this task does not include procurement of alternative funding, but this can be addressed separately if desired.



Deliverable 8: Financial Analysis Findings

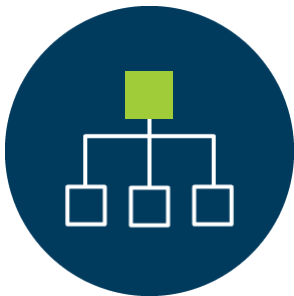
3.8 Analyze the Organization. BerryDunn will broadly assess the operational and management structure of the District. We will review the existing vision and the strategic planning process undertaken to create this vision. This review will include staffing to determine effectiveness and efficiency in meeting current and future responsibilities as related to the community's needs.

The needs assessment – including input from staff interviews, community and key stakeholder engagement, and level of service analysis, along with our expertise – will identify areas for enhancement including staffing, customer service, maintenance, communications, as well as operational efficiencies.

SWOT Analysis

Our team will meet with District staff to gather specific information about services, facilities, use, preferences, needs, and agency Strengths (Bright Spots), Weaknesses, Opportunities, and Threats (SWOT).

3.9 Conduct a Meeting with the Steering Committee. Following this phase, we will conduct a meeting with the Steering Committee to review the Analysis phase findings.



Deliverable 9: Organizational Analysis

Phase 4: Visioning

The Visioning portion is the most thought-provoking and creative phase of the planning process. Its purpose is to develop the most appropriate response to the identified needs and priorities of the community based on all of the previous technical aspects of the process in collaboration with District leaders.

4.1 Prepare a Summary of Engagement and Analysis Findings. Our team will develop a presentation of our preliminary findings following the visioning workshops, and facilitate a public meeting to gather feedback from community members.

Key Opportunities Matrix

During the findings phase of each project, BerryDunn project managers will compile a key opportunities analysis matrix that helps identify focus areas from the various tools and methodologies used to collect information. This matrix will help identify the most salient findings using both qualitative and quantitative data points.



Deliverable 10: Summary of Engagement and Analysis Findings

4.2 Facilitate a Park Board Update and Visioning Workshop. We will host a workshop with the Park Board to review findings and review the mission and vision. Workshop participants will include Park Board members, District staff, and any other committees as identified. We will discuss the list of attendees with the District to help ensure we have the appropriate people attending the sessions. The agenda for the workshops will be collaboratively developed. The first part of the workshop will review the findings and recommendations from all of the technical reports resulting from Phases 1 – 3.

Community engagement feedback will also be reviewed. Specific capital improvements, maintenance needs, operational changes, and potential recreation program systems will be reviewed in relation to the District's goals. The preliminary recommendations list will then be vetted and prioritized, bearing in mind existing organizational initiatives, fiscal realities, organizational culture, and other variables. Proposed improvements to the facilities, system and programming will be discussed. The result of the visioning process is the development of the goals and objectives to drive a plan that represents the values of the community, as well as a prioritized action plan to successfully chart out the roadmap for implementation.

This meeting will be followed by a Steering Committee meeting.

4.4 Lead a Visioning Workshop. Subsequent to the strategy framework workshop, BerryDunn will lead a visioning workshop with staff. This can include all of the employees of the District or whatever level of staff desired by leadership. In this workshop, participants will start to develop strategic goals, objectives, and initiatives and to discuss key performance indicators.

Our team utilizes best practices from the Malcolm Bridge National Quality Award Criteria for Performance Evaluation as well as the Balanced Scorecard approach, which is a leading framework for strategy development. The Balanced Scorecard strategy includes a review of relationships among customer, financial, internal business processes, and organizational learning and growth. This results in a comprehensive review of organizational direction. In addition, a dashboard of metrics will be developed as a way of measuring strategic performance. The elements included in strategy discussion are outlined in Table 1.

Table 1: Balanced Scorecard Elements

| Balanced Scorecard Approach |
|--|
| Customer perspective |
| Product/service attributes (programs, quality, accessibility, availability), relationships (customer loyalty), program offerings |
| Service quality |
| Brand and image |
| Financial Perspective |
| Productivity, growth, financial results |
| Earned revenue |
| Efficiency |
| Internal perspective |
| Operations management (maintenance practices, program development) |
| Customer Management processes (support systems and use of technology) |
| Innovation processes |
| Regulatory and social processes (safety, environmental) |
| Learning and growth perspective |
| Human capital (skill sets and competencies) |
| Information capital (management of organizational knowledge) |
| Organization capital |

4.5 Develop Recommendations and Cost Estimates. An outcome of the workshop will be the development of strategic goals, objectives, and initiatives included as an action plan. We will aim to develop a realistic set of goals and objectives. To identify recommendations for changes to policies and investment allocation, we will vet and rank a preliminary recommendations list, bearing in mind existing organizational initiatives, fiscal realities, organizational culture, and other variables. The resulting goals and objectives will drive a Plan that represents the values of the community, as well as a prioritized action plan to successfully chart out the roadmap for implementation.

Deliverable 11: Draft Action Plan and Tracking Tool

Phase 5: Finalization

5.1 Develop Draft Plan. The BerryDunn team will summarize and synthesize all research and stakeholder input and develop recommendations and priorities into a Draft Comprehensive and Strategic Plan Update. We will work with the project team to prioritize recommendations, balancing needs and cost/benefit analyses, capacity of the District, and potential budgetary realities.

From a design perspective, the proposed approach includes a basic design and layout. If a magazine-style design plan is desired, or if multiple communication pieces that mirror the last plan’s deliverables is desired, we are happy to discuss the additional corresponding fees.

Deliverable 12: Draft Comprehensive and Strategic Plan Update

5.2 Facilitate Review Session with the District. After applying first round edits, we will facilitate a review session with District and the Park Board to discuss feedback and recommendations within the plan.

5.3 Finalize the Plan. After implementing edits and submitting to the District for review after our presentation, we will develop a final Comprehensive and Strategic Plan Update.

The final plan will be placed on the District’s website for public access, and we will encourage additional public announcement methodology as well as provide recommendations for tools to communicate with residents about ongoing implementation updates.

We will provide the District with three unbound hard copies and one electronic copy of the final plan. If desired, we can produce a short overview video that the District can share on its website for an additional fee.

Deliverable 13: Final Comprehensive and Strategic Plan Update

5.4 Lead Implementation Workshop. Following the final presentation, we will hold a virtual meeting with staff to discuss techniques to effectively deploy the plan. The Comprehensive and Strategic Plan Update will include a section providing a detailed sequence of steps needed for successful implementation. Our team not only brings extensive strategic planning consulting experience, but also experience leading implementation through our work as staff members with multiple agencies. We are extremely interested and experienced in working with District staff to successfully implement comprehensive and strategic plans.

- Employee and Park Commissioner engagement
- Institutionalizing the process by documenting the steps in the process and continuous improvement of the process
- Ongoing plan adjustments
- Connection to the community

Deliverable 14: Implementation Workshop





SCHEDULE

3. PROPOSED TIMELINE

In Figure 2 below, we provide a high level timeline to complete the District’s requested scope of work. We expect this project to take approximately 10 - 12 months, and we will identify key dates in coordination with the District when developing the detailed schedule during project planning.

Figure 2: Proposed Project Timeline

| Tasks | M | A | M | J | J | A | S | O | N | D |
|--|---|---|---|---|---|---|---|---|---|---|
| Phase 1: Initial Project Planning | | | | | | | | | | |
| Phase 2: Engagement Public Involvement Intercept Surveys Statistically-Valid Survey | | | | | | | | | | |
| Phase 3: Analysis Inventory and Level of Service Analysis Demographics and Trends Organizational Assessment Recreation Programming Plan | | | | | | | | | | |
| Phase 4: Visioning | | | | | | | | | | |
| Phase 5: Finalization Draft Plan Final Plan | | | | | | | | | | |