
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: August 14, 2017

TO: Board of Park Commissioners

FROM: James W. Rogers, Executive Director
Laura Guttman, Strategy and Planning Coordinator

RE: 2017 MID-YEAR STRATEGIC PLAN PROGRESS REPORT

ISSUE

The 2017 Mid-year Strategic Plan Progress Report (SPPR) provides an overview of staff's progress toward implementing the 2017 Strategic Work Plan initiatives from January 1 to June 30, 2017. Distribution and review of this report is in accordance with Board policies.

DISCUSSION

To remain dynamic and responsive to changing needs, a successful strategic planning process requires an ongoing review of actual progress in relation to the goals in the work plan. Therefore, monitoring the plan is necessary to ensure that action is taken and that actual measurable results are achieved as anticipated.

The SPPR is compiled and submitted to the Board bi-annually at mid-year and year-end as an ongoing evaluation of achievement of long-term strategy for decision-making, resource allocation, and work plan development. The 2017 Mid-year SPPR has the same format and approach as the 2016 Mid-year SPPR, including status reports on achievement of Strategic Work Plan initiatives and outcomes for performance measures tracked semi-annually.

During the August 14, 2017 Board meeting, staff will provide an overview of the SPPR and look forward to the Board's feedback. After Board approval, the SPPR will be available on the District's website (epd.org) for public review.

RECOMMENDATION

That the Board of Park Commissioners reviews and approves the attached 2017 Mid-year Strategic Plan Progress Report.

Thank you.

Attachment: 2017 Mid-year Strategic Plan Progress Report

Elmhurst Park District Strategic Plan 2017 Mid-year Progress Report January 1 to June 30

NURTURE COMMUNITY CONNECTIONS → IMPROVE CUSTOMER EXPERIENCE → OPTIMIZE PROGRAM & FACILITY MIX

CUSTOMER CENTERED

MISSION STATEMENT
We provide experiences for the lifetime enjoyment of people who live and play in Elmhurst.

VISION STATEMENT
We aspire to be a customer centered organization through innovation and sustainability.

ELMHURST PARK DISTRICT

STRATEGIC PLAN

CONTINUOUS IMPROVEMENT THROUGH AN EMPOWERED TEAM
DEVELOP AN EMPOWERED STAFF → CREATE A CULTURE OF CONTINUOUS IMPROVEMENT → FOSTER A CULTURE OF INNOVATION

CREATE A BORDERLESS ORGANIZATION → EXCELLENCE IN INNOVATIVE OPERATIONAL MANAGEMENT

IMPROVEMENT THROUGH COLLABORATION & INNOVATION

ALIGN RESOURCES WITH COMMUNITY NEED → TAKE CARE OF WHAT WE HAVE → INVEST IN THE FUTURE

FISCAL AGILITY



2017 Mid-year Strategic Plan Progress Report

Executive Director's Message

I am pleased to present the last Elmhurst Park District's Mid-year Strategic Plan Progress Report (SPPR) for the 2013-17 Strategic Plan. This report is staff's method of demonstrating accountability with how we are taking action and achieving results to effectively implement your Strategic Plan. Our goal has been to provide the Board and community a clear and comprehensive report that monitors long-term strategy so the Strategic Plan remains a useful and relevant tool for future planning.

The SPPR is compiled and submitted to the Board bi-annually at mid-year and year-end, and after Board approval, it is available on the District's website (epd.org) for public review. The 2017 Mid-year SPPR has the same format and approach as the 2016 Mid-year SPPR, including status reports on achievement of Strategic Plan Initiatives and outcomes for performance measures tracked semi-annually.

As District staff is fully engaged with this Strategic Plan, this report continues to illustrate how the Board's vision for 2017 is being executed through the ongoing implementation of Plan Initiatives and Tactics. Since staff is focused on completing the highest priority tactics identified during the Board and staff's annual review of the Strategic Work Plan, the Board can be assured that its long-term strategy is being addressed in the final year of the Plan.

Furthermore, by tracking our progress towards implementing the 2013-17 Strategic Plan, the Board and staff have an understanding of how our past and current priorities should shape the next phase of strategic planning and implementation. This report of Strategic Plan accomplishments and ongoing work plans was utilized by the Vision 2020 planning team and staff to assess the current state of the District and develop the District's future strategy in the next Strategic Plan.

On behalf of staff, we appreciate your continued support and involvement in shaping the District's future.

Thank you,



James W. Rogers
Executive Director

2017 Mid-year Strategic Plan Progress Report

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Introduction and Overview

Why do Strategic Planning?

If our Mission and Vision Statements are to have any meaning, they must be accompanied by deliberate planning efforts to move the organization and the community toward a desired future. This requires clearly defined goals, actionable objectives, committed leadership and effective management. Above all, it requires managing the forces of change. Those forces include community demographics, fiscal constraints, government mandates, economic conditions, emerging technologies and many other influences on our operations. High performing organizations are those that learn to anticipate and adapt to change. The best tool for accomplishing these objectives is strategic planning.

Along with utilizing community input, multiple levels of staff were engaged in providing feedback and developing strategy throughout the 2013-17 Strategic Planning process, which creates a greater awareness and ownership of the Strategic Plan. Staff continue to be involved in implementing the Plan to ensure that Department initiatives and budget proposals reflect the necessary steps and resources for addressing the Board's priorities. The Board and staff's ongoing review of the Plan sustains its integrity and relevancy over time and facilitates the District's responsiveness to the community's needs as Elmhurst grows and changes.

Furthermore, for strategic planning to be effective and dynamic, District staff continually measure and assess performance. To evaluate achievement of the Strategic Plan priorities, staff compiles the Strategic Plan Progress Report (SPPR) to provide a snapshot of progress toward addressing and the District's 2017 Strategic Work Plan. This Mid-year report along with the Year-end SPPR assist the Board and staff with a continued evaluation of achievement of long-term strategy for decision-making, resource allocation and work plan development. Our ultimate goal is to ensure that we are providing experiences for the lifetime enjoyment of people who live and play in our community.

Understanding the Strategic Plan Progress Report

This SPPR provides an evaluation of the District's mid-year progress toward accomplishing the 2017 Strategic Work Plan, which is available on the District's website and in Attachment A of this report. This report begins with an overview of the process used in 2012 to develop the 2013-17 Strategic Plan along with an explanation of the Balanced Scorecard Framework, the tool utilized to define the District's strategy. The introductory sections provide the District's mission and vision statements and the overall five-year strategy approved by the Board along with overviews of the 2017 Strategic Work Plan (SWP). The main body of the report is organized by the Strategic Themes approved by the Board and includes a qualitative status report on addressing SWP Initiatives and then an analysis of performance measure outcomes to monitor accomplishment of this strategy. At the end of the report is a list of key terms and their definitions to provide clarity to the District's Strategic Plan terminology.

District Strategy

What Do We Need to Accomplish?

This section provides an overview of the District's 2013-17 Strategic Plan strategy and the 2017 Strategic Work Plan for implementing this strategy.

Strategic Plan Process and Balanced Scorecard Framework

Since 1992, the Elmhurst Park District has committed to developing and implementing a Strategic Plan, and in August 2012, the Board approved the District's fifth Plan. The Plan assists the Board and staff with anticipating future community desires and needs along with clarifying organizational direction for decision making. Since its inception, the Board and staff have selected and implemented projects, programs, and initiatives based upon the priorities articulated in the Plan.

To develop the Plan, the Board and staff reviewed the 2011 Attitude and Interest Survey, District long-range planning documents, performance reports, and employee feedback to gain an understanding of the current operating environment and future needs. To more accurately define our business purpose and vision for the future, the Board and staff also reviewed and reworded the District's **mission** and **vision** statements.

After revising the mission and vision statements, the Board and staff participated in a workshop to identify key organizational strengths, weaknesses, opportunities, and threats and brainstorm the key focus areas for the next three to five years. These key focus areas were then built into a foundation for the development of **strategic themes** based on the Balanced Scorecard, a strategic planning and management framework used to align business operations with vision and strategy, communicate strategy internally and externally, and monitor organizational performance against strategic objectives. It emphasizes the cause and effect relationships among distinct yet interrelated perspectives: customer needs, financial performance, internal support processes, and organizational learning and growth.

To further define what the District must accomplish to execute its themes, staff developed and the Board approved **strategic objectives**. Based on the **objectives**, staff developed **initiatives** (specific activities, projects and actions to be taken) with two- to five-year assigned timelines and key **performance measures** to allow for ongoing tracking of progress. Furthermore, each year, staff reviews and develops detailed action steps, or **tactics**, which ensure the completion of the strategic initiatives by focusing decision making and the allocation of resources on implementation of District strategy.



Mission, Vision and District Strategy

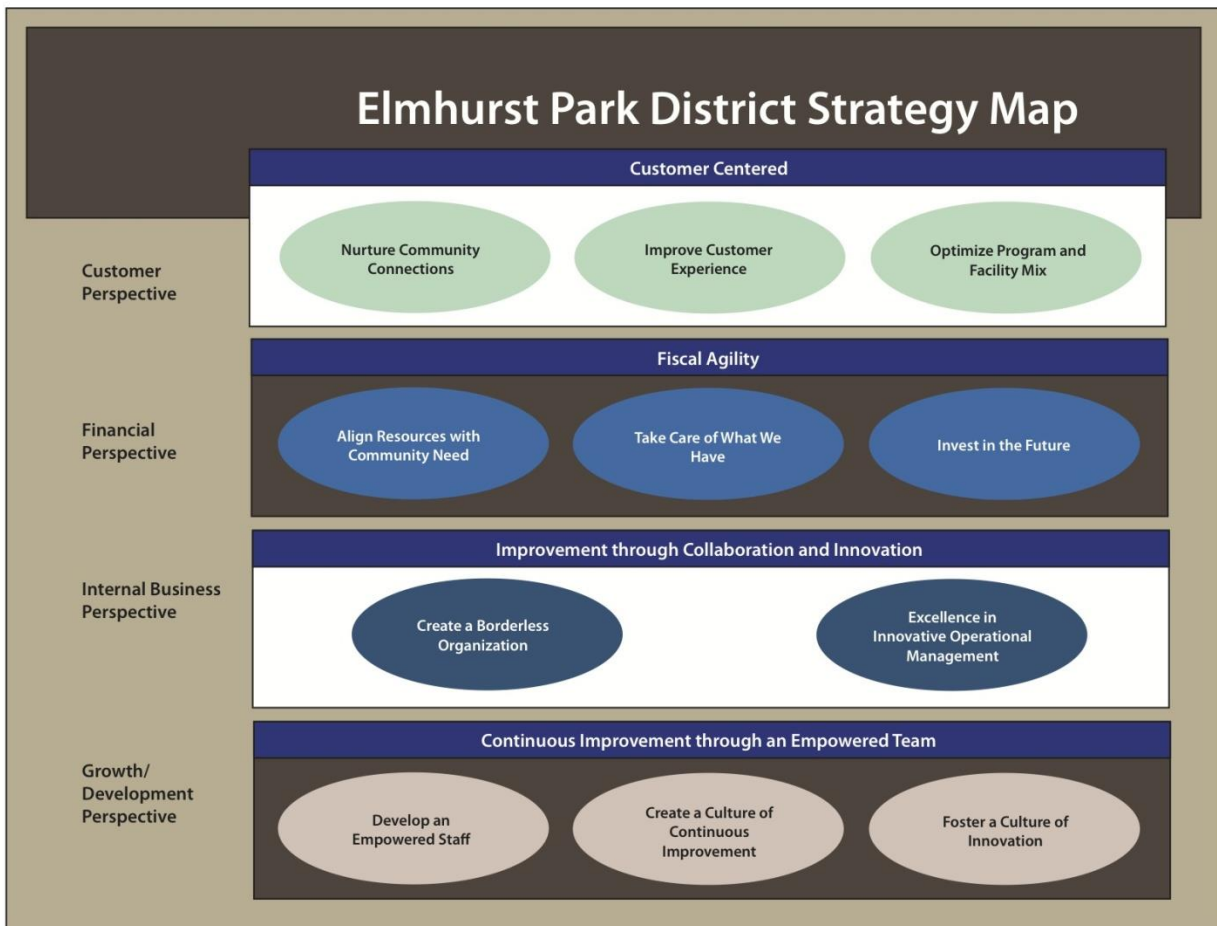
As described on the previous page, all of the District's Strategic Themes and Objectives are aligned with the District's Mission and Vision and the four Balanced Scorecard perspectives as represented on the Strategy Map below. The Map lists the four perspectives on the left side and the supporting Themes and Objectives adjacent to the list of perspectives. Refer to pages 11-28 for the District's definition of each Theme and Objective.

Mission Statement

We provide experiences for the lifetime enjoyment of people who live and play in Elmhurst.

Vision Statement

We aspire to be a customer centered organization through innovation and sustainability.

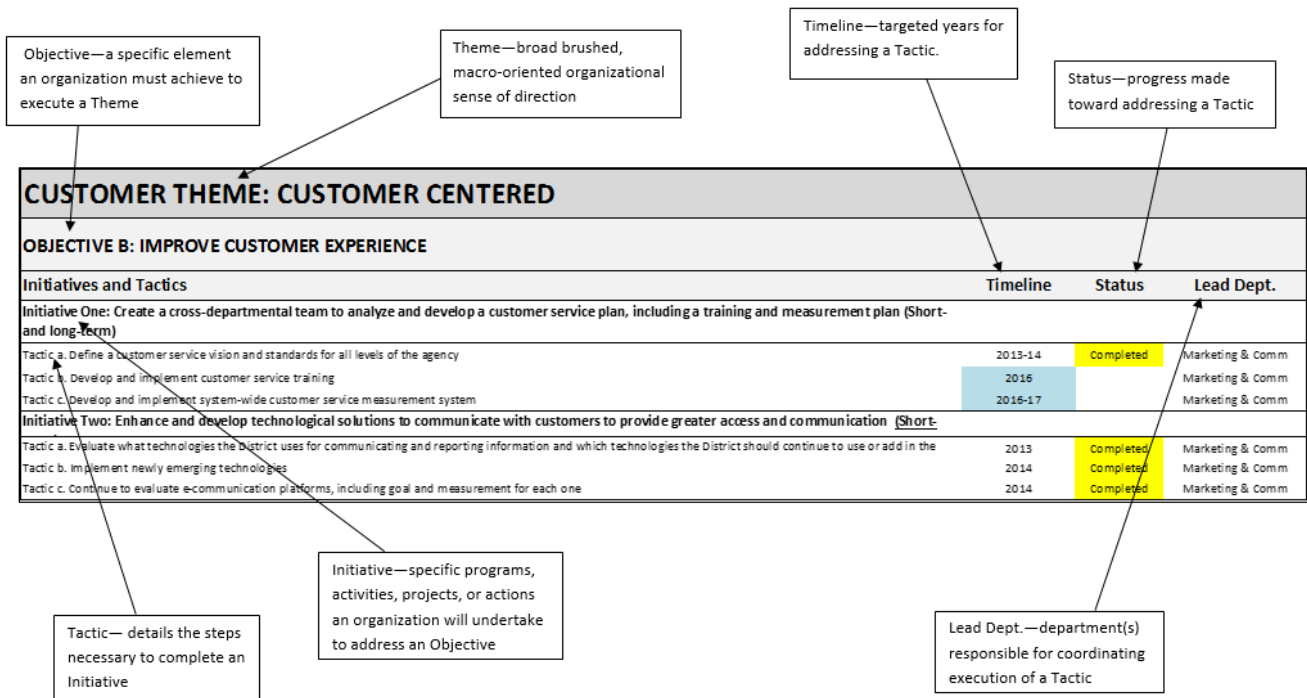


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Strategic Work Plan Initiatives and Tactics

Developed by staff and approved by the Board annually, the Strategic Work Plan (SWP) in Attachment A outlines the specific broad goals (initiatives) and tasks (tactics) which will be implemented to address District strategy. To allow for focused direction and concise tracking of this strategy, the SWP includes all initiatives during the five-year duration of the Strategic Plan. Since long-range strategy takes time to address, the implementation of each of the initiatives is over a two- to three-year period unless it will occur during all five years of the Plan. Therefore, the timing of initiatives is defined as follows: short-term (2013-15); mid-term (2014-16); long-term (2015-17); and continuous (2013-17). To foster additional accountability, the SWP also includes the lead staff position and/or team responsible along with the targeted deadline for completing each tactic. The SWP format is illustrated at the bottom of this page.

Moreover, the SWP includes initiatives and tactics that relate to planning, acting and evaluating. Planning relates to the District's ability to plan the future and involves gathering of information and conducting an assessment before taking action and making changes (e.g., program plan, staffing study). While these initiatives can be challenging to measure quantitatively, they are important because they lay the foundation for the District's future success. Acting initiatives relate to the District's ability to meet desired operations and service levels. They often involve implementing elements from the planning phase. These activities are important because they have tremendous impact on whether tasks or projects will have successful outcomes (e.g., process improvements, new fee structures). Evaluating initiatives relate to the effectiveness of both planning and actions. These initiatives are important because they let us know whether our planning and actions are producing the desired outcomes (e.g., gather internal customer feedback). On pages 11-28, staff provide status reports regarding the implementation of the 2017 SWP at mid-year.



Strategic Work Plan Progress How Are We Doing?

This section provides the definition of each Strategic Theme and its related Objectives along with a listing of the Initiatives in the 2017 Strategic Work Plan (SWP). For Initiatives scheduled to be addressed in 2017, staff describes the status of work completed to date and future plans for accomplishing those Initiatives. Staff also notes if an Initiative has been completed or deferred to the next Strategic Plan if determined to still be a priority during the Vision 2020 process. Following the status reports, staff summarizes the performance measure outcomes, which track accomplishment of District strategy.

Customer Centered Theme

About this Theme: Customers are defined as resident and business taxpayers, resident and non-resident users of services, and partners. Elements of the theme include engaging customers for long-term marketplace success through listening to the voice of the customer, building relationships, and using customer knowledge to improve services. This customer-focused structure puts customers' needs at the center of decision making.

Objective A: Nurture Community Connections

About this Objective: The District will continue its strong orientation toward community connections and partnership development. This will also assist in augmenting service delivery. Important to this objective will be identifying the goals, costs, and benefits of existing and future partnerships and to evaluate their effectiveness.

- **Initiative One:** Create process for reviewing existing and potential partnerships according to established criteria (deferred). *This initiative is deferred.*
- **Initiative Two:** Develop, nurture and evaluate existing affiliates and partnerships (continuous: 2013-17).

Mid-Year Status Update: Throughout the span of this Strategic Plan, staff has noted the development, nurturing, and evaluation of partner relationships and agreements in mid-year and year-end Strategic Plan Progress Reports. The District also gathered feedback from District stakeholders as part of the Indoor Sports Facility Market Demand and Financial Feasibility Study and Vision 2020 Plan processes to develop, strengthen, and evaluate current and potential future affiliate group and partner relationships and opportunities. As part of this Strategic Plan, this Initiative has been completed and will continue to be a high priority when implementing Vision 2020 Plan strategies.

- **Initiative Three:** Develop and identify new opportunities based on Strategic Plan, Program Plan and facility needs (mid- and long-term: 2014-17).

Mid-year Status Update: As part of the Vision 2020 process, the planning team and staff reviewed prior planning documents such as the Indoor Sports Facility Market Demand and Financial Feasibility Study and collected extensive community, stakeholder, Board and employee feedback to identify new opportunities to work with community partners. The Vision 2020 Plan includes key findings and strategies which will involve furthering the District's

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connection to community partners and stakeholders for successful implementation, including a potential new Indoor Sports Facility and Senior Center.

Objective B: Improve Customer Experience

About this Objective: An important element in operational excellence includes the ability to improve the customer experience. Building a systems approach to service delivery will be achieved through a cross-functional service team. This includes development of standards, implementing District-wide service training, knowledge of customers, and measuring customer satisfaction.

- **Initiative One:** Create a cross-departmental team to analyze and develop a customer service plan, including a training and measurement plan (short- and long-term: 2013-14 and 2016-17).

Mid-year Status Update: In 2013, staff formed a cross-departmental Customer Service Team of ten (10) full-time employees, which met bi-monthly for four months and identified key characteristics of people and companies that provide great service, developed a customer service vision statement (a credo to our customers) and broad-based standards of service for all employees, and defined the next steps to improve customer service.

In the third quarter of 2013, the Customer Service Team's outcomes were shared with the Management Team. During 2014 to 2016, other District priorities such as the implementation of the new registration system required staff time to be focused on training and understanding the new system and providing customer service to system users. Therefore, further implementation of the Customer Service Initiative was deferred. However, in 2016, staff did survey Courts Plus members and Pool Pass holders to gather feedback and implement improvements to enhance the customer experience.

The District also collected extensive community, customer, stakeholder, and employee feedback as part of the Vision 2020 process in 2016-17. Based on this feedback, creating a District-wide customer service model remains a top priority and will be addressed in 2018 as part of the Vision 2020 Plan implementation. Part of this process will include evaluating options and software to gather, track, and report customer feedback on a more consistent basis (tactic in the 2017 SWP).

- **Initiative Two:** Enhance and develop technological solutions to communicate with customers to provide greater access and communication (short-term: 2013-15). *This initiative was completed in 2015.*

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Objective C: Optimize Program and Facility Mix

About this Objective: The District wants to ensure the delivery of the “right” array of services and programs. The “right” array is determined by matching customer needs, demand, marketplace trends, and District capabilities. This also includes reviewing service and facility offerings to optimize facility space.

- **Initiative One:** Develop a District Program Plan (short-term: 2013-15). *This initiative was completed in 2015.*
- **Initiative Two:** Develop a process to best position core services in the marketplace (mid-term: 2014-15). *This initiative was completed in 2015.*
- **Initiative Three:** Create a process for review of the external market to determine duplication, opportunities, needs, pricing, etc. (mid-term: 2014-15). *This initiative was completed in 2015.*
- **Initiative Four:** Optimize Current and Future Facility Space (continuous: 2013-17).

Mid-year Status Update: With the completion of stormwater negotiations and the Indoor Sports Facility Market Analysis and Financial Feasibility Study in 2017, the last two tactics still in progress to address this initiative are conducting the planning process to update the District’s Strategic and Comprehensive Plans and reviewing facility use needs. By updating these long-range plans, the Board and staff will have direction for determining the future development, redevelopment, and use of District parks, facilities, and open space based on community, customer, stakeholder, Board, and employee feedback.

The Board conducted its last comprehensive planning process in 2005-07, community survey in 2011 and strategic planning process in 2012. On June 8, 2016, the Board approved undergoing a joint comprehensive and strategic planning process in 2016-17 to determine District priorities for the next three to five years (named the Vision 2020 process) and on September 12, 2016, hired The Lakota Group to conduct the process after undergoing a qualifications based selection process to pick the best firm for the project. As of June 30, 2017, project work completed to date includes the following:

Project Kick-off

- Held a kick-off meeting and tour with the project team led by The Lakota Group to confirm project goals, timelines, and expectations and data collection needs (September 2016);
- Launched a project website to provide information, updates, and links to surveys and documents (created and maintained by PROS Consulting, the firm leading the Strategic Planning portion of the process) (November 2016);
- Submitted to the project team the requested documents and data necessary to conduct the planning process (e.g. GIS maps, program, financial, planning, marketing documents and data, etc.) (September-December 2016);

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Engagement

Engaged the community throughout the process utilizing different methods for gathering feedback, including:

- Held interviews and focus groups with individuals representing various community groups, public organizations, educational institutions, sports groups, etc. Stakeholders who could not attend the in-person interviews provided their input via the phone (facilitated by The Lakota Group; 34 individuals participated from 27 organizations) (October and December 2016).
- Conducted a community needs assessment survey (overseen by the survey firm, ETC) and received a total of 328 completed statistically valid mailed surveys, which was three (3) above the goal of 325 (late fall 2016); 374 individuals completed the non-statistically valid survey online (late fall 2016).
- Held four Community Open Houses:
 1. On October 19, 2016, to provide the opportunity to learn about the process and additional ways to be involved and provide feedback on the future of District parks, facilities, and programs (facilitated by The Lakota Group with 15 individuals participating);
 2. On March 1, 2017, to present an overview of the initial project data analysis and community survey results, answer questions, and gather feedback on both (facilitated by The Lakota Group with 16 individuals participating); and
 3. On May 2, 2017, (morning and evening) to present potential strategies and gather input on community priorities (facilitated by The Lakota Group with 75 individuals participating).
- As a follow-up to the May 2, 2017 Community Open Houses, conducted an online survey from May 15 to 30, 2017 for the community to prioritize potential action items (distributed by The Lakota Group with 428 respondents).

Involved all levels of District staff on multiple occasions throughout the process, including:

- In December 2016, held seven full-time staff meetings and eight individual Management Team member interviews to gather ideas and aspirations for the next five-years (facilitated by The Lakota Group); ninety-three percent (93%) of full-time staff were able to attend a meeting/interview and all full-time staff were sent a follow-up questionnaire to provide the opportunity to submit additional feedback or feedback if they could not attend a meeting.
- During December 2016, distributed an anonymous Organizational Culture web survey (via PROS Consulting), which provided full- and part-time and seasonal employees the opportunity to submit feedback on the District's organizational/work culture (completed by 170 employees).
- In February 2017, facilitated a full-time staff workshop (The Lakota Group) to review feedback from the December 2016 full-time staff meetings and the Community Survey and Organizational Culture Survey results and begin development of the District's organizational values.
- Based on the outcomes of the Organizational Culture survey, conducted (The Lakota Group) three part-time staff open forums (over 130 participants) and an online survey (37 respondents) to gather feedback on the areas of organizational culture which part-time staff rated low (March-April 2017).
- Held four Vision 2020 Staff Work Group meetings and conducted one online survey to complete the development of organizational values and determine and prioritize the Vision 2020 strategic themes, goals, and tactics based on the feedback and data collected during the engage and analyze phases of the process (facilitated by The Lakota Group and PROS

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Consulting). The Work Group included twenty-six staff from all levels in the organization who met monthly from February to May 2017.

- Conducted two Management Team workshops to preliminarily review the Community Survey and Organizational Culture Survey results and develop a SWOT analysis for strategic planning in February 2016 (led by The Lakota Group and PROS Consulting) and to discuss the community and Staff Work Group prioritization of proposed strategies and finalize the 2018 action plan strategies in June 2017 (led by The Lakota Group).

Communicated and facilitated opportunities for the Board to review important project milestones and provide direction on the District's vision and strategies:

- In October 2016, interviewed Park Board Commissioners individually (facilitated by The Lakota Group).
- At the October 24, 2016 Board meeting, reviewed the project milestones completed and draft community needs assessment survey (presented by The Lakota Group).
- At the February 13, 2017 and April 10, 2017 Board meetings, conducted workshops to review the outcomes of the Strategic Planning process to date, determine the District's organizational values, review and revise the District's mission and vision statements, and confirm the strategic action plan themes.

Assessment/Analyze

- Completed an on-site assessment and analysis of all District parks (The Lakota Group and Recreation Results) and facilities (excluding buildings renovated after 2005) (Dewberry Architects) (October 2016 to April 2017).
- Underwent an assessment of recreation programming, including a program life cycle, classification, partnership, and marking effort analysis after identifying areas needing further review after the 2014-15 Program Plan and Service Analysis process (PROS Consulting) (March-April 2017).
- Completed the State of the Park District report (The Lakota Group), including the District's profile, engagement phase summary, and an analysis of the regional and local context, open space, demographics, national and local trends, and level of service (April 2017).

Final Strategy Development and Presentation

- With the involvement of full- and part-time staff and the Board, reviewed and revised the District's Mission and Vision Statements and developed Organizational Values to guide implementation of the District's future strategy and operations (facilitated by PROS Consulting) (February to April 2017).
- In June 2017, completed the Vision 2020 Plan key findings, recommended strategies and draft final document and presented it to the Board at its June 26, 2017 meeting (The Lakota Group Planning Team).

Next Steps

The Board will discuss, further review, and approve the final Vision 2020 Plan document in July 2017. During the 2018 Budget process, staff and the Board will finalize the 2018 Strategic Action Matrix, including tactic implementation goals, responsibilities, and timelines and determine and allocate what resources need to be budgeted to execute the Plan. The outcomes of the Vision 2020 process and the final Plan will be communicated to the community during the second half

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of 2017 through the District's different communication platforms and at the 2017 State of the Park District address.

Fiscal Agility Theme

About this Theme: This theme suggests the District's ability to respond nimbly and quickly to ever changing business demands, to re-prioritize agency resources to meet customer demands for service, and the ability to take advantage of opportunities as they arise. This also requires the District to have just-in-time financial information and results for good decision making.

Objective A: Align Resources with Community Need

About this Objective: The District will rely on statistically valid survey information and ongoing resident feedback in deciding capital priorities. Decisions will be based on providing for the strategic greater good of the community rather than randomly selecting tactical approaches in response to special interests. This objective also emphasizes the importance of using sophisticated pricing approaches based on financial targets and market demands.

- **Initiative One:** Improve the capital project review and development process (short-term: 2013-14). *This initiative was completed in 2014.*
- **Initiative Two:** Develop a consistent approach to the pricing of services (mid-term: 2014-17).

Mid-year Status Update: The first step towards developing a consistent approach towards the pricing of programs/services was the development of a cost recovery/subsidy allocation strategy which identified what services/programs to subsidize and at what level. During the program plan and service analysis process, staff developed models for tax-supported programs and enterprise programs based on the District's revenue policies. Staff also researched the elasticity of pricing and services to understand customer pricing thresholds and developed a consistent fee structure. To ensure that the District's cost recovery policy reflect these models and fee structures and District cost recovery trends, staff will undergo a comprehensive review of the District's revenue policies during the 2018 Budget process.

- **Initiative Three:** Ensure transparency by communicating ethics and values to community and internally (continuous: 2013-17). *This initiative was completed in 2016.*

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Objective B: Take Care of What We Have

About this Objective: The Elmhurst community expects the District to adequately care for current assets before investing in new parks and facilities. As growth and unmet user needs are addressed, the District will also ensure continued maintenance and investment in the existing infrastructure. This includes identifying the operating and maintenance costs for proposed new facilities and developing plans for replacement of existing assets.

- **Initiative One:** Based on the priorities outlined in District planning documents, maintain the District's infrastructure to continue to support high quality offerings (continuous: 2013-17).

Mid-year Status Update: Capital improvements enhance, expand, or maintain the infrastructure that the District needs to provide programs and services to the community and support new growth and development. To ensure a high quality of services and amenities, infrastructure expansion and improvements must continue as the District's demographics change and facilities age. The District's 2017-26 Capital Improvement Plan (CIP) details long-range capital improvement needs by outlining \$45.15 million in infrastructure and equipment improvements and expansions that the District plans to implement during a multi-year period and is annually reviewed and modified as funds and priorities change.

To ensure that the Capital Plan is not merely a wish list, but rather a schedule of realistic needs based on available funding and long-range planning documents, staff use project evaluation criteria to effectively establish a relative priority for assessing and prioritizing projects based on their level of immediacy, impact, and necessity. This prioritization process provides a consistent and fair method for assessing projects during the capital planning process.

Therefore, to confirm that the most critical needs are met based on the funding resources available, staff reviewed if the highest and high priority projects (based on the capital plan criteria rankings) proposed for 2017 were funded. The 2017 Capital Budget proposed by staff and approved by the Board did include the highest and high priority projects such as the Salt Creek Green Way Trail Connector, 135 Palmer Drive Land Acquisition and Site Development, Plunkett Park Redevelopment, 447 Armitage Land Development, Wagner Community Center Upgrades, Berens Tennis Court Resurfacing, and The Hub Sprayground Resurfacing. In the 2017 Year-end Strategic Plan Progress Report, staff will report if the highest/high priority projects were completed in 2017.

- **Initiative Two:** Create a comprehensive asset management plan that is linked to Capital Plan (Deferred). *This initiative is deferred.*

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Objective C: Invest In The Future

About this Objective: The District desires to be flexible and nimble in order to take advantage of opportunities that arise. The goal is to position the agency in its ability to meet future demand and customer preferences. At the same time, there will be continued effort in identifying efficiencies throughout operations, such as utility consumption.

- **Initiative One:** Seek opportunities that will positively impact the District's finances (continuous: 2014-17).

Mid-year Status Update: To address this initiative, staff have focused on exploring new or expanding current programs and facilities/amenities which improve cost recovery and implementing new customer retention strategies. Outcomes at mid-year 2017 are as follows:

Explore New or Expand Programming and Facilities/Amenities to Improve/Maintain Cost Recovery: In the first six months of 2017, the District made the following changes/additions to improve and/or maintain cost recovery:

- Developed and implemented a new dance coordinator position, which leads the Impact Dance Company and coordinates curriculum for recital and non-recital dance tracks. This new position was created when the Dance Company staff member resigned to open a dance studio in Elmhurst at the conclusion of the 2016 program and the program manager anticipated revenue/participation loss in this popular program. Staff anticipate a two to three year rebuilding effort so it was important to create this new position to not lose momentum in dance program offerings overall (recital dance classes and non-recital dance classes) and ensure consistent growth in dance participation/revenue.
- Offered a new special event, Mom/Son Dance, in the spring 2017 with 311 in attendance.
- Completed training in the Early Childhood Environmental Rating Scales which aligns with DCFS standards.
- Purchased new “age appropriate” toys/furniture for classroom use.
- Implemented “Pet Study” from the Early Childhood Creative Curriculum and the Start Smart sports curriculum from the National Alliance for Youth Sports.
- Increased swim opportunities during the 2017 pool season based on feedback in the 2016 end-of-season aquatics survey, including:
 - adding an adult swim on Sundays from 11:00 a.m. to 12:00 p.m., which compliments the Monday through Friday adult swim time already offered.
 - expanding Smalley Pool hours by changing the opening time on Sunday to 11:00 a.m. (from 12:00 p.m.); and
 - increasing late night swims at East End Pool resulting in increased pool hours twice a month (open until 10:00 p.m. versus 8:00 p.m.).
- Completed Marjorie Davis garden plot development to replace the plots no longer available at Golden Meadows Park. The new garden plots feature fifty-five (55) individual plots, five (5) water spigots, and split rail fencing.

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- Increased Courts Plus membership fees 10-17% to offer the best facility, experienced staff and quality programs.
- Unified all key aspects of member engagement, sales and retention under the Membership Services Supervisor with the addition of two part-time Membership Associates for improved coverage of open hours.
- Added three free outdoor yoga classes in the Wilder Garden with maximum participation.
- Planned the addition of Barre classes to the Courts Plus free group exercise schedule and offering of two A.C.T. F.A.S.T., women's self-defense classes as paying programs.

Evaluate and Improve Retention Strategies: Based on work with Atwood Consulting (the firm hired to conduct a business assessment of Courts Plus and provide recommendations), Courts Plus staff instituted a sales focused on-boarding system in 2015. The new system, along with improved target marketing, resulted in a record year in 2016 for both new members and canceled members, resulting in a decrease in net total members of 250 (versus net gain of 35 members in 2015). However, since the average amount of monthly-fee paying members improved by 2.8% (7,513 vs 7,307), membership revenue increased by \$31,542 as compared with 2015.

Courts Plus staff continues to focus on increasing new membership revenue through improved sales performance and overall membership revenue through higher retention and creating a positive, results driven culture with staff functioning as a committed team. In the first six months of 2017, staff increased the value of a membership by offering additional free classes and introducing a Courts Plus mobile app and new fitness incentive program. For example, fitness classes such as Insanity, Yoga, TRX Circuit and WOW are now included in the membership, and members can check in with the mobile app, find a class, track and log their workouts, set goals, earn rewards, find special offers and discounts on services and programs, participate in challenges, and cheer on others. Members who reach a usage goal of 132 visits in 2017 will receive a free month of dues in 2018.

Courts Plus Membership Services staff also attended a Highland Solutions Customer Experience Mapping Workshop. Following the workshop, staff interviewed ten new members to create a map of our onboarding experience, gaining valuable feedback for making continued improvements to Courts Plus and the onboarding process along with furthering connections with these new members.

Lastly, Courts Plus and Marketing and Communications staff updated the Member Retention Plan to focus on strengthening the member success program offering, showcasing amenities, and Court Plus' community presence. Courts Plus was present at the Fruitful Yield opening, Art in the Park, PEP Golf Outing, and EPD Adventure Day and plans to attend future 2017 community events.

- **Initiative Two:** Develop, implement and track cost recovery goals (mid- and long-term: 2014-17).

2017 Mid-year Status Update:

One of the outcomes of the 2014-16 program plan and service analysis process was the classification of programming and services into different categories based on community benefit levels and the determination of specific cost recovery goals (enterprise and tax-supported),



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ranging from 0% to 125% for each of these categories (e.g., social and educational, community events, beginning/intermediate skill based, special events, rentals, etc.). To ensure accounts reflect these categories for accurate tracking of cost recovery goals, the program/service categorizations were compared to the current account structure in the District's general ledger system. During the 2017 Budget process, many general ledger accounts within the Recreation and Enterprise Funds were separated to track program areas with variable cost recovery goals. Currently, most of the Recreation Funds general ledger categories fairly illustrate and match direct program revenue and expenses. During the 2018 Budget process, additional effort will be made by staff within the Enterprise Services Department to review general ledger accounts to improve the tracking and allocation of the actual incurred direct expenses associated with program and service categories.

The next step towards tracking cost recovery goals was to categorize actual 2016 revenue and expense general ledger accounts within the Recreation and Enterprise Services Funds as indirect or direct. Total indirect expenses were further categorized by their functional department category (i.e., Administration, Marketing, Finance). 2016 indirect expenses as compared to 2016 direct programs and service expenses averaged approximately 52%, with each functional category percentage identified separately. Since some program areas have unique facility or support staffing needs, additional analysis will be made to ensure a fair allocation number is used for assigning indirect expenses to some of these unique areas such as league sports.

In reviewing 2016 actual data in the Recreation Fund, most program areas exceeded cost recovery goals after applying the 52% indirect expense allocation. Further analysis is being completed on the Enterprise Services Fund for 2016 to separate some of the direct expenses related to programs and services. During the second half of 2017, staff will make improvements in employee timekeeping and expense allocation to ensure direct costs are accurately separated into their actual program categories.

Improvement through Collaboration and Innovation Theme

About this Theme: The District's tenet of pursuing operational excellence will be achieved through an inclusive and participative team-based environment. In addition, the District, rather than make decisions based on the status quo, will rely on best practice approaches founded on innovative techniques that result in sustainable organizational improvement.

Objective A: Create a Borderless Organization

About this Objective: Effective communication across the organization results in efficient internal service, in support of providing excellent external service. Internal seamlessness and ongoing communication is vitally important and requires identification of workplace barriers and standard operating procedures to guide staff in working effectively with others.

- **Initiative One:** Conduct methods to gather internal customer feedback and improve internal business performance (deferred). *This initiative is deferred.*
- **Initiative Two:** Evaluate and implement opportunities for employees to collaborate (continuous: 2013-17).

Mid-year Status Update: The District's cross-departmental/functional teams are intended to foster an exchange of ideas and the collaborative development and implementation of work plans. The District has two ongoing Employee Committees (Employee Relations and Safety) and ongoing cross-functional teams for registration, capital planning, environmental planning (Green Team), and performance management/job description review. New cross-functional teams were formed in 2017 to address Strategic Plan initiatives, including the following:

- *Vision 2020 Work Group:* comprised of twenty-six staff from all Departments and levels in the organization, the Work Group played an integral role throughout the planning process by reviewing the District's mission and vision statements, developing the District's new values (utilizing the Board's and full-time and part-time staff's feedback), and brainstorming, refining and prioritizing long-range strategic themes, goals, and tactics based on the District's new vision and values statements and Vision 2020 Plan key findings and strategies.
- *Strategic Technology Plan Task Force:* with thirteen (13) employees representing Administration, Courts Plus, Finance and Human Resources, Information Technology, Marketing and Communications, Parks and Facilities, and Recreation, this Task Force met to discuss and understand the District's technology needs and where technology fits in the future of the District. The Task Force reviewed the Information Technology Department mission, discussed the road to the future, identified trends, performed a SWOT analysis,

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ranked trends, and finalized short-, mid- and long-term Information Technology priorities and plans.

- *Recruitment and Retention Task Force:* Consisting of supervisors from Aquatics, Courts Plus, The Hub, Human Resources, Recreation, Registration, and Sugar Creek Golf Course, this Task Force investigated the recruitment and retention of part-time staff, including current practices and benefits and brainstormed additional ways to attract and retain part-time staff.

- **Initiative Three:** Evaluate and enhance communication among District employees (short-term: 2013-15). *This initiative was completed in 2015.*

Objective B: Excellence in Innovative Operational Management

About this Objective: The District will efficiently and effectively leverage labor resources in operations. Furthermore, the District will identify and continuously improve key processes and work toward adopting industry best practices.

- **Initiative One:** Complete a work analysis/staffing review to determine the best allocation of labor dollars (mid- and long-term: 2014-17).

Mid-year Status Update:

Staffing Study: To conduct an objective and comprehensive analysis of the appropriate level of staffing and departmental organizational structure to utilize resources in the most effective manner, staff hired a professional services firm with expertise in completing these types of studies. The District selected the firm by utilizing a qualifications based selection process in June 2014 and chose Matrix Consulting Group based on their qualifications and experience with government operations and their professional and analytical approach tailored to address issues specific to the District. In August 2014, the Board approved the expenditure of \$37,000 for Matrix Consulting Group to complete the staffing analysis of full- and part-time personnel.

After Board approval, the firm completed the following tasks to conduct the analysis (from July 2014 to June 2015):

- collected the District's staffing and organizational data, including conducting interviews with department managers, supervisors and front line staff, observing selected parks and facilities, and reviewing of department workloads and budgets.
- compiled the District's draft descriptive profile, organizational structure, and job specific key roles and responsibilities.
- completed a draft diagnostic assessment of the District's staffing, highlighting performance targets and potential operational alternatives to current practices.
- submitted the final report with recommendations and a documentation of the process.
- presented the report to the Management Team and Division Manager of Human Resources and Risk Management. At a subsequent meeting, staff preliminarily reviewed and discussed the recommendations.

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In April 2016, the Management Team and Division Manager of Human Resources and Risk Management comprehensively assessed the feasibility, status, and follow-up necessary to address the forty-six (46) recommendations to determine which have been accomplished, require additional analysis or should not be pursued (if unrealistic to implement). After this evaluation, staff determined that 33% of the recommendations had been accomplished, 33% will not be pursued based on feasibility of implementation or due to other options being implemented to address the recommendation and 35% require further research, analysis and discussion in 2016 based on their potential operational and financial impact. At year-end 2016, the District had implemented an additional seven (7) recommendations with only 20% (9 of 46) remaining outstanding.

At mid-year 2017, the District had implemented an additional four (4) recommendations with only 11% (5 of 46) remaining outstanding. The major outcomes of the study addressed in the first six months of 2017 include the following:

- after a staff resignation, completed an evaluation of the responsibilities and work plan of the GIS Specialist and subsequently made the decision to eliminate the GIS responsibilities and convert the Specialist position to an Information Technology help-desk position.
- transferred crew members engaged in athletic field maintenance from the Facilities Division to the Parks Division, along with Park Ambassador responsibilities.
- instituted a scheduled program of internal control and cash handling audits throughout the organization.

Compensation Study: A compensation analysis was originally planned to occur with the staffing analysis in 2014-15. However, it was cost prohibitive to complete at that time. Therefore, staff deferred the project and the Board approved the funding as part of the 2016 Budget. The purpose of this analysis was to review the District's salary classification structures to ensure fair, equitable, and competitive wages. After utilizing a qualifications based selection process, staff reviewed proposals and interviewed and selected the best firm to complete the Study. At the July 25, 2016 Board meeting, staff recommended, and Board approved, the expenditure to hire GovHR, LLC of Northbrook, Illinois.

To kick-off the project, GovHR met with Human Resources staff, followed by employee meetings and interviews to gather more details about positions and responsibilities. A salary survey of comparable Districts was also conducted to gauge market ranges. GovHR compiled the data and completed the Study in April 2017. Staff reviewed and assessed report outcomes, including potential next steps and timelines for implementation.

GovHR presented its final draft report to full-time staff and the Board on May 22, 2017, explaining the scope, purpose, and outcomes of the study. In June 2017, the firm completed its final report. Staff is currently determining the next steps for implementation, including how the new salary schedule will impact the 2018 Budget and a process for conducting a similar in-house compensation study to assess and update part-time salary ranges.

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- **Initiative Two:** Develop a dashboard of key indicators to assess and improve organizational performance (long-term: 2015-17).

Mid-year Status Update: The Management Team continues to report new Strategic Plan performance measures so that the Board and staff can effectively monitor the achievement of District strategy. For example, staff began tracking and reporting additional financial measures in the 2015 Year-end Strategic Plan Progress Report and new registration and financial measures in the 2016 Mid-year and Year-end Reports. In late 2017 and early 2018, staff will research dashboard software that will facilitate the reporting and tracking of strategic measures and develop metrics based on the feedback and performance data developed and collected during the Vision 2020 process. For a list of the Strategic Plan performance measures, see pages 29-37.

- **Initiative Three:** Institutionalize sustainable internal operations (continuous: 2013-16).

Mid-year Status Update: In 2016, the Green Team created an action plan and assigned tasks to members to achieve an 8% score improvement on the Illinois Park and Recreation Association (IPRA) Environmental Report Card by the end of the year (the District's score was 61% at the end of 2015 and 70% at the end of 2016). The Report Card is a tool utilized by Park Districts to assess their sustainability and environmental initiatives.

During the first half of 2017, the Green Team reviewed and updated its scoring of the IPRA Environmental Report Card resulting in an updated score of 74%, which moves the District closer towards its 80% performance target. Additional focus was put on tracking expenses associated with energy efficient and "green" product purchases. This initiative will allow the District to recognize actual dollars spent on being a sustainable organization. Additionally, the Green Team is continuing to work on implementing a single uniform waste recycling program for internal use for the District. This single source program will create equal standards and expectations for waste recycling among all Departments.

Some of other initiatives implemented by the Green Team at mid-year 2017 include:

- With the Employee Relations Committee, hosted a staff park cleanup event for Earth Day at Wild Meadows Trace.
- Continued managing battery, paint, aerosol, pen/marker, holiday lights, and tennis ball recycling throughout the District.
- Hosted an educational session on hazardous waste recycling with the Safety Kleen account representative.
- Presented an update on the Green Teams' 2016 accomplishments and future plans at a full-time All-Staff meeting.

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- **Initiative Four:** Utilize and improve technology for efficiency and reporting (continuous: 2014-17).

Mid-year Status Update:

Strategic Technology Plan: As technology continues to be a necessary part of conducting business, the District places a high priority on developing and implementing a Strategic Technology Plan (STP). A new plan is developed every three years to allow for maximum productivity. The current plan was completed in 2014 by a cross-functional Strategic Information Technology Committee consisting of representatives from all departments. During the first six months of 2017, staff implemented 2014 STP initiatives such as increasing cybersecurity protection through the deployment of ransomware protection throughout technology infrastructure and implementing a maintenance management system (MMS) to allow for the tracking of the District's maintenance operations.

Additionally, a 2018-2021 Strategic Information Technology Task Force was formed to discuss and understand the District's technology needs and where technology fits in the future of the District. The Team consisted of thirteen (13) employees representing Administration, Courts Plus, Finance and Human Resources, Information Technology, Marketing and Communications, Parks and Facilities, and Recreation. The Team reviewed the Information Technology Department mission, discussed the road to the future, identified trends, performed a SWOT analysis, ranked trends, and finalized short-, mid- and long-term IT priorities and plans. The revised Strategic Technology Plan is currently under review by the Executive Director and will be presented to the Board in early 2018.

Other technology improvements addressed in the first six months of 2017 included the following:

- Completed the installation of a District-wide door access system allowing for the elimination of keys and providing better security of District assets.
- Completed the setup and implementation of the Maintenance Work Order system – Facility Dude (Maintenance Edge), which is currently used by the Enterprise Services Department.
- Deployed Ransomware protection (Sophos Exploit) on all District servers, desktops, and laptops, reducing the District's vulnerability to infection via email/websites and improving the security of District documents, network shares, and email environments.
- Upgraded the District's website hosting to a dedicated, more robust server environment, allowing for faster response times.
- Decommissioned three (3) servers from Courts Plus (CPFS, CPAD1, CPAD2), saving the District approximately \$1,300 annually in maintenance costs. The consolidation of these servers to the primary Administration SAN (Storage Area Network) will allow for consistent backup of data through the virtual server software to the disaster recovery servers.
- Requested and received twelve (12) refreshed laptops for use in Rec Station from Elmhurst School District 205.
- Implemented the emergency after-hours (EAH) call line, providing a single point of contact for Information Technology support.
- Reduced analog phone line costs by approximately \$10,000 annually by moving eight (8) Rec Station AT&T lines to Verizon pay-as-you-go six (6) cent government lines and four (4) AT&T lines to the internal VOIP system with in-extension dialing.

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- Initiated the Amazon Business account with the People for Elmhurst Parks (PEP) Amazon Smile donation option, improving tracking of costs and purchases and increasing donations to PEP.
- Upgraded RecTrac credit card hardware (chip readers and signature pads) and vendor processing to Card Connect, providing encryption security and Payment Card Industry (PCI) compliance for all credit card transactions.

Continuous Improvement through an Empowered Team Theme

About this Theme: Continuous improvement is an ongoing effort to improve products, services, and processes. These improvements will be accomplished through both Board members and staff by providing the tools and opportunities necessary to work together as a team and make decisions in the best interest of the District.

Objective A: Develop an Empowered Staff

About this Objective: Leadership competencies will include a participative leadership style and team based approaches. In addition, leaders will define empowerment and provide guidelines and boundaries for employee decision making.

- **Initiative One:** Strengthen District training to facilitate the empowerment of staff (long-term: 2015-16). This initiative was completed in 2016.
- **Initiative Two:** Develop leaders (long-term: 2015-17).

Mid-year Status Update: During 2015, staff completed a review of leadership training materials to utilize John C. Maxwell's 360° Leader training program. In September 2016, sixteen mid-level supervisory staff began a six-session Lunch and Learn workshop program using John C. Maxwell's book, The 360 Degree Leader. The program illustrates to participants how to have greater impact in the organization by utilizing the law of influence - how to lead up, lead down, and lead across to impact subordinates, peers, and supervisors.

In 2017, staff finished the program during the first part of the year, and participants were provided the opportunity to complete an anonymous online evaluation of the program, which asked how respondents felt their ability to lead has improved as a result of the training. On a scale of 1- 5

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(1 = No change, 5 = Very much improvement), respondents rated their level of improvement for leading up, across, and down levels in the organization as follows:

Rating	1	2	3	4	5
Lead Up	0% (0)	16.67% (2)	33.33% (4)	50.00% (6)	0% (0)
Lead Across	0% (0)	9.09% (1)	45.45% (5)	36.36% (4)	9.09% (1)
Lead Down	0% (0)	0% (0)	54.55% (6)	45.45% (5)	0% (0)

Some sample comments provided on the survey included:

“Of all the sections, Leading Up was my favorite. I really enjoyed discussing the traits of different supervisors, and then examining ways to improve those relationships.”

“I think I’ll have a bit different perspective when dealing with “difficult” coworkers. This was a great reminder to be positive toward associates, and remember that in the end, we need to do what’s best for the organization.”

“I’ve become a better listener. I’ve tried to forge relationships as indicated in Maxwell’s book even though I prefer to remain a bit distant. I’ve asked employees their opinion and implemented their suggestions. I’ve provided more direction and clearly stated my expectations.”

After reviewing the survey results, staff has completed this initiative, and providing leadership training and similar professional development opportunities will continue to be a priority in the Vision 2020 Plan.

Objective B: Create a Culture of Continuous Improvement

About this Objective: A continuous improvement environment requires all staff and Board members of the District to play a role in improvement efforts. It also requires knowledge of process improvements, or having knowledge about waste and errors in work methods and how to streamline them. This culture suggests the need to question status quo thinking.

- **Initiative One:** Consider a Board assessment process to continuously improve Board governance (long-term: 2015-17).

Mid-year Status Update In April 2016, the Board undertook a self-evaluation process that was facilitated by Peter Murphy of the Illinois Association of Park Districts (IAPD). Mr. Murphy provided the board with several handouts including a compiled listing of board responses to a questionnaire regarding commissioner responsibilities and a recommended reading list geared toward leadership competencies. During the session, the board also undertook an additional questionnaire to gain insight to any areas needing improvement. Thereafter, in May 2016, the

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Board held a follow-up dialog on the self-evaluation, which included a discussion of ways to operate more efficiently and effectively.

In 2017, staff developed an “exit” interview for outgoing Board members to effectively transfer knowledge to current and new members. This questionnaire was utilized for the first time with former Commissioner Pelosi at the end of his term in May 2017. He completed the exit interview, and the results will be shared with the Board before the end of 2017.

- **Initiative Two:** Formalize a process for management of organizational knowledge (Deferred). *This initiative is deferred.*

Objective C: Foster a Culture of Innovation

About this Objective: Innovation requires a work culture that embraces change and is supported by encouraging staff to try new processes and services. Alignment exists between agency systems such as recruitment, hiring, reward and recognition, and performance feedback in support of adopting innovation. Changes in programs and services result from knowledge of industry trends and future customer requirements.

- **Initiative One:** Research industry trends and identify ways of integrating new ideas into programs, facilities, and services (long-term: 2017).

Mid-year Status Update: As part of the planning workshops and meetings for the Vision 2020 process, District employees received an analysis on national, local, and industry trends and demographics and applications for using this data for planning capital projects, programs, facilities, and services. The outcomes of the process and the data collected (e.g., community needs assessment survey, national and local trend analysis, park scorecard assessments, program assessments, etc.) will be utilized to plan for and further the implementation of Vision 2020 Plan priorities and for annual budget, program, and facility planning.

- **Initiative Two:** Establish organizational systems to promote innovation (long-term: 2016-17)

Mid-year Status Update: To address this initiative of establishing organizational systems to promote innovation, staff reviewed and made some modifications to the District’s current full-time performance management system in 2016, including distributing merit pools by Department versus using a District-wide pool and providing additional training to new employees and managers on the system.

To continue to address this initiative in 2017, staff collected extensive full- and part-time and seasonal employee feedback during the Vision 2020 process, including how to strengthen the District’s organizational culture to facilitate innovation. In 2018, staff will utilize this information to make improvements to the District’s recognition and reward system, training program, and other initiatives that will strengthen the District’s organizational culture. Therefore, for the span of this Strategic Plan, this initiative has been completed and will continue to be addressed as part of the Vision 2020 Plan implementation.

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Performance Measures






Performance measurement provides data to complement decision making, improve performance, communicate progress and foster accountability. Using the Strategic Plan Strategy Map (see page 8), District staff develop measures for tracking the impact of implementing the Strategic Objectives and compiled charts on pages 29-37 which illustrate the measures that are or will be tracked and reported semi-annually or annually in the Strategic Plan Progress Report (SPPR).

As staff continues implementation of the 2013-17 Strategic Plan, many of the performance measures are a work in progress and will be further refined as staff determine if and when it is feasible to begin tracking each measure, the frequency each should be tracked (semi-annually or annually) and the availability of historical data for assessing long-term trends. Some of the proposed measures may also change or new ones will be added after the completion of related initiatives.

Since many planning initiatives were still in progress during 2015-16 and the new registration system came online in late 2015, staff did not start tracking or reporting new measures in 2015 related to registration or cost recovery goals, but have begun or will begin to track these new measures in 2016 and 2017. Also in 2016, staff started tracking new registration and financial measures based on best practices in performance reporting and the capabilities of the new registration system. In late 2017 and early 2018, staff will research dashboard software, which will facilitate improved reporting and tracking of Strategic Plan measures and develop metrics based the feedback and performance data collected during the Vision 2020 process.

Performance Reporting

For measures that are tracked on a semi-annual basis (as indicated in the last column of the charts on pages 29-37), staff provide mid-year 2016 and 2017 actual performance data and the year-end performance target in the performance measure outcome tables. Staff developed the symbols below to convey how actual performance compares to the year-end performance target. The parenthesis after each performance category defines the outcome range for that category.

<u>Significantly Above Target</u> (>10%) 	<u>Above Target</u> (0.01% to 10%) 	<u>At Target</u> (0%) 	<u>Below Target</u> (-.01% to -10%) 	<u>Significantly Below Target</u> (<-10%) 
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In the SPPR, staff continues to develop and refine performance targets for measures to provide a snapshot of how actual performance compares to the annual goal. By tracking achievement of performance targets, staff can assess the effectiveness of the current SWP toward achieving District strategy and make adjustments to work plans and the allocation of resources to ensure the future success of the Plan.

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Performance Measures by Theme

Customer Centered Theme		
Performance Measure	Performance Target	Timing of Reporting and Year to Begin Tracking
Program Success Rate	80% or higher	Semi-annually 2013
Total Unique Registrants	8,800	Semi-annually 2016
Percent of Program and Pass Registrants by Age Group	To be determined	Semi-annually 2016
Percent of Unique Resident Households Completing a Transaction	50%	Semi-annually 2016

The Park District serves the community in many ways, many of which can be difficult to track. In 2016, the Park District conducted a Community Needs Assessment survey in which 88% of respondents indicated that they or a member of their household has visited a park in the past year and 45% registered for a program. Also, a majority of respondents (97%) indicated the condition of the parks they have visited was either “excellent” (38%) or “good” (59%). In 2016, staff also surveyed Courts Plus members and Pool Pass members to gather feedback and implement improvements to enhance the customer experience at both those facilities and continues to conduct participant program evaluations. In 2017, staff will assess what measures can be added to this report in 2018 to assess overall customer satisfaction and will continue to track the customer measures in this section, which highlight the District's efforts in reaching members of the community and participation levels.

Program Success Rate

One indicator of the District’s success with matching the “right” array of programs and services to meet customer interest and demand along with marketplace trends is the success rate of programs (total number of courses offered versus the total number of courses that ran).



For the past three years, staff continued to address the outcomes of the 2014-15 program plan process, which optimized program offerings, including divesting in programs that were not viable and pursuing partnership opportunities to invest in programs with a growing market. Examples include reducing the variety of environmental and general interest programs offered that were targeted for divestment and offering fewer fitness classes with more participants per class as a strategy to improve overall cost recovery. The goal of conducting and addressing the outcomes of the program plan was to improve the District’s program portfolio to meet cost recovery goals and improve the success of programs for future financial sustainability.

As illustrated in the chart on the next page, at mid-year 2017, the recreation program average success rate of 90% and enterprise program average success rate of 86% are both above the District’s year-end performance target of 80%. The 2017 mid-year recreation program average

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success rate remains unchanged as compared to the 2016 mid-year success rate, and the Enterprise program average success rate is a slight 2% decrease as compared to the 2016 mid-year success rate.

Recreation success rates have been trending above the 80% mark due to program manager efforts to optimize available facility space as result of intensive collaboration and coordination. As confirmed by the data and feedback collected in the Vision 2020 Plan process, due to the limited availability of program space, it is difficult to offer a wide variety of new/innovative programs. To continue to meet the performance target for enterprise programs, staff will adjust the number days and times programs are offered to match the demand in program areas that experienced lower success rates than 80% (i.e. fitness, kids, and climbing wall programming).

Category	<u>2016 Mid-year Program Success Rate</u>	<u>2017 Mid-year Program Success Rate</u>	<u>Annual Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
Recreation Programs	90%	90%	80% or above	<u>Significantly Above Target</u> <u>(>10%)</u> 12.5% 
Enterprise Programs	88%	86%	80% or above	<u>Above Target</u> <u>(0.01% to 10%)</u> 7.5% 


Data Source: RecTrac Registration Software

Total Unique Registrants

One indicator of the success of program offerings is the total of unique individuals registering in programs. Unique registrants is the total number of individuals registered for at least one recreation or enterprise services program (residents and non-residents). Each individual is counted only once regardless of the number of programs that individual was registered for during the measurement period. Programs from Sugar Creek were not included in this measure along with participation in programs not requiring registration such as community events. Additionally, registration for adult sports leagues counts as one registration per team.

As illustrated on the chart on the next page, at mid-year 2017, the number of unique registrants was 7,162 as compared to 6,744 at mid-year 2016 (a 5.8% increase) and 18.6% below the year-end performance target of 8,800. At year-end 2016, unique registrants totaled 8,597, which was 2.3% below the year-end performance target. This measure is tracked to assess the number of individuals reached by District programs.

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<u>Category</u>	<u>2016 Mid-year Total Unique Registrants</u>	<u>2017 Mid-year Total Unique Registrants</u>	<u>Year-end Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
Total Unique Registrants	6,744	7,162	8,800	Significantly Below Target (<-10%) 18.6% 

Data Source: RecTrac Registration Software

Percent of Program and Pass Registrants by Age Group

One indicator of the District's reach in the community among the youth, adult, and senior populations is the number of unique individual District residents registered for at least one recreation and enterprise services program or that purchased a pass divided by the number of residents in Elmhurst in that age group as indicated by U.S. Census data. This measure does not include Sugar Creek programs and passes or participation in programs which do not require registration such as community events. The chart below illustrates 2016 and 2017 mid-year percent of unique registrants by each age group. At mid-year 2017 as compared to mid-year 2016, the percent of unique registrants by age group had increased from 1% to 26% in each age category except 10-14, which decreased by 2%.

<u>Age Category</u>	<u>2016 Mid-year Percent of Unique Registrants by Age Group^{1,2}</u>	<u>2017 Mid-year Percent of Unique Registrants by Age Group^{1,2}</u>	<u>Year-end Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
0-4	48%	49%	50%	-2% 
5-9	67%	68%	65%	5% 
10-14	52%	51%	50%	2% 
15-19	17%	22%	25%	-12% 
20-34	14%	16%	20%	-20% 
35-49	27%	28%	33%	-15% 
50-64	12%	16%	19%	-16% 
65 & Older	14%	19%	22%	-14% 

¹Total unique participants in age category/total 2010 Elmhurst population in age category

²Removed registrants that had no birthdate (.18% (in 2016) and .15% (in 2017) of total population)

Data Source: RecTrac Registration Software and 2010 United States Census


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Percent of Unique Resident Household Completing a Transaction

Another indicator of the Elmhurst household involvement in District programs and activities is assessing the percent of unique resident households completing a transaction to register for a program, purchase a facility pass or point of sale item, or rent a facility. This measure illustrates the District's reach in the community as it relates to activities and programs which require payment and/or registration.

The measure is calculated by dividing the unique resident household accounts which have completed a transaction processed through the District's RecTrac software by the total number of households in Elmhurst as indicated by census data. Each resident household account is counted only once regardless of the number of individuals in that household or transactions processed for that household during the measurement period. Programs from Sugar Creek were not included in this measure along with participation in programs not requiring registration such as community events. Additionally, registration for adult sports leagues counts as one registration per team.

As illustrated in the chart below, at mid-year 2017, the percent of unique resident households that completed a transaction was 35.3%, which is 5.4% lower than at mid-year 2016 and 29.4% below the year-end performance target. At year-end 2016, the percent of unique resident households completing a transaction was 40.8%, which was 18.4% below the year-end performance target.

<u>Category</u>	<u>2016 Mid-year Percent of Unique Resident Households Completing a Transaction</u>	<u>2017 Mid-year Percent of Unique Resident Households Completing a Transaction</u>	<u>Year-end Performance Target</u>	<u>2017 Year-end Performance Trend</u>
Percent of Unique Resident Households Completing a Transaction	37.2%	35.3%	50.0%	<u>Significantly Below Target</u> <u>(<-10%)</u> 29.4% 

Data Source: RecTrac Registration Software and United States Census

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Fiscal Agility Theme		
Performance Measure	Performance Target	Timing of Reporting and Year to Begin Tracking
Percent of non-tax revenue	60% or higher	Annually 2013
Met Reserve Targets - 1st Tier	Met Board Reserve Policy Targets	Annually 2013
Met Reserve Targets - 2nd Tier	Met Budget Target	Annually 2013
Average dollar of round per golfer	Higher than the previous six-year average	Annually 2013
Capital Assets Condition Ratio	50%	Annually 2015
Debt Service Ratio	20%	Annually 2015
Program Revenue Per Unique Registrant	\$500	Semi-Annually 2016
Fund Balance as a percentage of expenditures	Met Board Fund Balance Policy	Annually 2017
Percent of profit earned-Courts Plus	15%	Annually 2017
Cost Recovery Goals	Met Cost Recovery Goals	Annually 2017

Program Revenue per Unique Registrant

One indicator of the District's success with maintaining or increasing non-tax program revenue is the program revenue per unique registrant. This measure is calculated by dividing total revenue generated from recreation and enterprise services programs by the number of unique registrants (residents and non-residents). Unique registrants is the total number of individuals registered for at least one recreation or enterprise services program. Each individual is counted only once regardless of the number of programs that individual was registered for during the measurement period. Programs and revenue from Sugar Creek were not included in this measure along with participation in programs not requiring registration such as community events. Additionally, registration for adult sports leagues counts as one registration per team.

As illustrated on the chart on the following page, at mid-year 2017, the program revenue earned per unique registrant was \$378 as compared to \$395 at mid-year 2016 (a 4.5% decrease) and 24.4% below the year-end performance target of \$500. At year-end 2016, program revenue per unique registrant was \$492, which was 1.6% below the year-end performance target.

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<u>Category</u>	<u>2016 Mid-year Program Revenue Per Unique Registrant</u>	<u>2017 Mid-year Program Revenue Per Unique Registrant</u>	<u>Year-end Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
Program Revenue Per Unique Registrant	\$395	\$378	\$500	<u>Significantly Below Target</u> (<-10%) 24.4% 

Data Source: RecTrac Registration Software

Improvement through Collaboration and Innovation Theme		
Performance Measure	Performance Target	Timing of Reporting and Year to Begin Tracking
Percent of full-time staff involved in cross-functional teams	75% or higher	Semi-annually 2013
Environmental Report Card Results	80%	Annually 2015
Satisfaction with internal communications and internal services	To be determined	Annually 2017
Borderless Satisfaction Survey	To be determined	Annually 2017

Performance measures for this Theme will continue to be developed as an outcome of the Vision 2020 Plan process. In 2016-17, extensive employee feedback was collected (e.g., Organizational Culture Survey, full- and part-time focus groups/open forums, strategic planning workshops, etc.), which will be utilized to develop new performance metrics. Specifically, the Organizational Culture Survey and focus groups/open forums elicited feedback and ideas on improving internal communications and collaboration. In the Mid-year SPPR, staff continues to report on staff involvement in cross-functional teams.

Percent of Full-time Staff Involved in Cross-functional Teams

As one indicator to assess the level of formal cross-departmental interaction, staff tracks the percentage of employees serving on cross-functional committees and teams. To successfully

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foster a borderless organization, the District’s standard for the effective level of engagement and involvement of District employees is that at least 75% of full-time employees participate on a cross-functional team.

As illustrated in the chart below, at mid-year 2017, 68% (51) of full-time employees were on one of the two ongoing employee committees and/or on a project, policy and/or planning team or task force (55% (41 employees) excluding the Safety and Employee Relations Committees), which is an increase of 2.9% as compared to mid-year 2016 and 9.3% below the year-end performance target. During the second half of 2017, the Management Team will continue to determine if employees who currently do not serve on a committee or cross-functional team could serve, where appropriate, on a current or newly created cross-functional team.

<u>Category</u>	<u>2016 Mid-year Percent of Staff Involved in Cross-functional Teams</u>	<u>2017 Mid-year Percent of Staff Involved in Cross-functional Teams</u>	<u>Year-end Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
Percent of Full-time Staff	66%	68%	75% or higher	Below Target (-.01% to -10%) 9.3% below

Data Source: Abra (HRIS System) and Microsoft Excel Spreadsheet

Continuous Improvement through an Empowered Team Theme		
Performance Measure	Performance Target	Timing of Reporting and Year to Begin Tracking
Percent of full-time employees utilizing continuing education	80% or higher	Semi-annually 2013
Employee satisfaction	To be determined	Annually 2017
Training program satisfaction	To be determined	Annually 2017

Performance measures for this Theme will continue to be developed as part of the Vision 2020 process. In 2016-17, extensive employee feedback was collected (e.g., Organizational Culture Survey, full- and part-time focus groups/open forums, strategic planning workshops, etc.), which will be utilized to develop new performance metrics. Specifically, the Organizational Culture Survey and focus groups/open forums elicited feedback and ideas for improving employee


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satisfaction and continuing education. In the Mid-year SPPR, staff continues to report on the percent of full-time employees utilizing continuing education.

Percent of Full-time Employees Utilizing Continuing Education

To provide staff with the tools and knowledge to perform their job successfully and expose them to innovative ideas and industry trends, the District encourages full-time staff at every level in the organization to participate in external training (the annual performance target is at least 80% of full-time employees).

As illustrated in the chart below, 92% of full-time employees (68 out of 74) participated in continuing education opportunities by attending or viewing at least one seminar/webinar training during the first half of 2017 provided by an outside organization/individual and submitting required documentation to the Human Resources Division. This percentage is significantly higher than the 2016 mid-year percentage of 51% (39 employees out of 77 utilized this benefit) and 15.0% above the year-end performance target. The increase of 44.6% as compared to 2016 is mainly due to the Vision 2020 process Full-time Staff Workshop and Work Group Workshops presented and facilitated by The Lakota Group and PROS Consulting along with GovHR's review of the District's Compensation Study at a Full-time All-staff meeting.

<u>Category</u>	<u>2016 Mid-year Percent of Staff Utilizing Continuing Education</u>	<u>2017 Mid-year Percent of Staff Utilizing Continuing Education</u>	<u>Year-end Performance Target</u>	<u>2017 Mid-year Performance Trend</u>
Full-time Staff	51%	92%	80% or higher	<u>Significantly Above Target</u> <u>(>10%)</u> 15.0% 

Data Source: Abra (HRIS System)

Definition of Key Terms

Definition of Key Terms

The following list of key words describes the definition of the terminology used for the Strategic Plan.

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

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

Values—describe the way the District operates. Values are meaningful expressions of describing what is important in the way we treat our employees and our guests and relates to the internal culture of the organization.

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

Major Focus Areas—as part of the planning workshop, staff members were asked to brainstorm ideas about areas of major focus the Department should concentrate on during the next five years. While the focus areas are not part of the strategy map, they do become an important part of strategy formulation. Within the list of objectives and initiatives, references are made throughout the Plan to ensure focus on the five most critical areas.

Performance Measures—a standard used to evaluate and communicate performance against expected results. Measures are normally quantitative indicators and capture numbers, dollars, percentages, etc. Measures assist the staff with the ability to determine organizational performance.

Performance Target—what the District is trying to achieve to measure accomplishment of the Strategic Objective

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

Strategic Objectives—concise statements describing the specific elements an organization must perform to execute its strategy.

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

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Tactics—are subordinate to the initiatives and detail the steps necessary to complete an initiative. Staff members will identify the tactics for the initiatives before the start of each fiscal year.

Variance—difference between the expected result and the actual result.

Attachment A
2017 Strategic Work Plan

2017 Strategic Work Plan

CUSTOMER THEME: CUSTOMER CENTERED			
OBJECTIVE A: NURTURE COMMUNITY CONNECTIONS			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Create process for reviewing existing and potential partnerships according to established criteria (Deferred)			
Initiative Two: Develop, nurture and evaluate existing affiliate and partnerships (Completed)			
Initiative Three: Develop and identify new opportunities based on Strategic Plan, Program Plan and facility needs (Mid- and long-term)			
Tactic c. Identify new local partnerships for athletic field/facility usage as part of the Indoor Sports Facility Study	2016-17	In Progress	Administration
OBJECTIVE B: IMPROVE CUSTOMER EXPERIENCE			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Create a cross-departmental team to analyze and develop a customer service plan, including a training and measurement plan (Short- and long-term)			
Tactic d. Research and evaluate options and related software to gather, track, and report customer feedback	2017		Marketing & Comm/IT
Initiative Two: Enhance and develop technological solutions to communicate with customers to provide greater access and communication (Completed)			
OBJECTIVE C: OPTIMIZE PROGRAM AND FACILITY MIX			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Develop a District Program Plan (Completed)			
Initiative Two: Develop a process to best position core services in the marketplace (Completed)			
Initiative Three: Create a process for review of the external market to determine duplication, opportunities, needs, pricings, etc. (Completed)			
Initiative Four: Optimize Current and Future Facility Space (Continuous)			
Tactic a. Assess/review facility usage needs based on program and core service plans, Indoor Facility Study and Long-range Capital Plan	2014-17	In Progress	Facility & Rec Departments
Tactic d. Update Comprehensive Plan, including gathering feedback from community (e.g. public meetings, survey)	2016-17	In Progress	Administration

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**

2017 Strategic Work Plan

FINANCIAL THEME: FISCAL AGILITY			
OBJECTIVE A: ALIGN RESOURCES WITH COMMUNITY NEED			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Improve the capital project review and development process (Completed)			
Initiative Two: Develop a consistent approach to the pricing of services (Mid-term)			
Tactic c. Review and update revenue/expense policies	2015-17	In Progress	Administration
Initiative Three: Ensure transparency by communicating ethics and values to community and internally (Completed)			
OBJECTIVE B: TAKE CARE OF WHAT WE HAVE			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Based on the priorities outlined in District planning documents, maintain the District's infrastructure to continue to support high quality offerings (Continuous)			
Tactic a. Based upon the District's long-range financial plan, develop a comprehensive funding plan for financing the highest/high priority projects in the Capital Plan	2013-17	In Progress	Administration
Tactic b. Implement the highest/high priority projects in the Capital Plan	2013-17	In Progress	Administration
Initiative Two: Create a comprehensive asset management plan that is linked to Capital Plan (Deferred)			
OBJECTIVE C: INVEST IN THE FUTURE			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Seek opportunities that will positively impact the District's finances (Continuous)			
Tactic b. Explore new or expand programs and facilities/amenities to improve and maintain cost recovery goals	2014-17	In Progress	P&F, ENT, REC
Tactic c. Continue to seek outside financial support	2014-17	In Progress	Administration, M&C
Tactic d. Evaluate and improve retention strategies and programs	2015-17	In Progress	P&F, ENT, REC, SC, M&C
Initiative Two: Develop, implement and track cost recovery goals (Mid- and long-term)			
Tactic b. Enhance internal cost accounting practices for cost recovery tracking and reporting	2016-17	In Progress	Finance & HR
Tactic c. Track cost recovery goals	2017		P&F, ENT, REC, SC

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**

2017 Strategic Work Plan

INTERNAL BUSINESS THEME: IMPROVEMENT THROUGH COLLABORATION AND INNOVATION			
OBJECTIVE A: CREATE A BORDERLESS ORGANIZATION			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Conduct methods to gather internal customer feedback and improve internal business performance (Deferred)			
Initiative Two: Evaluate and implement opportunities for employees to collaborate (Continuous)			
Tactic a. Implement cross-functional teams that address Strategic Plan initiatives	2013-17	In Progress	Administration
Tactic b. Create cross-functional teams that involve all levels of the organization	2015-17	In Progress	Administration
Initiative Three: Evaluate and enhance communication among District employees (Completed)			
OBJECTIVE B: EXCELLENCE IN INNOVATIVE OPERATIONAL MANAGEMENT			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Complete a work analysis/staffing review to determine the best allocation of labor dollars (Mid- and long-term)			
Tactic d. Assess the feasibility of and implement recommendations	2015-17	In Progress	Finance & HR
Tactic e. Conduct compensation study and determine next steps	2016-17	In Progress	Finance & HR
Initiative Two: Develop a dashboard of key indicators to assess and improve organizational performance (Long-term)			
Tactic a. Develop indicators and determine performance targets	2015-17	In Progress	Administration
Tactic b. Begin tracking and reporting outcomes and next steps if targets are not met	2015-17	In Progress	Administration
Tactic c. Research and implement technology that will support tracking and reporting indicators on dashboard software	2017		Administration/IT
Initiative Three: Institutionalize sustainable internal operations (Continuous)			
Tactic c. Create action plan for addressing deficient areas of IPRA Environmental Report Card	2015-17	In Progress	Green Team
Initiative Four: Utilize and improve technology for efficiency and reporting (Continuous)			
Tactic a. Implement Strategic Technology Plan priorities	2014-17	In Progress	IT

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**

2017 Strategic Work Plan

LEARNING AND GROWTH THEME: CONTINUOUS IMPROVEMENT THROUGH AN EMPOWERED TEAM			
OBJECTIVE A: DEVELOP AN EMPOWERED STAFF			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Strengthen District training to facilitate the empowerment of staff (Completed)			
Initiative Two: Develop leaders (Long-term)			
Tactic c. Test effectiveness and provide support to new leaders	2016-17	In Progress	Administration
OBJECTIVE B: CREATE A CULTURE OF CONTINUOUS IMPROVEMENT			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Consider a Board assessment process to continuously improve Board governance (Long-term)			
Tactic d. Transfer knowledge between outgoing and incoming Board members	2017	In Progress	Administration
Initiative Two: Formalize a process for management of organizational knowledge (Deferred)			
OBJECTIVE C: FOSTER A CULTURE OF INNOVATION			
Initiatives and Tactics	Timeline	Status	Lead Dept.
Initiative One: Research industry trends and identify ways of integrating new ideas into programs, facilities and services (Long-term)			
Tactic a. Conduct bi-annual service/program/facility analysis trainings specifically designed to discuss the macro operating environment, including social and demographic, technological, economic and political trends	2017	In Progress	Administration
Tactic b. Integrate trend analysis review into the budget, capital, work plan development and program/service analysis processes	2017		Administration
Initiative Two: Establish organizational systems to promote innovation (Completed)			

Status Color Highlight Key - Completed in **Yellow**; In Progress in **Green**; Future Year in **Blue**; Deferred to Future Strategic Plan in **Purple**