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**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**

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**DATE:** April 10, 2023

**TO:** Board of Park Commissioners

**FROM:** James W. Rogers, Executive Director  
Laura Guttman, Director of Strategy & Planning  
Lynsey Heathcote, Strategy & Planning Coordinator

**RE: 2022 YEAR-END VISION 2020 PROGRESS REPORT**

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**ISSUE**

The 2022 Year-End Vision 2020 Progress Report provides a status report on implementation of the fifth year of the Vision 2020 Plan (from January 1 to December 31, 2022). The distribution and review of this report is in accordance with Board policies.

**DISCUSSION**

To remain dynamic and responsive to changing needs, a successful long-range 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 action is taken and measurable results are achieved as anticipated.

The Vision 2020 Progress Report is compiled and submitted to the Board bi-annually at mid-year and year-end as an evaluation of achievement of long-term strategy for decision-making, resource allocation, and work plan development. The 2022 Year-End Vision 2020 Progress Report reflects and monitors the 2022 Strategic Work Plan (SWP) goals and tactics (approved by the Board on December 13, 2021 and last revised on September 12, 2022) and performance measures which track achievement of the Vision 2020 Themes.

***Overview of Third Year Plan Outcomes***

***SWP Tactic Implementation:*** The attached Progress Report highlights the work completed during 2022 to address the sixteen (16) 2022 SWP tactics. It includes a summary chart on page 7 illustrating progress on tactic implementation, including:

- 9 tactics (56% of total) were achieved;
- 5 tactics (31% of total) on track or just started; and
- 2 tactics (13% of total) were delayed/deferred to a future year.

By remaining focused on accomplishing 2022 tactics, District staff continue to address the Plan's six strategic themes for parks, facilities, programming, communications, finance, and internal operations. Having recovered from the significant financial and operational impacts of the pandemic, the Board and staff continue to transition into a post-pandemic future to strategically position the District to complete large-scale high priority park and facility projects with dedicated

revenue sources, facilitate future financial sustainability, invest in core services, and maintain a healthy organizational culture.

The Board and staff will consider new strategies in 2023 that are financially sustainable to address large-scale project priorities and current and future needs. As part of the process, the District will gather community feedback to ensure the next comprehensive and strategic plan reflects the community's vision for parks and recreation in Elmhurst. Gathering this feedback in 2023 will address a 2022 tactic deferred to 2023: *Conduct community engagement to update long-range plans.*

*Performance Measure Outcomes:* The Year-End Progress Report also includes reporting of forty (40) performance outcomes for thirteen (13) measures (how actual performance compares to the year-end performance target). Page 8 of the Progress Report includes a summary chart illustrating 2022 performance outcomes (with a key defining each target category) including:

- 26 performance outcomes (65% of total) were significantly above (21) or above (5) performance targets (as compared to 61% in 2021); and
- 14 performance outcomes (35% of total) were below (1) or significantly below (13) performance targets (as compared to 39% in 2021).

Despite fourteen (14) outcomes being below performance targets, outcomes are primarily trending upward in 2022 as compared to 2021 due to restarting and expanding programs and services after pandemic related restrictions were lifted mid-year 2022 (Percent of Non-Tax Revenue, Total Unique Registrants, Percent of Unique Resident Households that Completed a Transaction, and Percent of Program and Pass Registrants by Age Group (0-4, 15-19, 20-34, 35-49, 50-64, 65+)). The Capital Asset Condition Ratio is also likely to trend upward in 2023 as the District continues to invest in its assets based on available funding.

To effectively monitor future District strategy and performance, staff will assess all measures and their performance targets in 2023 to determine which should be tracked in future years based on new strategic priorities (along with new measures) and if performance targets need adjustment.

During the April 10, 2023 Board meeting, staff will answer Commissioners' questions about the 2022 Year-End Progress Report. After Board approval, the Report will be available on the District's website for public review.

### **RECOMMENDATION**

That the Board of Park Commissioners review and approve the attached 2022 Year-End Vision 2020 Plan Progress Report.

Thank you.

Attachment: 2022 Year-End Vision 2020 Progress Report

# ELMHURST PARK DISTRICT

# Vision 2020

*Focus on the Future*



**2022 Year-End Progress Report**  
**January 1 to December 31**

April 10, 2022

Board of Park Commissioners  
Elmhurst Park District  
Elmhurst, Illinois

Honorable Commissioners:

I am pleased to present the fifth Elmhurst Park District Vision 2020 Plan Year-end Progress Report. This report is staff's method of demonstrating accountability with how we are taking action and achieving results to effectively implement the Vision 2020 Plan. Our goal is to provide the Board and community a clear and comprehensive report that monitors long-term strategy to ensure the Vision 2020 Plan remains a useful and relevant tool for future planning.

The Report is compiled and submitted to the Board bi-annually at mid-year and year-end and is available on the District's website after Board approval. It includes status reports on the implementation of 2022 Strategic Work Plan (SWP) tactics and performance measure outcomes.

By remaining focused on accomplishing 2022 tactics, District staff continue to address the Plan's six strategic themes for parks, facilities, programming, communications, finance, and internal operations. Having recovered from the significant financial and operational impacts of the pandemic, we continue to transition into a post-pandemic future to strategically position the District to complete large-scale high priority park and facility projects with dedicated revenue sources, facilitate future financial sustainability, invest in core services, and maintain a healthy organizational culture.

Despite 2020 being the last year of the three-year strategic plan cycle, the Board and staff continued to postpone the comprehensive update of long-range priorities due to the continuing restrictions and financial and operational impacts of the pandemic. On July 11, 2022, the Board provided consensus on Vision 2020 Plan large-scale project planning for 2023-25 to address some of the unmet needs in the Plan, including moving forward with dog park planning, Pick Park development, and improving park and facility maintenance. This forward-thinking decision helped shape capital and work planning. In September 2022, the Board added an additional SWP tactic of developing a Pick Park master plan and applying for a grant to partially fund park construction.

On October 24, 2022, the Board provided consensus for the District to reassess and update long-term comprehensive and strategic plan priorities in 2023. Based on community and employee feedback, the Board and staff will assess critical issues for parks, facilities, programming/services, communications, finance, and internal operations. These critical issues will steer the creation of new strategic priorities to successfully implement long-range strategy in the future.

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

Thank you,



James W. Rogers  
Executive Director



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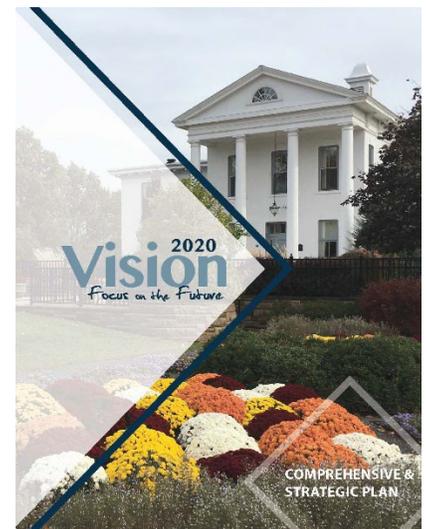
# Introduction

In 2016-17, the Board of Park Commissioners and staff updated the District's Comprehensive and Strategic Plans using a process that included the following:

- gathering community and staff feedback as well as assessments of parks, facilities, and programs;
- analyzing the current and future state of the District;
- forming the community's future vision of park and recreation services; and
- developing an action plan to implement that vision.

By basing each Plan on community feedback and defining priorities, the Board prepares for future community desires and needs along with clarifying organizational direction for focused decision making. Since the inception of the District's first Comprehensive Plan and Strategic Plan, the Board and staff have implemented projects, programs, and initiatives based upon the priorities articulated during the planning process.

While a Comprehensive Plan and a Strategic Plan are unique in their purpose and scope, they have interrelated goals and development processes. Therefore, the Board and staff combined them into a single guiding document named the Vision 2020 Plan. The Plan incorporates broad themes and specific goals and tactics for comprehensive planning (e.g., physical asset and program improvements) and strategic planning (e.g., internal operations, communication, and financial improvements). These themes, goals, and tactics are articulated in the Vision 2020 Strategic Work Plan (SWP).



This Vision 2020 Progress Report provides a snapshot of the District's year-end progress towards accomplishing the SWP tactics and achievement of performance measure targets tracked at year-end. The Year-End Report along with the Mid-Year Vision 2020 Progress Report assist the Board and staff with a continued evaluation of achievement of long-term strategy for decision-making, resource allocation, and work plan development.

The Progress Report begins with an overview of the District's strategic framework (i.e., mission, vision, organizational values, strategic themes, and goals), SWP, and performance measures. The main body of the report includes an implementation progress summary of SWP tactics and performance measure outcomes overall and for each Vision 2020 Theme. At the end of the report, the Appendices include a list of key terms with their definitions to provide clarity to Vision 2020 terminology and the detailed 2022 Strategic Work Plan (approved by the Board on December 13, 2021 and last revised by the Board on September 12, 2022).

Some performance outcomes for the prior year (2021) were adjusted as needed to enhance the accuracy of how data is currently reported and/or to reflect audited financial data, and therefore, may be different than in the 2021 Year-End Progress Report.

# Vision 2020 Plan Overview

## District Strategic Framework

As part of the Vision 2020 Plan Process, the Board and staff reviewed and updated the District's existing **mission** and **vision** statements and established District **values** to serve as the guiding philosophy for the creation of District strategy. Then, staff participated in collaborative workshops to identify organizational strengths, weaknesses, opportunities, and threats as well as brainstormed key priorities for the next three to five years. These key priorities provided the framework for developing **strategic themes** (broad macro-oriented statements of organizational direction).

Staff then developed three to five-year **goals** (broad statements describing what the District must achieve to execute strategy) and one to two-year **tactics** (programs, activities, projects, etc.) to outline the specific actions needed to address the strategic themes. The themes, goals, and tactics reflect Vision 2020 Plan key priorities and are highlighted on the following page and in Appendix B.



## Strategic Work Plan (SWP) and Performance Measures

After Board approval of the Vision 2020 Plan in July 2017, staff developed the District's SWP based on the Plan's five-year strategy action matrix. Updated by staff and approved by the Board annually, the SWP is an action plan that outlines the specific goals and tactics to implement District strategy and drive budget priorities. The SWP format includes an overview of the District's mission, vision, values, themes, and goals as well as the detailed action plan for each tactic (i.e., goals/values addressed, cost range, timeframe, lead/staff involved, and implementation goal).

Along with reporting the implementation progress of tactics, staff track Vision 2020 Plan needs assessment metrics and other performance measures that link to monitoring Vision 2020 strategy. Staff continue to evaluate the performance targets for these measures to provide a snapshot of how actual performance compares to the annual goal. By monitoring these measures and SWP tactics, the Board and staff assess the effectiveness of the SWP towards achieving District strategy and make adjustments to work plans and allocation of resources (e.g., budget, staffing, etc.) to ensure the future success of the Plan.

# Vision 2020 Strategy

**MISSION**  
**We enrich lives while having fun!**

**VISION 2020**  
*Focus on the Future*

**VISION**  
 To be a national leader in providing memorable parks and recreation experiences to our community

**VALUE**  
*Integrity*  
 We will always do the right thing and we will do it the right way

**VALUE**  
*Customer Service Excellence*  
 We will exceed customer expectations and present the "wow" moment

**VALUE**  
*Fun*  
 We will inject fun and passion in what we do everyday

**VALUE**  
*Community Focused*  
 At the end of the day, it's all about the community we serve

## THEMES



**PARKS**

Meet community needs for parks, open space, and outdoor amenities.

**FACILITIES**

Meet community needs for new and existing indoor recreation space.

**PROGRAMMING**

Innovative programming to meet community needs.



**INTERNAL OPERATIONS**

Strengthen organizational culture.

**COMMUNICATIONS**

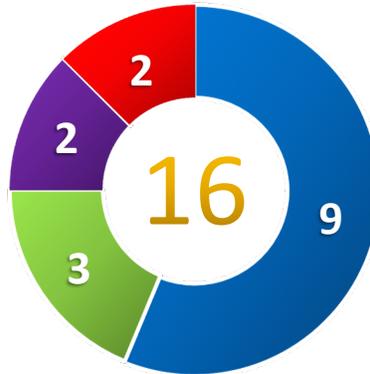
Exceptional and consistent guest experience.

**FINANCE**

Sustainable revenue strategies and funding options.

# Progress Report Executive Summary

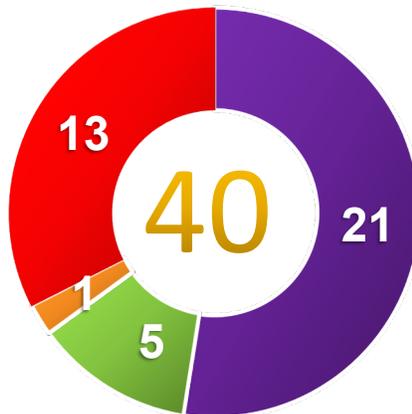
## STRATEGIC WORK PLAN TACTICS 2022 YEAR-END PROGRESS



Achieved <b>9</b>	Nearly Achieved/ On Track <b>3</b>	Just Started <b>2</b>	Not Started <b>0</b>	Delayed/ Deferred <b>2</b>
<ul style="list-style-type: none"> <li>• Complete Glos Park site improvements</li> <li>• Complete construction of neighborhood park at Centennial Park</li> <li>• Redevelop Eldridge Park East play area and pathways</li> <li>• Complete master plan for Pick Park and apply for Open Space Lands Acquisition &amp; Development (OSLAD) Grant</li> <li>• Complete Adult Center renovation</li> <li>• Implement Centennial Recreation Center (CRC) facility and operations plan</li> <li>• Review and determine future investment towards services suspended since the pandemic began</li> <li>• Improve capital and asset management planning</li> <li>• Evaluate and implement actions to become a more diverse, equitable, and inclusive organization</li> </ul>	<ul style="list-style-type: none"> <li>• Restore Sugar Creek Golf Course creek</li> <li>• Invest in services identified as financially sustainable and meeting community needs</li> <li>• Review, determine, and begin implementing optimal organizational structure</li> </ul>	<ul style="list-style-type: none"> <li>• To facilitate becoming a more diverse, equitable, and inclusive organization, build relationships, gather feedback, and collaborate with the community</li> <li>• Communicate the District's financial condition and future outlook and the resulting impact on the ability to address community priorities</li> </ul>		<ul style="list-style-type: none"> <li>• Conduct community engagement to update long-range plans</li> <li>• Conduct organizational culture survey</li> </ul>

# Progress Report Executive Summary

## PERFORMANCE MEASURE SUMMARY 2022 YEAR-END OUTCOMES



### Significantly Above Target (>10%)

Success Rates (Courts Plus Programs), Met Reserve Targets (Tier 1 & 2 – General, Recreation, IMRF, FICA, Liability, Audit, Special Recreation & Museum), Debt Service Ratios, and Fund Balance as a percentage of Expenditures

**21**

### Above Target (0.01% to 10%)

Success Rates (Recreation Programs), Percent of Program and Pass Registrants by Age Group (5-9, 10-14), Customer Satisfaction Rating, and Program Revenue per Unique Registrant

**5**

### At Target (0%)

**0**

### Below Target (-0.01% to -10%)

Percent of Non-Tax Revenue

**1**

### Significantly Below Target (<-10%)

Capital Assets Condition Ratio, Total Unique Registrants, Percent of Unique Resident Households that Completed a Transaction, Percent of Program and Pass Registrants by Age Group (0-4, 15-19, 20-34, 35-49, 50-64, 65+), Net Promoter Score, and Met Reserve Targets (Tier 1 & 2 – Sugar Creek Golf Course)

**13**

### Performance Outcomes to Be Tracked in Future Progress Reports

Park Assessments, Park Level of Service Standards, Park Use, Facility Assessments, Facility Level of Service Standards, Facility Usage, Program Life Cycle Distribution, Cost Recovery Goals, and Organizational Culture Survey

**9**

As provided in the assessment of individual performance measures throughout the report, the symbols below convey visually how actual performance compares to the year-end performance target based on the quantitative ranges for each performance target category (e.g., Above Target (0.01% to 10%)).

Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
↑	↑	↔	↓	↓	N/A

# Theme Progress Reports

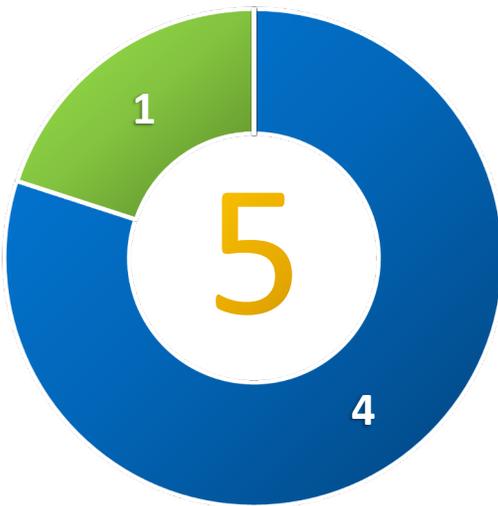
## PARKS

Meet community need for parks, open space and outdoor amenities



<b>GOALS</b>	PA1: Maintain and update existing parks, open spaces, and amenities
	PA2: Address open space and amenity deficiencies and equitability
	PA3: Provide new recreational opportunities to respond to community needs

### TACTIC PROGRESS SUMMARY



<b>Achieved</b>	<b>4</b>	<ul style="list-style-type: none"> <li>Complete Glos Park site improvements</li> <li>Complete construction of neighborhood park at Centennial Park</li> <li>Redevelop Eldridge Park East play area and pathways</li> <li>Complete master plan for Pick Park and apply for Open Space Lands Acquisition &amp; Development (OSLAD) Grant</li> </ul>
<b>Nearly Achieved/On Track</b>	<b>1</b>	<ul style="list-style-type: none"> <li>Restore Sugar Creek Golf Course creek</li> </ul>
<b>Just Started</b>	<b>0</b>	
<b>Not Started</b>	<b>0</b>	
<b>Delayed/Deferred</b>	<b>0</b>	

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Complete Glos Park site improvements	PA1 PA2 PA3	●	<ul style="list-style-type: none"> <li>• Based on community input, create a unified master plan to connect the 135 Palmer Drive site to Glos Park</li> <li>• Demolish 135 Palmer Drive building and develop site, adding additional park open space</li> </ul>	<ul style="list-style-type: none"> <li>• Board approved hiring of Upland Design for landscape architect/engineering services to develop park expansion master plan (3/2021)</li> <li>• Board authorized Midwest Environmental Consulting Services, Inc. to provide environmental services (for the Palmer Drive building), including abating all hazardous materials and overseeing the removal of an underground storage tank (4/2021)</li> <li>• Held open house to gather community feedback on three (3) expansion concepts and potential new park amenities (46 participants) (5/2021)</li> <li>• Following the open house, conducted online survey to gather additional input on concept plans and potential new amenities (605 respondents) (5/2021)</li> <li>• Gathered feedback on proposed master plan at a second open house (26 participants) (6/2021)</li> <li>• Board reviewed and approved master plan (6/2021)</li> <li>• Midwest Environmental Consulting Services, Inc. completed Palmer Drive building abatement with final air testing (Summer 2021)</li> <li>• R W Collins Company removed a 6,000-gallon heating tank from 135 Palmer Drive property, transported it off site, and disposed its tank product along with contaminated soils (Summer 2021)</li> <li>• Board approved contract for Fowler Enterprises, LLC to provide building demolition services (6/2021)</li> <li>• Fowler Enterprises, LLC demolished building, removed adjacent parking lot, and backfilled and graded site (Summer/Fall 2021)</li> </ul> <p style="text-align: right;"><i>Continued Next Page</i></p>	<ul style="list-style-type: none"> <li>• Remove and replace a District asset that has reached the end of its useful life</li> <li>• Provide additional park open space and new amenities</li> <li>• Protect and preserve open space from impacts of urban development</li> <li>• Hold ribbon cutting event to celebrate completion of project with neighborhood</li> </ul>

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>Upland Design’s surveyor completed topographic survey to develop construction drawings based on master plan and site elevations (Fall 2021)</li> <li>Purchased new park pergola early due to projected price increases from steel pricing volatility (11/2021)</li> <li>Completed project bid process and Board awarded expansion project construction services to Hacienda Landscaping, Inc. (Winter 2022)</li> <li>Hacienda Landscaping, Inc. completed site excavation to start construction (Spring 2022)</li> <li>Hacienda Landscaping, Inc. installed site furnishings and amenities and completed landscaping and final restoration (Spring 2022)</li> <li>Held grand opening event on July 16, 2022 (7/2022)</li> </ul>	



**Glos Park Expansion**

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Complete construction of neighborhood park at Centennial Park</p>	<p>PA1 PA2 PA3</p>	<p style="text-align: center;">●</p>	<ul style="list-style-type: none"> <li>• Create neighborhood park master plan based on community input</li> <li>• Complete construction in conjunction with Adult Center redevelopment</li> </ul>	<ul style="list-style-type: none"> <li>• Board approved contract to purchase property at 155 E. St. Charles Road for potential new adult center and park (in a neighborhood identified as deficient in park space) and completed purchase of property (8 &amp; 9/2019)</li> <li>• Board dedicated Centennial Park, the first new park in more than three decades (7/2020)</li> <li>• Board approved hiring of Upland Design for landscape architect/engineering services to develop park master plan (3/2021)</li> <li>• Held open house to gather feedback to shape park plan concepts (52 participants) (4/2021)</li> <li>• Based on first open house feedback, Upland Design developed two (2) park concept plans and gathered additional feedback at a second open house (15 participants) and via an online survey (683 respondents) (5/2021)</li> <li>• Based on the second community open house and survey feedback, Upland Design developed draft master plan (5/2021)</li> <li>• Board reviewed and approved draft master plan (6/2021)</li> <li>• Purchased and received playground equipment and park shelter early due to anticipated price increases and to avoid supply chain back-ups (7 &amp; 12/2021)</li> <li>• Upland Design completed project engineering and design (Summer 2021)</li> <li>• Completed project bid process (Fall 2021) and Board awarded project to E. Hoffman, Inc. (10/2021)</li> </ul> <p style="text-align: right;"><i>Continued Next Page</i></p>	<ul style="list-style-type: none"> <li>• Provide equity across the community regarding park access in neighborhoods where homes are not walking distance from a park</li> <li>• Expand park offerings and level of services provided to community</li> <li>• Protect and preserve open space from impacts of urban development</li> <li>• Hold ribbon cutting event to celebrate completion of project with neighborhood</li> </ul>

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>Completed City of Elmhurst's Planned Unit Development Process for Adult Center/Centennial Park site, including presenting the concept plan to the City's Development, Planning and Zoning Committee and Zoning and Planning Commission and holding a public meeting at the site (Fall 2021)</li> <li>Elmhurst City Council approved Planned Unit Development application, including an Ordinance granting a Conditional Use permit (Fall 2021)</li> <li>E. Hoffman, Inc. completed site excavation and construction (Spring 2022)</li> <li>Held grand opening event on June 18, 2022 (6/2022)</li> </ul>	



**New Centennial Park**

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Redevelop Eldridge Park East play area and pathways</p>	<p>PA1</p>	<p style="text-align: center;">●</p>	<ul style="list-style-type: none"> <li>• Replace playground equipment that has reached the end of its useful life</li> <li>• Replace sand play area and woodchips with a unitary surface</li> <li>• Expand and refurbish pathways in compliance with Americans with Disabilities Act (ADA)</li> <li>• Add an ADA accessible parking stall</li> </ul>	<ul style="list-style-type: none"> <li>• To gather feedback on play area redevelopment, conducted in-person surveys at Eldridge Park and during a Party in the Park (approximately 60 people attended) (Spring/Summer 2019)</li> <li>• Conducted online survey to collect community input on initial playground concepts (Fall 2019)</li> <li>• Board approved playground concept with many features the community requested, including more climbing equipment, swings, seating, and shade structures (Winter 2020)</li> <li>• Postponed project due to pandemic-related financial constraints and approved project funding in 2022 Budget (2020/2021)</li> <li>• Purchased playground equipment and site furnishings early to avoid supply chain delays and volatile pricing (Winter 2022)</li> <li>• Completed project bid process (Winter 2022) and Board awarded project to Hacienda Landscaping, Inc. (Spring 2022)</li> <li>• Kids Around the World, a non-profit organization, removed existing playground equipment to refurbish and reinstall it in a developing country (Spring 2022)</li> <li>• Completed construction, including removing footing, excavation, and installation of playground equipment (Summer 2022)</li> <li>• Held ribbon cutting on August 24, 2022 (8/2022)</li> </ul>	<ul style="list-style-type: none"> <li>• Donate old playground structures to Kids Around the World, a nonprofit organization that repurposes playgrounds and rebuilds them in developing countries</li> <li>• Increase ADA accessibility of the Eldridge Park East Play Area</li> <li>• Hold ribbon cutting event to celebrate completion of project with neighborhood</li> </ul>

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Restore Sugar Creek Golf Course creek	PA1		<ul style="list-style-type: none"> <li>• Research and apply for available grants to support the project and offset costs</li> <li>• Retain professional services to evaluate creek conditions and create an environmentally sound stream stabilization, pond improvements, and riparian corridor enhancements plan</li> <li>• Implement plan to address streambank erosion, loss of property, sediment accumulation, water quality degradation, and irrigation pond deterioration</li> </ul>	<ul style="list-style-type: none"> <li>• Board approved project to restore eroding creek (9/2018)</li> <li>• Worked with Living Waters Consultants, Inc. on grant submittals, final engineering, and permit applications (Fall 2018)</li> <li>• Received \$47,000 grant through the National Fish and Wildlife Foundation Five Star and Urban Waters Restoration Program (Fall 2019)</li> <li>• Living Waters Consultants, Inc., completed final engineering plans (Spring 2020)</li> <li>• Notified by DuPage County that \$60,000 of grant funding was approved through the Water Quality Improvement Program (3/2021)</li> <li>• Notified by the Illinois Environmental Protection Agency (IEPA) that grant funding was approved for approximately 50% of the restoration project cost (9/2021)</li> <li>• Entered into an agreement with Living Waters Consultants, Inc. to perform bidding, construction observation, and grant administration services (Winter 2022)</li> <li>• Board approved Agreement between DuPage County, Village of Villa Park, and District outlining each agencies' responsibilities and funding and cost obligations (Winter 2022)</li> <li>• Completed project bid process (Spring 2022) and Board awarded project to Semper Fi Land, Inc. (6/2022)</li> <li>• Started construction in early October with projected completion date of Spring 2023 (Fall 2022)</li> <li>• Groundbreaking ceremony held at the Golf Course on November 5, 2022 (11/2022)</li> </ul>	<ul style="list-style-type: none"> <li>• Avoid additional costs for irrigation upon failure of current system and need to change or possibly close up to five golf holes due to unsafe shorelines</li> <li>• Ensure continued benefits of the creek and golf course, including open space, recreational opportunities, aquatic habitat, flood storage, and runoff conveyance</li> </ul>

## PARKS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Complete master plan for Pick Park and apply for Open Space Lands Acquisition &amp; Development (OSLAD) Grant</p>	<p>PA1 PA2 PA3</p>	<p style="text-align: center;">●</p>	<ul style="list-style-type: none"> <li>• Create neighborhood park master plan based on community input</li> <li>• Apply for OSLAD grant to partially fund park development</li> </ul>	<ul style="list-style-type: none"> <li>• Pick Subdivision Park District consolidated with the Elmhurst Park District (2015)</li> <li>• Acquired ownership of a 0.11-acre parcel of property at 151 Monterey Avenue (Fall 2021) and the Board and Elmhurst City Council each approved an Ordinance transferring ownership of three 0.30 acre parcels previously owned by the City of Elmhurst to the Park District (Fall 2022), resulting in four combined parcels totaling 1.01 acres</li> <li>• Board approved hiring of Upland Design to provide master plan development and public engagement services (7/2022)</li> <li>• Held open house at Monterey properties to gather feedback on park development (49 participants) (8/2022)</li> <li>• Board officially named the Monterey properties Pick Park (after the original owner of the land, Albert Pick) (9/2022)</li> <li>• Based on the first open house feedback, Upland Design developed two (2) concept plans and gathered additional feedback at a second open house to garner input on the two options (41 attendees, 58 returned surveys) (9/2022)</li> <li>• Based on the second community open house and survey feedback, Upland Design developed a draft master plan (9/2022)</li> <li>• Board reviewed and approved draft master plan (9/2022)</li> <li>• District applied for an OSLAD grant for \$340,300 to fund half of development cost (\$680,600 total) (9/2022)</li> </ul>	<ul style="list-style-type: none"> <li>• Provide equity across the community regarding park access in neighborhoods where homes are not within walking distance from a park</li> <li>• Expand park offerings and level of services provided to community</li> <li>• Protect and preserve open space from impacts of urban development</li> </ul>

# PARKS PERFORMANCE MEASURE SUMMARY



Significantly Above Target (>10%)	0
Above Target (0.01% to 10%)	0
At Target (0%)	0
Below Target (-0.01% to -10%)	0
Significantly Below Target (<-10%)	2
Performance Outcomes TBD & Tracked in Future Report Park Assessments, Level of Service Standards, and Park Use	3

Performance Measure	Timing of Reporting and Year to Begin Tracking	Category	2021 Year-End Result	2022 Year-End Result <sup>1</sup>	Year-End Performance Target	2022 Year-End Performance Outcome
Park Assessments	Annually 2023	N/A	N/A	N/A	TBD	N/A
Level of Service Standards	Annually 2023	N/A	N/A	N/A	TBD	N/A
Park Use	Future	N/A	N/A	N/A	TBD	N/A
Capital Assets Condition Ratio	Annually 2015	Governmental Funds	43.2%	44.3%	50.0%	↓
		Sugar Creek Golf Course	26.2%	25.7%		↓

<sup>1</sup>Unaudited

Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
↑	↑	↔	↓	↓	N/A

# Capital Assets Condition Ratio

## YEAR-END PROGRESS

At year-end, the Governmental Fund Capital Assets Condition Ratio is 44.3% and Sugar Creek Golf Course Fund Capital Assets Condition Ratio is 25.7%.

The **Governmental Funds** Capital Assets Condition Ratio is significantly below its 50% performance target by 11.4% (based on a net asset depreciation of \$1,155,250). It is a 1.1% increase as compared to the 2021 ratio of 43.2%. To assist with meeting cash and investment goals during the pandemic, the District continued to conservatively invest in assets in 2022, which resulted in only a slightly increased Governmental Fund Capital Asset Condition Ratio. The District continues to invest in its aging assets based on available funding. Other reasons for the slight increase include the District adding two new assets in 2022 (Centennial Recreation Center and Centennial Park) and accounting for Courts Plus and Wilder Mansion assets in the Governmental Funds data (as explained below).

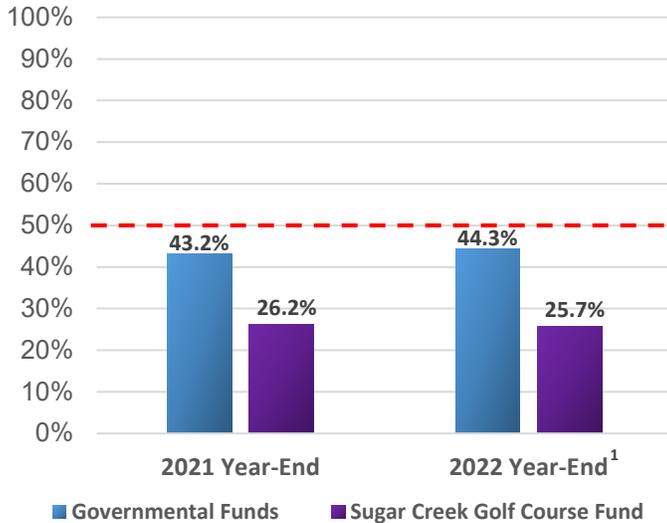
The **Sugar Creek Golf Course Fund** Capital Assets Condition Ratio is significantly below its 50% performance target by 48.5% (based on a net asset depreciation of \$157,485). It is a 0.5% decrease as compared to the 2021 ratio of 26.2%. With the retirement of debt at Sugar Creek Golf Course in 2022 and completion of the creek restoration project in 2023, the Golf Course can build its cash and investment reserves to complete capital projects, which will likely increase the Capital Asset Condition Ratio. Also, the sale of the rental house during 2022 impacted the Ratio since it was in the original value of assets, but not the remaining value at the end of 2022.

The Enterprise Services Fund Capital Assets Condition Ratio is no longer being tracked in this Report since the Fund was eliminated in 2022 due to Courts Plus along with Wilder Mansion and garden weddings no longer being enterprise operations. The Enterprise Services Fund data is now reflected in the Governmental Funds Capital Assets Condition Ratio since former Enterprise Services Fund expenses are in the tax-supported Recreation Fund and capital projects are in the Capital Improvement Fund.

## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure is used to assess the need for facility and equipment upgrades and specifically considers the remaining useful life of facilities and equipment based on depreciation.
- Capital Assets Condition Ratio is the remaining value of the District's depreciable assets divided by the original value of those assets. The District records capital assets separately for the Governmental and Sugar Creek Golf Course Funds.
- The performance target identified for the Capital Assets Condition Ratio is 50% to ensure the District invests sufficient dollars to offset the annual depreciation of the District's assets.
- A higher ratio suggests an organization is making investments on a routine basis.

Capital Assets Condition Ratio  
Year-End 2021 and 2022



Data Source: BS&A Financial Software  
<sup>1</sup> Unaudited  
 - - - Year-End Performance Target

Fund Category	Year-End Performance Target	2022 Year-End Performance Outcome
Governmental Funds	50.0%	-11.4% Significantly Below Target
Sugar Creek Golf Course Fund	50.0%	-48.5% Significantly Below Target

# FACILITIES

Meet community need for new and existing indoor recreation space



<b>GOALS</b>	FA1: Maintain and update existing facilities
	FA2: Invest in new indoor facilities / spaces to respond to community needs
	FA3: Optimize use of existing facilities

## TACTIC PROGRESS SUMMARY



Achieved	<b>2</b>	<ul style="list-style-type: none"> <li>Complete Adult Center renovation</li> <li>Implement Centennial Recreation Center (CRC) facility and operations plan</li> </ul>
Nearly Achieved/ On Track	<b>0</b>	
Just Started	<b>0</b>	
Not Started	<b>0</b>	
Delayed/Deferred	<b>0</b>	

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred

## FACILITIES TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Complete Adult Center renovation	FA2 PR2	●	<ul style="list-style-type: none"> <li>Complete renovation of building for use as a recreation center</li> <li>Bring building into compliance and improve its aesthetics</li> <li>Specific work includes completing building abatement; remodeling restrooms and reception area for ADA compliance; adding a fire protection system; completing exterior improvements (roof shingles, roof ladder, and signage); making site improvements (pavement, sidewalks, raise storm structures, and remove dead trees); installing new exterior doors; and painting the interior</li> </ul>	<ul style="list-style-type: none"> <li>Board approved contract to hire Dewberry Architects for architecture/engineering services (Winter 2021)</li> <li>Held project kick-off meeting with staff and representatives of Dewberry Architects and their subcontracted engineers (Spring 2021)</li> <li>Dewberry Architects completed, and the Board reviewed updated project scope, cost estimates, and schematic design (Spring/Summer 2021)</li> <li>Completed project bid process (Fall 2021) and Board approved contract to hire EHC Industries, Inc. for asbestos abatement and O'Neill Contractors, Inc. for construction (Fall 2021)</li> <li>Completed City of Elmhurst's Planned Unit Development Process for Adult Center/Centennial Park site (Fall 2021)</li> <li>Elmhurst City Council approved the Planned Unit Development application, including an Ordinance granting a Conditional Use permit (Fall 2021)</li> <li>EHC Industries, Inc. completed asbestos abatement (Fall 2021)</li> <li>O'Neill Contractors, Inc. completed construction and installed and painted temporary exterior doors and frames (permanent doors delayed due to supply chain demand) (Winter/Spring 2022)</li> <li>Completed post-construction cleaning to prepare for building set-up (Spring 2022)</li> <li>Replaced all original 1970s interior lighting fixtures using LED retrofit kits through the ComEd Energy Efficiency Program (lighting costs projected to decrease by 80% for the life of the fixtures) (Spring 2022)</li> <li>Opened facility for programming and registration and held grand opening event on June 17, 2022 (Spring 2022)</li> <li>Installed permanent exterior doors and frames (Summer 2022)</li> </ul>	<ul style="list-style-type: none"> <li>Offer new adult center desired by community</li> <li>Expand programming options in renovated spaces</li> <li>Provide an upgraded, welcoming, and more functional space for adult programs</li> <li>Facilitate relationships with new and existing partners (such as College of DuPage and Elmhurst Public Library) to increase adult program offerings</li> <li>Expand inter-governmental cooperative efforts with City of Elmhurst by providing space for senior social services currently at City Hall</li> <li>Hold ribbon cutting event to celebrate completion of project with community</li> </ul>

## FACILITIES TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Implement Centennial Recreation Center (CRC) facility and operations plan	FA3 PR3	●	<ul style="list-style-type: none"> <li>Create facility and operations plan, including programming, registration, and custodial needs</li> <li>Implement plan to open facility and begin offering programming and registration services in June 2022</li> </ul>	<ul style="list-style-type: none"> <li>Completed facility and operating plan to allocate necessary resources in 2022 Budget to open facility (Fall 2021)</li> <li>To support future operational needs, new Facilities Specialist I and Registration Clerk positions were approved in the 2022 Budget (Winter 2022)</li> <li>To prepare for June 2022 opening, position of Program Supervisor – Active Adults (eliminated in 2020) was restored in the 2022 Budget and filled in February (Fall 2021/Winter 2022)</li> <li>Implemented programming plan with development and scheduling of events and activities for summer season (Winter 2022)</li> <li>Worked with representatives from Metropolitan Family Services and City of Elmhurst to plan for relocating the Office of Senior Services from City Hall (Winter/Spring 2022)</li> <li>Implemented registration operating plan to open registration desk and lobby, including hiring a new Registration Clerk and purchasing supplies (Spring 2022)</li> <li>Filled Facilities Specialist I position to prepare building for programs from a custodial and operational set-up (Spring 2022)</li> <li>Posted emergency evacuation plans and installed fire extinguishers (Spring 2022)</li> <li>To address technology needs, completed cabling, installed security cameras, and coordinated installation of networking hardware and internet services (Spring 2022)</li> <li>Memorandum of Understanding was approved by Elmhurst City Council (6/6/2022) and Park Board (6/27/2022), outlining both organizations' responsibilities for housing Metropolitan Family Services and use of space within the facility by the agency (6/2022)</li> <li>Opened facility for programs and registration on June 13, 2022 (6/2022)</li> </ul>	<ul style="list-style-type: none"> <li>Offer new adult center desired by community</li> <li>Expand adult and senior programming options and provide additional location for registration</li> </ul>

# FACILITIES PERFORMANCE MEASURE SUMMARY



Significantly Above Target (>10%)	<b>0</b>
Above Target (0.01% to 10%)	<b>0</b>
At Target (0%)	<b>0</b>
Below Target (-0.01% to -10%)	<b>0</b>
Significantly Below Target (<-10%)	<b>0</b>
<b>Performance Outcomes TBD &amp; Tracked in Future Report</b>	
Facility Assessments, Level of Service Standards, and Facility Usage	<b>3</b>

Performance Measure	Timing of Reporting and Year to Begin Tracking	Category	2021 Year-End Result	2022 Year-End Result	Year-End Performance Target	2022 Year-End Performance Outcome
Facility Assessments	Annually 2023	N/A	N/A	N/A	TBD	N/A
Level of Service Standards	Annually 2023	N/A	N/A	N/A	TBD	N/A
Facility Usage	Future	N/A	N/A	N/A	TBD	N/A

<b>Significantly Above Target (&gt;10%)</b>	<b>Above Target (0.01% to 10%)</b>	<b>At Target (0%)</b>	<b>Below Target (-0.01% to -10%)</b>	<b>Significantly Below Target (&lt;-10%)</b>	<b>Not Tracked in Report</b>
					N/A

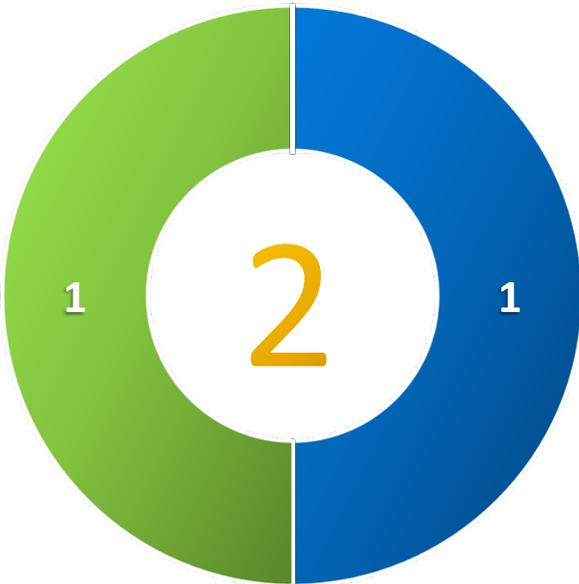
# PROGRAMMING

Innovative programming to meet community needs



<b>GOALS</b>	PR1: Remain aware of and responsive to trends
	PR2: Regularly engage the community to understand program needs
	PR3: Provide sustainable, high quality and inclusive program offerings

## TACTIC PROGRESS SUMMARY



Achieved	<b>1</b>	<ul style="list-style-type: none"> <li>Review and determine future investment towards services suspended since the pandemic began</li> </ul>
Nearly Achieved/ On Track	<b>1</b>	<ul style="list-style-type: none"> <li>Invest in services identified as financially sustainable and meeting community needs</li> </ul>
Just Started	<b>0</b>	
Not Started	<b>0</b>	
Delayed/Deferred	<b>0</b>	

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred

## PROGRAMMING TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Review and determine future investment towards services suspended since the pandemic began</p>	<p>PR1 PR2 PR3 F1</p>	<p style="text-align: center;">●</p>	<ul style="list-style-type: none"> <li>• Identify services to review</li> <li>• Evaluate and determine which suspended services are to be reoffered based on feedback, impact, alignment with mission, financial viability, market position, and competition</li> </ul>	<ul style="list-style-type: none"> <li>• Identified which pre-pandemic services and programs were still not being offered since the pandemic began (Winter 2022)</li> <li>• Repurposed Courts Plus Fit4Life Gym into a multi-purpose classroom allowing for expansion and relocation of early childhood and youth programming (previously at Wagner Community Center (WCC)) to address demand for these programs and deficiencies in current program space availability (Summer 2022)</li> <li>• To discontinue previous program duplication and maximize available facility spaces, continued to consolidate and streamline program offerings such as summer day camps and martial arts programming (2022)</li> <li>• Resumed swim lessons, special events, and rentals at the outdoor pools (Summer 2022)</li> <li>• Resumed adult programs (including day trips) and expanded program opportunities for adults at Centennial Recreation Center (Summer/Fall 2022)</li> <li>• Resumed personal training services at Courts Plus (Winter 2022)</li> <li>• Will resume and expand special event opportunities for early childhood, youth, and teens in 2023, including Daddy/Daughter and Mother/Son special events in Summer/Fall (with new more inclusive, gender-neutral branding)</li> </ul>	<ul style="list-style-type: none"> <li>• Maximize resources by reinstating services that are financially sustainable and meet community needs</li> <li>• Potentially pursue alternate uses of facility spaces that were previously used for suspended services</li> </ul>

## PROGRAMMING TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Invest in services identified as financially sustainable and meeting community needs	PR1 PR2 PR3 F11		<ul style="list-style-type: none"> <li>• Identify what resources are necessary to sustain and/or grow core services</li> <li>• Allocate identified resources</li> </ul>	<ul style="list-style-type: none"> <li>• Added early childhood and youth gymnastics programs to time slots and space previously used for competitive gymnastics (due to a decline in enrollment for competitive teams) (2022)</li> <li>• Added additional martial arts classes (Summer 2022)</li> <li>• Increased group exercise class offerings at Courts Plus based on member demand and higher participation, including the addition of RPM, a popular Les Mills group cycling class (Winter 2022)</li> <li>• Expanded drop-in pickleball play and leagues at Courts Plus (Fall 2022)</li> <li>• Offered additional afternoon and evening programs for early childhood and youth dance, gymnastics, theater, and general interest programs allowing for enrollment increases (Fall 2022)</li> <li>• Based on public feedback, offering a four day a week preschool option (Monday-Thursday) with enrichment class options on Fridays at Courts Plus for 2023-24 school year</li> <li>• Developing and expanding summer camp offerings to increase enrollment opportunities in 2023</li> <li>• Expanding program offerings for early childhood age participants in the evenings and Saturday mornings in 2023</li> <li>• This Tactic will continue to be implemented in 2023.</li> </ul>	<ul style="list-style-type: none"> <li>• Enhance and expand core services</li> <li>• Maximize cost recovery and facility spaces and ensure consistent quality of services offered</li> </ul>

# PROGRAMMING PERFORMANCE MEASURE SUMMARY



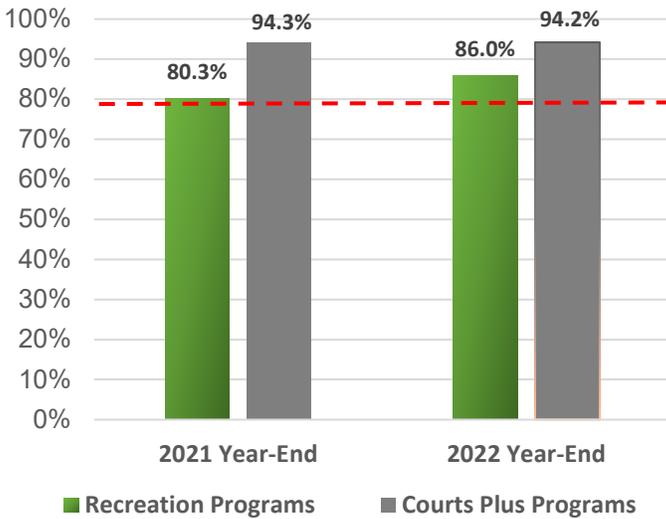
Significantly Above Target (>10%)	1
Above Target (0.01% to 10%)	3
At Target (0%)	0
Below Target (-0.01% to -10%)	0
Significantly Below Target (<-10%)	8
Performance Outcome TBD & Tracked in Future Report	1
Program Life Cycle Distribution	

Performance Measure	Timing of Reporting and Year to Begin Tracking	Category	2021 Year-End Result	2022 Year-End Result	Year-End Performance Target	2022 Year-End Performance Outcome
Program Success Rate	Semi-annually 2013	Recreation	80.3%	86.0%	80.0% or above	↑
		Courts Plus	94.3%	94.2%		↑
Total Unique Registrants	Semi-annually 2016	N/A	6,984	7,453	8,800	↓
% of Unique Resident Households that Completed a Transaction	Semi-annually 2016	N/A	31.1%	33.9%	50.0%	↓
% of Program & Pass Registrants by Age Group	Semi-annually 2016	8 age groups	Range from 7.9% to 61.7%	Range from 9.1% to 70.6%	Range from 19% to 65%	2 age groups ↑ 6 age groups ↓
Program Life Cycle Distribution	Annually 2023	N/A	N/A	N/A	TBD	N/A

Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
↑	↑	↔	↓	↓	N/A

# Program Success Rate

Program Success Rate  
Year-End 2021 and 2022



Data Source: RecTrac Registration Software  
 - - - Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the Recreation Program Success Rate of 86.0% is above the year-end 80% performance target by 7.5%. As compared to 2021, this Success Rate increased 5.7%.

The Courts Plus Program Success Rate of 94.2% is significantly above the performance target by 17.8%. As compared to 2021, this Success Rate slightly decreased 0.1%.

Both Recreation and Courts Plus programs illustrate this rate of success due to continuing to offer and expand programs to meet demand and by maximizing available indoor spaces.

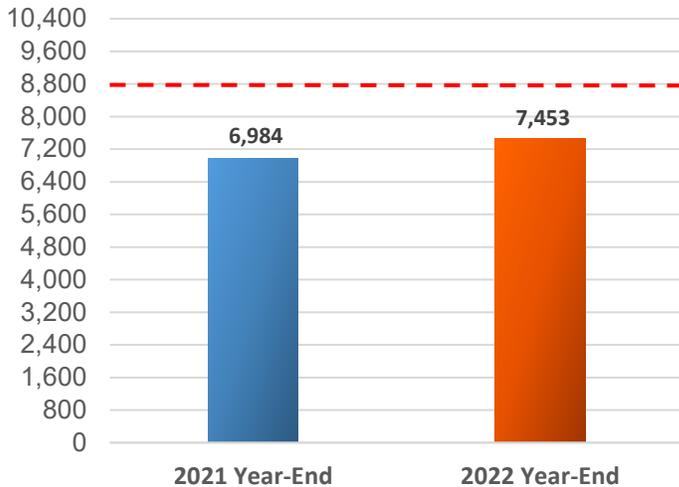
## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure reflects whether the District is successful with matching the “right” array of programs and services to meet customer interest and demand along with marketplace trends.
- The higher Program Success Rate percentages are, the more successful the District is with offering courses that align with community interests.
- Program Success Rate measures the total number of programs that ran (as reported in the Park District’s registration software) divided by the total number of programs offered by the District.
- To meet the performance target, the total number of courses ran as compared to the total number of programs offered must be a ratio of at least 80 programs ran for every 100 programs offered.
- Sugar Creek Golf Course programs were not included in this measure along with participation in programs not requiring registration such as Courts Plus group fitness programs.

Category	Year-End Performance Target	2022 Year-End Performance Outcome
Recreation Programs	80.0% or above	7.5% Above Target
Courts Plus Programs	80.0% or above	17.8% Significantly Above Target

# Total Unique Registrants

Total Number of Unique Registrants  
Year-End 2021 and 2022



Data Source: RecTrac Registration Software  
 - - - Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the number of Total Unique Registrants (7,453) is significantly below the year-end performance target of 8,800 by 15.3%. As compared to year-end 2021, Total Unique Registrants increased by 469, which is a 6.7% increase.

The upwards shift is mainly due to continuing to reoffer and expand programs to meet demand in 2022 after the lifting of pandemic-related restrictions mid-year 2022. This measure will likely continue to result in an upward trend in 2023 based on the on-going demand for programs and activities.

Note: To manage capacity limits during the pandemic in 2020 and 2021, staff utilized pre-registration for the first time for some facilities, services, and programs (e.g., Courts Plus fitness floor, The Hub Sprayground, group fitness classes and community events). In 2022, pre-registration for most of these facilities, services and programs was eliminated, which may impact the comparison of 2021 and 2022 data.

## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure reflects the District's reach in the community as it relates to the total number of individuals involved in District programs and activities which require payment and/or registration.
- Total Unique Registrants is the total number of individuals registered for at least one program (residents and non-residents).
- Each individual is counted only once regardless of the number of programs that individual registered for during the measurement period.
- Programs from Sugar Creek Golf Course were not included in this measure along with participation in programs not requiring registration such as some community events. Additionally, registration for adult sports leagues counts as one registration per team.

Year-End Performance Target	2022 Year-End Performance Outcome
8,800	-15.3% ↓ <i>Significantly Below Target</i>

# Percent of Unique Resident Households that Completed a Transaction

Percent of Unique Resident Households that Completed a Transaction  
Year-End 2021 and 2022



Data Source: RecTrac Registration Software and U.S. Census Bureau 2021 American Community Survey (ACS) (total Elmhurst Households - 16,476)

<sup>1</sup>2021 Year-End data was adjusted to reflect Elmhurst total household data from 2021 ACS (updating 2010 U.S. Census Bureau Decennial Census data)

- - - Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the Percent of Unique Resident Households that Completed a Transaction is 33.9%, which is 32.2% below the year-end performance target of 50.0%. This measure increased 2.8% as compared to 2021.

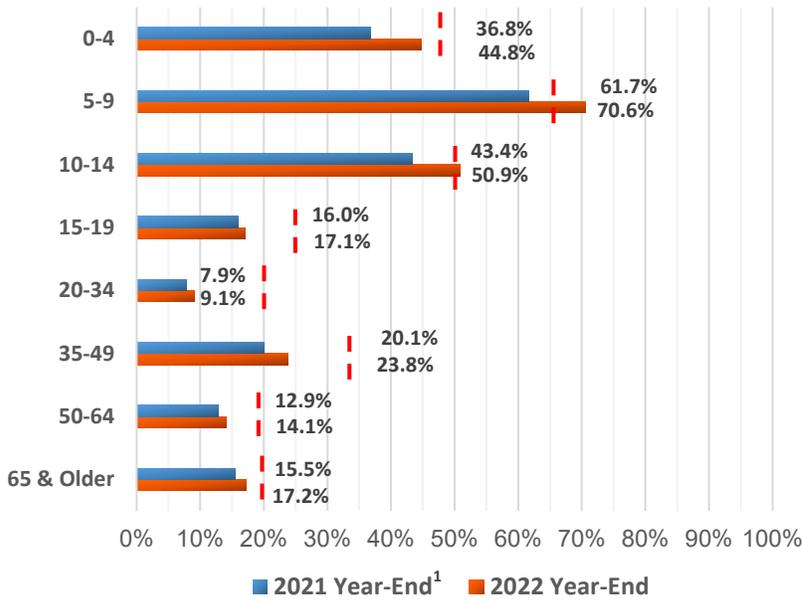
After the lifting of pandemic-related restrictions mid-year 2022, the District increased the reoffering and expansion of programs and services in 2022, which will continue in 2023. Therefore, this measure will likely continue to experience an upward trend.

## ABOUT THIS MEASURE AND WHY IT MATTERS

- Percent of Unique Resident Households that Completed a Transaction reflects Elmhurst household involvement in District programs and activities and the District's reach in the community as it relates to activities and programs which require payment and/or registration.
- This measure is the percentage 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 is the total number of unique resident household accounts which have completed a transaction processed through the District's registration software divided by the total number of households in Elmhurst (U.S. Census Bureau data).
- Each resident household account is counted only once regardless of the number of individuals in the household or transactions processed during the measurement period.
- Programs from Sugar Creek Golf Course were not included in this measure along with participation in programs not requiring registration such as some community events. Additionally, registration for adult sports leagues counts as one registration per team.

Year-End Performance Target	2022 Year-End Performance Outcome
50.0%	-32.2%  Significantly Below Target

# Percent of Program and Pass Registrants by Age Group



Data Source: RecTrac Registration Software and U.S. Census Bureau 2021 American Community Survey (ACS)

<sup>1</sup>2021 Year-End data was adjusted to reflect Elmhurst population data by age group from 2021 ACS (updating 2010 U.S. Census Bureau Decennial Census data)

Notes: Percentages in chart are the total unique residents in age category/total Elmhurst population in age category. Registrants who did not provide a birthdate are not reflected in data.

- - - Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the Percent of Program and Pass Registrants by Age Group increased in all eight (8) age categories as compared to 2021 as illustrated in the adjacent chart. Two (2) of the eight (8) categories were above year-end performance targets at 8.7% (5-9 age category) and 1.8% (10-14 age category). Six (6) age categories were significantly below, ranging from -10.4% (0-4) to -54.3% (ages 20-34).

After the lifting of pandemic-related restrictions mid-year 2022, the District restarted and expanded programs and services, which led to the upward trend in the percentage of participants in all age categories.

Other reasons for the upward trend include:

- opening the Centennial Recreation Center in June 2022, which allowed for the expansion of adult programming and
- placing a priority in 2022 on investing in services identified as financially sustainable and meeting community needs, which will continue in 2023 (see pages 24-25).

Age Group Category	Year-End Performance Target	2022 Year-End Performance Outcome
0-4	50.0%	-10.4%  Significantly Below Target
5-9	65.0%	8.7%  Above Target
10-14	50.0%	1.8%  Above Target
15-19	25.0%	-31.5%  Significantly Below Target
20-34	20.0%	-54.3%  Significantly Below Target
35-49	33.0%	-27.8%  Significantly Below Target
50-64	19.0%	-25.8%  Significantly Below Target
65 & Older	22.0%	-21.6%  Significantly Below Target

## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure reflects the District's reach in the community among the youth, adult, and senior populations by assessing the number of individuals and age groups reached by District programs.
- Percent of Program and Pass Registrants by Age Group is the number of unique individual District residents who registered for at least one program or purchased a pass divided by the number of residents in Elmhurst in that age group (U.S Census Bureau data).
- This measure does not include Sugar Creek Golf Course programs and passes or participation in programs which do not require registration such as some community events. Additionally, registration for adult sports leagues counts as one registration per team.

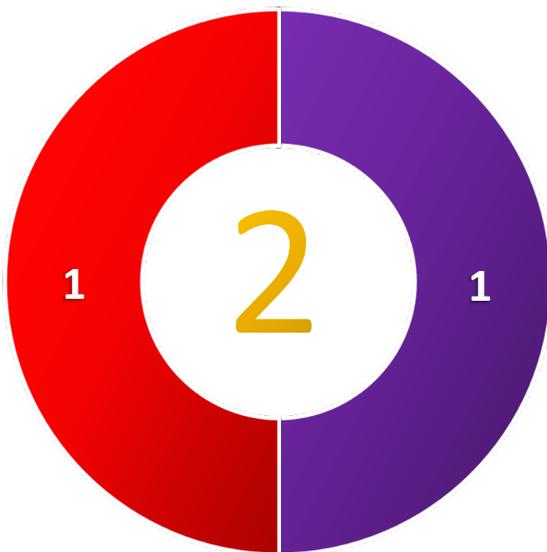
# COMMUNICATIONS

Exceptional and consistent guest experience



<b>GOALS</b>	CO1: Foster a customer-first environment
	CO2: Enhance community engagement

## TACTIC PROGRESS SUMMARY



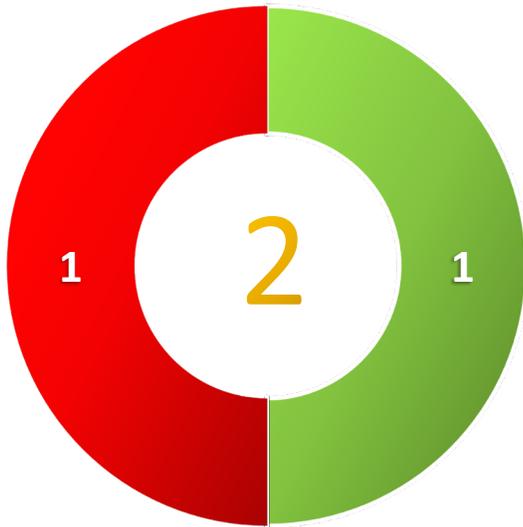
Achieved	0	
Nearly Achieved/ On Track	0	
Just Started	1	<ul style="list-style-type: none"> <li>To facilitate becoming a more diverse, equitable, and inclusive organization, build relationships, gather feedback, and collaborate with the community</li> </ul>
Not Started	0	
Delayed/Deferred	1	<ul style="list-style-type: none"> <li>Conduct community engagement to update long-range plans</li> </ul>

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred
●	◐	◑	◒	○	➔

## COMMUNICATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Conduct community engagement to update long-range plans</p>	<p>PR2 CO2</p>		<ul style="list-style-type: none"> <li>• Hire professional services firm to assist Board and staff with utilizing innovative and proven methods for collecting community feedback</li> <li>• Execute effective methods for collecting community feedback</li> <li>• Utilize data collected to determine future priorities and update District's long-range plans</li> </ul>	<ul style="list-style-type: none"> <li>• Tactic deferred to 2023 since the Board and staff continued to postpone the comprehensive update of long-range priorities due to the continuing restrictions and financial and operational impacts of the pandemic. With the District transitioning to a stable post-pandemic future, the Board and staff will determine new priorities in 2023 based on community engagement feedback.</li> </ul>	<ul style="list-style-type: none"> <li>• Ensure that future priorities reflect and represent the community's future vision and needs</li> <li>• Gauge the community's readiness to support strategies for funding priorities</li> </ul>
<p>To facilitate becoming a more diverse, equitable, and inclusive organization, build relationships, gather feedback, and collaborate with the community</p>	<p>CO1 CO2</p>		<ul style="list-style-type: none"> <li>• Connect and engage with community stakeholders and individuals to increase understanding of, and partner with, underrepresented groups</li> </ul>	<ul style="list-style-type: none"> <li>• Contacted organizations doing DEI work in Elmhurst to share the District's DEI efforts, learn more about their work, and explore collaboration opportunities (Fall 2022)</li> <li>• Met with Elmhurst Pride Collective to learn more about the organization's mission and work and discuss potential collaboration opportunities (Fall 2022)</li> <li>• This tactic will continue in 2023 with the goal of becoming more equitable and inclusive through training and community engagement.</li> </ul>	<ul style="list-style-type: none"> <li>• Effectively implement sustainable and inclusive DEI efforts</li> <li>• Foster a greater sense of belonging for all members of the organization and community</li> </ul>

# COMMUNICATIONS PERFORMANCE MEASURE SUMMARY



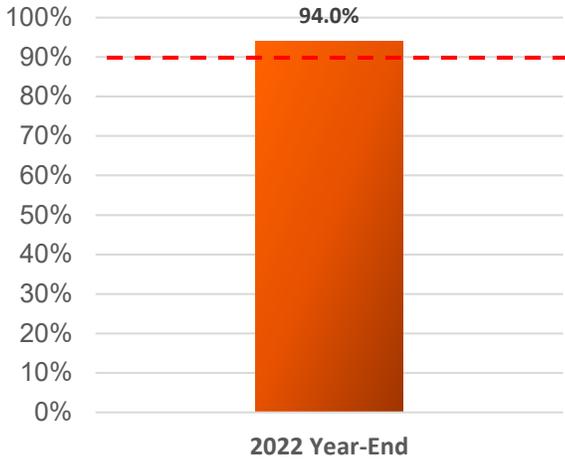
Significantly Above Target (>10%)	0
Above Target (0.01% to 10%)	1
At Target (0%)	0
Below Target (-0.01% to -10%)	0
Significantly Below Target (<-10%)	1
Performance Outcomes TBD & Tracked in Future Report	0

Performance Measure	Timing of Reporting and Year to Begin Tracking	Category	2021 Year-End Result	2022 Year-End Result	Year-End Performance Target	2022 Year-End Performance Outcome
Customer Service Quality Ratings	Annually 2018	In-Person	94.7%	N/A	90.0%	N/A
		Virtual	90.8%	N/A	90.0%	N/A
Customer Satisfaction Rating		N/A	N/A	94.0%	90.0%	↑
Net Promoter Score®	Annually 2018	N/A	27.0%	54.0%	70.0%	↓

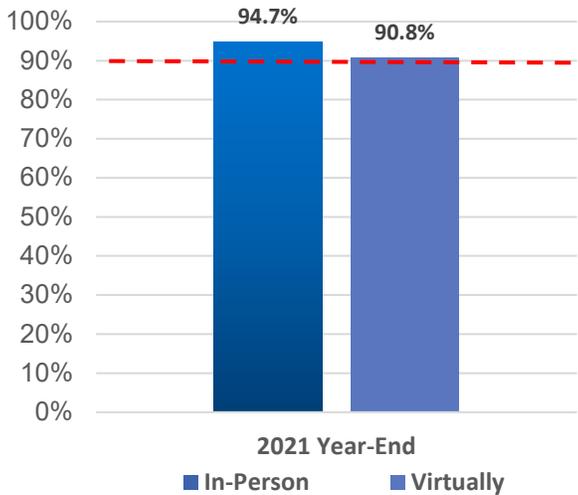
Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
↑	↑	↔	↓	↓	N/A

# Customer Satisfaction Rating

Customer Satisfaction Rating  
Year-End 2022



In-Person and Virtual Customer Service  
Quality Rating Year-End 2021<sup>1</sup>



Data Source: Customer Service and Program Satisfaction Surveys  
<sup>1</sup>2021 survey respondents were rated by the quality of in-person and virtual customer service separately since they involved a different customer experience  
 - - - Year-End Performance Target

Year-End Performance Target	2022 Year-End Performance Outcome
90.0% or above	4.4%  Above Target

## YEAR-END PROGRESS

In 2022, 94.0% of youth program evaluation survey respondents rated their satisfaction with the program as extremely satisfied or satisfied. This outcome illustrates that most survey respondents were positive about the program experience. Furthermore, the 94.0% rating was 4.4% above the performance target of 90.0%.

In 2022, data was collected from youth program evaluation surveys and in 2021, from a quality of customer service survey. The difference between the two surveys is outlined below.

## ABOUT THIS MEASURE AND WHY IT MATTERS

In 2022:

- This measure indicated program survey respondents' satisfaction level with a youth program.
- Staff collected data for this measure by asking respondents on a program evaluation survey to rate program satisfaction on a rating scale from extremely satisfied to extremely dissatisfied.
- The percentage was calculated based on the total percentage of respondents who chose the rating of extremely satisfied or satisfied. If all respondents chose extremely satisfied or satisfied, then 100% of the respondents were satisfied with the program.
- Staff strives for a 90% or above overall rating, which is based on providing customer service excellence consistently to all District customers.

In 2021:

- This measure indicated customer service survey respondents experience with the quality of customer service received from District staff.
- Staff collected data for this measure by asking respondents in an external customer survey (available online) to rate the quality of customer service on a rating scale from excellent to poor.
- Percentage was calculated based on the total percentage of respondents who chose the rating of excellent or good. If all respondents chose excellent or good, then 100% of the respondents were satisfied with the quality of customer service.
- Staff strives for a 90% or above overall rating, which is based on providing customer service excellence consistently to all District customers.

# Net Promoter Score (NPS)<sup>®</sup>

Year-End Performance Target	2022 Year-End Performance Outcome
70.0% or above	-22.9%  Significantly Below Target

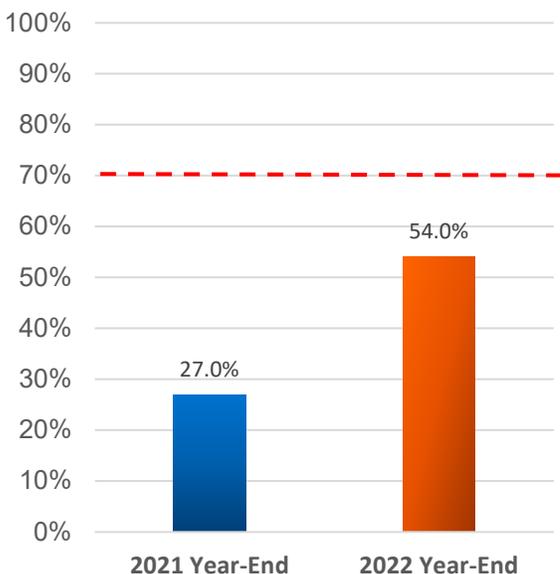
## YEAR-END PROGRESS

The Net Promoter Score (NPS) is a measure that rates an entity based on how likely people are to recommend it to others driven by their overall customer experience and loyalty. The District collects data on customer service or program satisfaction surveys to calculate the NPS by asking survey respondents to rate from 1 to 10 how likely they are to recommend the District to family or friends. For 2022, the NPS was 54.0% based on subtracting 65.0% of “promoters” (rating their likelihood of recommending a program at 9 or 10) from the 11.0% that are “detractors” (rating the likelihood of recommending a program at 1-6). In 2022, data was collected from youth program evaluation surveys and in 2021, from a customer service survey.

In 2022, the NPS was 22.9% below the District’s year-end performance target of 70.0%. Given the NPS possible score range of -100% to +100%, national standards are a positive score (NPS) above 50% is “excellent”.

Staff began reporting this measure in 2018 to monitor improvements made to increase Customer Service Excellence, including the new customer service model and training. The performance target of 70% or above was based on the goal of providing “world class” service. Customer service standards and training were updated in 2021 to reflect operational changes, new ways to provide customer service virtually, and to ensure customer service expectations are met.

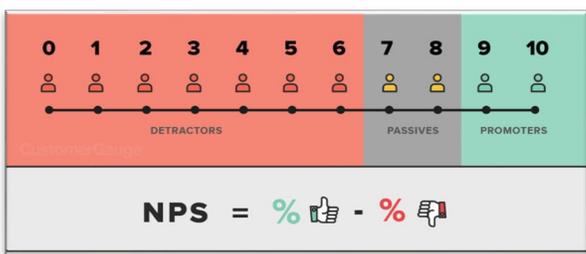
Net Promoter Score  
Year-End 2021 and 2022



Data Source: Customer Service and Program Satisfaction Surveys  
 Year-End Performance Target

## ABOUT THIS MEASURE AND WHY IT MATTERS

- The NPS is a measure that rates an entity based on how likely people are to recommend it to others driven by their overall customer experience and loyalty.
- NPS provides a broad insight to gather deeper customer feedback and to benchmark customer loyalty either historically or against competitors making it a good indicator to predict future revenue.
- In 2022, the District collected data for this rating by asking on program satisfaction surveys, “On a scale of 1 through 10, how likely are you to recommend this program to family or friends?” and in 2021 on a customer service survey, “On a scale of 1 through 10, how likely are you to recommend the Elmhurst Park District to a friend?”
- As illustrated in the adjacent graphic, the NPS is calculated as the percentage of: **Promoters** (respondents who answer 9-10 and are defined as loyal enthusiasts who will keep buying and referring others, fueling growth) minus the **Detractors** (answer 6 or below and therefore, unhappy customers who can damage reputations and impede growth through negative word-of-mouth). **Passives** are considered neutral and are not part of the calculation of NPS (answer 7 or 8 and thereby, are satisfied but unenthusiastic customers who are vulnerable to competitive offerings).
- Given the NPS possible range of -100% to +100%, national standards are that a positive score (NPS) above 0% is considered “good” since this means that most customers are more loyal, a +50% is “excellent,” and above 70% is considered “world class.”



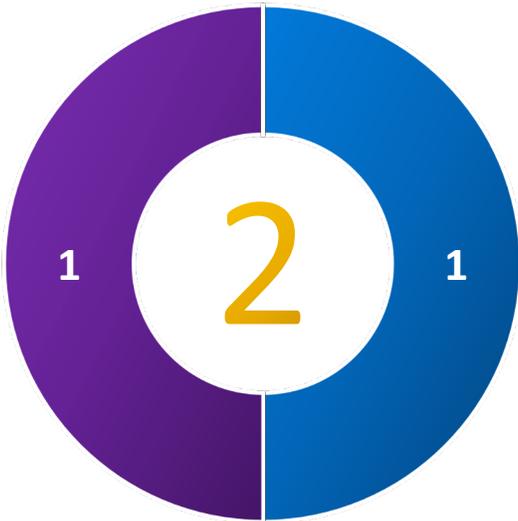
# FINANCE

Sustainable revenue strategies and funding options



<b>GOALS</b>	FI1: Develop strategies to improve financial sustainability
	FI2: Seek alternate sources of revenue

## TACTIC PROGRESS SUMMARY



Achieved	<b>1</b>	<ul style="list-style-type: none"> <li>Improve capital and asset management planning</li> </ul>
Nearly Achieved/ On Track	<b>0</b>	
Just Started	<b>1</b>	<ul style="list-style-type: none"> <li>Communicate the District's financial condition and future outlook and the resulting impact on the ability to address community priorities</li> </ul>
Not Started	<b>0</b>	
Delayed/Deferred	<b>0</b>	

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred

## FINANCE TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
<p>Improve capital and asset management planning</p>	<p>F11 PA1 PA2 FA1 FA2</p>	<p style="text-align: center;">●</p>	<ul style="list-style-type: none"> <li>• Research other agencies processes and innovative practices for capital and asset management planning</li> <li>• Evaluate current capital and asset management processes</li> <li>• Assess options and implement improvements for enhanced tracking and reporting of capital needs and plans</li> <li>• Comprehensively document future capital needs to project future financial and operational impacts and prioritize the timing of improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Researched and reviewed capital and asset management planning processes at other agencies and innovative practices (Spring 2022)</li> <li>• Utilizing the research, began evaluation of current capital and asset management planning process to determine strengths and opportunities for improvement (Spring 2022)</li> <li>• Implemented changes to improve process within available resources, including redesigning the Capital Project Request Form, developing a more detailed long-range capital project spreadsheet, and using additional evaluation metrics to determine the relative priority of projects (Spring 2022)</li> <li>• Utilized redesigned long-range capital project spreadsheet to report and analyze capital project data by project category, park location, and facility location for additional transparency of proposed capital project needs and financial and project planning (Fall 2022)</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate effective long-range financial planning</li> <li>• Utilize improved data for illustrating project needs for grant applications, advocacy, and District communications</li> </ul>

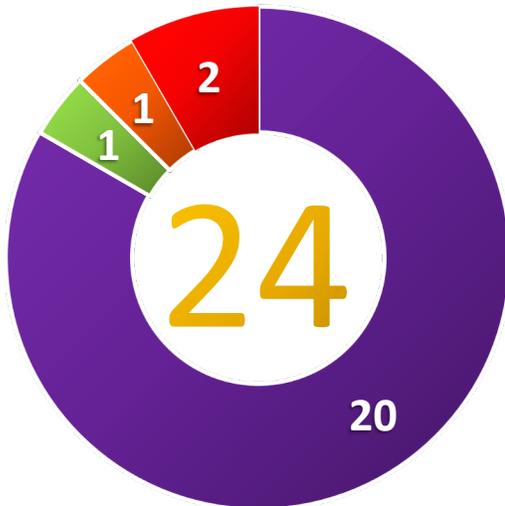
## FINANCE TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Communicate the District's financial condition and future outlook and the resulting impact on the ability to address community priorities	F11 F12 CO2		<ul style="list-style-type: none"> <li>Using different methods and messaging, communicate the District's current financial state, economic environment, and future outlook with an emphasis on future challenges towards funding capital, maintenance, and operational needs</li> </ul>	<ul style="list-style-type: none"> <li>Compiled list of metrics for reporting on the District's financial condition, future outlook, and benefits provided to the community along with potential methods for communicating data (Spring 2022)</li> <li>Began inventorying available data to begin reporting (or track in the future) and developing a communications timeline (Spring 2022)</li> <li>Added messaging to relevant District news articles related to taking care of current assets to continue to tell our story (Spring/Summer 2022)</li> <li>Executive Director and Park Board President presented future outlook in the State of the Park District address and posted recording (Fall 2022)</li> <li>This Tactic will continue to be implemented in 2023.</li> </ul>	<ul style="list-style-type: none"> <li>Create a greater awareness of future challenges towards funding capital, maintenance, and other operational needs</li> <li>Increase support for funding future capital needs</li> </ul>



**Centennial Recreation Center Program**

# FINANCE PERFORMANCE MEASURE SUMMARY



Significantly Above Target (>10%)	20
Above Target (0.01% to 10%)	1
At Target (0%)	0
Below Target (-0.01% to -10%)	1
Significantly Below Target (<-10%)	2
Performance Outcomes TBD & Tracked in Future Report Cost Recovery Goals	1

Performance Measure	Timing of Reporting and Year to Begin Tracking	2021 Year-End Result	2022 Year-End Result <sup>1</sup>	Year-End Performance Target	2022 Year-End Performance Outcome
Percent of Non-Tax Revenue	Annually 2013	43.9%	51.4%	55.0% or above	↓
Met Reserve Targets – Tier 1 <sup>2</sup>	Annually 2013	9 out of 10 funds met the targets	8 out of 9 funds met their targets	Met Board Reserve Policy Targets (9 funds)	8 funds ↑ 1 fund ↓
Met Reserve Targets – Tier 2 <sup>2</sup>	Annually 2013	9 out of 9 funds met their targets	8 out of 9 funds met their targets	Met Budget Target (9 funds)	8 funds ↑ 1 fund ↓
Debt Service Ratio <sup>2</sup>	Annually 2015	3 out of 3 funds met their targets	2 out of 2 funds met their targets	20.0% or below (2 categories)	2 Categories ↑
Program Revenue Per Unique Registrant	Semi-annually 2016	\$368	\$527	\$500	↑
Fund Balance as a Percentage of Expenditures	Annually 2018	2 out of 2 fund categories met their targets	2 out of 2 fund categories met their targets	Met Board Fund Balance Policy Targets (2 categories)	2 Categories ↑
Cost Recovery Goals	Annually 2023	N/A	N/A	TBD	N/A

<sup>1</sup>Unaudited

<sup>2</sup>Less performance targets in 2022 due to elimination of Enterprise Services Fund

Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
↑	↑	↔	↓	↓	N/A

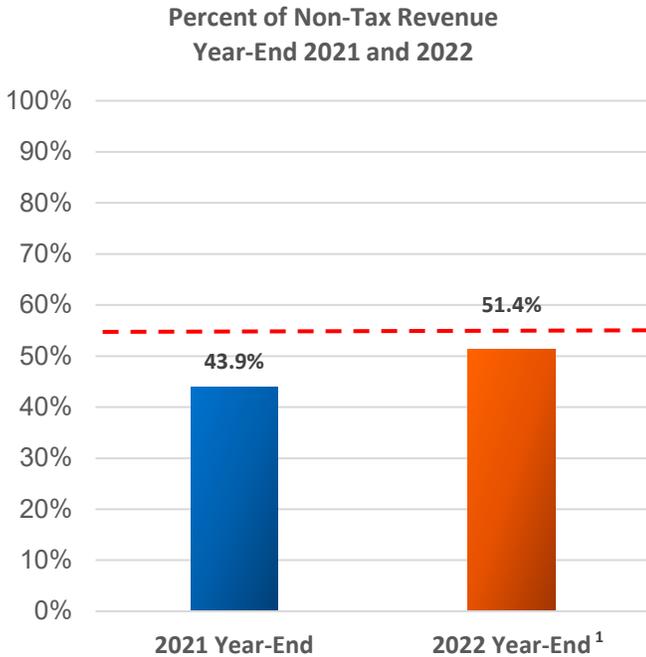
# Percent of Non-Tax Revenue

## YEAR-END PROGRESS

In 2022, the Percent of Non-Tax Revenue was 51.4% of total revenue (excluding bond proceeds and transfers between funds), which is below the Board's 55.0% target by 6.6%. It is 7.5% higher as compared to 2021 non-tax revenue of 43.9%.

The upward trend for this measure in 2022 is due to the lifting of COVID-19 restrictions mid-year 2022. This allowed staff to continue to expand and re-start additional fee-based programs and services that led to a continued increase in non-tax revenue. It is likely this trend will continue in 2023 based on registration trends in a post-pandemic world.

Staff also continue to review and implement revenue pricing strategies based on trends, market conditions, and inflation and pursue partnership and grant opportunities to ensure that the performance target will be met in future years.



Data Source: RecTrac Registration Software

<sup>1</sup> Unaudited

- - - Year-End Performance Target

## ABOUT THIS MEASURE AND WHY IT MATTERS

- Percent of Non-Tax Revenue is the percentage of revenue received from other sources besides taxes. Examples of non-tax revenue include user and membership fees, retail sales, interest income, grants, contractual receipts, sponsorships, and donations.
- The Board has a policy that at least 55% of revenue be received from non-tax revenue.
- This measure is calculated by the total tax revenue divided by total revenue generated. Bond proceeds and transfers between funds are excluded from this measure.

Year-End Performance Target	2022 Year-End Performance Outcome
55.0% or above	-6.6% <i>Below Target</i> ↓

# Cash and Investment Targets – Tier 1

## YEAR-END PROGRESS

At year-end, the District's Tier 1 Cash and Investment Targets illustrate the following trends:

- The District exceeded its targeted levels in eight (8) out of nine (9) funds and fell significantly below target in one (1) fund, Sugar Creek Golf Course. Sugar Creek Golf Course is significantly below target because its cash and investments do not reflect the pre-existing book value (\$196,470.61) of the house that was sold in 2022. However, this amount will be reflected in its audited 12/31/2022 cash & investments.
- Tax receipts, for both property and corporate replacement taxes, were unanticipatedly above 2022 budget projections by nearly \$600,000.
- Demand for services increased significantly when pandemic-related restrictions were lifted mid-year, resulting in non-tax revenues exceeding budget by more than \$250,000.
- Operating expenses were conservatively projected for 2022 because pandemic-related restrictions were still in place when the estimates were originally calculated.
- Capital expenditures were nearly \$450,000 under budget due to certain projects spanning multiple years (Centennial Recreation Center Renovation and Park Development, Sugar Creek Restoration), others under budget (Wilder Park North Tennis Courts and Courts Plus Fitness Equipment Replacements) and others being deferred due to supply chain delays (Rolling Vehicle Stock and Sugar Creek Golf Maintenance Equipment Replacements).

Fund Category	2022 Budget Performance Target Tier 1	2022 Actual Cash and Investments Tier 1 <sup>1</sup>	2022 Year-End Performance Outcome
General (50%)	\$1,833,500	\$4,545,189	147.9%  Significantly Above Target
Recreation (15%)	\$1,259,909	\$5,932,451	370.9%  Significantly Above Target
IMRF (50%)	\$251,991	\$538,199	113.6%  Significantly Above Target
FICA (50%)	\$287,057	\$589,989	105.5%  Significantly Above Target
Liability (10%)	\$35,897	\$148,260	313.0%  Significantly Above Target
Audit (50%)	\$25,762	\$87,506	239.7%  Significantly Above Target
Special Recreation (25%)	\$106,546	\$1,416,589	1,223.6%  Significantly Above Target
Museum (25%)	\$66,147	\$224,166	238.9%  Significantly Above Target
Sugar Creek Golf Course (\$300,000)	\$300,000	\$20,671	-93.1%  Significantly Below Target

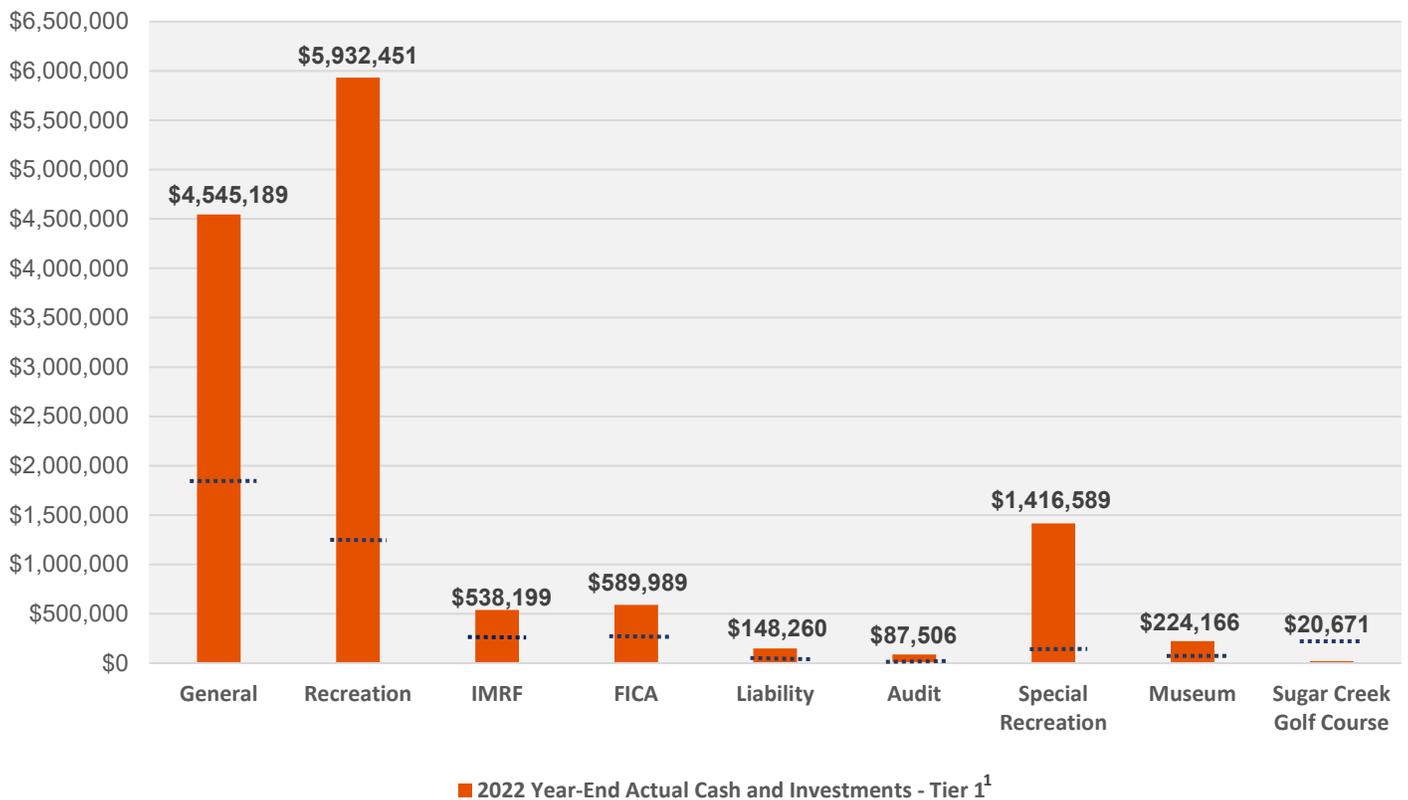
Data Source: BS&A Financial Software

<sup>1</sup> Unaudited

# Cash and Investment Targets – Tier 1 (Continued)

## ABOUT THIS MEASURE AND WHY IT MATTERS

- To ensure the District remains fiscally strong in future years, the Board’s Reserve Policy includes a two-tiered level for its cash and investments for all operating funds.
- Tier 1 target levels are in place to ensure the District can meet cash flow obligations and emergency or unanticipated expenditures or revenue shortfalls.
- The Policy states the budget must provide for cash and investments of not less than the percent of projected expenses (excluding reserves funding capital expenses) or a set dollar amount established for each of the funds based on their cash flow (e.g., General Fund is 50% of expenses).
- The targets vary as they reflect the unique nature of the cash flows of each fund. A cash flow analysis is conducted annually for all funds and an evaluation of all the cash and investment targets is conducted every three (3) years for all funds.



Data Source: BS&A Financial Software  
<sup>1</sup> Unaudited  
 ..... Year-End Performance Target

# Cash and Investment Targets – Tier 2

## YEAR-END PROGRESS

- For the same reasons noted on page 41 concerning Tier 1 targets, at year end the District's Tier 2 Cash and Investment Targets exceeded targeted levels in eight (8) out of nine (9) funds and fell significantly below target in one (1) fund, Sugar Creek Golf Course. A portion of these reserves will fund future capital projects.

Fund	2022 Budget Performance Target Tier 2	2022 Actual Cash and Investments Tier 2 <sup>1</sup>	2022 Year-End Performance Outcome
General	\$1,251,878	\$2,711,689	116.6%  Significantly Above Target
Recreation	\$2,375,343	\$4,672,542	96.7%  Significantly Above Target
IMRF	\$115,240	\$286,208	148.4%  Significantly Above Target
FICA	\$128,079	\$302,932	136.5%  Significantly Above Target
Liability	\$28,643	\$112,363	292.3%  Significantly Above Target
Audit	\$38,683	\$61,744	59.6%  Significantly Above Target
Special Recreation	\$1,014,717	\$1,310,043	29.1%  Significantly Above Target
Museum	\$88,134	\$158,019	79.3%  Significantly Above Target
Sugar Creek Golf Course	\$33,850	-\$279,329	-925.2%  Significantly Below Target

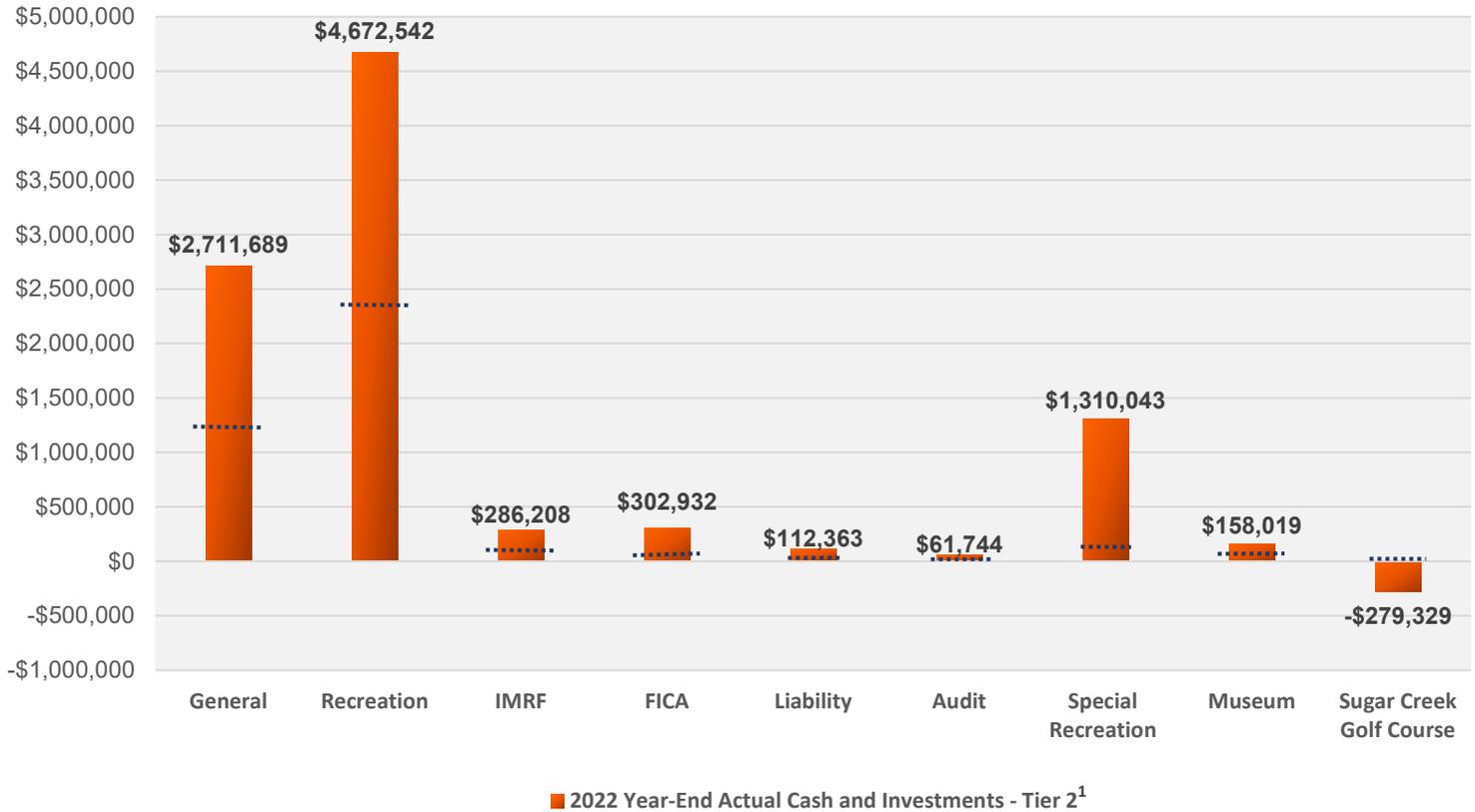
Data Source: BS&A Financial Software

<sup>1</sup> Unaudited

# Cash and Investment Targets – Tier 2 (Continued)

## ABOUT THIS MEASURE AND WHY IT MATTERS

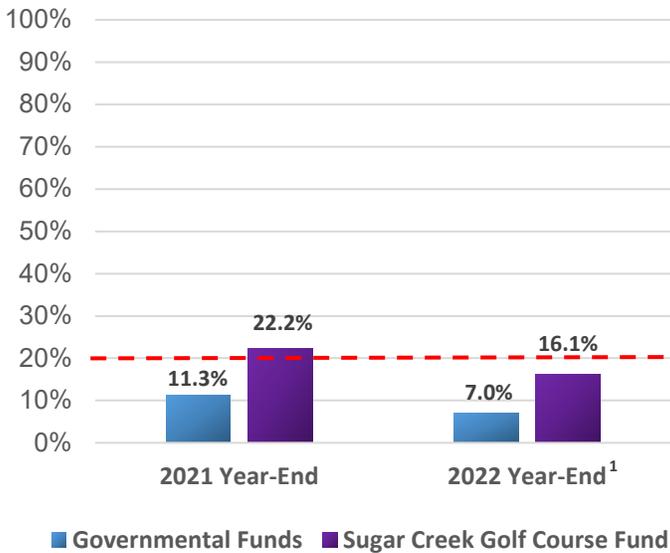
- To ensure the District remains fiscally strong in future years, the Board’s Reserve Policy includes a two-tiered level for its cash and investments for all operating funds.
- If the Tier 1 targets are achieved as described on page 42, the budget must provide the additional funds necessary to implement the Capital Improvement Plan (current or future projects) or fund future debt.



Data Source: BS&A Financial Software  
<sup>1</sup> Unaudited  
 ..... Year-End Performance Target

# Debt Service Ratio

Debt Service Ratio  
Year-End 2021 and 2022



Data Source: BS&A Financial Software

<sup>1</sup> Unaudited

--- Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the Governmental Funds Debt Service Ratio is 7.0% and Sugar Creek Golf Course Fund Debt Service Ratio is 16.1%. A lower ratio provides for more financial flexibility since less resources are being committed to a required financial debt obligation. This is why the performance target is at or below 20%.

In the **Governmental Funds**, the debt service ratio is significantly above the performance target (20% or below) by 65.1%. As compared to 2021, the debt service ratio decreased 4.3% (from 11.3% to 7.0% in 2021). This decrease is primarily due to retiring of a debt instrument in 2022 that funded the purchase and redevelopment of Wagner Community Center.

The **Sugar Creek Golf Course Fund** Debt Service Ratio is significantly above the performance target (20% or below) by 19.5%. As compared to 2021, the debt service ratio decreased 6.1% (from 22.2% to 16.1% in 2021). This decrease is primarily due to the retirement of two debt instruments in 2022 that funded golf course and clubhouse improvements. One was debt certificates through the District, and the second was through the Village of Villa Park.

The **Enterprise Services Fund** Debt Service Ratio is no longer being tracked in this Report since this Fund was eliminated in 2022 due to Courts Plus along with Wilder Mansion and garden weddings no longer being enterprise operations. The Enterprise Services Fund data is now reflected in the Governmental Funds Debt Service Ratio.

## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure is used to analyze an organization's debt service flexibility with the amount of expenses committed to annual debt service.
- Debt Service Ratio is calculated by the total debt service principal and interest divided by total expenses plus principal. Transfers between funds are not included in total expenses.
- The performance target identified for the Debt Service Ratio is 20% or below, which allows for operational flexibility by limiting committed resources.
- As the ratio increases, service flexibility decreases because more resources are being committed to a required financial obligation.

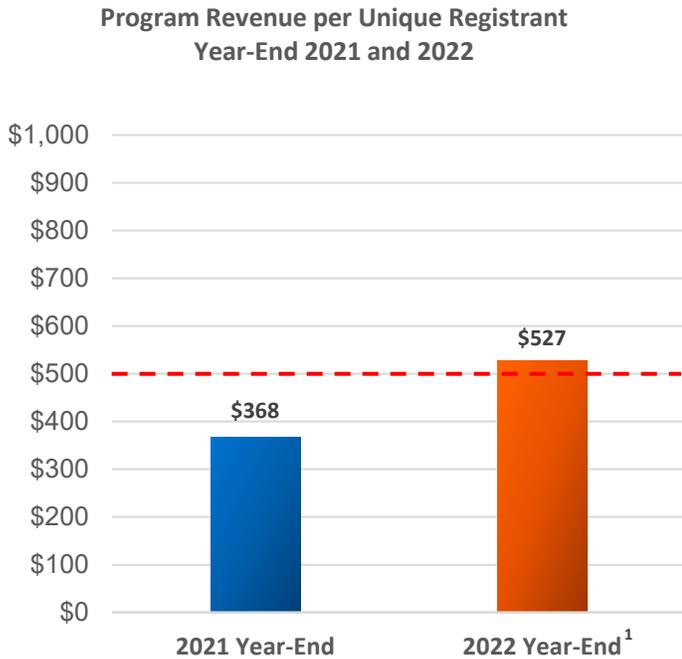
Fund Category	Year-End Performance Target	2022 Year-End Performance Outcome
Governmental Funds	20.0% or below	65.1% <i>Significantly Above Target</i> ↑
Sugar Creek Golf Course Fund	20.0% or below	19.5% <i>Significantly Above Target</i> ↑

# Program Revenue per Unique Registrant

## YEAR-END PROGRESS

In 2022, the Program Revenue per Unique Registrant earned is \$527, which is 5.3% above the year-end performance target of \$500. It is \$159 above the 2021 outcome of \$368, which is 43.2% increase as compared to 2021.

After the lifting of pandemic-related restrictions mid-year 2022, the District reoffered and expanded programs, resulting in a significant upward trend for this measure. This measure will likely continue to trend upwards in the future based on the continued demand for programs.



Data Source: RecTrac Registration Software

<sup>1</sup> Unaudited

- - - Year-End Performance Target

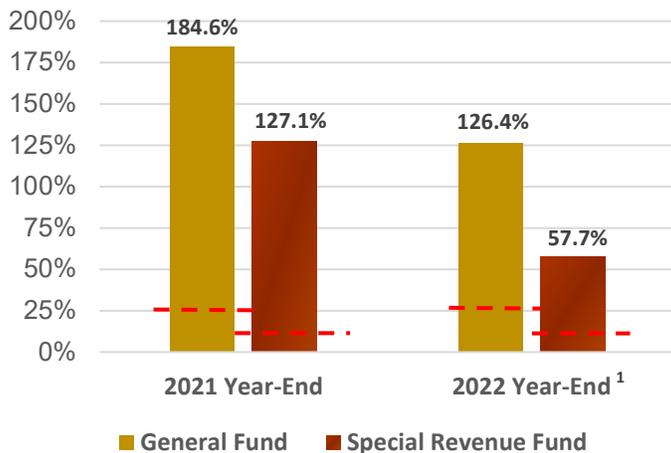
## ABOUT THIS MEASURE AND WHY IT MATTERS

- This measure reflects the District's ability to maintain or increase its non-tax program revenue.
- Program Revenue per Unique Registrant is the average amount of revenue generated by each unique registrant.
- This measure is calculated by dividing total revenue generated from programs by the number of unique registrants (residents and non-residents). Unique registrants is the total number of individuals registered for at least one 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 Golf Course were not included in this measure along with participation in programs not requiring registration. Additionally, registration for adult sports leagues counts as one registration per team.

Year-End Performance Target	2022 Year-End Performance Outcome
\$500	5.3% Above Target 

# Fund Balance (Percentage of Expenditures)

Fund Balance (Percent of Expenditures)  
Year-End 2021 and 2022



Data Source: BS&A Financial Software  
<sup>1</sup>Unaudited  
 - - - Year-End Performance Target

## YEAR-END PROGRESS

In 2022, the General Fund Balance Percentage of Expenditures is 126.4% and the Special Revenue Fund Balance Percentage of Expenditures is 57.7%, which illustrates the Board has provided for financial stability and the ability to be fiscally agile should revenue shortfalls or emergencies occur.

The **General Fund** ending reserve balance is sufficient to fund 126.4% more than annual expenses based on 2022 expenditures (405.8% above the performance target of 25.0% or above). The **Special Revenue Fund** ending reserve balance is sufficient to fund 57.7% of total annual expenditures based on 2022 actual expenses (477.1% above the performance target of 10.0% or above).

For both Fund categories, this measure decreased as compared to 2021 (58.2% difference for the General Fund and 69.4% for Special Revenue Fund). This decrease is due to restoring spending for restarting programs and services and essential capital asset management projects, which were reduced in 2020 and 2021 due to pandemic-related financial constraints.

## ABOUT THIS MEASURE AND WHY IT MATTERS

- To provide financial stability, cash flow, and assurance the District can continue to plan for contingencies should revenue shortfalls or emergencies occur, the Board’s policy states that the budget must meet targets for unrestricted fund balance/net asset levels.
- The General Fund reserve balance includes reserves in the General, IMRF, FICA, Liability, and Audit funds, and the Special Revenue Fund balance includes reserves in the Recreation, Special Recreation, and Museum Funds.
- In establishing these targets, the District considers the predictability of revenues and expenses and potential exposure for significant one-time outlays. Several Funds do not have targets due to the unique nature of their expenditures and net assets.
- Fund Balance levels are reviewed annually during the budget process and a formal review of the policy is conducted every three (3) years to ensure targets are appropriate.

Fund Category	Year-End Performance Target	2022 Year-End Performance Outcome
General Fund	25.0% or above	405.8%  Significantly Above Target
Special Revenue Fund	10.0% or above	477.1%  Significantly Above Target

# INTERNAL OPERATIONS

Strengthen organizational culture



<b>GOALS</b>	IO1: Continue to invest in training, continuing education and personal development
	IO2: Improve internal communication and engagement
	IO3: Assess operational needs and organizational structure
	IO4: Become a more data-driven organization
	IO5: Increase focus on District-wide succession planning

## TACTIC PROGRESS SUMMARY



<b>Achieved</b>	<b>1</b>	<ul style="list-style-type: none"> <li>Evaluate and implement actions to become a more diverse, equitable, and inclusive organization</li> </ul>
<b>Nearly Achieved/On Track</b>	<b>1</b>	<ul style="list-style-type: none"> <li>Review, determine, and begin implementing optimal organizational structure</li> </ul>
<b>Just Started</b>	<b>0</b>	
<b>Not Started</b>	<b>0</b>	
<b>Delayed/Deferred</b>	<b>1</b>	<ul style="list-style-type: none"> <li>Conduct organizational culture survey</li> </ul>

Achieved	Nearly Achieved	On Track	Just Started	Not Started	Delayed/Deferred

## INTERNAL OPERATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
Evaluate and implement actions to become a more diverse, equitable, and inclusive organization	IO1 IO2	●	<ul style="list-style-type: none"> <li>• Provide employees DEI engagement opportunities, including a DEI Team</li> <li>• Based on stakeholder feedback, develop and implement action plan to become a more diverse, equitable, and inclusive culture</li> <li>• Provide opportunities to increase awareness of the importance of DEI</li> </ul>	<ul style="list-style-type: none"> <li>• Formed employee Diversity, Equity, and Inclusion (DEI) Team with 14 full-time and part-time employees (3 &amp; 4/2021)</li> <li>• Gathered feedback (along with resources) from other organizations on their experiences with implementing DEI initiatives (4 &amp; 5/2021)</li> <li>• Held first Team meeting, which included discussing DEI definitions, the Team's role and expectations, and available resources to begin planning next steps (Spring 2021)</li> <li>• Team discussed potential next steps to be more gender inclusive at the District and updated registration software (and related forms) to expand gender identity options to include a non-binary option along with an option for persons who have a different gender identity than male, female, or non-binary (Summer/Fall 2021)</li> <li>• Team wrote and distributed an Inclusion Vision Stand to define and communicate the Team's vision of how to create sustainable DEI efforts and foster inclusion across the organization (Summer 2021)</li> <li>• Offered DEI book club, which read and discussed <u>Creating Belonging at Work</u> by Rhodes Perry (11 &amp; 12/2021) and held employee DEI Discussion Group, which focused on a different DEI topic at four (4) meetings to expand participants understanding of DEI (Spring 2022)</li> </ul> <p style="text-align: right;"><i>Continued Next Page</i></p>	<ul style="list-style-type: none"> <li>• Instill a culture of equity and inclusion so everyone can fully participate and feel they belong</li> <li>• Create a DEI action plan that facilitates sustainable change and reflects engagement from District stakeholders</li> <li>• Enhance recruitment, employee engagement, and retention</li> </ul>

## INTERNAL OPERATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>• Presented two (2) DEI Program and Service Reports to Board to provide progress on DEI efforts along with an overview of DEI definitions, potential program outcomes, and purpose and components of DEI organizational assessments and action plans (10 &amp; 12/2021)</li> <li>• Underwent a Request for Proposals (RFP) selection process to choose a DEI professional services firm to conduct a DEI organizational assessment, including forming a selection team that reviewed submitted proposals, interviewed firms, and selected the firm that was best fit for the project based on evaluation criteria (Fall 2022)</li> <li>• Board approved hiring of Dr. Tamekia Scott from Edquity-Minded Consulting to conduct a DEI organizational assessment, develop recommendations and implementation strategies with staff, and compile and present an implementation report (Winter 2022)</li> <li>• Held project kick-off meeting with Dr. Scott to confirm work plan and timelines (Winter 2022)</li> <li>• Dr. Scott implemented project communications plan, including maintaining an online project landing page with information and updates, creating a project overview video, and sending project update emails (Winter/Spring 2022)</li> <li>• Promoted project in employee newsletter articles, employee survey video, emails, etc. (Winter-Summer 2022)</li> </ul> <p><i>Continued Next Page</i></p>	

## INTERNAL OPERATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>• Dr. Scott completed the organizational assessment, including:                             <ul style="list-style-type: none"> <li>○ conducted an online survey for employees to share their DEI personal experiences, understanding, and engagement (Winter and Spring 2022)</li> <li>○ reviewed DEI policies and documented practices to validate the survey data and provide additional evidence of areas of strength and challenges/opportunities for growth (Spring 2022)</li> <li>○ held six (6) group meetings with staff and eight (8) individual interviews with Board members and Executive Director to gather more detailed information about the survey feedback, policies/practices, and District's DEI culture (Spring 2022); and</li> <li>○ based on the organizational assessment findings, developed recommendations, resources, and guidelines for future DEI planning and support (Summer 2022)</li> </ul> </li> <li>• Dr. Scott assisted a staff Working Group with drafting implementation strategies, timelines, and measures of success (Summer 2022)</li> <li>• Dr. Scott provided Board a project update, including organizational assessment outcomes and next steps (10/2022)</li> </ul> <p style="text-align: right;"><i>Continued Next Page</i></p>	

## INTERNAL OPERATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>• Dr. Scott compiled Implementation Report to summarize project outcomes and recommendations and Board accepted Report goals and objectives at its November 28, 2022 meeting (Fall 2022)</li> <li>• 2023 Strategic Work Plan includes new tactic to implement Report</li> </ul>	
Review, determine, and begin implementing the optimal organizational structure	IO2 IO3 IO5	●	<ul style="list-style-type: none"> <li>• Analyze District operations, work environment, and organizational structure</li> <li>• Determine the appropriate resource levels and organizational structure needed to meet operational and strategic goals along with customer expectations</li> <li>• Consider the best timeline for implementing organizational changes</li> </ul>	<ul style="list-style-type: none"> <li>• To improve park operations in the field and improve outcomes in park maintenance, restructured supervision within Parks Department without increasing number of employees (Winter 2021)</li> <li>• To optimize Enterprise Services financial performance and facility maintenance resources across the District, shifted Courts Plus, Wilder Mansion, and Sugar Creek Golf Course facility operations, budget, and staffing to Facilities Department (from the Enterprise Services Department) (Fall 2021/Winter 2022)</li> <li>• Due to retirement of Director of Recreation and to support current and future operations and succession planning, adjusted structure of Recreation Department by: <ul style="list-style-type: none"> <li>○ shifting oversight and supervision of aquatics and Hub from Facilities Department, creating a new position (Division Manager–Recreation) to supervise these functions,</li> <li>○ restoring Program Supervisor–Adults position eliminated in 2020 (Spring 2022), and</li> </ul> </li> </ul> <p style="text-align: right;"><i>Continued Next Page</i></p>	<ul style="list-style-type: none"> <li>• Identify strengths and opportunities for organizational improvement</li> <li>• Facilitate successful execution of District strategy</li> <li>• Provide employees opportunities for growth and advancement</li> </ul>

## INTERNAL OPERATIONS TACTICS PROGRESS SUMMARY

Tactic(s)	Goal(s)	Status	Work to be Completed	Progress to Date	Opportunities
				<p><i>Continued from Previous Page</i></p> <ul style="list-style-type: none"> <li>○ creating a second Division Manager–Recreation position to oversee four (4) program supervisors (Winter-Summer 2022).</li> <li>● Proposed four (4) new full-time park and facility maintenance positions in 2023 Budget to strengthen maintenance operations and support (Fall 2022)</li> <li>● Tactic will continue to be addressed in 2023, including continuing to implement optimal organizational structure and creating employee development and succession plans.</li> </ul>	
Conduct organizational culture survey	IO1 IO2 IO3 IO4	➔	<ul style="list-style-type: none"> <li>● Conduct survey to assess employee engagement and its impact on employee performance and organizational health</li> <li>● Based on feedback, determine future priorities for maintaining a healthy culture</li> </ul>	<ul style="list-style-type: none"> <li>● Tactic deferred to 2023 due to conducting a comprehensive employee DEI survey for the DEI organizational assessment in 2022. Another reason for the postponement is to collect timely employee feedback during the 2023 process to update the Comprehensive and Strategic Plan.</li> </ul>	<ul style="list-style-type: none"> <li>● Measure employee’s engagement levels to take action to strengthen culture and improve retention</li> <li>● Ensure future priorities reflect employee needs</li> </ul>



**Eldridge Adventure Days**

# INTERNAL OPERATIONS PERFORMANCE MEASURE SUMMARY



Significantly Above Target (>10%)	<b>0</b>
Above Target (0.01% to 10%)	<b>0</b>
At Target (0%)	<b>0</b>
Below Target (-0.01% to -10%)	<b>0</b>
Significantly Below Target (<-10%)	<b>0</b>
Performance Outcomes TBD & Tracked in Future Report Organizational Culture Survey	<b>1</b>

Performance Measure	Timing of Reporting and Year to Begin Tracking	2021 Year-End Result	2022 Year-End Result	Year-End Performance Target	2022 Year-End Performance Outcome
Organizational Culture Survey	Annually 2023	N/A	N/A	TBD	N/A

Significantly Above Target (>10%)	Above Target (0.01% to 10%)	At Target (0%)	Below Target (-0.01% to -10%)	Significantly Below Target (<-10%)	Not Tracked in Report
					N/A

# APPENDIX A

## KEY TERMS AND DEFINITIONS

# Key Terms and Definitions

The following are the definitions for key terms used in the Vision 2020 Progress Report.

**Comprehensive Plan**—long-range planning tool updated every five to ten years and developed through a community planning process. It provides direction regarding development and acquisition of agency’s current and potential physical assets.

**Goals**—broad statements describing the specific steps an organization must achieve to execute its strategy.

**Mission**—the core purpose of the organization and why it exists.

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

**Performance Target**—what the District is trying to achieve in a quantitative measure of performance to assess accomplishment of the Strategic Themes.

**Strategic Plan**—a long-range planning tool updated every three years and developed through a community planning process. It provides direction regarding the agency’s main focus and activities.

**Strategic Themes**—provide broad macro-oriented organizational direction for addressing the future vision of the organization.

**Strategic Work Plan**—the action plan for implementing strategy with timelines and the positions/departments responsible for implementation.

**Tactics**—the specific programs, activities, projects, or actions an organization will undertake to meet strategic themes and goals.

**Values**—meaningful expressions of describing what is important in the way employees and customers are treated and relates to the internal culture of the organization.

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

**Vision**—the 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.

# APPENDIX B

## 2022 STRATEGIC WORK PLAN

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**VISION 2020**  
**2022 STRATEGIC WORK PLAN**  
**MISSION, VISION, VALUES, THEMES, AND GOALS**

<b>Mission</b>	We enrich lives while having fun.
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<b>Vision</b>	To be a national leader in providing memorable parks and recreation experiences to our community.
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Values	
<b>Fun</b> <b>Integrity</b> <b>Customer Service Excellence</b> <b>Community Focused</b>	We will inject fun and passion in what we do everyday We will always do the right thing and we will do it the right way We will exceed customer expectations consistently and present the 'wow' moment At the end of the day, it's all about the community we serve

Themes	Goals	Performance Metric(s) to Track Achievement of Strategy (Themes)
<b>PA</b> <b>PARKS</b> Meet community need for parks, open space, and outdoor amenities.	PA1: Maintain and update existing parks open spaces and amenities. PA2: Address open space and amenity deficiencies and equitability. PA3: Provide new recreational opportunities to respond to community needs.	Capital Assets Condition Ratio Future (to be reviewed during long-range plan update in 2023): <i>Park Use; Park Assessments; Level of Service Standards</i>
<b>FA</b> <b>FACILITIES</b> Meet community need for new and existing indoor recreation space.	FA1: Maintain and update existing facilities. FA2: Invest in new indoor facilities / spaces to respond to community needs. FA3: Optimize use of existing facilities.	Future (to be reviewed during long-range plan update in 2023): <i>Facility Assessments; Level of Service Standards; Facility Usage %</i>
<b>PR</b> <b>PROGRAMMING</b> Innovative programming to meet community needs.	PR1: Remain aware of and responsive to trends. PR2: Regularly engage the community to understand program needs. PR3: Provide sustainable, high quality and inclusive program offerings.	Program Success Rate; Total Unique Registrants; % of Unique Resident Households Completing a Transaction; % of Program & Pass Registrants by Age Group; Future: <i>Program Life Cycle Distribution (% of New Programs; report actual versus targets in each life cycle category)</i>
<b>CO</b> <b>COMMUNICATIONS</b> Exceptional and consistent guest experience.	CO1: Foster a customer-first environment. CO2: Enhance community engagement.	Customer Service Quality Rating; Net Promoter Score
<b>FI</b> <b>FINANCE</b> Sustainable revenue strategies and funding options.	FI1: Develop strategies to improve financial sustainability. FI2: Seek alternate sources of revenue.	Percent of Non-tax revenue; Met Reserve Targets - 1st and 2nd Tier; Program Revenue Per Unique Registrant; Debt Service Ratio; Fund Balance as a Percentage of Expenditures Future: <i>Cost Recovery Goals</i>
<b>IO</b> <b>INTERNAL OPERATIONS</b> Strengthen organizational culture	IO1: Continue to invest in training, continuing education and personal development. IO2: Improve internal communication and engagement. IO3: Assess operational needs and organizational structure. IO4: Become a more data-driven organization. IO5: Increase focus on Districtwide succession planning.	Future: <i>Organizational Culture Survey</i>

*Italicized Indicators-Future Strategy Indicators in Vision 2020 Plan*

**VISION 2020  
2022 STRATEGIC WORK PLAN: TACTIC ACTION PLANS**

Year 5										
Theme	Goals	Tactics	EPD Values	Cost	Anticipated Start	Anticipated Completion	Lead	Staff Groups	Implementation Goal	Progress
PA	PA1, PA2, PA3	Complete Glos Park site improvements	Community Focused, Integrity, Fun	\$\$\$\$	March 2021	July 2022	Director of Facilities	Facilities, Parks, Administration, Marketing & Communications	Based on master plan driven by community feedback, complete site development to expand open space in Glos Park	●
PA	PA1, PA2, PA3	Complete construction of neighborhood park at Centennial Park	Community Focused, Integrity, Fun	\$\$\$\$	January 2021	June 2022	Director of Facilities	Facilities, Parks, Administration, Marketing & Communications	Based on master plan driven by community input, complete construction in conjunction with Adult Center renovation	●
PA	PA1	Redevelop Eldridge Park East play area and pathways	Community Focused, Integrity, Fun	\$\$\$	September 2019	October 2022	Director of Facilities	Facilities, Marketing & Communications	Replace playground equipment reaching the end of its useful life and expand and refurbish paths	●
PA	PA1	Restore Sugar Creek Golf Course creek	Community Focused, Integrity	\$\$\$\$	August 2017	March 2024	Director of Courts Plus/Wilder Mansion	Courts Plus/Wilder Mansion, Sugar Creek Golf Course, Village of Villa Park	Restore Sugar Creek by addressing engineering and design recommendations and seeking outside funding.	◐
PA	PA1, PA2, PA3	Complete master plan for Pick Park and apply for Open Space Lands Acquisition & Development (OSLAD) Grant	Community Focused, Integrity, Fun	\$	August 2022	September 2022	Director of Facilities	Facilities, Parks, Administration, Marketing & Communications	Hire Upland Design to develop master plan based on feedback from Pick Subdivision residents and apply for OSLAD grant	●
FA	FA2, PR2	Complete Adult Center renovation	Community Focused, Integrity, Fun	\$\$\$\$	January 2021	June 2022	Director of Facilities	Facilities, Recreation, Administration, Marketing & Communications, Information Technology	Complete renovation of the new Adult Center	●
FA	FA3, PR3	Implement Centennial Recreation Center facility and operations plan	Community Focused, Customer Service Excellence, Integrity, Fun	\$\$	July 2021	June 2022	Director of Facilities	Facilities, Recreation, Information Technology, Human Resources	Implement registration and custodial staffing plan to meet programming needs, purchase equipment to implement operations plan, and begin offering programming to community	●
PR	PR1, PR2, PR3, FI1	Review and determine future investment towards services suspended since the pandemic began	Community Focused, Customer Service Excellence, Integrity	\$	May 2022	September 2022	Directors of Courts Plus/Wilder Mansion and Recreation	Courts Plus/Wilder Mansion, Recreation, Facilities, Marketing & Communications, Finance	Evaluate and determine which suspended programs and services should be reoffered based on community/participant feedback, their impact, alignment with mission, financial viability, market position, and competition	●
PR	PR1, PR2, PR3, FI1	Invest in services identified as financially sustainable and meeting community needs	Community Focused, Customer Service Excellence, Integrity	\$	August 2022	June 2023	Directors of Courts Plus/Wilder Mansion and Recreation	Courts Plus/Wilder Mansion, Recreation, Facilities, Marketing & Communications, Finance	Invest resources to offer services and programs that are financially sustainable and meeting community needs	◐
CO	PR2, CO2	Conduct community engagement to update long-range plans	Community Focused, Customer Service Excellence, Integrity	\$	September 2022	April 2023	Division Manager-Strategy & Planning	Marketing & Communications, Administration	Execute effective methods for collecting community input to drive future priorities	⇒
CO	CO1, CO2	To facilitate becoming a more diverse, equitable, and inclusive organization, build relationships, gather feedback, and collaborate with the community	Community Focused, Integrity	\$	September 2022	December 2022	Division Manager-Strategy & Planning	Administration, Marketing & Communications, DEI Team	Connect and engage with community stakeholders and individuals to increase understanding of, and partner with, underrepresented groups to effectively implement sustainable and inclusive DEI efforts	◐
FI	FI1, PA1, PA2, FA1, FA2	Improve capital and asset management planning	Community Focused, Integrity	\$	March 2022	July 2022	Division Manager-Strategy & Planning	Capital Planning Team	Review and improve capital and asset management processes to comprehensively document and plan for future needs and facilitate effective financial planning	●
FI	FI1, FI2, CO2	Communicate the District's financial condition and future outlook and the resulting impact on the ability to address community priorities	Community Focused, Integrity	\$	March 2022	December 2022	Director of Marketing & Communications	Marketing & Communications, Facilities, Parks, Administration, Finance	Using different methods and messaging, communicate the District's current financial state, economic environment, and future outlook to create a greater awareness of future challenges towards funding capital, maintenance, and operational needs	◐
IO	IO1, IO2	Evaluate and implement actions to become a more diverse, equitable, and inclusive organization	Community Focused, Customer Service Excellence, Integrity, Fun	\$\$	February 2021	December 2022	Park Board, Executive Director	Division Manager-Strategy & Planning, Division Manager-Human Resources & Risk, DEI Team	Based on stakeholder feedback, continue to develop and implement action plan to become a more diverse, equitable, and inclusive culture and work environment	●
IO	IO2, IO3, IO5	Review, determine, and begin implementing optimal organizational structure	Community Focused, Customer Service Excellence, Integrity, Fun	\$	October 2020	February 2023	Division Manager-Human Resources & Risk	Management Team	Determine and implement the optimum organizational structure to support current and future operations, succession planning, and the successful execution of District strategy	◐
IO	IO1, IO2, IO3, IO4	Conduct organizational culture survey	Community Focused, Customer Service Excellence, Integrity, Fun	\$	October 2022	April 2023	Division Manager-Strategy & Planning	Administration, Human Resources, Marketing & Communications	Conduct survey to assess employee engagement and its impact on employee performance and organizational health and to determine future priorities for maintaining a healthy culture	⇒

**Cost Symbol Key**

\$ \$0-\$25,000, including staff time  
 \$\$ \$25,001-\$99,999  
 \$\$\$ \$100,000-\$499,999  
 \$\$\$\$ > \$500,000

**Progress Symbol Key**

◐ Just Started  
 ◑ On Track  
 ◒ Nearly Achieved  
 ● Achieved  
 ⇒ Delayed / Deferred