

Rolling Meadows Park District Strategic Plan



Prepared by:



Heller and Heller Consulting, Inc.

This Page Intentionally Blank



Acknowledgements

Rolling Meadows Park District Board of Commissioners

Bill Cooley	President
Thomas Trapani	Vice President
Linda Blane	Treasurer
Donald Bohac	Commissioner
William Palla	Commissioner
Nick Sepke	Commissioner
Patti Weicker	Commissioner

Staff

Amy Charlesworth	Director of Parks and Recreation
Tim Klier	Superintendent of Finance and HR
Brian McKenna	Superintendent of Parks
Nick Troy	Superintendent of Recreation
Bob Veller	Ice Arena Division Manager

Project Support

Barbara Heller, Heller and Heller Consulting



Table of Contents

Introduction	3
Mission, Vision and Values	4
Board and Staff Workshop Information	5
Major Focus Areas	7
The Balanced Scorecard.....	10
Strategic Themes and Initiatives.....	11
Objective Statements.....	13
Strategy Maps	16
Strategic Initiatives 2011-2016	18
Implementation Guidelines	22
Summary	24
Definitions.....	25



Introduction

The Rolling Meadows Park District (RMPD) and Heller and Heller Consulting, Inc. (HHC) worked collaboratively with Board members and staff to develop the Rolling Meadows Park District Strategic Plan 2011 to 2016. This plan follows the long standing commitment by the District to establish future direction through an ongoing commitment to planning processes. The Strategic Plan's intent is to:

- Establish a five year future direction
- Align Board members and staff with organizational strategy
- Develop a framework for identifying and funding infrastructure improvements
- Driving innovation as part of the organizational culture

The platform for the Plan began in 2010 as Leisure Vision completed a series of community input meetings and developed and administered a statistically valid household survey. The strategic recommendations include initiatives addressing survey results.

The Strategic Plan primarily addresses the leadership infrastructure. The Plan will assist with the District's future allocation of resources, financial stability, staffing levels, organizational culture efforts, and the capacity for learning and growth.

Previous to this process, the District did have a mission statement. This process included a review of the mission statement, and the development of a vision statement. The Strategic Planning process included a workshop with Park Board members and Department Heads, a one half-day staff workshop, and follow up meetings with staff, providing opportunities for reflection and review.

The elements of the Plan include the major areas as follows:

- Revised mission and values, development of a vision statement
- Notes from Board and Staff workshops



- Information about the Balanced Scorecard framework for strategy
- Major Focus Areas
- Strategic Themes
- Objective Statements
- Strategy Maps
- Strategic Initiatives
- Guidelines for Implementation
- Strategic Plan Definitions

Mission, Vision and Values

Mission Statement

Provide opportunities for individual growth and community connections through parks and recreation

Vision Statement

To inspire our community to live happier and healthier lives by providing exceptional opportunities to play, learn and grow

Values:

- **Fun:** Having a creative flair and fun in what we do
- **Accountability:** Ensuring the best return on investment of taxpayers' resources and having the flexibility and nimbleness to be as efficient as possible
- **Community:** Aligning services and programs with needs, and continuously growing our connections with residents
- **Quality:** Setting high standards of performance; doing our best in everything we do
- **Integrity:** Ensuring high ethical standards



- **Cooperation:** Work for the greater good of the team and reliably respond to others' requests

Board and Staff Workshop Information

During the Board and staff workshops, facilitated discussion included topic areas such as: 1) A listing of intended outcomes from the strategic process 2) An organizational SWOT (strengths, weaknesses, opportunities, threats), and 3) Park District major focus areas. These topic areas preceded the discussion about the strategic initiatives.

Suggested Outcomes from the Strategic Planning Process

Board members and staff were asked for their opinions about what outcomes they would like to see as a result of this process.

- Giving the community what it wants
- Accountability to our residents
- Meeting current and future needs
- We create community
- To create goals for staff to achieve
- Shared vision

Thoughts About Survey Results

- Focus on peoples' highest priorities
- We want to be better than good
- Surprised at interest in pool
- Trail connections are important
- Programs for adults have a high need and unmet need
- Maybe ask questions differently
- Adult fitness has a significant need



Organizational SWOT

Workshop participants were asked to identify the major strengths, weaknesses, opportunities and threats.

Strengths

- Staff
- Leadership of staff
- Size of the District
- District location
- Location of facilities
- Unique programs
- Engaged Board
- Distribution of parks
- Inexpensive programs
- Success with grant applications
- Co-ops with other districts
- Staff are empowered to change
- Volunteering as community leaders

Organizational Weaknesses

- Aging facilities
- Size (both a strength and a weakness)
- Location of some facilities restricts what we can do
- Engagement of some staff
- Economy
- Funding availability
- Limited program space
- Relationship with other agencies
- Competition with other districts and private clubs



- Some staff perception of the District

Organizational Opportunities

- Succession management
- Serving minority populations
- Active adult programming
- Continued efforts in park district reciprocity
- Identifying the causes of poor employee perception
- Referendum
- Find ways for more program space

Organizational Threats

- Competition
- If there is a change in district leadership
- Size of our community – changes in age and ethnic demographics
- Budget (lack of)
- Aging facilities
- Ongoing maintenance
- No new taxes!!!
- Older population

Major Focus Areas

The group completed a brainstorming exercise relating to major focus areas the District needs to ensure are included and addressed within the strategic recommendations. The participants were asked to identify what they considered to be the most significant issues the Park District will face during the next five years. The following is a list of all the ideas relating to focus areas. The bolded items received the most votes from the group and are the most significant. The ideas not bolded received less support from the group.



- **Strengthen customer service**
- **Grow adult programs**
- **Financially sound**
- **Facility/park improvements**
- **Planning for a referendum**
- Improving already successful programs
- Innovation
- Employee morale
- Community awareness of park district offerings
- Greater Diversity
- Continuous learning of staff
- Sustainable practices
- Identifying ways to expand indoor space
- Keep current with technology trends
- Risk Management

The next step in the Focus Area process was discussion about more specific elements relating to the ideas having the most support, or what do these areas look like? They are as follows:

Strengthen Customer Service

- Customer service standards
- Informing the customer instead of handing off to another staff person
- Universal ability to pay for services
- Customer service training
- First impression impact

Park and Facility Improvements

- Bleachers at sports complex are needed



-
- Softball leagues (we used to have)A, B, and C level fields and now we do not
 - Tennis courts
 - Sports complex needs to look fresher
 - All of our facilities need updating
 - Upgraded signage
 - Tree planting and landscaping in general

Grow Adult Programs

- Lack of space
- Develop committees/focus groups
- Expand programs that appeal to a larger audience
- Differentiate between active adults and senior
- Fitness, cooking are popular
- Survey results showed this as a significant unmet need
- Walking, biking clubs may be good additions

Financially Sound

- We need to continue applying for grants
- Accurate costs calculations for programs
- Continue to build reserves to 50% of Non-Operating and 25% of Operating Funds
- Inheritance

Referendum:

- Capital plan for facilities
- Decide what elements would be included
- How far in the future should we do a referendum
- Building advocacy is important



The Balanced Scorecard

The framework for the RMPD Strategic Plan is based on the Balanced Scorecard, a strategy framework that emphasizes the cause and effect relationships among internal support processes, employee learning and growth needs, financial performance, and customers and their needs. The Scorecard also includes a measurement system that monitors organizational performance. The Scorecard focuses on the key drivers of success that leads to the achievement of mission and vision.

The Balanced Scorecard framework includes four perspectives:

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



Strategic Themes and Initiatives

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

- **Customer:** Impress for Success
- **Financial:** Adaptability through All We Do
- **Internal Business:** Excellence in All We Do
- **Learning and Growth:** Innovative Empowered Workforce

The Themes, along with the Major Focus Areas provide the over-arching framework for the Plan's implementation.

Strategic Plan Hierarchy

The Plan includes a hierarchy of elements that starts with the most macro level of strategy and moves to a more micro level (moving from strategic to tactical). The starting point for any strategic planning process is the review of the vision, mission, and values. The mission statement was changed from its previous wording. The vision statement was newly created. Values were discussed among staff and Board members which resulted in new values. Subsequent to the development of Strategic Themes, Objectives were developed. Objectives describe what the District needs to do well in support of the Themes. For example, one of the Objectives for the Theme: Impress for Success is: "*Quality of Service.*" Therefore, the District must identify ways to strengthen its quality of service. Initiatives are more micro-level in support of the Strategic Objectives. Following along with the Impress for Success Theme, an example of an Initiative is improving first impressions of staff and facilities. As evidenced from the sequence listed above, the Initiatives are more specific than the Objectives, and the Objectives are more specific than the Themes.



A measurement system of key performance indicators follows the Themes and Objectives. The measurement system reflects the District's progress in completing the Strategic Initiatives. The tactics are detailed action steps that outline how each initiative will be accomplished. Tactics are very specific, lengthy in number, and are best developed year to year. As a result, tactics are not included within the Plan. They will be developed each year for the current year Initiatives.

The Balanced Scorecard hierarchy is presented by the pyramid shown below.



Objective Statements

The following is a list of Objectives and a specific definition that describes each of them. The Objectives support each of the four strategic themes. They represent what the organization needs to do well in support of the four major themes. These statements result in common organizational understanding of the intended meaning of each of the objectives. This is particularly helpful for new employees and Board members.

Impress for Success

Objective 1: Quality of Service

The Park District is dedicated toward continuously improving its service. This is a complex challenge, given the multitude of programs, facilities, parks and related services. In addition, many part-time and seasonal staff represent the front line of service and are employed only part of the year. The District's intent is to strengthen both staff and facility first impressions and develop service standards as well as ensuring outreach to a growing minority population.

Objective 2: Facility and Service Improvements

The District recognizes the need to update many of its facilities. The ultimate goal is to specifically identify priorities for renovation/additions based on community need and current use patterns of facilities. In addition, the District will organize citizen involvement for the development and organization of a referendum.





Adaptability Through All We Do

Objective 1: Continue to Grow Alternative Revenue

This includes continued reliance on grants as well as developing a District wide process for sponsorships for events. The District will have a greater ability to leverage financial resources as a result of reducing its reliance on tax support.

Objective 2: Staff Efficiency and Adaptability

Efficiency efforts include staff's ability to constantly monitor staffing levels and re-allocate resources toward the highest level of needs as determined by the community. In addition, staff will review customer access (Website, registration system, telephone support) on a regular basis.

Objective 3: Constant Evaluation of Services

The evaluation of services includes the development of a master plan to determine facility improvements and upgrades. This will result in the District's pursuit of a referendum to fund needed improvements. This also suggests using a continuous process of resident feedback in determining customer satisfaction levels.

Excellence in All We Do

Objective 1: Continuous Improvement

The District will look toward technology enhancements to improve the service delivery process. This includes using program registration software to its full capability through staff training and reinforcement. The District also wants to ensure innovation becomes a core organizational competency and connects current and future trends with program and service offerings. In addition, this objective includes development of a process to simplify forms, procedures, and processes.

Objective 2: Strengthening Internal and External Relationships

Good external communication requires good internal communication in the delivery of transparent service. The creation of internal communication guidelines will set a standard for staff's ability to inform and educate one another. It will guide



supervisors toward effective feedback and communication with their staff groups. In addition, The District is also interested in determining levels of satisfaction from its key partners and stakeholders as it continuously moves toward improving services.

Objective 3: Brand and Image

The District aspires to have good brand awareness, primarily through strengthening marketing efforts as outlined in a marketing plan that provides direction for the District's approach and the allocation of labor resources in support of marketing efforts.

Innovative Empowered Workforce

Objective 1: Opportunity for Continuing Education

The ability to implement many of the strategic initiatives depends on the Board and staff's efforts in learning and growth opportunities. The District will maintain an ongoing commitment toward training. In addition, The District encourages employees to augment the agency's efforts with their own initiatives.

Objective 2: Motivated Team

The development and refinement of organizational culture, one that espouses collaboration, cooperation, and personal responsibility will result in a highly



motivated and accountable agency. The District recognizes the importance of teamwork among staff and the Board in the delivery of excellent service.

Objective 3: Change is Good; Give it a Chance

Organizations that thrive and prosper are those that hold onto their legacy while endlessly adapting to the current business environment and future shifts in demographics and trends. The District embraces change and will become expert in implementing change initiatives through training and a change management process.

Strategy Maps

The District's mission and vision will provide the framework for the strategic recommendations. In addition, the recommendations include actions related to the Major Focus Areas:

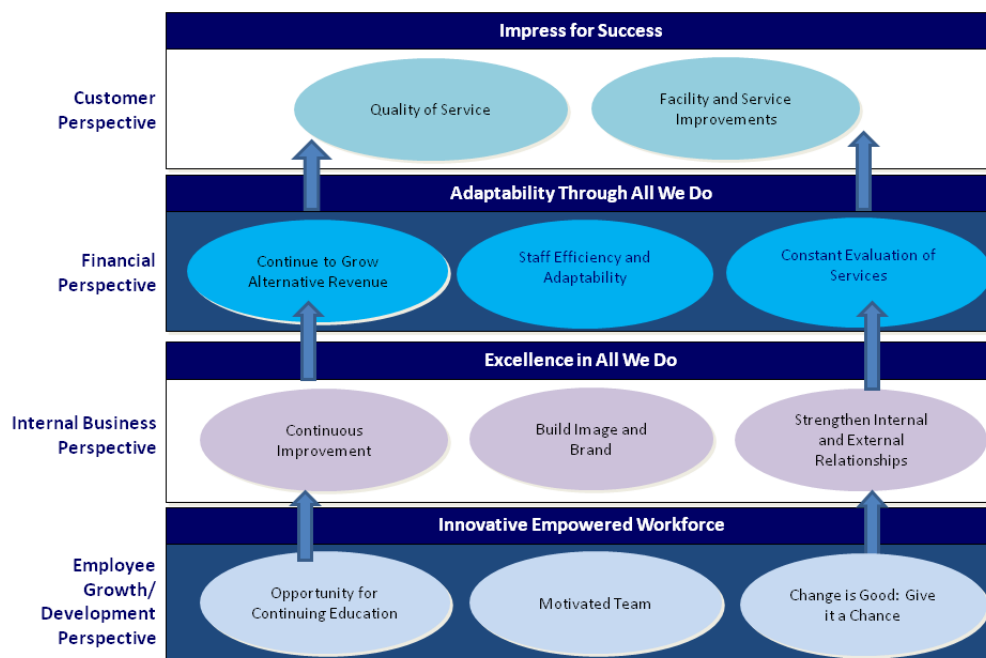
- Strengthen customer service
- Grow adult programs
- Financially sound
- Facility/park improvements
- Planning for a referendum

All of the Strategic Themes, Objectives and Initiatives are aligned with the four Balanced Scorecard perspectives: customer, financial, internal business support, and learning and growth. As part of the strategic recommendations, the remaining section of the report details the Strategic Themes, Strategic Objectives, Strategic Initiatives and Measures. This will create a directional tool for decision-making during the next five years, 2011-2016.

Two Strategy Maps follow. The first map provides the list of the four perspectives and their supporting objectives. The second map includes the same information with the addition of a measurement system in support of the Themes and Objectives.



Rolling Meadows Park District Strategy Map



Rolling Meadows Park District Balanced Scorecard

Vision: : *To inspire our community to live happier and healthier lives by providing exceptional opportunities to play, learn and grow*

Mission: *Provide opportunities for individual growth and community connections through parks and recreation*

	Themes	Objectives	Measures A=annually Q=quarterly
Customer	Impress for Success	<ul style="list-style-type: none"> •Quality of Service •Facility and Service Improvements 	<ul style="list-style-type: none"> ▪ Customer satisfaction (a) ▪ Customer access satisfaction (q) ▪ Number of program registrations (q)
Financial	Adaptability through All We Do	<ul style="list-style-type: none"> •Grow Alternative Revenues •Staff Efficiency and Adaptability •Constant Evaluation of Services 	<ul style="list-style-type: none"> ▪ Quantified efficiency improvements (q) ▪ Alternative funding dollars (q)
Internal	Excellence in All We Do	<ul style="list-style-type: none"> •Continuous Improvement •Brand and Image •Strengthening Internal and External Relationships 	<ul style="list-style-type: none"> ▪ Partner satisfaction (a) ▪ Marketing effectiveness (a) ▪ Number of processes improved (q)
Learning and Growth	Innovative Empowered Workforce	<ul style="list-style-type: none"> •Opportunity for Continuing Education •Motivated Team •Change is Good; Give it a Chance 	<ul style="list-style-type: none"> ▪ Annual training hours (a) ▪ Employee satisfaction toward training (a) ▪ Change management satisfaction (q) ▪ Board and staff team satisfaction (a)



Strategic Initiatives 2011-2016

The following are the Themes, Objectives, and Initiatives for the next five years, 2011-2016. Time period priorities are attached to each Initiative as follows:

- Short Term Initiatives to be accomplished between May, 2011 and April, 2013
- Mid Term Initiatives to be accomplished between May 2013 and April 2015
- Long Term Initiatives to be accomplished between May 2015 and April 2016
- Ongoing Goals are repeated during the entire time period

A few of the Initiatives are supported by tactics. This is a result of discussion at the staff workshop in which a few of the identified initiatives were re-categorized from initiatives to tactics. The tactics for the other Initiatives will be developed on a year to year basis by staff. As mentioned previously, the Plan becomes too detailed to include tactics for all of the Initiatives.



Customer Perspective Theme: Impress for Success

Objective 1: Quality of Service

- Improve first impressions through training and reinforcement of presentation of staff and surroundings (short term)
- Develop customer service standards (short term)
- Develop a minority outreach program to ensure all residents are represented in community feedback processes (mid-term)
- Develop a standardized system for the measurement of customer satisfaction (mid-term)



- Increase the household participation level from 37% by offering programs through an expansion of active adult and fitness/wellness programs. Differentiate markets between active adults and seniors (long term)

Objective 2: Facility and Service Improvements

- Analyze space usage and develop recommendations for increased capacity through improved, marketing, morning hours use, and primetime programming opportunities (mid-term)
- Have the Foundation lead a community input effort in preparation of a future referendum (mid-term)
- Research the ability to add programming space either independently or through partnerships (long term)

Financial Perspective Theme: Adaptability through All We Do

Objective 1: Continue to Grow Alternative Revenues

- Investigate a program for referral incentives (short term)
- Review the opportunity for naming rights for facilities (long term)
- Develop an overall District wide process to actively pursue corporate sponsorships and grants on a continuous basis (continuous)
 - Pursue special event sponsorships (tactic)

Objective 2: Staff Efficiency and Adaptability

- Develop a process to continuously evaluate services including annual program evaluation process, space capacity usage review, access review process (Website, program registration, and telephone and in person staff contact) (continuous)
- Develop the capital plan in alignment with greatest unmet resident needs from the household survey (continuous)



Objective 3: Constant Evaluation of Services

- Develop a Master Plan for facility improvements and upgrades, followed by the preparation of a referendum (mid-term)
- Use a continuous process to incorporate customer feedback, including survey and program results into improvement ideas (continuous)

Internal Business Support Perspective Theme: Excellence in All We Do

Objective 1: Continuous Improvement

- Improve staff use of program registration software to use data for decision making (short term)
- Develop a technology plan that includes continuous updating of computers (mid-term)
- Develop a process to identify industry trends as a way of being innovative in service, program, and facility offerings (long term)
- Develop a process to continuously simplify forms and procedures (continuous)

Objective 2: Strengthening Internal and External Relationships

- Develop a program for cross training and shadowing employees (short term)
- Develop internal communication standards and a cross functional team to manage the communication process (short term)
- Perform a partner satisfaction review to determine how the District can improve as a partner to other governmental agencies, athletic affiliate groups, and other stakeholders (long term)

Objective 3: Brand and Image

- Improve employee identification (short term)
- Dedicate labor resources toward the provision of marketing support (mid-term)



- Develop a new logo (tactic)
- Develop an overall marketing plan (long term)

Learning and Growth Perspective Theme: Innovative Empowered Workforce

Objective: Opportunity for Continuing Education

- Develop a succession management process and identification of leadership competencies for the Department Heads (long term)
- Provide continuous education and training for staff, aligned with strategy (continuous)
 - Technology, team, customer service and first impressions training (tactic)

Objective: Motivated Team

- Develop a job learning process that provides employees with an opportunity to learn about all areas of the District (mid-term)

Objective: Change is Good; Give it a Chance

- Develop a management model for change (short term)
- Develop a process to evaluate change initiatives (mid-term)



Implementation Guidelines

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

- All employees and Board members should receive a copy of the plan or electronic access to the Plan.
- Post a summary of the Plan on the Website and track results on the site as well.
- Elements of the Strategic Plan should be incorporated into the orientation program.
- Regular reporting of the Plan's progress should occur. Break the Plan into separate fiscal years and report one year at a time. Each initiative for the year should include a list of tactics that support the goal's completion. It is the project leader's responsibility to report on his/her goal, included in a monthly or quarterly report. A suggestion is to input each year's data on a spreadsheet that lists the Themes, Objectives and Initiatives start date and completion date, and which staff person is responsible for the Initiative's completion.
- At the end of the year, perform an annual review of the initiatives.
- Update major stakeholders on the Plan's implementation and results on an annual basis.
- Conduct staff meetings on a quarterly or semi-annual basis to review the Plan's progress and results and report the Plan's progress to the Park Board on a quarterly basis.
- The performance appraisal process should reflect the completion of the Strategic Plan initiatives as an evaluation criterion. Also, performance criteria should be aligned with key cultural efforts of the District such as innovation, teamwork, and service.



-
- Track the measurement system on a quarterly basis. Some of the measures will be calculated annually. Provide an annual narrative about the results. Review the inventory of measures on an annual basis and make adjustments as necessary to ensure the measures continuously add value to decision making. Include a combination of lagging and leading indicators. (lagging indicator, or outcomes measure past performance; leading indicators or performance drivers assist in establishing future performance)
 - After completion of the first year of the Plan and baseline results are quantified, targets should be initiated for the measurement system. For example, if there is a customer satisfaction measure of achieving 90% customer satisfaction, and in the initial year, the 90% is achieved, the target for successive years could be 95%.
 - There should be an annual just-in-time review of the next year's Initiatives to determine if priorities have changed. This can be included at an annual retreat in which successive years' Initiatives are discussed as part of the annual budget process. Initiatives should tie into the budget process.
 - Post a chart of each year's initiatives on office walls in administrative areas with a check-off column, designating completion as part of a visual management program. Staff meetings should regularly include discussion of strategy.
 - After each year of the Plan, the staff should review the Plan process and re-tool any parts of the process that need improvement.
 - Some of the Initiatives require individual effort to complete; others require a group of employees to complete the work. The Initiatives are specific work projects that are scheduled for completion between fiscal year 2011 through fiscal year 2014. Each Initiative is designated as year 1, 2, 3 or ongoing.



Summary

The Rolling Meadows Park District has reached a mature cycle of its life as an organization. This stability should enable the agency to dedicate itself to a strong strategy focus in the next five years. This will lay the groundwork for a future campaign to garner additional funding for facility development and renovation.

Park District leadership espouses to be accountable to its residents and desires to re-position and re-energize itself with implementation of the Strategic Initiatives. In addition, it desires to align the organizational culture with community need. In order to successfully deploy the elements of strategy, the District's Board members and staff will need to continuously improve service processes, strengthen internal and external communication and relationships, and elevate the importance and attachment to innovation in its culture. It is the intent of the Plan to effectively



work toward the District's vision of: *To inspire our community to live happier and healthier lives by providing exceptional opportunities to play, learn and grow.* The Rolling Meadows Park District Strategic Plan 2011-2016 is a starting point of a great new chapter for the community.



Definitions

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

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

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

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

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

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

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

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



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

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

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