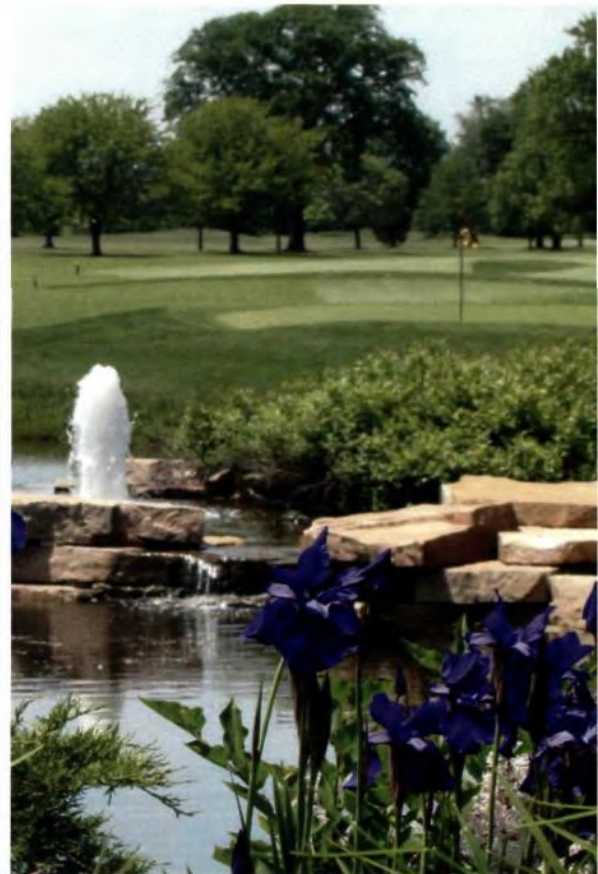




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Strategic Plan

2012-2017

ACKNOWLEDGEMENTS

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WHEELING PARK DISTRICT STRATEGIC PLAN

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INTRODUCTION

Strategic planning is an organizational management activity that is used to set priorities, focus energy and resources, strengthen operations, and ensure that staff and Board members are working toward common goals. It also establishes an agreement around intended outcomes/results, and assesses for adjustments within the organization's direction in response to trends and a changing environment. Effective strategic planning describes not only where an organization is going and the actions needed to progress, but also measures its success in achieving the intended outcomes/results.

Wheeling Park District has developed its Strategic Plan to provide direction in serving its communities in parks and recreation for the time period from May 2012 to April 2017. The Plan creates direction for the future allocation of resources, financial stability, staffing levels, internal support and communication, organizational culture efforts, and the capacity for learning and growth. This Plan is the result of the collaborative efforts of Park District staff, Leadership Team, and the Board of Commissioners. It was prepared with input from the Community Survey conducted by Leisure Vision, and supports the Parks and Recreation Comprehensive Plan provided by PROS Consulting, Inc.



PLANNING DEFINITIONS

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

Mission – Defines our core purpose. It's the business we are in.

Vision – Defines the desired future of the organization. It's a "stretch" for the organization to achieve, but achievable. Sets the overall, big picture direction and must be measurable.

Organizational Values – Describe the way the District operates and a system of shared values about what is important. These are expectations for consistent practices by members of the organization. A shared philosophy and attitude toward team members and guests.

Balanced Scorecard Perspectives – The five perspectives include Guest, Community, Financial, Internal Business Process, and Learning and Growth. They demonstrate cause and effect relationships in the completion of strategy. All Strategic Initiatives are in alignment with these five perspectives.

Strategic Initiatives – Support the Mission. What the organization and its members need to do as they relate to the five Balanced Scorecard perspectives. Goals and objectives set are within the perspective of the Initiatives.

Strategic Plan – Focuses on issues confronting the organization, issues that have resulted from forces and trends – internal and external. It is a systematic approach to define short-term goals.

Strategic Goals – Statements describing the specific elements the organization must do well in order to execute its strategy.

Strategic Objectives – Specific programs, activities, projects or actions to undertake in an effort to meet performance targets. Objectives are detailed through specific tactics and plans of action, which are not included within the Strategic Plan. Tactics and action plans are included in separate documents, such as the Agency's annual goals.

Measures – A standard used to evaluate and communicate performance against expected results. Measures are quantitative indicators, and typically show growth or decline in numbers, financials, percentages, etc. Measures assist staff with the ability to determine organizational performance.

Tactics – Tactics are not included as part of the Plan. The development occurs after the Plan's implementation. Tactics are subordinate to the goals, and detail the action needed to take place in order to complete the goals.

Major Initiatives – Large, long-range projects, commitments, or shifts in direction. Major Initiatives are identified in the Parks and Recreation Comprehensive Plan Report.

Parks and Recreation Comprehensive Plan – Focuses on long-range projects and initiatives. The plan looks at trends, demographics, facilities, and land use. It is the guide to meet the Vision.

HISTORY OF PARK DISTRICT PLANNING PROCESS

Beginning in 2003, and running through 2004, the District embarked on an initiative to reevaluate the organization's core purpose and its communication efforts. Essentially, it took a look at its identity and image. Included in this assessment was a process where Board and staff members evaluated the Park District's mission statement to determine if it effectively reflected the core purpose of the organization. The outcome of this process resulted in revising the Park District's Mission Statement, which now clearly articulates the Wheeling Park District's reason for existing. As adopted by the Park Board in 2004, Wheeling Park District's mission is **To provide memorable experiences in parks & recreation that enrich our communities.** Additionally, it was recognized that since people are the Park District's most valuable asset, the tag **We're People Driven** was added to the updated Park District logo.

Revising the Park District's mission statement and evaluating its communication efforts in 2004 were the genesis of a change process that began to move the Agency to function as a strategy-focused organization. This transformation instilled a sense of common purpose, identified shared organizational values, and established a set of key, strategic initiatives that provide an aligned course of direction in meeting the Park District's mission today and in the future. The presence of a strategic planning process has created a better sense of order, and channels resources in a direction that yields the greatest benefit to Park District resident taxpayers and other guests – overall, focusing efforts on what is truly important for the organization. The Park District's key, strategic initiatives and targeted outcomes include:

Strategic Initiative

Targeted Outcome

Quality Guest Services and Experiences	=	Guest Loyalty and Retention
Improvements in Internal Processes and Systems	=	Effectiveness and Efficiency
Establish Long-Term Financial Strategies	=	Financial Stability
Developing Community Relationships	=	Community Partnerships
Continuous Learning Environment	=	Motivated and Knowledgeable Employees

Strategic Initiative Supporting Statements

Quality Guest Service and Experiences – Providing quality service and experiences includes knowing guests, creating satisfied guests through memorable experiences, and developing lifelong relationships. Goals are to continue to improve service, identify the Park District's targeted guests' current and future needs, and to create loyalty among those individuals. Measurement of current services and guest experiences will continue, along with developing methods to improve services and experiences. The desired outcome is to provide experiences that exceed expectations, resulting in high **guest loyalty and retention.**



Improvements in Internal Processes & Systems – The Park District has made a commitment toward continuously improving processes and systems. This initiative is supported throughout the organization, including software upgrades, developing policies and procedures reflecting today's operation, improved communication methods, and internal accountability systems. Continuous improvements to processes

and systems provide **efficiency and effectiveness** throughout the organization, resulting in operational excellence.

Developing Community Relationships – The Park District recognizes the importance of creating opportunities for **partnerships** and involvement with all of its constituents, including residents, sponsors, other governmental entities, the business community, and community organizations. The Agency is working to identify key partners to collaborate with to improve the overall community. The desired outcome is to create a shared communitywide vision, embraced by all, for the betterment of the community.

Establish Long-Term Financial Strategies – Financial stability is imperative in order to maintain existing assets, have the ability to continue to provide services, and to invest in future opportunities. In order to maintain, as well as expand upon, existing services and facilities, the Park District will need to establish and maintain long-term **financial strategies**.

Continuous Learning Environment – Undoubtedly, the Park District's most valuable asset is its people. The District continues to invest in its employees by creating a working environment that continuously provides learning opportunities and new challenges. The District recruits employees that are well matched with the organization's culture. Opportunities for employees to actively participate in improving the overall organization are encouraged through collaboration, empowerment and trust. The organization is dedicated to creating a culture that is fun, and based on developing cohesive relationships. The desired outcome is to cultivate **motivated and knowledgeable employees and Board Members**.

All Agency, department, and individual goals are developed in support of the Park District's strategic initiatives, targeted to achieve outcomes in carrying out its mission.

2005 Communitywide Needs Assessment

With the Park District's revised mission established and communicated throughout, as well as the Agency beginning to function as a strategy-focused organization under the guise of the strategic initiatives, a communitywide needs assessment was conducted by Leisure Vision in 2005. The needs assessment was conducted in a manner that maximized community input. The assessment evaluated the respondents' perceptions of quality and value of today's park and recreation experiences and facilities, identified other recognized park and recreation providers, and measured met and unmet park and recreation needs. Data collected was deemed statistically valid and reported in a manner that guides the Park District in its planning and strategic decision-making in order to meet the future needs for park and recreation experiences and facilities. Based on the recognized value and importance of this process, the Park Board formalized its commitment to conduct a communitywide needs assessment every five years to measure residents' views of the quality and value of park and recreation services, as well as to identify future needs.

Vision Statement Process

With the Park District mission, strategic initiatives, organizational values, and results of the Community Attitude and Interest Survey and Needs Assessment in place, staff and Board members had the necessary information to create the Vision and set the future direction for the Wheeling Park District. Developing the Vision and its supporting statements was one of the final components that guided the planning process conducted by the Park District Board, staff and residents. It is important to

differentiate that the *vision* is what the Park District is pursuing, based on community and resident input, whereas the *mission* describes the Park District's purpose; it is true today and in the future. Maximizing community and resident input through the 2005 Needs Assessment process guided the Park Board and staff in crafting the Vision through facilitated workshops. As a way of defining the Wheeling Park District's direction for the future, in April 2006, the Board of Commissioners adopted the following Vision Statement:

To become the provider of choice in parks and recreation within the communities that we serve.

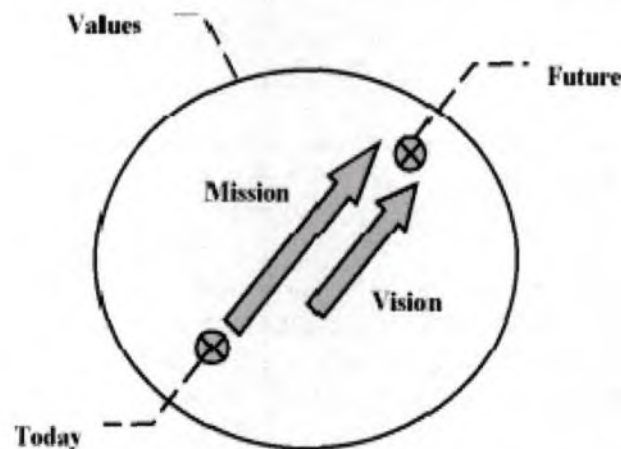
In order to achieve the Vision, based on community feedback, three primary areas of focus were established:

Participation – The Wheeling Park District commits to continually reach out to the community, seeking input to identify valid park, recreation services, and facility needs.

Open Space – The Wheeling Park District commits to strike a balance between maintaining its facilities and preserving open space within the existing urban environment.

Partnerships – The Wheeling Park District commits to build purposeful partnerships that are of civic priority, fiscally responsible and enhance the community.

How does a Vision Statement Differ from the Mission Statement?



Referring to the above figure, note that the arrow representing the Park District's mission connects both the present and the future. Again, this is because the mission statement is true both today and also in the future. The Wheeling Park District's purpose is parks and recreation – that's what the organization provides today and in the future.

The Vision Statement, unlike the Mission Statement, was not true in 2005; therefore, the arrow representing the Park District's Vision does not connect to the present, only to the future.

Both the Mission Statement and Vision Statement exist and are in concert with the Park District's organizational values.

Park and Recreation Comprehensive Plan

The Vision provides direction for what the Park District is working to achieve in the future, while continuing to meet its mission. Late in 2006 and throughout 2007, the Park Board and staff worked with Pros Consulting LLC to complete the Park District's first Park and Recreation Comprehensive Plan. This Plan is a broad-based, long-range planning tool for the entire District that guides the future of park facilities and recreation programs. The Plan also provided recommendations to the District for redevelopment, growth and enhancement of its park and open space system, which includes parks, trails, and recreation services, for the next five to ten years.

As a result of this work, priorities were set and formalized into a Plan that serves as a long-range tool to meet the District's vision for parks and recreation. The document considers the community input process performed in 2005, along with the inventory and assessment of parks, facilities and programs. The Plan determined the best land use and land management practices, as well as evaluated the District's current open space, indoor recreation space, and recreation services, compared to community needs, current standards and trends. It has assisted in establishing priorities for annual goals of improvements and investment, along with implementation strategies. The Plan serves as a guide in assisting staff and Board to make decisions that best serve the long-term park and recreation needs of the community.

Park and Recreation Comprehensive Planning – Major Initiatives

In February 2008, a Board Workshop was held to discuss and prioritize major initiatives that will take place over the next five to ten years. Results of this workshop assist in guiding Board decisions and commitments for future, and realistic, major priorities. The three major priorities, set in rank order, include:

Heritage Park/CRC Utilization – Rather than listing these two assets as separate initiatives, they are combined into one, as there are mutual benefits associated with developing the park and enhancing the CRC's utilization. With the Heritage Park Master Plan and Report complete, the Board determined a CRC Utilization Study should be conducted, with the goal being to improve the effectiveness of the layout and access, and to increase the overall use of the existing space. Components of this study consider the possibility of integrating VOW Senior Services into the CRC and, based on need, expanding current fitness/wellness space, as well as many other opportunities to improve utilization.

Land Acquisition Strategies – This priority is a result of an identified need and a deficit of land available for open space, particularly in the southern part of the Park District's service area. Targeted acquisitions of open space for new parks and access points to existing parks are of interest. This will assist in achieving improved equity throughout the District, and better access will improve entryways into parks and increase awareness.

Neighborhood Park Revitalization Program – This initiative focuses on ongoing improvements at the neighborhood parks, and includes lifecycle replacement of amenities (such as playgrounds) to reflect the uniqueness of each park. Recognized opportunities exist to develop more "wow factor" at various parks as part of the revitalization program. As part of the playground replacement schedule, more innovative play structures and interactive equipment will be considered during the Park District's "people-driven" playground design process.

MISSION

To provide memorable experiences in parks & recreation that enrich our communities.

Approved by the Board of Commissioners November 2, 2004.

VISION

To become the provider of choice in parks and recreation within the communities that we serve.

Three Primary Areas of Focus to Achieve the Vision:

Participation

The Wheeling Park District commits to continually reach out to the community, seeking input to identify valid park, recreation services, and facility needs.

Open Space

The Wheeling Park District commits to strike a balance between maintaining its facilities and preserving open space within the existing urban environment.

Partnerships

The Wheeling Park District commits to build purposeful partnerships that are of civic priority, fiscally responsible and enhance the community.

Approved by the Board of Commissioners April 4, 2006.

***Mission, Vision, Organizational
Values and strategy first –
objectives and tactics second.***



ORGANIZATIONAL VALUES

As an organization, Park Board, and as team members, we value:

Respect

We make every effort to work as a team while appreciating individual differences. We seek cooperation and consensus between team members and guests. We value the opinions and efforts of others.

Communication

We strive for open and honest communications with ongoing, active listening between team members and guests and respond to one another with clarity, tact and in a timely manner. We value information that our guests provide. Individual differences are accepted and all issues are open for discussion.

Integrity

We shall maintain trust and respect for one another and our guests by being responsible, accountable and honoring our commitments. We are dedicated to doing what we say we are going to do.

Innovation

Team members continuously work to improve guest service and remain focused on Park District key initiatives. Team members are encouraged to create new ideas, find and implement new approaches in providing parks and recreation experiences, and remain flexible to the changing needs of the guests we serve.

Recognition and Appreciation

Recognition reaffirms the worth and efforts of team members and accomplishments. Ongoing, timely acknowledgement and a genuine "thank you" are shared both verbally and in writing. Major accomplishments are recognized and rewarded.

Continuous Learning

The agency and team members will work as partners to foster professional growth and development in order to provide quality services. Providing opportunities for continuous learning and taking on new responsibilities are of great importance and value.

Fun

We have fun and take pride in our work while making a difference in the community and in people's lives.

Empowerment

As a team, we believe that we are responsible for our success and let people do their jobs. We will continually foster a work environment built on trust, learning, responsibility, collaboration and accountability.

People

We recognize that people are the organization's most valuable asset. Team members are the delivery system for our services and are dedicated to providing memorable experiences to our guests.

Approved by the Board of Commissioners March 15, 2005.

2012-2017 STRATEGIC PLAN DEVELOPMENT

Board and Staff Workshops

Initial Board and staff workshops were held in spring 2010 in order to prepare for the 2010-2011 Community Survey. Topics covered in these workshops included:

- History of Park District's Planning Process
- Review Park and Recreation Comprehensive Report (PRCR) and provide status of the Implementation Plan
- Status report on Agency Goals
- Community Survey and tentative schedule
- Strength, Weaknesses, Opportunities, and Threats (S.W.O.T) Analysis
- Conducted staff and Board survey

These discussions related to organizational performance, progress on Agency goals (as they related to the PRCR), and the 2008-2010 Strategic Plan. Project priorities were discussed as well. The following lists the information generated from the workshops:

S.W.O.T. Analysis

Strengths

Quality staff
 Facilities
 Financial position
 Partnerships
 Resident support
 Reputation

Opportunities

Heritage development
 Lake Cook property
 Create guest loyalty
 Weakened competition
 Partnerships
 Environmental practices
 Land acquisitions

Weaknesses

Public awareness
 Location of current open space
 Aging facilities
 Gaps in staff skills and support
 Environmental stewardship
 Temporary loss of Heritage Park

Threats

Economy
 Unfunded mandates
 Competition for leisure time
 Weather
 Rising costs
 Succession in Parks and Recreation
 Funding for grants



Workshop attendees were also asked to identify 3 ideas and/or thoughts on items they believed the District should address in the future, and how these ideas may fit into existing, or future, District plans.

- Walking and biking trails (Long term)
- Heritage Park redevelopment (Mid term)
- Lake Cook property planning (Long term)
- Survey teens (Immediate and include with Community Survey)
- Financial sustainability (Ongoing)
- Business plans (Short term)
- Addressing diversity (Ongoing)
- Pursue additional intergovernmental partnerships (Short term)
- Acquisition of open space (Ongoing, as appropriate opportunities become available)
- Conduct Board Workshops (Short term)

Community Input

As part of preparing to conduct the Community Survey, and to incorporate results into the Strategic Plan, stakeholder interviews and focus groups were held at the Wheeling Park District. Ron Vine from Leisure Vision conducted small-group, public input meetings with various community members, staff, and Board members. Similar questions were asked of all groups, with a few questions specific to the audience, such as Board members. The following is a brief summary of consensus information generated during the meetings.



Future: What is the most important result you want to have accomplished in the next five years?

Many comments related to park improvements, adding amenities and improved accessibility. Additionally, improved and enhanced communication to increase participation, plus overall awareness of the Park District, was important. Participants also expressed the importance of taxing bodies continuing to work together to improve the community.

Issues: What are the most important issues facing the Wheeling Park District?

- Continue the funding programs they have in place
- Continue reaching out to the community. You can't just offer programs; you have to reach out into the community.
- The reconstruction they are doing here at Heritage Park
- Finances
- Economy
- Ethnicity
- Traffic on Dundee, including the train
- Redevelopment of Heritage Park
- So many things to take care of; i.e., golf course, pools, neighborhood parks, etc.
- Managing construction at Heritage and keeping on top of other things.
- Getting everyone to know they are welcome at the Park District. I don't think the Park District has done enough in actively addressing diversity.

Survey Findings

The Park District conducted a Community Survey during 2010-2011. The purpose of the survey was to help measure quality and usage of Park District services; establish priorities for the future development of parks and recreation facilities, programs and services within the community; and to benchmark the results of the survey as compared to 2005 survey results for the Wheeling Park District.

The following information summarizes the major survey findings:

- **Visiting Park District Parks** Sixty percent (60%) of households have visited Wheeling Park District parks during the past year. The parks visited by the highest percentage of households during the past year are: Heritage Park (35%), Childerley Park (24%), and Chamber Park (13%).

Of the 60% of households that have visited Park District parks during the past year, 88% rated the physical condition of the parks they've visited as either "excellent" (32%) or "good" (56%). An additional 11% of households rated the parks as "fair," and only 1% rated them as "poor."

- **Participation in Park District Programs** Thirty-two percent (32%) of households have participated in Wheeling Park District programs during the past 12 months. Of the 32% of households that have participated in Park District programs during the past year, 93% rated the quality of the programs as either "excellent" (47%) or "good" (46%). An additional 6% of households rated the programs as "fair," and only 1% rated them as "poor."

- **Ways Respondents Learn about Park District Programs and Activities** The Wheeling Park District Brochure (86%) is, by a wide margin, the most frequently mentioned way that respondents learn about Wheeling Park District programs and activities. The other most frequently mentioned ways that households learn about Park District programs/activities are: from friends and neighbors (24%), Park District website (19%), and the newspaper (17%).

- **Use of Park District Recreation Facilities** The Wheeling Park District recreation facilities that the highest percentage of households have used during the past 12 months are: Community Recreation Center (50%), Outdoor Family Aquatic Center (40%), and the Arctic Splash Indoor Pool in CRC (31 %).

- **Organizations Used for Parks and Recreation Programs and Services** The organizations used by the highest percentage of households for parks and recreation programs and services are: the Wheeling Park District (45%), the Indian Trails Library (40%), private or public schools (19%), and churches (15%).

- **Need for Recreation Programs** The recreation programs that the highest percentage of households have a need for are: fitness and wellness programs (51%), community special events (39%), adult programs (30%), water fitness programs (25%).

- **Most Important Recreation Programs** Based on the sum of their top four choices, the recreation programs that households rated as the most important to their household

are: fitness and wellness programs (40%), community special events (26%), adult programs (21 %), and water fitness programs (18%).

- **Recreation Programs Participated in Most Often at Park District Facilities** Based on the sum of their top four choices, the recreation programs that households participate in most often at Wheeling Park District facilities are: fitness and wellness programs (19%), community special events (12%), and youth sports programs (10%).

- **Need for Sports Fields and Recreation Facilities** The sports fields and recreation facilities that the highest percentage of households have a need for are: indoor fitness and exercise facilities (50%), indoor recreation centers (47%), indoor swimming pool (47%), and outdoor aquatic center (43%).



- **Most Important Sports Fields Recreation Facilities** Based on the sum of their top four choices, the sports fields and recreation facilities that households rated as the most important are: indoor swimming pool (37%), indoor fitness and exercise facilities (37%), outdoor aquatic center (34%), and indoor recreation centers (31%).

- **Reasons Preventing Households from Using Sports Fields, Recreation Facilities and Programs** The most frequently mentioned reasons preventing households from using Wheeling Park District sports fields, recreation facilities and programs more often are: "fees are too high" (25%), "program times are not convenient" (19%), "program not offered" (11 %), and "I do not know what is being offered" (11 %).

- **Need for Various Parks Items** The parks items that the highest percentage of households have a need for are: walking and biking trails (67%), large community parks (46%), small neighborhood parks (44%), nature areas/wildlife habitats (43%).

- **Most Important Parks and Items** Based on the sum of their top four choices, the parks items that households rated as the most important are: walking and biking trails (54%), small neighborhood parks (28%), large community parks (25%), and nature areas/wildlife habitats (23%).

- **Reasons Preventing Households from Using Park Items** The most frequently mentioned reasons preventing households from using Wheeling Park District park items more often are: "I do not know locations of parks" (12%), "parks do not have the right equipment" (8%), and "too far from our residence" (8%).

- **Level of Support for Actions to Improve the Parks and Recreation System** The actions that the highest percentage of households are either very supportive or somewhat supportive of the Park District taking to improve the parks and recreation system are: develop new walking/biking trails and connect existing trails (84%) and upgrade existing neighborhood parks (77%).

- **Actions Most Willing to Fund with Tax Dollars** Based on the sum of their top three choices, the actions to improve the parks and recreation system that households are

most willing to fund with tax dollars are: develop new walking/biking trails and connect existing trails (54%) and upgrade existing neighborhood parks (36%).

- **Most Important Benefits Provided by the Park District** Based on the sum of their top three choices, households indicated that the most important benefits provided by the Wheeling Park District are: improve physical health and fitness (47%), make Wheeling a more desirable place to live (39%), increase property values in Wheeling (32%), and help reduce crime (30%).
- **Level of Satisfaction with the Overall Value Received from the Park District** Sixty-six percent (66%) of households are either very satisfied (29%) or somewhat satisfied (37%) with the overall value their household receives from the Wheeling Park District. Only 6% of households are either somewhat dissatisfied (4%) or very dissatisfied (2%) with the Park District. In addition, 17% of respondents rated the Park District as "neutral," and 11% indicated "don't know."

Wheeling Park District conducted a survey of teens in the Wheeling Park District during the spring of 2011. The purpose of the survey was to understand current activities teens participate in after school and on weekends, current and past usage of Park District facilities, and programs teens would like to see the Wheeling Park District offer. The survey was administered on site at schools in the Wheeling Park District.

Leisure Vision worked extensively with Wheeling Park District officials in the development of the survey questionnaire. This work allowed the survey to be tailored to issues of strategic importance to teens in the Wheeling Park District.

Four hundred twelve surveys were completed. The results of the sample of 412 households have a 95% level of confidence with a precision of at least +/-5%.

The following summarizes the major survey findings:

- **Participation in Activities** There are six activities over 75% of Wheeling Park District teens indicated they currently participate in, including: listening to music (86%), hanging out with friends (86%), watching television (85%), text messaging (79%), relax/do nothing (79%), and spend time with family (77%).

Based on the sum of respondents' top four choices, the activities Wheeling Park District teens participate in most after school are: hanging out with friends (44%), and text messaging (43%).

Based on the sum of respondents' top four choices, the activities Wheeling Park District teens participate in most on weekends are: hanging out with friends (48%), and spending time with family (40%).

- **Used to Participate In** Forty-nine percent (49%) of respondents indicated there are activities that they used to participate in but don't anymore. (35%), basketball (19%), and biking (18%).
- **Reasons for Participation in Current Activities** Teens were asked to indicate the two major reasons they participate in their current activities. The most frequently mentioned reason respondents indicated that they participate in current activities is: "I like the activity" (82%). The

second most frequently mentioned reason teens participate in current activities is because "my friends participate in the activity" (59%).

- **How Respondents Find Out About Current Activities** Teens were asked to indicate the two major ways they find out about their current activities. Eighty-one percent (81%) of respondents indicated they find out about their current activities "from my friends." Other frequently mentioned ways respondents indicated they find out about their current activities are: "from information given at school" (42%), and "from my parents" (30%).
- **Getting to Activities** The most frequently mentioned way respondents indicated they get to their activities was "my family drives me" (80%). Other frequently mentioned ways respondents indicated they get to their activities are: "I walk/bike/skateboard with my friends" (46%), and "friend's parents take me" (35%).
- **Whether Respondents Think There Are Enough Things to Do In Wheeling** Forty-six percent (46%) of teens indicated they thought "yes" there were enough things to do in Wheeling. Twenty-one percent (21 %) indicated "no," and thirty-three percent (33%) indicated "not sure."
- **Teen Use of Wheeling Park District Facilities** Eighty-four percent (84%) of teens "currently use or have used in the past" the Traditions Golf Course at Chevy Chase County Club. Other frequently mentioned facilities that are "currently being used or have been used in the past" include: the Fitness Center in CRC (74%), and the Gym in CRC (54%).
- **All the Reasons That Prevent Respondents From Using the Wheeling Park District More Often** Teens were asked to indicate ALL the reasons that prevent them from using the Wheeling Park District more often. Fifty-seven percent (57%) indicated "I go other places." Other frequently mentioned ways that prevent respondents from using the Wheeling Park District more often include: "I am happy with what I am doing now," "never occurred to me," and "my friends are not there."
- **Other Activities Teens Would Like the Wheeling Park District to Offer** Seventy-two percent (72%) answered "Have Movie Nights showing recently released movies for free." Other activities that teens would like to see offered include: "build a surf machine at the outdoor aquatic center (65%), "open up use of the outdoor aquatic center for parties on weekends" (61%), and "make a room available at the CRC just for teens" (57%).
- **Actions That Teens Would Most Want the Wheeling Park District to Take** Based on the sum of respondents' top three choices, the activities that teens would most want the Wheeling Park District to take are: "Movie nights showing recently released movies for free (71 %), "build a surf machine at the outdoor aquatic center" (53%), and "let people use the aquatic center for weekend parties" (42%).
- **Two Best Times for Respondents to Participate in Programs and Activities** Fifty-three percent (53%) indicated "weekends in the afternoon." Thirty-nine percent (39%) indicated "weekdays after school (3 p.m.-6 p.m.)."

THE BALANCED SCORECARD

The balanced scorecard is a strategic planning and management system that is used extensively in the private and public sectors, as well as nonprofit organizations, to align activities with the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals. It was originated in the early 1990s by Drs. Robert Kaplan (Harvard Business School) and David Norton as a performance measurement framework that added strategic, non-financial performance measures to traditional financial metrics to give managers and executives (in Wheeling Park District's case, its Board members and constituents) a more "balanced" view of organizational performance.

The balanced scorecard has evolved from its early use as a simple performance measurement framework to a full strategic planning and management system. The "new" balanced scorecard transforms an organization's strategic plan from a passive document into an action plan for the organization on a consistent, measurable basis. It provides a framework that not only provides performance measurements, but helps leaders identify what should be done and measured.

This new approach to strategic management was first detailed in a series of articles and books by Drs. Kaplan and Norton. Recognizing some of the weaknesses and vagueness of previous management approaches, the balanced scorecard approach provides a clear prescription as to what organizations should measure in order to "balance" the financial perspective. The balanced scorecard is a management system (not only a measurement system) that enables organizations to clarify their vision, mission and strategy and translate them into action.

Drs. Kaplan and Norton's Balanced Scorecard includes four perspectives: Financial, Internal Processes, Customer, and Learning and Growth. When the Park District started work to become a strategy-focused organization, it was recognized that a Community perspective should be included in the District's strategic initiatives; therefore, it is part of the scorecard.

Wheeling Park District's Balanced Scorecard framework includes five perspectives:

- Guest: To achieve the mission and vision, how should we appear to our guests?
- Community: To achieve our mission and vision, how should we appear to our Community Partners?
- Internal Processes: To satisfy our guests, which internal processes must we do extremely well?
- Financial: To succeed financially, how should we appear to our taxpayers?
- Learning and Growth: To achieve our mission and vision, how will we sustain our ability to change and improve, develop leaders among staff, and knowledgeable Board members?

Adapted from Robert S. Kaplan and David P. Norton, "Using the Balanced Scorecard as a Strategic Management System," *Harvard Business Review* (January-February 1996): 76.

The strategic recommendations included in this Plan outline future efforts and resource allocation relating to these five perspectives. This approach ensures that learning and growth of the organization relates to its strategic initiatives. Additionally, it focuses on the guest and the ability of the Agency to be financially sustainable.

Wheeling Park District is a strategy-focused organization that commits to excellence, accountability, ethical practices and financial stability which are based on its dedication to the mission, vision and organizational values. The Strategic Plan provides the foundation for this work.

STRATEGIC INITIATIVES AND OUTCOMES

In using the Balanced Scorecard, the Park District has developed Strategic Initiatives that are broad-brushed organizational descriptions that provide direction for outcomes. These initiatives follow the five perspectives outlined above and include:

Provide Quality Guest Service and Experiences

Providing quality service and experiences includes knowing guests, creating satisfied guests through memorable experiences, and developing lifelong relationships. Goals are to continue to improve service, identify the Park District's targeted guests' current and future needs, and to create loyalty among those individuals. Measurement of current services and guest experiences will continue, while developing methods to improve services and experiences. The desired outcome is to provide experiences that exceed expectations, resulting in **guest loyalty and retention**.



Developing Community Relationships

The Park District recognizes the importance of creating opportunities for **partnerships** and involvement with all of its constituents, including residents, sponsors, other governmental entities, the business community, and community organizations. The Agency is working to identify key partners to collaborate with to improve the overall community. The desired outcome is to create a shared communitywide vision, embraced by all, for the betterment of the community.

Establish Long-Term Financial Strategies

Financial stability is imperative in order to maintain existing assets, provide services, and invest in future opportunities. In order to maintain, as well as expand upon, existing services and facilities, the Park District will need to establish and maintain long-term **financial stability**.

Improvements in Internal Processes & Systems

The Park District has made a commitment toward continuously improving processes and systems. This initiative is supported throughout the organization, including software upgrades, developing policies and procedures reflecting today's operation, improved communication methods, and internal accountability systems. Continuous improvements to processes and systems provide **efficiency and effectiveness** throughout the organization, resulting in operational excellence.

Continuous Learning Environment

Undoubtedly, the Park District's most valuable asset is its people. The District continues to invest in its employees by creating a working environment that continuously provides learning opportunities and new challenges. The District recruits employees that are well matched with the organization's culture. Opportunities for employees to actively participate in improving the overall organization are encouraged through collaboration, empowerment and trust. The organization is dedicated to creating a culture that is fun, and based on developing cohesive relationships. The desired outcome is to cultivate **motivated, knowledgeable employees and Board Members**.

STRATEGIC PLAN HIERARCHY

The framework for the Plan includes a hierarchy of elements that starts with the most macro level of strategy to a more micro level (moving from strategic to tactical). The starting point for any strategic planning process is the review of the mission, vision, and organizational values. The mission statement was changed from its origin in 2005 and continues to effectively define the organization's purpose. Subsequent to the development of organizational values and strategic initiatives, agency goals were developed in support of the initiatives. Agency goals describe what the organization as a whole needs to do well in support of the initiatives.

This hierarchy is depicted below.



One of the Agency Goals under the Initiative *Quality Guest Services and Experiences* is “Evaluate and improve guest satisfaction and retention levels”; therefore, the District must identify ways to improve guest experiences. Department, division, and individual goals and objectives are more micro level in support of the Strategic Initiatives and Agency Goals. Following along with the Quality Guest Services and Experiences Initiative, an example of micro-level goals, objectives, and tactics is staff developing a process to seek input from guests on their experiences, evaluate and report on responses, and identify ways to strengthen and improve guest experiences. As shown in this sequence, the department, division, and individual goals and objectives are far more specific than the Agency goals, and the Agency goals are more specific than the Strategic Initiatives.

An example of the macro-level to micro-level work process discussed above follows.



STRATEGY MAP

The Park District's mission and vision provide the framework for the recommendations included in the Strategic Plan. All of the Strategic Initiatives, Goals and Objectives are aligned with the five Balanced Scorecard perspectives: guest, community, financial, internal process, and learning and growth. These are represented in the following strategy maps. The first map provides a continuum of the five perspectives and each of their supporting statements. The second map demonstrates the same five perspectives, with the addition of Strategic Initiatives, Goals and Measures, all in an effort to achieve the outcomes.

TRANSLATING MISSION, VISION, STRATEGY: 5 PERSPECTIVES



Adapted from Robert S. Kaplan and David P. Norton, "Using the Balanced Scorecard as a Strategic Management System," *Harvard Business Review* (July-August 2007): 153.



Wheeling Park District Balanced Scorecard

Vision: To become the provider of choice in parks and recreation within the communities we serve.

Mission: To provide memorable experiences in parks and recreation that enrich our communities.

	Strategic Initiatives	Goals	Measures Annually = (a) Quarterly = (q)	Outcomes
Guests	Quality guest services and experiences	- Align opportunities with guest and community needs - Pursue areas for growth - Implement Neighborhood Park Improvement Plan - Evaluate and Improve Internal and external guest satisfaction and retention levels - Develop Guest Loyalty and Recognition Program - Implement Major Park Improvement Plans - Implement ADA Transition Plan	- Develop process (q) - Participation (q) - Monitor progress (a) - Guest satisfaction (q) - Guest retention (q) - Develop program (q) - Report on progress (q) - Report on progress (a)	Loyalty and Retention
Community	Community relationships	- Develop strategic alliances - Foster existing relationships with State and Federal legislators	- Partner satisfaction - Opportunities (q)	Community Partnerships
Financial	Long-term financial strategies	- Align financial resources with need - Increase program and facility revenue - Increase alternative revenue sources	- Program and facility revenue (q) - Alternative revenue amount (q)	Financial Stability
Internal	Internal process and system improvements	- Develop and streamline critical processes - Maintain and achieve Agency accreditations - Strengthen Internal and external guest communications - Develop business plans for specific operations/facilities - Develop Agency environmental practices and standards	- Key processes documented (q) - Progress (q) - Progress (q) - Progress and findings (q) - Committee work (q)	Effectiveness and Efficiency
Learning & Growth	Continuous learning environment	- Staff and Board development - Uphold an accountable work environment - Encourage Innovation, creativity	% of participation (q) - New opportunities (q)	Motivated and Knowledgeable Employees and Board Members

STRATEGIC INITIATIVES AND GOALS 2012-2017

The following are the Park District's Strategic Initiatives, Goals and Objectives for the time period of May 2012 to April 2017. Time period priorities are attached to each objective as follows:

- Short-term goals – to be accomplished between May 2012 and April 2014
- Mid-term goals – to be accomplished between May 2014 and April 2016
- Long-term goals – to be accomplished between May 2016 and April 2017
- Ongoing goals are repeated during the entire time period

Dedicated staff time will be required to complete the goals. Before each year begins, the list of short-, mid-, or long-term goals will be evaluated according to current workload demands to ensure realistic pursuit in the number of goals and objectives attempted and completed.

Each year, staff will present, for Board approval, Agency goals that are derived from the Strategic Plan. Included in the annual goals are specific programs, activities, projects, and financial targets the organization will undertake through action plans, in an effort to execute what was established in the Strategic Plan.

GUEST INITIATIVE: QUALITY GUEST SERVICES AND EXPERIENCES

Guest Perspective

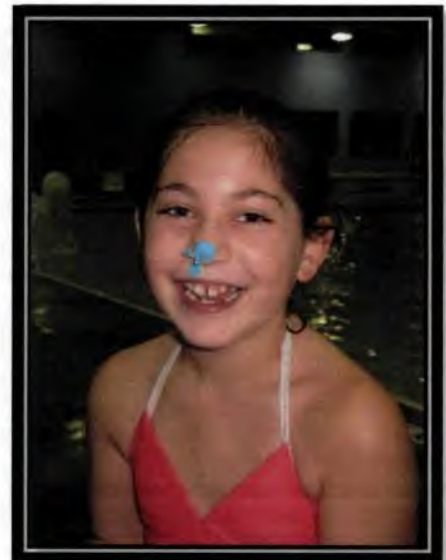
Strategic Initiative: Quality Guest Services and Experiences

Goal 1: Align opportunities with guest and community needs.

- Develop a process to monitor and review program lifecycles and trends **Ongoing**
- Conduct Communitywide Survey every 5 years to identify needs through a statistically valid survey **Long Term**

Goal 2: Pursue areas for growth, as identified in Communitywide Survey results, usage, data, trends, and facility feasibility studies.

- Programs – Fitness and Wellness, Community Special Events, Teen and Adult Programs **Short Term**
- Facilities – Indoor Fitness, Recreation Centers, Indoor Swimming Pool, Chevy Chase Country Club, Heritage Park Pavilion, Sports Complex **Short – Mid Term**
- Walking and Biking Trails **Mid – Long Term**
- Improve upon and develop new Dashboard/Scorecard reporting to effectively measure usage and data **Short Term**



Goal 3: Evaluate and improve internal and external guest satisfaction and retention levels.

- Develop a District/department/divisional approach that efficiently and effectively measures guest satisfaction and retention **Short Term**
- Conduct a compensation comparison survey **Short Term**

- Implement guest satisfaction measurement tool **Mid Term**
- Evaluate results and implement methods for improvements **Ongoing**

Goal 4: Develop Guest Loyalty and Recognition Program.

- Evaluate existing and/or develop a Guest Loyalty and Recognition Program based on guest input and trends **Mid Term**
- Promote and implement Guest Loyalty and Recognition Program **Long Term**
- Evaluate, and monitor for change, existing internal guest recognition program **Ongoing**

Goal 5: Implement Major Park Improvement Plans.

- Heritage Park Redevelopment Project **Short Term – Mid Term**
- Lake Cook Property – Park Development **Short Term – Long Term**

Goal 6: Implement the 2012-2017 Neighborhood Park Improvement Plan.

- Meadowbrook Tot Lot **Short Term**
- Husky Park Improvement **Short Term**
- Pleasant Run Park Improvement **Short Term**
- Horizon Park Improvement **Mid Term**
- Denoyer Park Improvement **Mid Term**
- Childerley Park Improvement **Long Term**

Goal 7: Implement ADA Transition Plan.

- Phase I **Short Term**
- Phase II **Short Term**
- Phase III **Mid Term**

COMMUNITY RELATIONS INITIATIVE: DEVELOPING COMMUNITY RELATIONSHIPS

Community Perspective

Strategic Initiative: Developing Community Relationships

Goal 1: Develop Strategic Alliances.

- Develop methods to connect with, and deliver service to, diverse markets **Ongoing**
- Develop an overall partnership evaluation process **Short Term**
- Explore new opportunities for collaborations and partnerships **Ongoing**
- Review existing, and redevelop, affiliate program **Short Term**
- Build upon working relationships with other governmental agencies, businesses, and service organizations **Ongoing**



Goal 2: Foster existing relationships with State and Federal Legislators.

- Keep in regular communication with legislators on Park District issues, public events and potential opportunities **Ongoing**

- Participate in state and national legislative forums on parks and recreation **Ongoing**
- Host an event targeted at legislators to promote advocacy of issues important to the Park District **Mid Term**

FINANCIAL INITIATIVE: ESTABLISH LONG-TERM FINANCIAL STRATEGIES

Financial Perspective

Strategic Initiative: Establish Long-Term Financial Strategies

Goal 1: Align financial resources with need.

- Continue to meet fund balance targets and build levels to meet target at Chevy Chase Country Club **Ongoing**
- Generate targeted annual transfers to capital projects funds **Ongoing**
- Update and formalize Capital Replacement and Improvement Plan (CRIP) **Short Term**
- Conduct a cost of service (COS) study to ensure appropriate pricing **Mid Term**

Goal 2: Increase Program and Facility Revenue to include:

- Chevy Chase Country Club
 - Golf **Ongoing**
 - Food & Beverage **Ongoing**
- Recreation
 - Fitness & Wellness **Ongoing**
 - Aquatic Center **Ongoing**
 - Recreation Programs **Ongoing**



Goal 3: Increase Alternative Revenue Sources.

- Continue to research and seek new opportunities that provide additional funding **Short Term**
- Develop a strategy to target those alternative sources **Short Term**

INTERNAL BUSINESS INITIATIVE: IMPROVEMENTS IN INTERNAL PROCESSES AND SYSTEMS

Internal Business and Processes Perspective

Strategic Initiative: Improvements in Internal Processes and Systems

Goal 1: Develop and Streamline Critical Processes.

- Strengthen and further develop operational procedures, processes and staff standards in core areas of operations **Short Term**
- Develop and implement a Districtwide Technology Plan **Mid-Long Term**
- Develop and implement an Electronic Document Management and Data Organization Storage Plan **Short – Mid Term**
- Develop and implement a Districtwide Security Plan **Short Term**

Goal 2: Maintain and Achieve Agency Accreditations.

- Maintain Park District Risk Management Agency (PDRMA) Accreditation **Ongoing – Mid Term**

- Achieve Distinguished Park & Recreation Agency accreditation **Short Term**
- Continue to qualify for GFOA's Certificate of Achievement for Excellence in Financial Reporting **Short Term**
- Research and evaluate NRPA Gold Medal requirements and value **Mid – Long Term**

Goal 3: Strengthen Internal and External Guest Communications.

- Identify internal guest communication methods and guidelines **Ongoing – Short Term**
- Conduct an external guest communication audit **Short Term**
- Build upon brand and image **Ongoing**
- Develop and implement Heritage Park Brand and Communication Plan **Short Term**
- Develop an overall Public Awareness/Promotions Plan **Long Term**

Goal 4: Develop Business Plans for specific operations and/or facilities, to include:

- Chevy Chase Country Club
 - Golf **Short Term**
 - Food & Beverage **Short Term**
- Fitness & Wellness **Short Term**
- Family Aquatic Center **Short Term**
- Arctic Splash **Short Term**
- Heritage Park **Short Term**

Goal 5: Develop Agency Environmental Practices and Standards.

- Form an internal Environmental Committee to address the following: **Short – Long Term**
 - Districtwide recycling
 - Energy efficiency
 - Best Management Practices (BMP) in design and development
 - Funding sources
 - Environmental education
 - Environmentally-responsible purchasing
 - Stewardship
 - Communication



LEARNING AND GROWTH INITIATIVE: CONTINUOUS LEARNING ENVIRONMENT

Learning and Growth Perspective

Strategic Initiative: Continuous Learning Environment

Goal 1: Staff and Board Development

- Develop core competencies for leadership positions and provide training through Wheeling Park District University (WPDU) **Short Term**
- Evaluate and revise new-employee orientation and training program **Ongoing**
- Create guest service and standards training through WPDU **Short Term**
- Revise performance evaluation process to include core competencies **Mid Term**
- Develop a succession management process **Mid Term**
- Strengthen Board competencies **Ongoing**
 - Provide pre-election packets and new Board member orientation
 - Make available state and national park and recreation conferences
 - Participate in Board member training opportunities
 - Conduct Board assessment through facilitator

Goal 2: Uphold an accountable work environment.

- Conduct a workload/staffing analysis to determine the best allocation of human resource expenses **Short Term**
- Hold employees accountable to meet their goals and position expectations **Ongoing**
- Monitor and report on progress of individual, divisional, department, and Agency goals **Ongoing**

Goal 3: Encourage Innovation, Creativity.

- Cultivate an environment that supports creative thinking **Ongoing**
- Develop a process to celebrate Park District milestones **Mid Term**
- Encourage and support continuous learning **Ongoing**



IMPLEMENTATION GUIDELINES

Implementation Guidelines

- All employees will receive a copy of the Strategic Plan or electronic access to the Plan.
- Elements of the Strategic Plan will be incorporated into the District's new employee and Board member orientation process.
- A summary of the Plan will be available on the Park District's website and will track results on the site as well.
- The District will provide regular reporting on the Plan's progress. The Plan will be divided into separate fiscal years and reported on annually. At the beginning of each year, staff will be responsible for updating each goal. Each goal for the year will include a list of tactics that support the goal's completion. Project Leaders are responsible for reporting on their team's goals in a quarterly report. A spreadsheet will list the Strategic Initiative, Goals and Objectives, Measurement, start date and completion date, and staff members responsible for the goals completion.
- The District will update major stakeholders on the Plan's implementation and results on an annual basis.
- Our organization will conduct staff meetings on a quarterly or semi-annual basis to review the Plan's progress and report results to the Board.
- The performance evaluation process will reflect the completion of the Strategic Plan Initiatives as a performance measure.
- Every employee's goals (Work Plan) will have a direct correlation to the District's Strategic Plan.
- The measurement system will be tracked on a regular basis. Some of the measures will be calculated annually, and an annual narrative about the results will be developed.
- There will be an annual "just-in-time" review of the next year's strategies to determine if priorities have changed. This will be included at an annual staff workshop in which successive years' Initiatives are discussed.
- Each year, the staff and Board will review the Plan process and address any parts of the process that need improvement.
- After the initial year, the Plan will align with individual departments. Departments will have their own Strategy Map and scorecard, aligned with the District's organizational strategy.

SUMMARY

The Wheeling Park District's 2012–2017 Strategic Plan positions the organization for the next five years. The District will continue to build upon its established legacy of years and years of excellent park and recreation services, as well as endlessly adapt to changing times and innovation. This requires a continuously improving culture – one committed to accountability, transparency, and providing the best possible value for taxpayers and guests. The District will also continue its external focus to its guests, as well as the community at large.

The District's commitment to its strategic initiatives creates a sense of discipline and focus, and aligns the entire organization around a clear and compelling future. Not only will these efforts help to achieve the vision of becoming the recreation provider of choice, these efforts will also help work toward creating a reputation as being an employer of choice within the community, and within the parks and recreation industry as well.

With all of the changing demands for services, competitive pressures, and ongoing future challenges the Agency faces, the Strategic Plan provides the District with the necessary framework to tackle challenges and opportunities for years to come. It ensures that Wheeling Park District is on course to fulfill its vision and help efforts in...

Positioning for the Future!





an IAPD/IPRA Distinguished Agency

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