

2018-2021 Strategic Plan



ACKNOWLEDGEMENTS

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WHEELING PARK DISTRICT STRATEGIC PLAN

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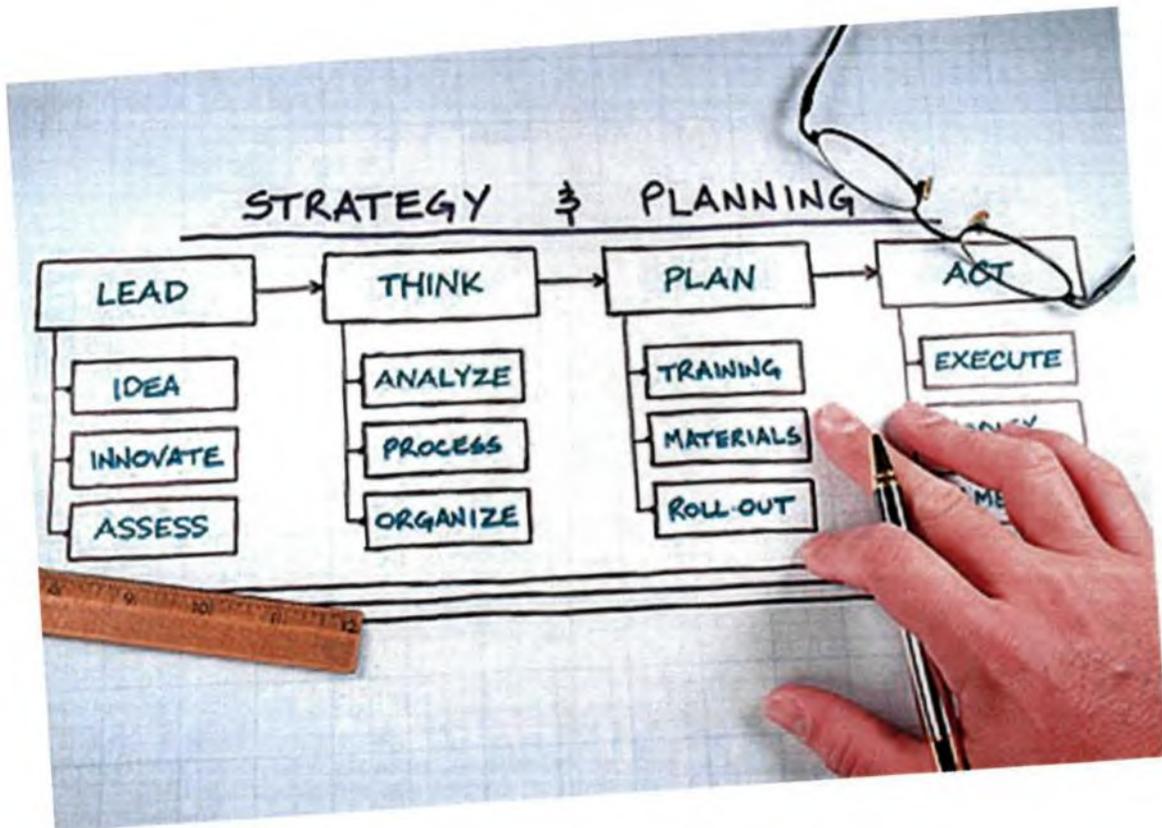
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INTRODUCTION

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 2018 to April 2021. 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, Strategic Plan Project Team, and the Board of Commissioners. It was prepared with input from the Community Survey conducted by aQity Research & Insights, Inc., and supports the 2017 Parks and Recreation Comprehensive Plan.



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 six perspectives include Guests, Community, Financial, Internal Business Process, Learning and Growth, and Environmental. They demonstrate cause and effect relationships in the completion of strategy. All Strategic Initiatives are in alignment with these six 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
Environmental Stewardship	=	Culture of Environmental Responsibility

Communitywide Needs Assessments

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 guide of the strategic initiatives, a communitywide needs assessment was conducted by Leisure Vision in 2005 and again in 2010. The needs assessments were conducted in a manner that maximized community input. The assessments 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. 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.



Consistent with Board policy, in December 2015, a communitywide survey was conducted by aQity Research & Insights, Inc. to help establish the priorities for the future development of parks and recreation facilities, programs and services within the community. The survey was designed to obtain the opinions of the community with regard to the level of satisfaction in the services provided by Wheeling Park District, measure the rate of participation and usage of Park District parks/facilities, understand the constraints to participation, understand the best channels of communication, and calculate the net promoter scores among recent users and participants. The results provided an in-depth understanding of the key issues, general perceptions, organizational concerns, and overall views of the Park District that helped guide the general comprehensive plan and the 2018–2021 Strategic Plan.

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 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 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.

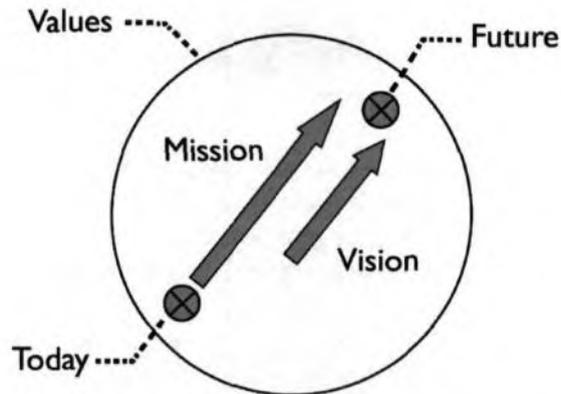
In order to achieve the Vision, based on community feedback, three primary areas of focus were established:

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 the 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. Wheeling Park District’s purpose is parks and recreation – that’s what the organization provides today and in the future.

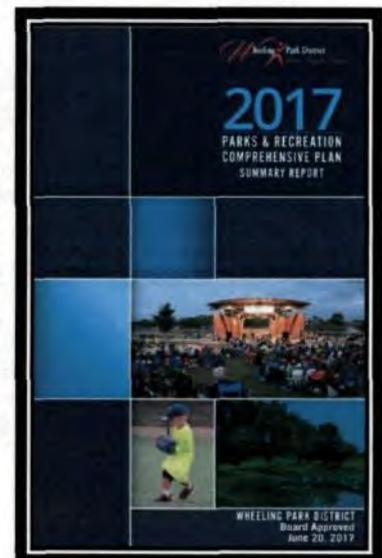
The Vision Statement, unlike the Mission Statement, was not true in 2005; therefore, the arrow representing the Park District’s Vision does not connect to the present, only to the future.

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

Parks 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 Parks and Recreation Comprehensive Plan. This Plan was a broad-based, long-range planning tool for the entire District that guided 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 ten years.

The 2007 Parks and Recreation Comprehensive Plan concluded in 2017 and a new plan was approved by the Board in June 2017. Much of the 2007 Comprehensive Plan is still relevant to the District, therefore an update of the 2007 Comprehensive Plan was undertaken utilizing several documents and overall research of the District to prepare an updated situational analysis. The analysis served to guide findings and recommendations for a 2017 Parks and Recreation Comprehensive Plan. The new review included the 2015 Community Survey results for Wheeling Park District, Needs Assessment, Park District Vision and Mission, Annual Reports, and the updated Village of Wheeling Comprehensive Plan with adoption of the Station Area Plan, Town Center Concept Plan and Active Transportation Plan.



The 2017 Parks and Recreation Comprehensive 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.

2017 Parks and Recreation Comprehensive Plan – Major Initiatives

Major Initiatives

Heritage Park Signature Facility Development and Community Recreation Center

This continues to be the most important and significant initiative for the District. This initiative combines the goal of continued development of Heritage Park with creating better utilization for the Community Recreation Center. Ultimately, each separate part of the initiative will create energy and synergy between the two parts of the park, the outdoor park component and all of its amenities, coupled with the Community Recreation Center's desire to align program and facility services with guest needs. This includes integrating the Wheeling Senior Center operation into its program mix, expanding the Fitness Center, and offering more fitness and wellness programs.

Continued improvements to Heritage Park are recommended in the 2017 Parks and Recreation Comprehensive Plan. Plans for a significant playground, signage, and other site improvements are identified further in this Plan.

Land Acquisition Strategies

The 2017 Parks and Recreation Comprehensive Plan recommends continuing to pursue strategic land acquisitions to better serve the community, specifically addressing areas of deficiency, particularly north of Lake Cook Road, and south of Hintz Road.

Program Offerings Designed Around Core Programs

The Comprehensive Plan process included an analysis of program offerings by the District. As a result of the assessment, core programs were identified. This major initiative recommends aligning program offerings with the needs of guests, according to the needs assessment survey results.

Creation of District Trail Network

A highly desired need of residents in the community is the development of strong trail connectivity. This requires the Park District to work with the Village to adopt an overall trail system master plan.

Sports Field Development

The Comprehensive Plan process included a thorough review of Wheeling Park District's inventory of sports fields, their capacity for use, and the demand by users. The analysis shows a need for large multipurpose fields. The focus moving forward is for a field house with indoor athletic spaces.

Demographic Shifts in the Community

The Park District understands the shifting demographics of the community and the need to continue its efforts in diversifying programs and services in response to the changes in demographics. Strategic initiatives, strategic objectives, measures, and outcomes are represented in the Wheeling Park District Strategy Map found on page 22. Subsequent to the map is a listing of all the project tasks, listed in alignment with the strategic initiatives.

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.

2018-2021 STRATEGIC PLAN DEVELOPMENT

Strategic Plan Project

Staff workshops were held in winter/spring 2018 to develop the Strategic Plan stemming from the results of the 2017 Comprehensive Plan. To accomplish this work, a select group of staff was asked to assist. Staff was chosen not based on title or level within the organization, but rather on each person's ability to work and comprehend on a strategic thinking level for the entire District. The District contracted with Tim Buividas of the Corporate Learning Institute to help facilitate the meetings and assist with the process. Mr. Buividas has an extensive professional background in strategic planning and proved to be a very valuable asset throughout the process.

On February 23, 2018, the Strategic Plan Project Team held an off-site retreat to kick off a series of meetings, building upon previous work, to develop the Park District's 2018-2021 Strategic Plan. The planned outcome for the Strategic Planning Retreat was for the group to begin prioritizing goals that were identified in the 2017 Parks & Recreation Comprehensive Plan (PRCP).



As part of preparing for this workshop, members of the team needed to refamiliarize themselves with the 2017 PRCP Executive Summary. Everyone independently reviewed and prioritized the Strategic Project Tasks found on pages 17-18 in the 2017 PRCP and provided feedback as to when they believed each item should be accomplished. Each goal was assigned as *short term*, *mid term*, *long term*, *on hold*, or *remove* based on the following criteria:

- Short-term goals – accomplished between May 2018 and April 2019
- Mid-term goals – accomplished between May 2019 and April 2020
- Long-term goals – accomplished between May 2020 and April 2021
- On hold – unrealistic to accomplish 2018-2021
- Remove – completed or no longer valid

In addition, team members were requested to review pages 1-8 and pages 15-20 of the 2012-2017 Strategic Plan, and bring copies of the 2017 PRCP, 2012-2017 Strategic Plan, and most recent update of the 2016-2017 Agency Goals.

The work of the group, over the course of four meetings between February and April 2018, resulted in a review and consensus for what the District's Strategic Plan goals should be for the short term, mid term, and long term. This was done by reviewing the goals in each of the six Strategic Initiatives: *Quality Guest Services & Experiences*, *Community Relationships*, *Long-Term Financial Strategies*, *Internal Processes and System Improvements*, *Continuous Learning Environment*, and *Environmental Stewardship*, and ranking them based on importance to the District, and the likelihood for completion in the three-year window (May 2018-April 2021).

At the conclusion of the four meetings, the staff group was able to finalize the goals and agree to their designated place in the schedule. The final step of the process was to assign leaders and teams to accomplish the goals, with the assistance of the entire District.

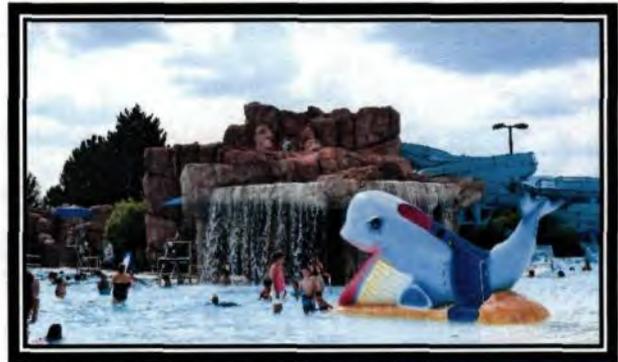
Survey Findings

The Park District contracted with aQity Research & Insights, Inc. to conduct a Community Survey in 2015. 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 2010 survey results for Wheeling Park District.

The following information summarizes survey findings:

Overall Opinion of the Wheeling Park District

- ❖ Virtually all Wheeling residents (95%) are familiar with the Park District, and hold it in very high regard.
 - ◆ Four out of five (81%) give the Park District favorable esteem scores, with only 10% rating it unfavorable. The remaining 9% were neutral.
 - ◆ The Park District's average esteem rating (on a 0-10 scale) is a very favorable 7.4. Only the Indian Trails Public Library receives a higher score (8.1).
 - ◆ The Forest Preserve District and the Village receive lower (yet still favorable) scores of 7.0 and 6.3 respectively.
- ❖ The Park District's strong esteem ratings are generally in line with other neighboring park districts (which receive an aggregate average of 7.7), and slightly higher than the statewide benchmark of 7.2.
- ❖ The oldest Wheeling residents are most favorable with the Park District. Younger residents under age 35 and Hispanic residents tend to give lower, yet still positive scores (7.1 and 6.7 respectively).
- ❖ The District's top strengths are the quality and variety of its programs and activities, cited by 32% overall.
 - ◆ Specific facilities are also frequently valued, specifically the pools and aquatic park (16%), the CRC in general (7%) and the Fitness Center specifically (9%), and Heritage Park (8%).
- ❖ When asked what they dislike about the Park District or what it could do better, the most frequent responses were "nothing I dislike" (18%) and "cannot think of anything" (16%).
 - ◆ The most frequent negatives concerned administrative issues with the Park District (18% – better communication needed, less waste, dislike policies)
 - ◆ Dislikes over costs and fees (17%)
 - ◆ Park improvements (16%)—more trails, open space, more safety).



Local Issues

- ❖ A clear majority of Wheeling residents are very satisfied with:

- ◆ The availability of recreational activities and programs in the community (71%, including 55% “very satisfied”)
- ◆ The number of parks (67%, with 50% “very satisfied”)
- ◆ The amount of open space (65%, with 44% “very satisfied”)

- ❖ Of the local issues tested, residents are clearly least satisfied with:
 - ◆ Property taxes (61% are dissatisfied overall, with only 23% satisfied)
 - ◆ The quality of public schools (50% satisfied vs. 37% dissatisfied)

- ❖ While satisfaction with the level/number of recreational activities, parks and open space is very strong, fewer than ten percent consider any of these to be among the most important local issues. Instead Wheeling residents are most concerned with:
 - ◆ Property taxes (53% rank this as among the top two issues)
 - ◆ Crime and safety (50%)
 - ◆ Quality of public schools (29%)
 - ◆ Village services (30%)

- ❖ Older residents (ages 55+) and women tend to be most satisfied with the availability of parks and programs in their community.

Value of the Wheeling Park District

- ❖ Most residents (53%) had no idea how much of their residential property taxes go to the Wheeling Park District. Only 3% overall estimated correctly that the Park District’s share is seven percent of property taxes.

- ❖ When informed of WPD’s actual seven percent share of property taxes, residents overall feel it is “somewhat” good value.
 - ◆ The average value rating on a 0-10 scale is 6.1, slightly above neutral.

- ❖ Overall, 50% feel the Park District represents a good or excellent value, while the remaining 50% were either neutral (30%) or said it was a poor value (20%).
 - ◆ Older residents, recent Park District users/visitors, NW region residents, and upper-income households tend to rate the Park District more favorably than average.
 - ◆ Conversely, those age 35 to 44, nonusers of the District, residents in the South region, and Hispanic households tend to give lower scores (closer to neutral). The level of tax sensitivity among Wheeling residents is also coupled with concerns about the Park District’s fees for its programs and memberships.
 - ◆ Consistently between 10% and 20% of residents voice concerns over the District’s fees for memberships and programs. This is generally the most frequent negative comment cited regarding the Park District.

Usage of Wheeling Park District Parks, Facilities, and Programs/Events

- ❖ Three-fourths (72%) of respondents report using or visiting a District park or facility in the past year.
 - ◆ Usage is consistent across most subgroups. The best predictor of using a District park or facility is the presence of children under age 18 in the household (87% among those with children, vs. 66% among households without children).

- ❖ The most widely used facilities and parks are:
 - ◆ The CRC (used by 56% of all residents)
 - ◆ Heritage Park (32%)
 - ◆ Chevy Chase Country Club (22%)
 - ◆ The outdoor aquatic center (19%)
 - ◆ These four facilities draw residents evenly from throughout Wheeling (though Northeast residents tend to use Heritage Park more than average).
 - ◆ The remaining Park District properties are used less often, and users tend to be nearby residents. For example, 11% used Childerley Park in the past year, and most of those visitors (69%) live in the NW part of Wheeling.



- ❖ Thirty-two percent of Wheeling households report taking part in a Park District program or event in the past year, most often:
 - ◆ Special events sponsored by the District (42% of recent participants)
 - ◆ Youth swimming and aquatic activities (39%)
 - ◆ Adult fitness activities/programs (34%)
 - ◆ Adult swimming/aquatics (23%)
 - ◆ Outdoor concerts (23%)
- ❖ Among those who have experienced District parks and facilities, or programs and events, satisfaction with each is extremely positive.
- ❖ Programs and events receive especially strong ratings, as does the level of maintenance and upkeep of District properties and facilities.
- ❖ No more than 10% are dissatisfied with the exception of perceived safety at Park District facilities (13%), and the number of parks available in the community (13%).

CRC Feedback

- ❖ The CRC has drawn attendance from a majority of Wheeling households in the past year, especially among Hispanics, households with children, and upper-income residents.
 - ◆ Most often they report using the Fitness Center, followed closely by the indoor pool.
 - ◆ Nonusers of the CRC usually cite lifestyle issues (too busy) or lack of interest as reasons for not taking advantage of the facility. About one in ten each report going elsewhere for recreation and exercise (e.g., health clubs, other facilities), or high fees at the CRC.



- ◆ A few cite the limited parking and difficult access to the facility off of Dundee Road as concerns regarding the CRC and other nearby Park District properties (Heritage Park, Family Aquatic Center).
- ❖ Awareness of the facility is very high. Nearly nine in ten nonusers know that the CRC is located behind Village Hall.

Chevy Chase Country Club

- ❖ Men and higher-income residents are most likely to report using Chevy Chase in the past year. Most nonusers have not been to the facility either because:
 - ◆ They do not golf and therefore feel they have no need to visit (42%)
 - ◆ They are unaware of the facility or its events (29%)
 - ◆ As a result, suggestions to draw interest and attendance at Chevy Chase focus on ideas for events, and family activities that are not necessarily related to golf.
 - ◆ These events would help raise awareness, as 40% of nonusers did not know that this is a public Park District facility.
 - ◆ Relatively few (14%) cite greens fees or costs as a deterrent to using Chevy Chase.



Recent Park Improvements

- ❖ Just over half (53%) of Wheeling residents have seen recent improvements to local neighborhood parks.
 - ◆ While not statistically significant, those in the NE and West-Central regions tended to notice these improvements.
 - ◆ Among all residents reporting recent local park improvements, satisfaction with these upgrades is very strong (84% satisfied, including 63% “very satisfied”).
- ❖ Similarly, about half (48%) report seeing park improvements in other parts of the village over the past year (especially younger adults, Hispanics, and those with children).
 - ◆ Likewise, these improvements are very well received, with 80% satisfied (including 64% “very satisfied”).
 - ◆ Even nonusers of Park District facilities who have noticed recent improvements approve.

Interest in Expanded/Improved/New Facilities

- ❖ A majority of residents currently use or express an interest/need for:
 - ◆ Walking and biking trails (85%)
 - ◆ Indoor fitness facility (65%)
 - ◆ Nature center (63%)
 - ◆ Indoor pool (58%)

- ◆ Outdoor pool or aquatic park (52%)
- ◆ Indoor gym facilities (51%)

- ❖ In addition, one in three households express a need/interest in an off-leash dog park.
- ❖ One in four (23%) are interested in golf facilities.
- ❖ Demand for a skateboard park registered at just 6% overall.

Residents feel that their demand is already being well met for many of these facilities, especially the amenities provided by the CRC and aquatic center (fitness facility, indoor pool and outdoor pool, gym space).

- ❖ The amenities that may warrant attention going forward are:
 - ◆ A nature center (only about one in three think this need is somewhat being met)
 - ◆ An off-leash dog park (27% feel this need is being addressed).

Interest in Expanded/Improved/New Programs or Events

- ❖ At least three in five households express an interest, attendance or need for:
 - ◆ Outdoor summer events, such as concerts, movie nights, performances, etc. (70%).
 - ◆ Weekend family events and festivals (61%).
 - ◆ Learning activities for all ages (60%).
 - ◆ In addition, nearly half express interest in nature programs and education (48%).
 - ◆ Just over a third are interested in programs for senior adults (36%).
 - ◆ The remaining programs tested generated less need or interest (28% or less for swimming lessons, youth fitness programs, unique athletic events, or sports training programs).
 - ◆ Many feel that a gap remains in providing a number of these programs or events.
 - ◆ The biggest opportunities for the Park District are to expand its offering of outdoor summer events, learning programs, and weekend family events. These also ranked among the highest priorities for the District.
 - ◆ While many express initial interest in nature education programs, it was seldom mentioned as a number one priority.
 - ◆ Most felt that current programs offered by the Park District or other sources (swimming lessons, youth fitness programs, activities for seniors) are at least somewhat meeting demand.
 - ◆ In addition, only 12% overall felt that programs for seniors are most important.
 - ◆ Among those ages 65 and older, 33% feel that senior activities should be the top priority, but nearly as many (25%) felt that none of the program or event options tested represent a pressing need.



Other Findings

- ❖ The top two sources that Wheeling residents rely on for information about District facilities, programs and events are:
 - ◆ The Park District brochure/program guide (cited by 42%), which is most preferred by women, along with both the oldest residents (ages 65+) and households with children.
 - ◆ The Village of Wheeling website/mailings (41%) were especially favored by younger/newer Wheeling residents and Hispanics adults.
 - ◆ Just over a third (35%) of respondents report accessing the Park District website for this information.
 - ◆ Those who tend to prefer the District website are under age 35, women, and non-Hispanic households.
 - ◆ Nearly as many look to Park District mailings (28%), which are most favored by households with children.

- ❖ The survey concluded with an opportunity to express one thing that the Park District can do to improve or better serve Wheeling residents. Many were unable to offer any additional comments or suggestions (30%). Those who did most often suggested:
 - ◆ Expanded or improved parks and open space (20%), most often requesting an off-leash dog park (6%), more trails (7%), and enhanced safety in park areas (3%);
 - ◆ Administrative suggestions (15%), especially better communication of programs, facilities and events that are available to residents (9%), followed by a more intuitive website (3%);
 - ◆ More program offerings (12%), especially youth programs (4%), fitness classes (3%), programs for all ages (3%), and activities for seniors (2%); lower fees/costs (10% – along with another 3% seeking lower property taxes).

Implications

- ❖ Overall, Wheeling Park District is very highly regarded by Village households.
 - ◆ Virtually everyone is familiar with the Park District, and most have recently used or visited one of its parks or facilities. In addition, a third of residents have participated in a recent District program or event.
 - ◆ Consistently, recent users and participants express very strong satisfaction with the quality of these experiences. They are especially satisfied with the Park District's maintenance and upkeep of its properties.
 - ◆ Likewise, many recognize recent improvements to Park District parks and are very satisfied with these initiatives.
 - ◆ Along with these strong levels of satisfaction and usage, opportunities for improvement remain.



- ◆ Increased communication of Park District facilities, and especially its programs and special events, should remain a top priority. Many residents currently look to non-District sources (e.g., Village of Wheeling newsletters and website) for Park District information; as a result, there is less control over what information is shared. Efforts to improve the District website to make it the “go-to” source for recreation information needs to be a priority, while recognizing that the printed program guide is still heavily used.
 - ◆ Specifically, many express a lack of awareness of the programs and events that the District offers (and others remain unfamiliar with certain facilities, specifically Chevy Chase). Residents are especially interested in seeing more special events, such as seasonal festivals, outdoor summer events and concerts, and family activities. Increased marketing of existing programs and consideration of expanded events or schedules need to be considered. This may also represent an opportunity to partner with other agencies (the Village, Indian Trails Library, and schools) to raise awareness.
- ❖ While most Park District facilities are well known and utilized, many residents still do not recognize that Chevy Chase is a District facility.

- ◆ This historic and impressive facility is a missed opportunity for the District. As the Park District explores new ideas for events, family activities, etc., it should consider Chevy Chase as a potential venue. Several respondents offer a wide range of suggestions (open house, weekend family events, craft or food fairs, performances, etc.) that they feel would draw them to the facility.
- ◆ Expanding some of the outdoor summer events (e.g., concerts, movie night, etc.) that generate strong interest and moving them indoor to Chevy Chase during colder months should also be considered.
- ◆ The Park District also needs to demonstrate the excellent value that it represents to the community, especially given its relatively low dependence on property tax dollars.
- ◆ Communicating efforts to responsibly control costs and to “do more with less” while providing high quality recreational opportunities is key.
- ◆ Cooperative efforts with other agencies will support the message (the Heritage Park project is an excellent example).
- ◆ As described above, raising awareness of the wide variety of facilities (including Chevy Chase), parks, and extensive program and event offerings will also demonstrate strong value.
- ◆ This message of value is especially important given a strong anti-tax sentiment in Wheeling.



- ❖ Facility improvements that warrant further consideration include:
- ◆ A nature center (the Lake Cook property would be an excellent opportunity for this type of facility)
 - ◆ An off-leash dog park (currently an unmet need within the community)
 - ◆ Upgrades to the CRC, particularly the fitness facility (frequently mentioned by Fitness Center members)

- ◆ As reported, expanded outdoor summer events, family activities and learning activities are considered the highest priorities for new or expanded recreational activities.
- ◆ While some express interest in more senior programs and activities offered by the Park District, even those who would be served by these programs (ages 55+) are divided on whether or not they represent a priority.
- ◆ Keep in mind that the oldest Wheeling residents are among the most satisfied with the Park District, which suggests that they currently feel well-served.

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.

Wheeling Park District's Balanced Scorecard framework includes six 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?
- Financial: To succeed financially, how should we appear to our taxpayers?
- Internal Processes: To satisfy our guests, which internal 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, develop leaders among staff, and knowledgeable Board members?
- Environmental: To achieve our mission and vision, how should we create a culture of environmental responsibility?



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 six 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 six 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**.

Environmental Stewardship

Stewardship of the environment can take many forms. As a public agency dedicated to parks, recreation and open space, Wheeling Park District is in the unique position to take a leadership role across a wide spectrum of environmental practices to ensure that the communities it serves are provided with the tools to learn sustainability, and be sustainable. It is the Park District's responsibility, through policies, plans and actions, to lead by example and create a **culture of environmental responsibility**.

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.

Strategic Plan Hierarchy



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.

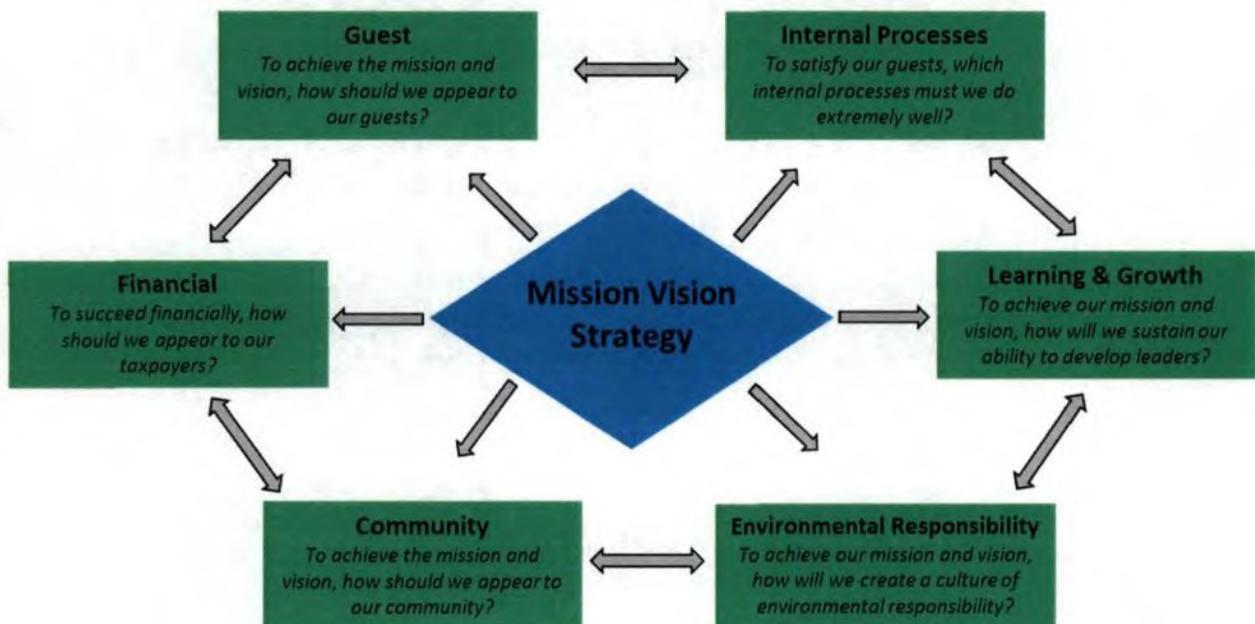
An example of the macro-level to micro-level work process discussed above follows.



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 six Balanced Scorecard perspectives: guest, community, financial, internal process, learning and growth and environmental. These are represented in the following strategy maps. The first map provides a continuum of the six perspectives and each of their supporting statements. The second map demonstrates the same six perspectives, with the addition of Strategic Initiatives, Goals, and Measures, all in an effort to achieve the outcomes.

TRANSLATING MISSION, VISION, STRATEGY: 6 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.



BALANCED SCORECARD

	Strategic Initiatives	Strategic Objectives	Strategic Measures	Outcomes
Guests	<ul style="list-style-type: none"> Quality guest services & experiences 	<ul style="list-style-type: none"> Align recreation opportunities with customer need Increase household program participation Continuously improve customer satisfaction & loyalty 	<ul style="list-style-type: none"> Program Registration (q) Customer satisfaction (q) Customer retention (q) Program cancellation rate (q) 	<ul style="list-style-type: none"> Loyalty & retention
Community	<ul style="list-style-type: none"> Community relationships 	<ul style="list-style-type: none"> Develop strategic alliances Continue to build image & brand 	<ul style="list-style-type: none"> Partner satisfaction 	<ul style="list-style-type: none"> Community partnerships
Financial	<ul style="list-style-type: none"> Long term financial strategies 	<ul style="list-style-type: none"> Increase fund balances Aligning financial resources with need Growing program and facility revenue 	<ul style="list-style-type: none"> Program & facility revenue (q) Alternative revenue amount (q) Non-tax revenue percentage (q) Program cost recover 	<ul style="list-style-type: none"> Financial stability
Internal	<ul style="list-style-type: none"> Internal process and system improvements 	<ul style="list-style-type: none"> Drive innovation Streamline critical processes Build efficiencies 	<ul style="list-style-type: none"> New programs (q) % of programs in decline lifecycle Internal customer satisfaction (a) Partner satisfaction (a) Efficiency savings (q) Key processes documented (q) 	<ul style="list-style-type: none"> Effectiveness & efficiency
Staff Learning & Growth	<ul style="list-style-type: none"> Continuous learning environment 	<ul style="list-style-type: none"> Foster a motivating work environment Develop a mission driven organization Trained and competitive staff 	<ul style="list-style-type: none"> Employee satisfaction (a) Regrettable turnover (q) % employees trained (a) 	<ul style="list-style-type: none"> Motivated & knowledgeable employees
Environmental	<ul style="list-style-type: none"> Environmental Stewardship 	<ul style="list-style-type: none"> Foster an environmental conscious staff and community 	<ul style="list-style-type: none"> Programs to promote environmental awareness Energy efficiency and tracking Recycling and tracking 	<ul style="list-style-type: none"> Culture of environmental responsibility

STRATEGIC INITIATIVES AND GOALS 2018-2021

The following are the Park District's Strategic Initiatives, Goals, and Objectives for the time period of May 2018 to April 2021. Time period priorities are attached to each objective as follows:

- Short-term goals – to be accomplished between May 2018 and April 2019
- Mid-term goals – to be accomplished between May 2019 and April 2020
- Long-term goals – to be accomplished between May 2020 and April 2021

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

- Formalize a process to analyze guest data and feedback **Short Term**
- Conduct Communitywide Survey every 5 years to identify needs through a statistically-valid survey **Long Term**
- Formalize a research process for identifying trends and opportunities **Short Term**

Goal 2: Increase Participation

- Create an All Agency Marketing Plan **Mid Term**

Goal 3: Continuously improve guest satisfaction and loyalty

- Formalize guest service standards **Short Term**

Goal 4: Implement Park Improvement Plans

- CRC Renovation and Expansion Project **Short Term – Mid Term**
- Meadowbrook Park **Short Term**
- Heritage Park Signs and Playground **Short Term**
- Avalon Sienna Playground **Long Term**
- Denoyer Park **Long Term**



COMMUNITY RELATIONS INITIATIVE: DEVELOPING COMMUNITY RELATIONSHIPS

Community Perspective

Strategic Initiative: Developing Community Relationships

Goal 1: Create Strategic Partnerships

- Formalize the corporate support program
Mid Term

Goal 2: Continue to develop consistent image and brand

- Create methods to communicate and deliver services to ethnically diverse markets
Mid Term
- Create a reputation in the community as being *The Leader (in the Village)* for health, fitness, and wellness activities
Long Term



FINANCIAL INITIATIVE: ESTABLISH LONG-TERM FINANCIAL STRATEGIES

Financial Perspective

Strategic Initiative: Establish Long-Term Financial Strategies

Goal 1: Align financial resources with need

- Create a cost of service model
Long Term

Goal 2: Grow Revenue

- Create revenue plans for each operation
Mid Term

Goal 3: Increase Alternative Revenue Sources

- Create an alternative revenue source strategy
Mid 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: Drive Innovation

- Create Performance Management System
Mid Term

Goal 2: Build efficiencies by streamlining processes

- Formalize systemwide internal guest communication processes **Short Term**
- Formalize procedures **Short Term**
- Formalize security plan **Mid Term**

Goal 3: Agency Accreditations

- Formalize and achieve Agency accreditations **Long Term**



LEARNING AND GROWTH INITIATIVE: CONTINUOUS LEARNING ENVIRONMENT

Learning and Growth Perspective

Strategic Initiative: Continuous Learning Environment

Goal 1: Foster a motivating work environment

- Formalize employee satisfaction measurement system **Short Term**

Goal 2: Maintain a mission-driven organization

- Formalize strategic plan that is deployed through the District and displays evidence of fulfilling the mission, vision, values and culture **Short Term**
- Create training for standards **Mid Term**

Goal 3: Develop Leaders

- Conduct Leadership training **Short Term**
- Provide staff training in KPM and tools **Short Term**
- Create core competencies for leadership positions **Short Term**



ENVIRONMENTAL INITIATIVE: ENVIRONMENTAL STEWARDSHIP

Environmental Perspective

Strategic Initiative: Environmental Stewardship

Goal 1: Foster an environmentally-conscious staff and Community

- Create a culture of environmental responsibility that will foster and promote a commitment to sustainability **Long Term**
- Assess the financial considerations and needs in making environmental stewardship decisions **Long Term**
- Update the Environmental Action Plan **Mid Term**



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 orientation process for new employees and Board members.
- A summary of the Plan will be available on the Park District's website and staff intranet site, which 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 Park Board year, staff will be responsible for updating each goal. Every 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 goal's completion.
- 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.

SUMMARY

Wheeling Park District's 2018–2021 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 on 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, they will also help the District 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!





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