

Lake Bluff Park District Strategic Plan (2015-2019)



PREPARED BY:



Heller and Heller Consulting, Inc.

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CHAPTER ONE - INTRODUCTION

The Lake Bluff Park District (LBPD) hired Heller and Heller Consulting to facilitate and develop a Strategic Plan in collaboration with Board members and staff. The Plan will provide a future direction for the District, taking into account results of the previously completed Strategic Plan and new priorities. In addition, the Plan provides Board members and staff with the opportunity to understand roles, relationships, and future direction, resulting in organizational alignment as a result of the development of strategy. Another intended outcome of the Plan is providing the District with a commitment to best practices.

The Strategic Plan addresses the leadership infrastructure. The Strategic Plan serves as a springboard to a continued overall Comprehensive Plan. In addition, strategic objectives have been created as part of this process and will serve as a precursor to the establishment of plans within the comprehensive planning process. The Strategic Planning process included a one and a half day workshop with Board members and staff. Following the workshops, a final iteration of the vision, mission, values and strategic objectives were reviewed by the Executive Director and Board members.

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

- Review Vision and Mission Statement
- Survey results from Board and Staff
- Notes from Board and Staff workshops
- Information about the Balanced Scorecard Framework for Strategy
- Description of Major Issues Areas
- Strategic Core Areas
- Redefining and Establishing Goals and Objectives
- Guidelines for Implementation
- Clarify Strategic Plan Definitions



The Mission and Vision Statements follow.

1.1 MISSION STATEMENT

As responsible stewards of community resources, the District will enhance the community through recreational experiences in a fun, safe and healthy environment.

1.2 VISION STATEMENT

Strengthening the spirit of community

1.3 VALUE STATEMENTS

- **Continuous Improvement** – We are proactively moving forward to better the District.
- **Community** – Our activities bring people together to create a family environment.
- **Stewardship** – We will leave our community better than we found it.
- **Service Orientation** – We foster a “guest first” attitude through superior experiences and ongoing communication.
- **Excellence** – As leaders in the community, we strive to be the best we can be and aspire to pride and quality in all that we do.

CHAPTER TWO – BOARD AND STAFF WORKSHOP BRAINSTORM INFORMATION

During the Board and staff workshops, the facilitated discussion included topic areas such as: 1) A listing of intended outcomes from the Strategic Process 2) An Organizational SWOT (Strengths, Weaknesses, Opportunities and Threats), and 3) Strategic Core Areas (Exceeding Guest Expectations, Financial Sustainability, Operational Excellence and Continuous Employee and Board Development). These topic areas preceded the discussion about the strategic goals and objectives.

The intended outcomes included:

- Achieve the vision
- Follow the mission statement
- Use as a decision tool
- Ability to focus on the big picture, rather than random, tactical approaches
- Create a unified document that Board and staff champion
- Be pro-active, rather than reactive
- Determine infrastructure needs and priorities
- Enhance communication among facilities (internally)
- Enhance external communication

2.1 ORGANIZATIONAL STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS

2.1.1 STRENGTHS

- Organization
 - Strong management team
 - Quality
 - Great assets
 - Board continuity
 - Critical thinking by Board
 - Communication
 - Understanding community
 - Reputation
-

2.1.2 WEAKNESSES

- Reputation
 - Ability to meet the demand for services
 - Financial strength
 - Performance measurement
 - The limited number of full-time maintenance staff
 - Difficulty in recruiting staff
-

2.1.3 OPPORTUNITIES

- Foundation (project direction is needed for the Foundation)
 - Technology
 - Changing demographics
 - Security
 - Stakeholder partnerships (village, school district, etc.)
 - Master plan for West Park
 - Expand Knollwood boundaries where specific homes are not in District boundaries
 - More community member involvement on board committees
-

2.1.4 THREATS

- State budget
- Unfunded mandates by legislation
- Minimum wage changes
- Affordable Care Act
- Debt load
- Succession planning for Board and staff
- Recruiting and retaining staff

CHAPTER THREE – MAJOR PRIORITY AREAS

The Major Priority Areas (MPA) exist to ensure the Strategic Plan addresses the most important elements of focus for the future. The selection of MPAs occurred previously to the strategic planning workshop with the staff and Board. The following list shows the MPAs.

The following were the top areas of priority:

- Develop a Comprehensive Program Plan
- Develop and improve marketing/image/communication development and improvement
- Establish a stronger financial position, including reserves, operating revenues and expenses, and capital replacement
- Retain skilled and knowledgeable employees
- Enhance guest service orientation and standards
- Develop a Comprehensive (Master) Plan including a comprehensive assessment and facility/park audit and investment cost estimates and priorities
- Meet capital improvements
- Grow new non-tax revenue sources
- Research the opportunity to repurpose assets
- Reduce annual golf course loss
- Reduce annual paddle loss
- Reduce debt
- Provide the Foundation with goals and projects to raise funds
- Develop a long term financial plan
- Establish cost recovery goals

CHAPTER FOUR – THE BALANCED SCORECARD

The framework for the LYPD Strategic Plan is based on the Balanced Scorecard, a strategy framework that emphasizes the cause and effort relationships among internal support processes, employee learning and growth needs, financial performance, and an emphasis on guests and their needs. Guests include both residents as well as non-residents. The Scorecard also includes a measurement system that monitors organizational performance. The Scorecard focuses on the key drivers of success that lead to the achievement of the mission and vision.

The Balanced Scorecard framework includes four core areas:

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

CHAPTER FIVE –STRATEGIC CORE AREAS

In using the scorecard, the District has developed Strategic Core Areas that are broad-brushed organizational descriptions that provide direction. Unique to Lake Bluff, the following four are outlined above. They include:

- **Guest:** Exceeding Guest Expectations
- **Financial:** Financial Sustainability
- **Internal Operations:** Operational Excellence
- **Learning and Growth:** Continuous Employee and Board Development

These Core Areas provide the over-arching focus of the Plan’s implementation. It is critical for the District to effectively deploy the mission, vision, and the four Core Areas during employee orientation programs, staff manuals, hiring process, reward and recognition system, and performance feedback. In addition, the process also should be included in Board orientation programs.



CHAPTER SIX – STRATEGIC PLAN HIERARCHY

The framework for the Plan includes a hierarchy of elements that starts with the most macro level of strategy and moves to a more micro level (moving from strategic to tactical). The starting point for any strategic planning process is the review of the vision and mission. Goals describe what the District needs to do well in support of the Core Areas. For example, one of the Goals for the Exceeding Guest Expectations Core Areas is: *“Offering the right array of programs and services”*. Therefore, one method of achieving Exceeding Guest Expectations results from the Goal of offering the right programs and services. Objectives are more micro-level in support of the Strategic Core Areas. Following along with the Exceeding Guest Expectations Core Areas, an example of an Objective is *“Identify community needs by completing ongoing surveys and focus groups”*.

The next step in the process is to develop measures. The measurement system reflects the District’s progress in completing the Strategic Goals and Objectives.

The tactics, which follow objectives, are detailed action steps that outline how each objective will be accomplished. Tactics are very specific and lengthy in number. As a result, tactics are not included within the Plan. They will be developed by the staff each year for the current year Objectives.

Strategic Plan Hierarchy



CHAPTER SEVEN – STRATEGIC GOALS

The following is a list of goals and a specific definition that describes each of them. The goals support each of the four Strategic Core Areas. These statements result in common organizational understanding of the intended meaning of each of the Goals. This is particularly helpful for the new employees and Board members.

7.1 EXCEEDING GUEST EXPECTATIONS

Goal 1: *Offering the right array of programs and services* – Program and service offerings should support and relate to community needs. This is accomplished through utilization of the household survey results, study of demographics and current recreation trends. The development of a system wide approach to the recreation program process will result in the District’s success in aligning programs and services with the needs of Lake Bluff residents and non-resident guests.

Goal 2: *Provide a quality product at a good value* – Value is represented by the benefits of a program or service compared to its cost. As a result, it is imperative for the District to implement sophisticated pricing mechanisms as well as have a good understanding of important guest requirements. When pricing increases are recommended, it is important to ensure there is a correlating increase in benefits.

Goal 3: *Provide consistent service experiences* – Given the number of transactions that occur day in and day out and the number of full-time, part-time and seasonal staff involved in servicing guests, providing consistency is a significant challenge. Consistency is greatly enhanced as a result of good standards and staff training.

7.2 FINANCIAL SUSTAINABILITY

Goal 1: *Dedicated funding for capital* – The District is seeking private funding to assist with the capital plan. In addition, the District is seeking donations and utilizing operating funds. These projects are in response to priorities mentioned in the 10 Year Capital Plan. Another important component of this Goal is tracking the capital improvements.

Goal 2: *Establish a financial operating target* – This important Goal would establish a standard return to be budgeted annually, to establish a stronger financial position, including reserves, and operating revenues and expenses. In addition, this area includes efforts to reduce golf course and paddle losses to develop categories of services and programs according to subsidy level and to develop cost of service goals.

Goal 3: *Establish a debt guideline* – Identify appropriate level of debt and establish guidelines for current and future Board members and staff.

7.3 OPERATIONAL EXCELLENCE

Goal 1: *Improve major processes* – Become an efficient organization through the use of technology, annual policy reviews and continued development of procedures.

Goal 2: *Effectively promote and communicate programs and services and build District brand* — This includes identification of brand attributes that differentiate the Lake Bluff Park District from other service providers in the community. The goal is to market these attributes, increase participation in programs and services and continue to strengthen the emotional attachment and appeal guests have for the District. Develop a consistent message through branding standards (website, program guide, logo, etc.).

Goal 3: *Strengthen stakeholder collaboration* – Residents are looking for increased value through strategic partnerships with key agencies such as the County, Village, Library, Township, and School District. A review process is needed to ensure existing and future agreements have the appropriate level of benefit to the District.

Goal 4: *Improve environmentally sustainable practices* – The District will operate with regard to its environmental impact in the community, including recycling, reduction of waste, and reuse of materials. This includes a commitment to recycling in all parks and facilities, tracking energy use, and developing green practices in all areas of the District such as reduction of chemical and pesticide use, creating green designs, and moving toward a more paperless office environment. In addition, sustainable practices speak to the need to operate in a financially sustainable way.

7.4 CONTINUOUS EMPLOYEE AND BOARD DEVELOPMENT

Goal 1: *Foster a learning environment* – The District will develop a human, organizational, and institutional plan through shared approaches to learning. This, along with continuous improvement, will require an approach to aligning resources toward employee and Board growth and development.

Goal 2: *Attract and retain Board and staff talent* – In order to attract and retain quality Board and staff talent, it is necessary for the District to include community members, review staff compensation and benefit plans and find unique ways to promote and recruit open positions.

Goal 3: *Continue/maintain transparent management practices* – The District recognizes the importance of strengthening transparency and trust with community residents. As a result, the Board and staff will spend significant time developing ongoing relationships and communication guidelines. In addition, the District will develop an ongoing process to evaluate its community outreach efforts.

8.1.1 GUEST CORE AREA: EXCEEDING GUEST EXPECTATIONS

Goal 1: *Offer the right array of programs and services*

Objectives

- Creation of an annual program review process, such as looking at revenue and participant trends, marketing approaches, future program positioning and value propositions
- Refine programs and services according to existing and changing demographics by ongoing review of internal and external data
- Identify current and future trends for programs and services
- Identify community needs by completing ongoing surveys and focus groups

Goal 2: *Provide a quality product at a good value*

Objectives

- Establish standards for programs and services
- Determine the value (fairness) of services
- Determine value and pricing of services

Goal 3: *Provide consistent service experiences*

Objectives

- Establish guest service standards
- Develop a performance tool to determine ways to exceed expectations
- Establish a system wide approach to measuring guest satisfaction
- Provide on-going guest service training

8.1.2 FINANCIAL CORE AREA: FINANCIAL SUSTAINABILITY

Goal 1: *Dedicated funding for capital*

Objectives

- Grow new non-tax revenue sources
- Provide the Foundation with goals and specific projects to raise funds

Goal 2: *Establish an operating financial target*

Objectives

- Establish a target for annual operating revenue contribution to a capital account
- Reduce annual golf course loss
- Reduce annual paddle loss
- Research the opportunity to repurpose assets
- Develop a long term financial plan
- Establish cost recovery goals
- Define and develop cost of services and impacts on Park District

Goal 3: *Establish a debt guideline*

Objective

- Reduce debt associated with capital infrastructure



8.1.3 INTERNAL OPERATIONS CORE AREA: OPERATIONAL EXCELLENCE

Goal 1: *Improve major processes*

Objectives

- Identify major processes throughout the District and continuously work on improving them
- Create measures to assess Strategic Plan progress
- Develop a Technology Plan
- Obtain Distinguished Accreditation Recognition

Goal 2: *Effectively promote and communicate programs and services and build District brand*

Objectives

- Develop design and signage guidelines
- Develop a consistent message through branding standards (website, program guide, logo, etc.)

Goal 3: *Strengthen stakeholder collaboration*

Objectives

- Collaborate with North Shore Water Reclamation District regarding project located at beach
- Continue reviewing agreements with Village, School District, Lake Bluff Open Lands, Lake Bluff Baseball Association, etc.

Goal 4: *Improve environmentally sustainable practices*

Objectives

- Develop a sustainability plan
- Implement the IPRA sustainability scorecard

8.1.4 LEARNING AND GROWTH CORE AREA: CONTINUOUS EMPLOYEE AND BOARD DEVELOPMENT

Goal 1: *Foster a learning environment*

Objectives

- Provide cross training opportunities
- Strengthen the orientation process
- Ensure growth and development opportunities for staff reporting to and part of the Executive Team
- Establish a leadership development program

Goal 2: *Attract and retain Board and staff talent*

Objectives

- Develop methods to retain excellent employees
- Analyze recruitment methods and develop creative ways to attract candidates for positions
- Create opportunities for individuals to prepare for Board succession
- Develop a staff succession plan
- Identify needed organizational competencies and ensure staff and Board members work toward achieving competency in those areas

Goal 3: *Continue/maintain transparent management practices*

Objective

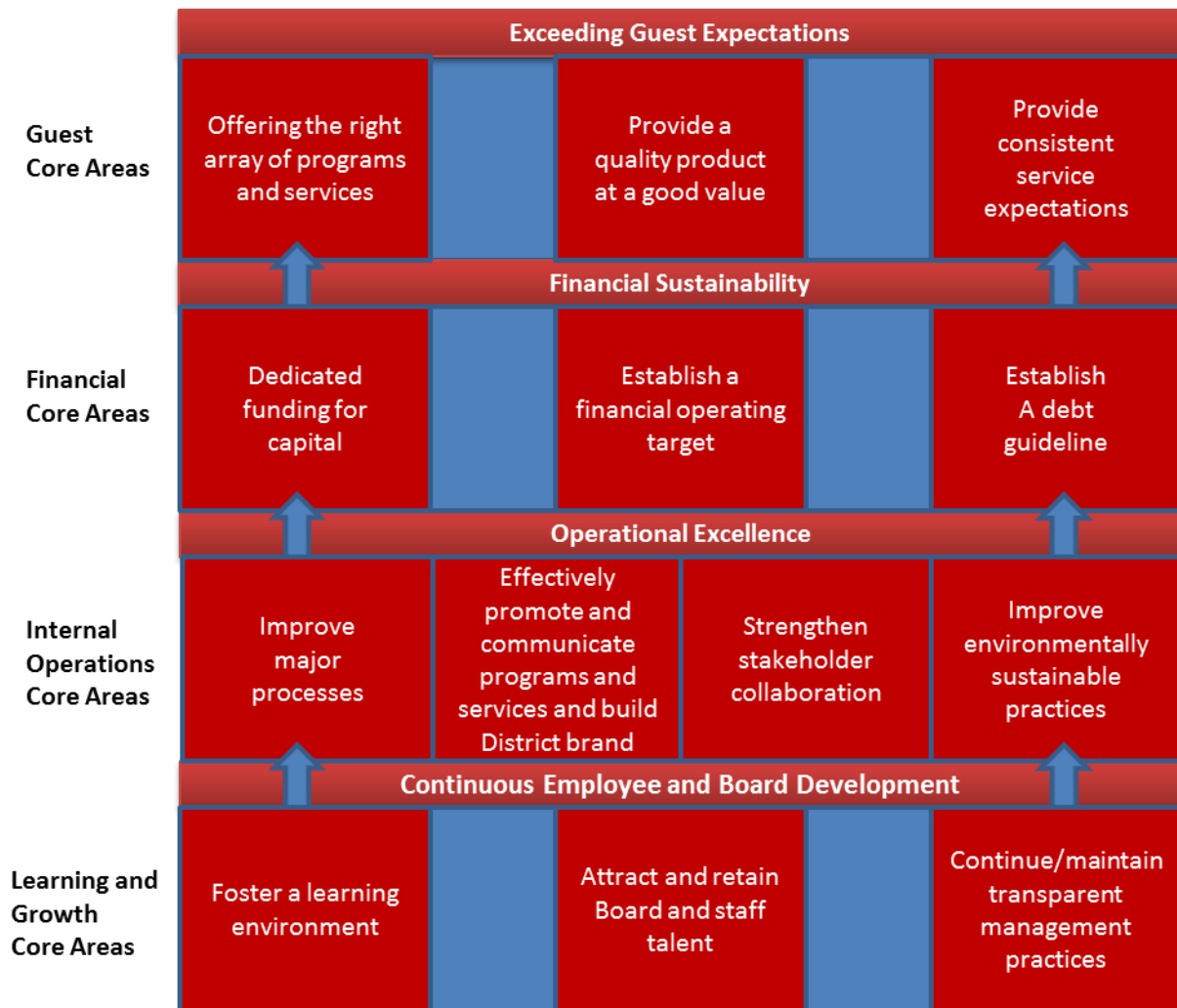
- Implement Plan and champion oversight of the Plan

CHAPTER NINE – STRATEGY MAPS

It is the intent of the Lake Bluff Park District Strategic Plan to ensure the elements of the mission and vision shape the strategic recommendations. As part of the strategic recommendations, the remaining section of the report details Strategic Core Areas, Strategic Goals, Strategic Objectives and Measures. This will create the framework for decision making during the next four years, 2015-2019.

Two Lake Bluff Park District Strategy Maps follow. The first map provides the list of the four core areas and their supporting Goals. The arrows represent the cause and effect relationships among the four core areas. For example, learning and growth is needed to support major process Goals. The second map has the same information and includes a measurement system in support of the Strategic Core Areas and Goals.

Lake Bluff Park District Strategy Map



Mission: As responsible stewards of community resources, the District will enhance the community through Recreational experiences in a fun, safe and healthy environment

Vision: Strengthening the spirit of community

	Strategic Core Areas	Goals	Measures (a=annually & q=quarterly)
Guest	Exceeding Guest Expectations	<ul style="list-style-type: none"> Offer the right array of programs and services Provide a quality product at a good value Provide consistent service experiences 	<ul style="list-style-type: none"> Customer satisfaction (a) Customer retention (q) Number of program registrations (q) Market penetration by age segment (q)
Financial	Financial Sustainability	<ul style="list-style-type: none"> Dedicated funding for capital Establish an operating financial target Establish a debt guideline 	<ul style="list-style-type: none"> Percent of debt to total budget Core program and facility cost recovery (q) Core program and facility revenue growth (q)
Internal Operations	Operational Excellence	<ul style="list-style-type: none"> Improve major processes Effectively promote and communicate programs and services and build District brand Strengthen stakeholder collaboration Improve environmentally sustainable practices 	<ul style="list-style-type: none"> Partner satisfaction (a) Core program and facility cost recovery (q) Environmental scorecard (a) Dollar savings from efficiencies (q)
Learning and Growth	Continuous Employee and Board Development	<ul style="list-style-type: none"> Foster a learning environment Attract and retain Board and staff talent Continue/maintain transparent management practices 	<ul style="list-style-type: none"> Labor hours lost from accidents Number of patron accidents Employee satisfaction toward training (a) Customer satisfaction (a)

CHAPTER TEN – TIMELINE

The following are the Strategic Core Areas, Goals, and Objectives for the next four years, 2015-2019. Time period priorities are attached to each Objective. These represent timeframes as follows:

- Short Term Goals to be accomplished between June 2015 to December 2016
- Mid Term Goals to be accomplished between January 2017 to December 2017
- Long Term Goals to be accomplished between January 2018 to April 2019
- Continuous Goals are repeated on an annual basis during the entire time period

A few of the listed objectives are supported by tactics based on Board and staff input generated at the second Board workshop. Other tactics will be developed on a year to year basis by staff.

CHAPTER ELEVEN – IMPLEMENTATION GUIDELINES

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

- All employees and Board members should receive a copy of the plan or electronic access to the Plan.
- Post the Plan on the Website and track results on the site as well.
- Elements of the Strategic Plan should be incorporated into the orientation program.
- **Regular reporting of the Plan's progress should occur.** Break the Plan into separate fiscal years and report one year at a time. At the beginning of each year, assign a staff member or a staff team to be responsible for regularly updating each objective. Each objective for the year should include a list of tactics. It is the project leader's responsibility to report on his/her goal, and include it in a quarterly report. A suggestion is to input each year's data on a spreadsheet that lists the Strategic Core Areas, Goals and Objectives start date and completion date, and which staff person is responsible for completion.
- **The Park Board of Commissioners should review the Strategic Plan progress on a quarterly basis.** At the end of the year, each Objective should have an annual review with updates.
- Conduct staff meetings on a quarterly or semi-annual basis to review the Plan's progress and results and report the Plan's progress to the Park Board on a quarterly basis.
- Update major stakeholders annually on the Plan's implementation and results.
- Performance appraisal process should reflect the completion of the Strategic Plan Objectives and Tactics as an evaluation criterion.
- Track the measurement system on a quarterly basis. Some of the measures will be calculated annually. Provide an annual narrative about the results. Review the inventory of measures annually and adjust as necessary to ensure the measures continuously add value to decision making. Include both lagging and leading indicators.
- After the Plan's first year and baseline results have been quantified, targets should be set for future measurements. For example, if there is a guest satisfaction measure of achieving 90% guest satisfaction, and in the initial year, 90% is achieved, the target for successive years could be 95%.

- There should be an annual just-in-time review of the next year's Objectives to determine if priorities have changed. Staff should develop tactics and include them in the annual budget.
- Post a chart of each year's Objectives on office walls in administrative areas with a check-off column, designating completion as part of a visual management program. Staff meetings should regularly include discussion of strategy.
- After each year of the Plan, the staff should review the Plan process and make necessary adjustments to any parts of the process that need improvement.
- Some of the Objectives require individual effort to complete; others require a group of employees to complete the work. The Objectives are specific work projects that are scheduled for completion between fiscal year 2015 through fiscal year 2019. Each Objective is designed as short term, middle term, and long term or ongoing.
- During the second year of the Plan, and after the District has experience with the Strategic Plan process, cascade the Plan to individual Departments. This results in the Departments having their own scorecard, aligned with the organizational strategy.



CHAPTER TWELVE - DEFINITIONS

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

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

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

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

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

Balanced Scorecard Core Areas – The four core areas include Guest, Financial, Internal Operations Process, and Learning and Growth. They demonstrate cause and effect relationships in the completion of strategy. All of the Strategic Goals are aligned with these four core areas.

Strategic Core Areas – Broad-brushed, macro-oriented organizational sense of direction that relates to the four Balanced Scorecard core areas of guest, financial, internal operations, and growth and development.

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

Strategic Goals – Concise and broad statements describing the specific elements an organization must do well in order to execute its strategy.

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

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