

2016 Strategic Plan



Final Project Report

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Bartlett Park District

Strategic Plan Final Report

Bartlett Park District (BPD) engaged Executive Service Corps (ESC) to assist in developing its 2016 Strategic Plan. BPD regularly prepares a strategic plan every five years to coincide with the completion of a community needs assessment and attitude survey, and a comprehensive master plan for Park District programs, services and facilities.

Bartlett Park District Objective

The consulting assignment has the following three objectives:

- 1) To assist the Bartlett Park District in the development of a strategic plan for the next three to five years; this plan needs to be approved and in place no later than the beginning of March 2016 to ensure sufficient time to create the goals for fiscal year 2017 which begins in May 2016.
- 2) To have broad involvement of the commissioners, staff and other key stakeholders in the design of the plan to ensure its acceptance and implementation.
- 3) To provide a process which can be used by the park district to regularly update the plan.

Bartlett Park District – ESC Strategic Plan Project Timeline

Engagement Steps	Timing
Step One: Prepare to Plan	
○ ESC team requests, receives and examines park district documents and data	November
○ Park District establishes Planning Committee to oversee planning process	November
○ Planning meeting with Park District Planning committee	November
○ ESC develops interview guide to be used for individual interviews with Board members and Executive Director, key community leaders if determined appropriate by the planning committee, and up to five focus groups with Superintendents and the managers reporting to them	November
Step Two: Analysis	
○ ESC team schedules and conducts interviews	November – Early December
○ ESC team incorporates input into interim diagnostic report including key issues, SWOT analysis and potential strategic goals and reviews with Planning Committee	January 14

Engagement Steps	Timing
<ul style="list-style-type: none"> ○ Bartlett Park District and ESC team meet to review Retreat presentation and plan for a one-day retreat 	January 24
<u>Step Three: Retreat</u>	
<ul style="list-style-type: none"> ○ ESC facilitator reviews SWOT and list of categorized issues and participants identify the key goals to be accomplished to address each issue 	February 6
<u>Step Five: Retreat Follow Up</u>	
<ul style="list-style-type: none"> ○ ESC prepares a final report summarizing the work done and the goals agreed upon at the retreat 	Late February- Early March
<ul style="list-style-type: none"> ○ Park District management develops the detailed action plans supporting each of the agreed upon goals 	March
<ul style="list-style-type: none"> ○ Implementation begins 	April

Data Request List and Analysis

ESC provided a comprehensive list of data and documents that would be helpful in becoming familiar with BPD's operations and strategic issues. Documents requested included information on programs, facilities, comprehensive master plan, community survey results, financial performance and audit reports, board organization/committees/minutes, marketing and public relations, organizational information, and Park District goals and objectives. BPD staff was incredibly responsive, providing all of the information and documents requested in a timely manner and a format that was easy to understand. ESC conducted a thorough review of the information and incorporated pertinent issues in the SWOT analysis and Strategic Issues, which are discussed later in this report.

Planning Committee

As part of this process, ESC requested that BPD establish a planning committee to oversee the entire strategic plan process. This committee was established with four members, including:

Rita Fletcher, Executive Director
 Ted Lewis, President – Board of Commissioners
 Peter Pope, Superintendent of Villa Olivia
 Kelly O'Brien, Superintendent of Parks and Planning

Interviews

ESC requested the opportunity to interview key stakeholders in the strategic plan, including the Board of Commissioners, Executive Director, Superintendents and key staff members. At BPD's

direction, ESC conducted one-on-one interviews with the Board and Executive Director. Superintendents and members of their respective staffs were interviewed following a Focus Group format. Altogether, feedback was collected from thirty people in this process. The findings from these interviews were then compiled and shared with the Planning Committee. Key output was incorporated into the SWOT and Strategic Issues documents presented at the Retreat.

Strengths, Weaknesses, Opportunities and Threats

Based on the findings from the Data Review and Interviews, the ESC consulting team prepared a draft version of the internal Strengths and Weaknesses of the Park District as well as the external Opportunities and Threats facing the Park District. These were reviewed with the Planning Committee and then presented to the board and staff leaders at the Retreat, with no changes suggested.

Strategic Issues

Following a thorough analysis of all the documents, interview/focus group feedback, and the SWOT, the ESC consulting team drafted a preliminary list of six key Strategic Issues that it sees BPD facing over the five year planning horizon. In addition, ESC drafted possible goal statements to address each strategic issue. These were reviewed with the Planning Committee on January 14th, and, following minor revisions, were presented at the Retreat.

Strategic Plan Retreat

The Bartlett Park District held a Retreat on Saturday, February 6, 2016 at Villa Olivia. Participants included the entire BPD Board, Executive Director, the five department Superintendents, and the ESC consulting team.

The first part of the retreat consisted of grounding participants on a) the retreat purpose, b) relevant background data and trends that would be impacting the future direction of the Park District, and c) SWOT analysis. The second half of the retreat was dedicated to presentation and group discussion of the major Strategic Issues and Goals that were recommended by the Planning Committee. From these discussions, Retreat participants agreed on the final Strategic Issues, and following open discussion, established priorities for the goals corresponding to each issue.

Finalized Strategic Issues and Prioritized Goals

The following summarizes the six key strategic areas of focus, and prioritized goals that were agreed upon at the Retreat. These goals will form the framework for objectives and specific action items, which include timelines, accountable parties and resources required to

successfully accomplish each objective. The Staff has been tasked with completing plan development for approval at the March Board meeting.

Strategic Issue #1: Villa Olivia

Issue	Priority
<i>Charter the Staff with exploring strategic alternatives for Villa Olivia and presenting recommendations to the Board</i>	1
<i>Develop near-term, low cost program and service offerings to generate additional revenues and cash flow at Villa Olivia until longer-term strategy is implemented</i>	2
<i>Determine immediate strategies to minimize, or eliminate recurring operating losses from golf operations</i>	3
<i>Ensure Villa Olivia marketing strategy incorporates measurable outcomes that complement current and future programs</i>	4
<i>Optimize program integration between Villa Olivia and other BPD facilities and programs</i>	4

Strategic Issue #2: Financial Management

Issue	Priority
<i>Develop and continually update rolling five-year pro-forma cash flow forecasts that incorporate selected strategic issues and goals to enable business decision making</i>	1
<i>Benchmark the monetary return of current programs and services, put into place financial outcome measures that will result in improved ROI for all future programs and services</i>	2
<i>Develop financial models to evaluate the consolidated impact of alternative Villa Olivia business strategies</i>	3
<i>Install concrete metrics for BPD to monitor and manage the financial performance of its' operations</i>	3
<i>Take a leadership role in expanding Park District co-op purchasing programs and capital improvement projects to maximize buying power</i>	4

Develop financial models focused on the Recreation fund to ensure the appropriate balance between revenues and expenses

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Strategic Issue #3: Marketing

Issue	Priority
<i>Develop a comprehensive marketing strategy, communications plan and budget to increase community awareness, program participation across all segments, and drive top line revenue improvement</i>	1
<i>Design metrics to measure marketing effectiveness in order to plan budget (e.g., website hits, Google search rankings, \$/Unit)</i>	2
<i>Evaluate options (including outsourcing) to increase BPD and Villa Olivia advertising revenues and corporate sponsorships</i>	3
<i>Leverage technology and social media to drive increased reach and volume at lowest cost</i>	4

Strategic Issue #4: Recreational Programs

Issue	Priority
<i>Research new program opportunities to drive further penetration and revenues across all age and ethnic segments</i>	1
<i>Develop a formal lifecycle evaluation process, regularly reviewing participation and profitability metrics to rationalize program offerings</i>	1
<i>Develop a community outreach plan to build greater awareness, strengthen program development, and possibly drive operating efficiencies</i>	2
<i>Assess possibilities to build partnerships with current competitors and other organizations</i>	3
<i>Utilize technology to facilitate more frequent community input and to evaluate specific needs of targeted groups in a more cost effective manner</i>	3
<i>Understand our competition and leverage Park District strengths to capture more of our resident's recreational activities and dollars</i>	4

Strategic Issue #5: Parks and Facilities

Issue	Priority
<i>Renovate or re-design existing parks to reflect changing community needs and to manage maintenance costs, incorporating findings from Comprehensive Master Plan</i>	1
<i>Assess the need for, and economics of an indoor sports facility</i>	1
<i>Conduct due diligence, and build alignment around plans whether to develop parks and facilities west of Route 59, and proceed with implementation</i>	2
<i>Evaluate the economic benefits of innovative land-use techniques (synthetic fields, re-designed parks, etc.)</i>	3
<i>Pursue grant funding opportunities (state, manufacturer, education) to defray capital costs of parks and facilities improvements</i>	4
<i>Consider implementing volunteer partnerships to help maintain parks and reduce operating expenses</i>	4
<i>Implement the Inclusive Playground in conjunction with the BP Foundation</i>	4

Strategic Issue #6: Workforce Environment

Issue	Priority
<i>Continue to utilize programs that motivate and recognize our employees, link performance to pay, and incent everyone to always try to do better</i>	1
<i>Determine and staff incremental resource requirements to support the new Strategic Plan</i>	2
<i>Encourage continuous learning through targeted employee training programs and appropriate industry partnerships and affiliations</i>	3
<i>Look for opportunities to strengthen internal communications and provide forums for input and feedback from employees at all organizational levels</i>	3
<i>Strive to maximize the overall effectiveness of our volunteers by cultivating an environment of partnership, support, spirit and advocacy</i>	4

Planning Process to Keep the Plan Current

Bartlett Park District has maintained a very disciplined approach to strategic plan development. They review plan progress on a regular basis, and update goals and objectives annually. The process and templates for this plan are intended to be ones that can be followed in future years. ESC has found that most clients typically undertake extensive planning efforts like this approximately every five years. However, each organization's business climate can change very rapidly, and as such, ESC recommends that clients revisit their strategic plans more frequently, even yearly if possible. This is consistent with the financial priority to develop and update an annual 5-year planning and cash flow forecast. In this manner, BPD can determine:

1. Whether any of the strategic goals in the existing plan have been completed
2. Whether any of the critical goals have emerged that are not included in the plan
3. Whether circumstances have changed regarding any in-process goals that result in the need to revise any objectives, action items, or timelines