

## 1.0 Executive Summary

### Strategic Planning

In July 2008, the Wheaton Park District administrative staff began the journey of building a highly effective leadership team. The initial goal was to renew and further develop the strategic direction of and for the future of the Park District. The team has completed this process and is now focused on the implementation of its plan. Their work is the foundation of this document. It is the foundation for the future of the Park District and the Residents it serves. Further expansion of the Leadership Team will occur as this plan moves forward.

With the help of the Corporate Learning Institute, an organizational alignment approach was used as the primary model for the development of the Leadership Team and strategies that will ultimately expand to include all aspects of the District and all staff. A visual representation of the organizational alignment model is attached to this summary. As you read this document, it will become apparent that the Leadership Team has moved rapidly from a conceptual approach to a tangible product around which the agency can function in an excellent fashion.

The Team developed a tag-line or motto as a rallying point that they felt captured the spirit of the mission vision and core values they developed for the Team and the Agency: “One Team, One Goal”.

Team Vision: The Leadership Team pulling together as a catalyst for the park district to become the best in the country.

Agency Mission: To enhance the quality of community life through a diversity of healthy leisure pursuits and heightened appreciation for our natural world.

Agency Vision Statement: We, the Wheaton Park District team, commit to service excellence, financial stability and an enriched quality of life for our stakeholders. We accomplish this through continuous improvement of people and systems while living our values.

### Agency Core Values:

Integrity (articulated through Character Counts)

Fun

Adaptability and Growth

Commitment

Kindness

Service

Moving further along the continuum of alignment toward the tangible, the Team developed four key Avenues of Accountability that they felt would set appropriate boundaries and direction for all future strategic planning and action.

1. Sustainability Makes Sense
2. Investing in People
3. Doing Things Better and Smarter
4. Ensuring Excellence and Satisfaction

Agency strategic directions and objectives were developed to further guide the now expanded Leadership Team in the creation of all Agency Project Charters. These directions and objectives are summarized below:

Strategic Direction – Aim the Wheaton Park District toward financial self sustainability.

Strategic Objective – From fiscal year end 2009 to fiscal year end 2014, reliance on property taxes for Corporate and Recreation Fund operations will be reduced by 10%.

Strategic Direction – Aim the Wheaton Park District toward becoming an environment where stakeholders are highly engaged and very satisfied.

Strategic Objective – From year end 2009 to year end 2014, internal and external awareness and satisfaction ratings will be improved with each measurement.

Strategic Direction – Aim the Wheaton Park District toward becoming a happy, healthy, and professionally developed and value driven Team.

Strategic Objective – By year end 2014, the Wheaton Park District will be a leader in providing internal services among Illinois Park Districts.

Strategic Direction –Aiming the Wheaton Park District toward becoming a highly effective and efficient place of public business.

Strategic Objective –By year end 2012, a District wide Business and Operations Plan will be completed.

The leadership team developed seven initial charters that will further define the direction and actions of the District over the next five years. These charters describe the improvement initiatives that we feel will be met and provide a plan of action to accomplish the initiatives. Each charter follows the format that is outlined below:

Charter Format  
Strategic Directions  
Authority  
Project Sponsor  
Opportunity Statement  
Business Case  
Goal Statement  
Project Scope  
Project Team  
Project Plan

Using this format and the strategic model previously established the following Project Charters were developed and are presented in complete detail in the body of this document:

Initial Project Charters

1. Complete and Operational and Capital Funding Sustainability Analysis
2. District-Wide software Improvements and Utilization
3. District Business Plan Model
4. Access to Recreation
5. Values Across Lines Using Excellent Service - V.A.L.U.E.S
6. Event Rental and Catering Plan
7. Field House – The Loss of Hubble, Filling the Void

Park, Open Space and Facility Use and Development Plans

All Agency Staff were invited to participate in the development of the vision for all parks and facilities over the next five years. This was accomplished through weekly focus groups over a twelve week period. The focus groups were lead by Director of Planning Rob Sperl and Planner Steve Hinchee.

Each Park and Facility Plan includes current characteristics, primary use, and recommendations for development or improvement. While not all of the visions will be realized in five years, the plans, coupled with our Capital Asset and Equipment Replacement Plan will direct the agency's capital planning and expenditures in a logical fashion.

Our use, maintenance of, and future vision for School District owned park and recreational sites is articulated in the following section of the document entitled Park – School Agreement/Use and Development Plans. The School and Park District must re-examine the existing intergovernmental agreement that governs the joint use and development of these public assets.

The appendix provides additional planning documents included in this report for reference and action over the next five years includes:

- Americans with Disabilities Act Transition Plan
- Capital Asset and Equipment Replacement Plan
- Land Acquisition Plan
- Bikeway Plan
- Encroachment Reduction Plan

The visions of each of these current planning documents will be realized through the Charter process outlined herein.

Operational and Capital Funding Considerations

Finance Director Rita Trainor has developed projections for the Wheaton Park District property tax levies for years 2010, 2011, 2012 and 2013. These projections will be found in section 8 of this document for your examination. The projections illustrate the chilling effect that the property tax extension

limitation laws' limiting rate has had, and will continue to have, on our formerly robust Recreation Fund Levy.

While there are other impacts on finances such as annually increasing operating costs related to providing health insurance, paying utilities, funding our pension system, and unfunded mandates, taking the time in this summary to articulate them all is not necessary. The simple point to be made is that the Wheaton Park District must aggressively seek alternative forms of revenue, aggressively operate in a more efficient manner, aggressively meet the realistic needs of our most valuable resource - people, and aggressively develop strategic partnerships that deepen the community dollar. Only through these efforts will we be able to continue to provide the services our residents need at the level of service they expect.

Also included in section 8 of this document is the debt service schedule for our 2009 bond issues. The utilization of our annual general obligation bond proceeds as an alternate revenue source has allowed the board to generate an additional \$9,000,000 to fund the Northside Park development project and the overdue replacement of the Community Center roof. This model also allows us to continue to generate \$600,000 in capital dollars annually for both new projects and continuing annual infrastructure upkeep. If you examine the annual cost of meeting our capital asset and equipment replacement needs (see sections 9 and 13) as well as paying for new capital developments outlined in section 5, you will note that without new sources of capital our money will fall short of our needs and wants. This awareness gives us the ability to plan for success instead of failure.

If you examine our strategic directions, avenues of accountability, core values, and initial charters, you will see this strategic plan provides the guide for turning our financial challenges into opportunities for excellence in public service. It will not be easy, but it is possible if we achieve alignment.