



TEAMWORK • RESPECT • ENTHUSIASM • COMMUNICATION • COLLABORATION

# TOGETHER

2017~2021 NWSRA STRATEGIC PLAN



# Mission, Vision, Core Values

## Mission Statement

- We exist to provide outstanding opportunities through recreation for children and adults with disabilities.

## Vision Statement

- To be a leading force, creating greater options that enrich the life experiences of the participants, families and communities we serve.

## Core Values

- Teamwork: Support each other and work together
  - Respect: Be open, honest and kind
  - Enthusiasm: Exceed expectations
- Collaboration: Combine resources to achieve common goals
  - Communication: Listen, share and adapt

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# Acknowledgements

# Acknowledgements

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# Acknowledgements

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Rita Fletcher, Bartlett Park District

Dennis Stein, Streamwood Park District





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2017-2021 NWSRA STRATEGIC PLAN

# Introduction

# Introduction

In 2016, NWSRA initiated a strategic planning process to develop its formal strategic plan for 2017-2021. Plan development was facilitated by a Strategic Planning Team, which consisted of staff, Board Members and volunteer consultants. The plan's Pillars, Focuses, Goals and Action Items were all derived from community and staff input solicited during the planning process. Procedures utilized in the development of the plan included staff and resident surveys, staff and community focus groups, and staff and Board Member feedback on the draft plan. Through the strategic planning process, NWSRA identified its core strengths, weaknesses, opportunities and challenges. It also clarified the Mission, Vision and Values of the Association.

## The plan established four Pillars:

Financial  
Management

Operational  
Excellence

Promoting  
Leadership

Outstanding  
Service

The strategic plan is designed to guide NWSRA over the next five years. However, this document should be viewed as merely a first step toward effecting change through implementation. Goals within the strategic plan will be reviewed and updated annually to ensure proper prioritization and follow through of goals and action items, and allow for adaptation to changing circumstances. Further, departmental goals will be developed to ensure proper implementation of the overall strategic plan.







## Organizational Background

# Organizational Background

The Northwest Special Recreation Association (NWSRA) is the largest provider of recreational services for children and adults with disabilities in the state of Illinois. As an extension of 17 park districts throughout the northwest suburbs, NWSRA offers public access, year round recreational programming to over 6,000 individuals with disabilities in its service area. The Special Recreation Association (SRA) model is unique to the state of Illinois and leads the nation in inclusion and accessibility for residents with disabilities. The model represents a consolidation of local Park District, Village and Township efforts to provide recreational services to individuals with disabilities. Founded in 1974, NWSRA:

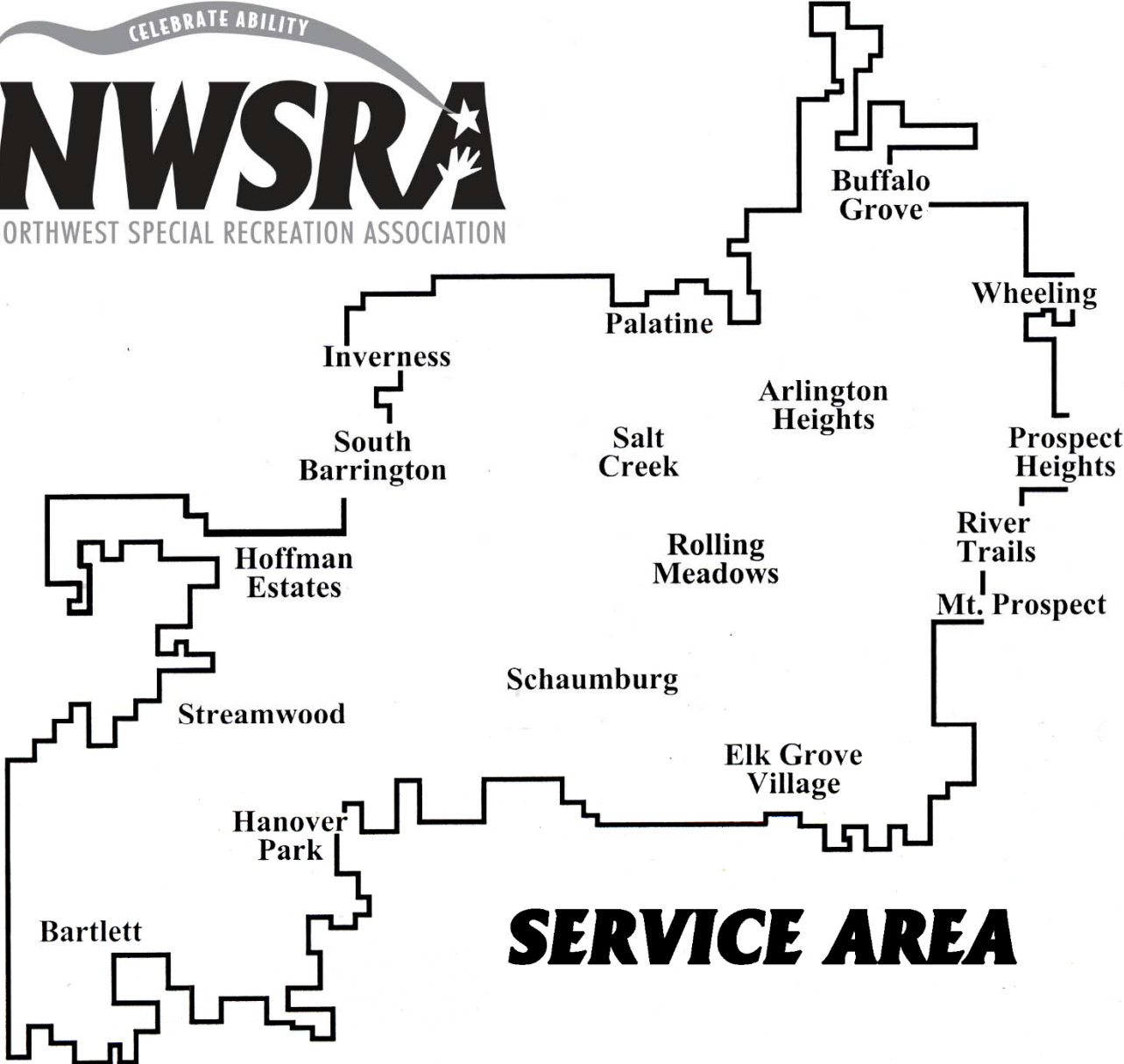
- Collectively addresses the financial and social responsibilities set forth by the unfunded ADA mandate and inclusion of individuals with disabilities
  - Pools resources and funding to address the need for services and accessible public parks and facilities
  - Centralizes a team of staff to collectively address best practices and trends affecting individuals with disabilities
- Increases the range of inclusive services for individuals with any type of disability provided within member communities

NWSRA is a leader among peers with over 15,000 registrations in more than 2,000 programs in 2014. The organization is a two-time National Recreation and Park Association (NRPA) National Gold Medal Award winner and is recognized as a Distinguished Accredited Agency by the Illinois Park and Recreation Association, an honor only 10% of Illinois park and recreation agencies have received. NWSRA has received the National Recreation and Park Association (NRPA) Excellence in Inclusion award, recognizing the national leader in service and promotion of inclusive opportunities for children and adults with disabilities.

## NWSRA's Partner Park Districts

NWSRA serves 17 northwest suburban park districts located within Cook County and southern Lake County (see the attached map of the NWSRA service area). These park districts include Arlington Heights, Bartlett, Buffalo Grove, Elk Grove, Hanover Park, Hoffman Estates, Inverness, Mt. Prospect, Palatine, Prospect Heights, River Trails, Rolling Meadows, Salt Creek, Schaumburg, South Barrington, Streamwood and Wheeling.







# Strategic Planning Process

# What is Strategic Planning?

A collaborative effort between customers, staff and Board Members to identify strategic direction of the agency for the next three -five years. Its creation 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.

# Five Phases of Strategic Planning



# Strategic Plan Hierarchy



# History of Strategic Planning Process

In 2006, to proactively position for the future, NWSRA retained Leisure Vision to conduct a Needs Assessment Survey. The survey was tailored to the issues of strategic importance to effectively plan for the future. Through results obtained, the completion of its Comprehensive Plan. This master plan included a detailed assessment resulting in a guide for future decisions as it applied to the development of NWSRA programs, services and infrastructure over the following five years.





# History of Strategic Planning Process

This process resulted in revising the mission statement, which now clearly articulates NWSRA's reason for existing. As adopted by the NWSRA Board in 2010, the mission is "To provide outstanding opportunities through recreation for children and adults with disabilities."

Revising the mission statement and developing a comprehensive direction for the future helped to move the Association to function as a strategy-focused organization. Instilling a common purpose, identified shared core values, and establishing a set of key, strategic initiatives provided an aligned course of direction in meeting NWSRA's mission today and in the future.



# 2017-2021 Strategic Planning Process



# Planning Definitions

## Strategic Plan Process:

- A collaborative effort between customers, staff and Board Members to identify strategic direction of the agency for the next five years. Its creation 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.

## Mission:

- Defines the fundamental purpose of NWSRA, describing why it exists.

## Vision:

- Defines the desired or intended future state of NWSRA in terms of its fundamental objective and strategic direction.

## Values:

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

## Balanced Scorecard Perspectives:

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

# Planning Definitions

## Pillars:

- Essential principles that lay the foundation for aligning the organization's Mission with its Vision.

## Focuses:

- Areas identified within each Pillar that are in need of improvement

## Goals:

- Broad endpoints with the goal of realization throughout the 5-year Strategic Plan Process

## Action Steps:

- Annual goals identified and prioritized for each year of the 5-year Strategic Plan Process

## 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.



**Pre-Planning: Culture Check-In  
Facilitated by Ginny Bateman**

# Culture Check-In

## Organizational Culture

Organizational culture encompasses values and behaviors that contribute to the unique social and psychological environment of an organization. Culture includes the organization's vision, values, norms, systems, symbols, language, assumptions, beliefs and habits.

## Ravasi and Schultz

Ravasi and Schultz (2006) wrote that the organizational culture is a "set of shared assumptions that guide what happens in organizations by defining appropriate behavior for various situations. It is also the pattern of such collective behaviors and assumptions that are taught to new organizational members as a way of perceiving and, even, thinking and feeling." Thus, organizational culture affects the way people and groups interact with each other, with clients and with stakeholders.

## Developing Understanding

Due to the arrival of several new employees and staff movement, it was deemed important to develop a clear understanding of the organizational culture at NWSRA. This process included staff feedback related to the existing Core Values and how each staff member felt the values directly related to the agency. Staff feedback from the culture check-in related to each of the Core Values is included in the following pages.

# Culture Check-In

## Staff Feedback on Core Value: Respect for each individual

▶ Positivity, remaining upbeat, calm understanding

▶ Compassion, show you care

▶ Empathetic, understanding and putting yourself into others shoes

▶ Co-workers respect, communication, becoming more aware

▶ Keeping department issues in department and faith in each other to follow through

▶ Remember that everybody has something going on in their life

▶ Gives you a feeling of pride

▶ Not to judge by appearances

▶ Feedback and growth options/ideas

▶ Ask what are the solutions, as a supervisor, listen to their solutions

▶ Fighting for rights

▶ Kudos / recognition to each other

▶ Trust in leadership

▶ Show respect through face to face conversations, not lengthy conversations via email

# Culture Check-In

## Staff Feedback on Core Value: Respect for each individual

Discuss solutions

No judgment

Reasonable  
Accommodations /  
Accommodations

Kindness / courtesy

Meeting every  
person at their level

Providing good  
care / service

Attempting trying  
adaption

Active listening/  
following up

Quality staff

Appropriate planning

No unilateral  
programming  
decisions

Being prepared

Awareness of  
customer interest,  
understanding  
cultural diversity

Time cognizant

Does not invade  
personal space

Allows for venting  
without offense

Understands there  
will be questions

Patience and  
understanding



# Culture Check-In

## Staff Feedback on Core Value: Collaboration for Community Access

Training of member district agency staff	Creating awareness	Networking with civic organizations	Marketing
Partnering with social services	Using partners for resources	Allows for new participant discovery	Extends our resources
Teaching /education public and community	New/creative opportunity and programs	Opportunity for new volunteers/staff	Community support / assisting in accessibility
Knowing new /private agencies and see what's already offered, when is it appropriate to go here or there	PURSUIT and other community based programs	Inclusion	Education public, "person first"



# Culture Check-In

## Staff Feedback on Core Value: Collaboration for Community Access

- RMCC program space
- Gold Standard treatment in community facility
- Outreach / incentivize schools outreach for kids who don't know us
- Identify unique opportunities
- Targeting outlying member agencies
- Expand resources for ADA best practice website
- Recognizing member district comprehensive plans



# Culture Check-In

## Staff Feedback on Core Value: Commitment to Enthusiastic Service

"TEAMWORK"

Don't walk away when the going gets tough

Don't take negativity personally

"Fake it to make it" to create an enthusiastic and positive program experience for the participants

Prepared for programs and emergency situations

Cohesive work environment

Open to change of better ideas

Continued education

Committed to new and innovative ideas

Dedication

Going above expectations

Believing in and enjoying therapeutic recreation

Acceptance of all types of individuals



# Culture Check-In

## Staff Feedback on Core Value: Dedication to Safe and Fun Programs

Individualized plans for success

Safety committee

Enthusiastic attitudes

Continuing education

Current trends

PDRMA

Providing training for member districts for safe and fun programs

Quick on your feet à able to adapt

Be willing to work as a team

Realistic understanding of resources

Formation of a behavior team

Process of Distinguished Agency accreditation


Enthusiastic staff with a good sense of teamwork

Staff to participant match ups that are safe

Specific, detailed program lesson planning, back to basics

# Culture Check-In

## Staff Feedback on Core Value: Dedication to Safe and Fun Programs



Accountability, program leader and supervisor
Ownership of staff and volunteers in programs
Allow entry level staff to design program
PDRMA review
Retaining qualified staff
Constant management of behaviors, staying ahead of behaviors, being pro-active, not just tracking.
Utilize staff strengths for programs for skill based programs

Accountability, program leader and supervisor

Ownership of staff and volunteers in programs

Allow entry level staff to design program

PDRMA review

Retaining qualified staff

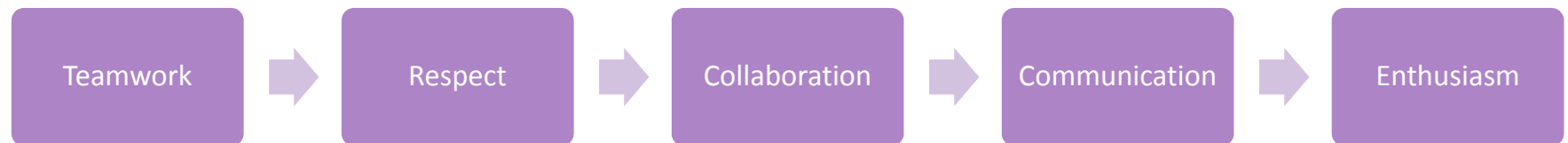
Constant management of behaviors, staying ahead of behaviors,  
being pro-active, not just tracking.

Utilize staff strengths for programs for skill based programs

# What Are Core Values?

► **What guiding principles are important to:**

- How your organization operates (e.g. its activities, standards, quality, etc.);
- How your organization is perceived externally (i.e. in the eyes of the public or other external stakeholders);
- How staff and volunteers carry out your organizations services and activities?





**Step 1: SWOT Analysis and Survey**  
**Facilitated by Amy Charlesworth**



# SWOT ANALYSIS

Helpful

Harmful

31

Internal

## STRENGTHS

Attributes of the organization that help achieve the mission

## WEAKNESSES

Attributes of the organization that stop achievement of the mission

External

## OPPORTUNITIES

External conditions that help achieve the mission

## THREATS

External conditions that could damage the mission



What will we do with the information we gather?



# SWOT ANALYSIS

## STRENGTHS

What do we do better than others?

What unique capabilities and resources do we possess?

What do others perceive our strengths to be?

What are we best at?

# SWOT Analysis

## Strengths

Rich History  
Strong Reputation – Accredited  
Skilled Staff – Professional – versatile  
Knowledgeable regarding disabilities –  
Certifications - Specialty areas  
Outside Presentations  
Leaders in the field  
Relationship with Foundation  
Better growth opportunities for the staff  
Collaboration (staff, park districts, other agencies serving individuals with a disability)  
Programming with transportation/accessibility  
Choice/Variety of recreation opportunities  
Board involvement  
Leader in inclusion services  
Behavior management team  
Customer Service  
Planning  
Fiscally sound  
Relationship with our park districts  
Staff longevity  
Parent support / booster club  
Brand / label is recognizable  
Paralympics / Paralympic Clubs  
LED program  
Inclusion  
Pursuit Accommodating to individuals

Foundation – SLSF!  
Communication  
Thinking outside the box  
Availability  
Teamwork / caring for each other  
Provide opportunities for continuing ed.  
Professional networking  
Exceeding expectations  
Empathy of staff  
Above and beyond with communications  
Opportunity for advancement  
Attention to safety  
Internal relationships  
Provide most value even with budget restrictions  
Create & develop, keeps staff up to date  
Always thinking ahead  
Adaptable  
Flexible  
Taking advantage of opportunities (investigate, research, sustainable)  
Commitment of Staff and Board  
Innovation  
Resources of 17 agencies  
Provided case for serving people with a disability



# SWOT ANALYSIS

## WEAKNESSES

What do similar agencies do better than us?

What can we improve given the current situation?

What do others perceive as our weaknesses?

# SWOT Analysis

## Weaknesses

Staff turnover  
Internal communication  
Not modern database  
Gaps in knowledge  
Resistance to change  
Staff longevity  
Work Load vs. staff needs  
Redundant job duties  
Retention of PT staff  
Large Service Area  
Families wanting more services  
Outreach to different demographics  
Communication & follow through  
Spread ourselves too thin  
Change is good but might be hard to communicate with staff & for people to keep up

Equal opportunities to outliers  
Outreach - trying to get our message out to everyone  
Sensory room  
Resources need to uphold vast amount of programs and services provided  
More budget for individual programs  
Full time staff spread thin  
Sometimes we grow too fast (can't keep up)  
More program space – own facility....  
Program development staff involvement  
Reaching teens and HS groups  
Terminology – Letter  
Staff diversity (diversity as a whole)  
Training for diversity  
Trying to be all things to all people  
Growing too fast – quality suffers  
Needs vs. Resources how do we strike a balance



# SWOT ANALYSIS

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## OPPORTUNITIES

What trends or conditions may positively impact the Association?

What opportunities are available to the Association?

# SWOT Analysis

## Opportunities

PURSUIT Success  
Staff Turnover (new fresh ideas)  
Collaborations  
Untapped disability demographics  
Relationships with outside vendors, districts, agencies  
Snoezelen Room  
Early Childhood Programming  
Member district relationships  
Outreach committee  
Mentoring opportunities  
Behavior Team  
Reverse inclusion in PD programs  
Partnerships  
To get different certifications  
Set standards for programs – staff & lesson plans  
Reach people not seeing  
Advances in technology  
New Lightning athletics/sports  
Tennis and equestrian  
Connecting with schools  
Changing mentality of rec. and leisure  
Neighboring SRA's  
Attract massive amounts of staff  
High School work programs  
Benefits of outreach opportunities  
Private partnership opportunities

Universities, Colleges, high school recruitment of volunteers and PT staff  
SLSF – Always!  
Memberships  
Retirements  
Succession planning  
Job Description revamp  
Redefine with legislators  
Scholarships  
Higher incidents of Autism in community  
Focus on diversity  
Focus on underserved areas  
Expos / Marketing opportunities  
Media focus on people with disabilities  
Recruitment / Development  
New facilities in PD – get more new programs  
Transportation / Vehicles  
Adult Day program  
Fitness program collaborations  
Outreach to younger population to introduce to the field  
Success of Pursuit – opportunity to grow and expand  
Use what we know to help legislators understand what we do  
Partnership opportunities



# SWOT ANALYSIS

## THREATS

What trends or conditions may negatively impact you?

What are similar agency's doing that may impact you?

Do we have solid financial support?

What impact do our weaknesses have on the threats to us?

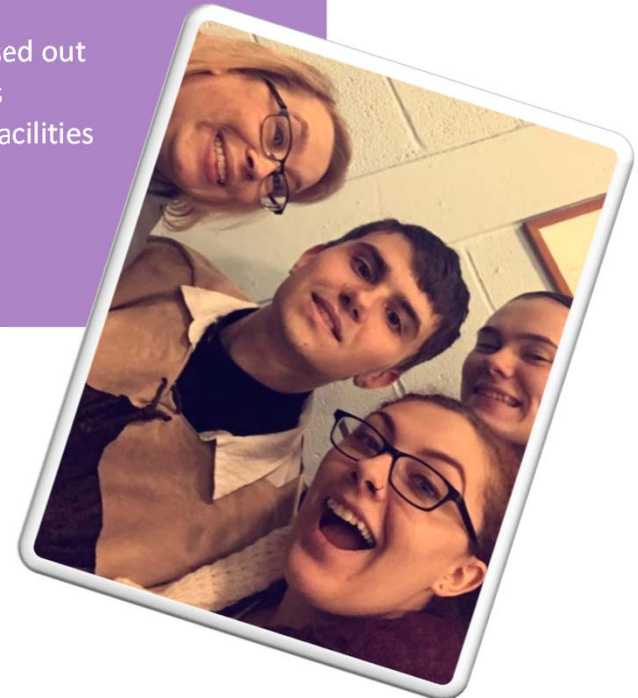


# SWOT Analysis

## Threats

Tax freezes on partner districts  
40 hour work weeks  
ACA  
EVA Changes  
Minimum wage increase  
State of Illinois economic situation  
Teachers as staff  
Other smaller facilities opening doing the same thing as NWSRA (private)  
Unbudgeted expenses  
Lack of Part-time staff  
New legislation  
Bring in demographics even when doing promotions  
Increase in disabled individuals  
People living longer

No state budget impact on families  
Increased scholarship requests  
Participants going elsewhere  
Potential for medical staff  
Money (EAV's falling)  
IMRF  
New labor laws  
Lack of facility space  
Staff competition (why work for us?)  
Mental health growing not having background to support their needs  
Materials to schools not passed out  
Weather effects on programs  
Space limitations at current facilities



# Survey

Review Internal and External Stakeholders

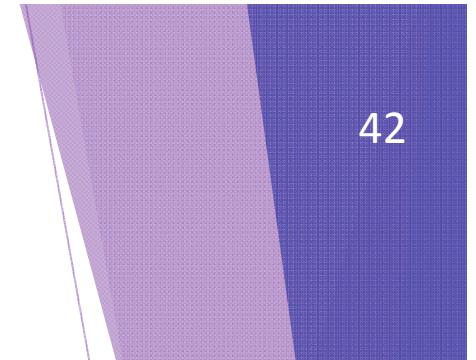


## Survey Results:

- 230 Respondents
- 61% Board, Staff, Volunteers & Partners
- 39% Participant/Parent

# Survey

With the Mission in mind, please rate your agreement with the following statements:



- ▶ The mission clearly defines the purpose of NWSRA 99%
- ▶ The mission of the Association is realistic 99%
- ▶ The programs of the Association are consistent with the Mission Statement 96%
- ▶ The Association's planning and budgetary priorities are supportive of the mission  
(*don't know: 24%*) 68%
- ▶ The Association's actions and decisions demonstrate an understanding that the association service the 17 area park districts 87% (*don't know 18%*)
- ▶ The Association engages the participants and responds to their needs accordingly 94%
- ▶ In relationship to the planning process for the 2017-2021 Strategic Plan, I believe the missions is still relevant to the Association 91%

# Survey

Based on the Vision Statement as created in 2010, rate your level of agreement

- ▶ Communicates the direction of the organization 89%
- ▶ Helps make day-to-day operating decisions 75%
- ▶ Keeps the Association focused 83%
- ▶ Motivates employees 74%
- ▶ In relationship to the planning process for the 2017-2021 Strategic Plan, I believe that this vision statement is still relevant to the Association. 87%




# Survey

Based on the Values, as identified in the Strategic Plan, rate your level of agreement that this is the culture of NWSRA

- ▶ Respect for each individual 96%
- ▶ Dedication to safe and fun programs 95%
- ▶ Collaboration for community access 87%
- ▶ Commitment to enthusiastic service 94%
- ▶ These values represent the current culture of the association 94%





***Step 2: Development of Mission, Vision,  
Core Values and Pillars  
Facilitated by Amy Charlesworth***

# Development of Mission, Vision, Core Values and Pillars

## Mission and Vision

- Based on the SWOT analysis, survey and feedback from stakeholders including; staff, board, parents and community supporters it was determined that the Mission and Vision set forth appropriate direction for the agency.

## Core Values

- A list of 40 common words and themes from the Culture check-in was used to create recommendations for the Core Values. Staff were asked to vote on which words or themes they identified with the most.
- Following are the words with the highest votes: Collaboration, Communication, Enthusiastic, Integrity, No Judgement, Acceptance, Respect, Teamwork

## Pillars

- Upon review of the SWOT analysis, survey, feedback from stakeholders including; staff, board, parents and community supporters identification of Core Values, four Pillars were created to build upon strengths and opportunities, as well as address weaknesses and threats.

# Development of Mission, Vision, Core Values and Pillars

Based upon feedback received through the Culture Check-in, SWOT Analysis and stakeholder survey, the following changes were made to the existing Mission, Vision, Core Values and Pillars:

2011-2016	2017-2021
<p><b>Mission Statement</b> We exist to provide outstanding opportunities through recreation for children and adults with disabilities.</p> <p><b>Vision Statement</b> To be a leading force, creating greater options that enrich the life experiences of the participants, families and communities we serve.</p> <p><b>Core Values</b></p> <ul style="list-style-type: none"> <li>• Respect for each individual</li> <li>• Dedication to safe and fun programs</li> <li>• Collaboration for community access</li> <li>• Commitment to enthusiastic service</li> </ul> <p><b>Cornerstones</b></p> <ul style="list-style-type: none"> <li>• Quality Service &amp; Community Access for Participants and Families</li> <li>• Effective Communication</li> <li>• Organizational Preparedness</li> <li>• Quality Staff and Volunteers</li> <li>• Financial Stability</li> </ul>	<p><b>Mission Statement</b> We exist to provide outstanding opportunities through recreation for children and adults with disabilities.</p> <p><b>Vision Statement</b> To be a leading force, creating greater options that enrich the life experiences of the participants, families and communities we serve.</p> <p><b>Core Values</b></p> <ul style="list-style-type: none"> <li>• Teamwork: Support each other and work together</li> <li>• Respect: Be open, honest and kind</li> <li>• Enthusiasm: Exceed expectation</li> <li>• Collaboration: Combine resources to achieve common goals</li> <li>• Communication: Listen, share and adapt</li> </ul> <p><b>Pillars</b></p> <ul style="list-style-type: none"> <li>• Financial Management</li> <li>• Operational Excellence</li> <li>• Promoting Leadership</li> <li>• Outstanding Service</li> </ul>



# Achieving the Vision

Financial Management

Financial

Operational Excellence

Internal Processes

Promoting Leadership

Learning & Growth

Outstanding Service

Customer

To be a leading force, creating greater options  
that enrich the life experiences of the  
participants,  
families and communities we serve

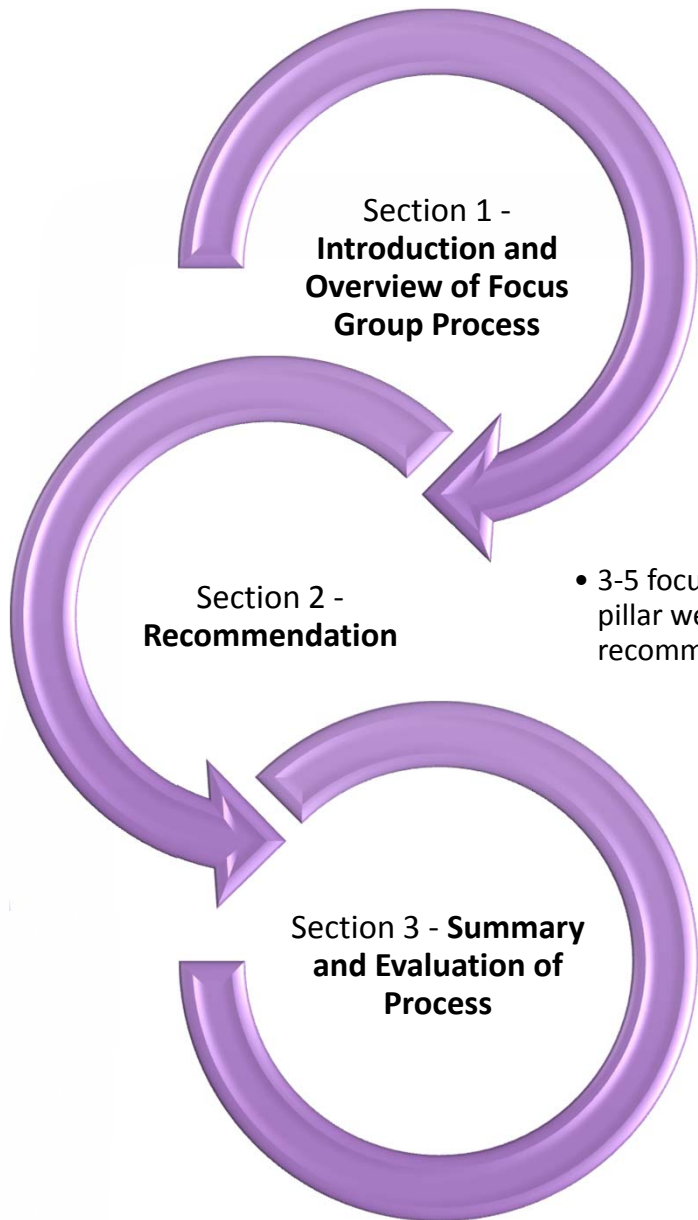


**Step 3:**

**Regional Focus Groups and  
Development of Focuses  
Facilitated by Jan Hincapie**



# Regional Focus Groups



**Section 1 -  
Introduction and  
Overview of Focus  
Group Process**

- Included an overview of the focus group process and the format used

**Section 2 -  
Recommendation**

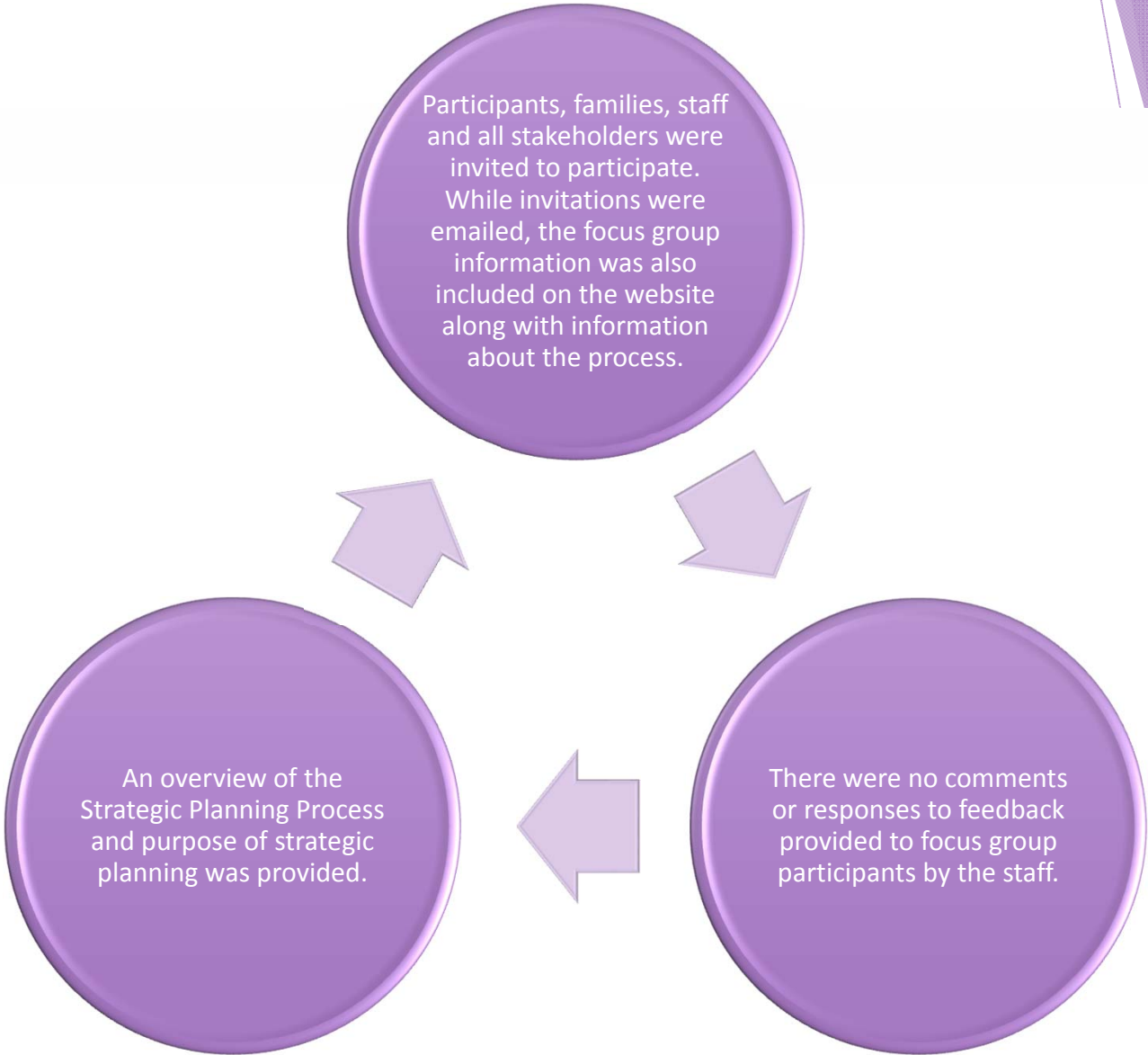
- 3-5 focuses under each pillar were recommended

**Section 3 - Summary  
and Evaluation of  
Process**

- Included a summary of the process logistics and any recommendations for future focus group processes, as well as an evaluation of the meeting

Participants, family members, community partners, Park District staff and other stakeholders were approached to create regional focus groups. Four regional focus group meetings were held to look at the past and evaluate where NWSRA has been, to assess where NWSRA currently is and to plan for the future to improve services to the residents of NWSRA member park districts. Following are the items discussed at the Regional Focus Group meetings.

# Regional Focus Group Meetings



# Regional Focus Group Meetings

The steps of the NWSRA process were illustrated, as well as what strategic planning cannot change. This included:

- Strategic Planning cannot change federal and state mandates and laws (many unfunded)
  - Minimum wage
  - Insurance and Retirement benefit requirements
- Strategic Planning cannot increase budgets, tax levies or change the cost of providing the services
  - Special Recreation levy
  - Cost of doing business is increasing (insurance, wages, cost of facilities and equipment)

# Publicity and Format of Focus Groups

Invitations were sent to participants, staff, volunteers and stakeholders

Information was included on the website

Participants were asked to RSVP

Participants signed in and were given name tags and an agenda

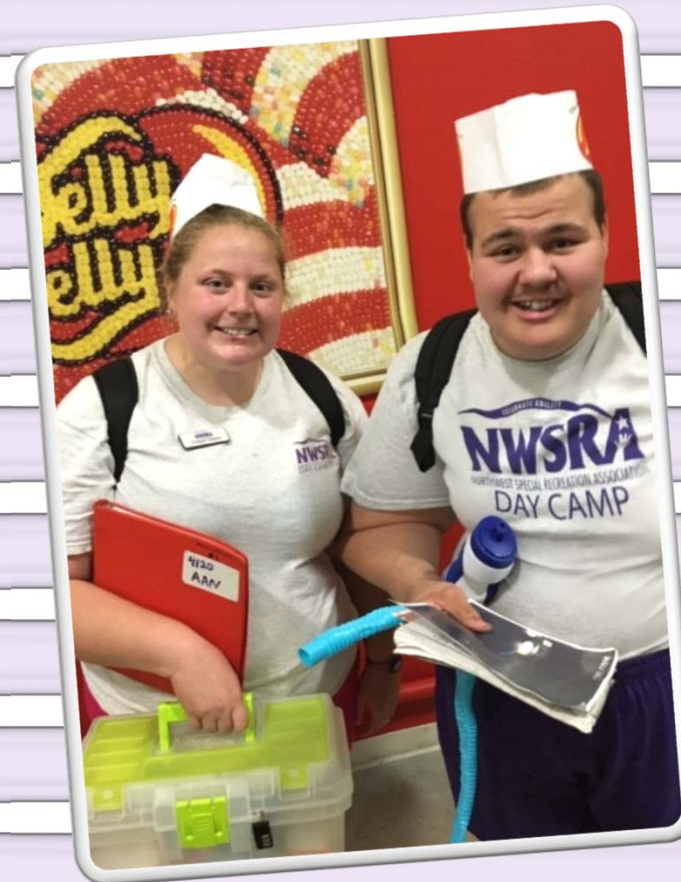
A brief PowerPoint was presented

Described the process

Talked about what Strategic Planning couldn't change

Presented the Mission, Vision and Core Values

Introduced the Pillars



# Input Phase

A blank sheet was placed on the wall for each pillar:

**Financial Management**

**Operational Excellence**

**Promoting Leadership**

**Outstanding Service**

Participants provided input and their input was documented in one of the four categories

Everyone received a sheet with the facilitator's name and email  
so they could provide further input

# Final Report

A final report was provided to the NWSRA Board of Trustees, and included the following information:

Focus Group  
Schedule, format and  
presentation

General Observations  
about the focus  
groups

Recommendations  
for the Focuses under  
each Pillar





# Regional Focus Groups

Thank you to the following Park Districts for providing facility space to host the Regional Focus Groups:

West Region: Schaumburg Park District

Central Region: Rolling Meadows Park District

East Region: Mount Prospect Park District

North Region: Buffalo Grove Park District



# Regional Focus Group Meetings: General Observations

The majority of the focus group participants were parents of adult participants.

The second largest group represented was parents of teen participants.

There were very few parents of young children.

The general consensus was that they greatly appreciated the services provided by NWSRA.

The focus group participants appreciated being asked for their input.

In one of the three focus groups it was difficult to get them to provide much input.

It was obvious that NWSRA serves as a lifeline to the families and that it has had a profound impact on their lives and the lives of their children.

There were 26 individuals attending the focus group sessions, of which four were park district staff.

# Regional Focus Groups

## Focus Group Feedback: West Region

- Impressed with staff
- Want more programming on No School Days Off
- Not enough skill development being taught for sports prior to the start of competitions
- Make sure that the participants with behaviors are being addressed
- Communication regarding behavior process
- Concerned about ratio of participants to staff
- More communication about a child's progress and what is happening in the program
- Less games and more inner agency scrimmages
- Work to build the community acceptance through service related projects done with the participants and families
- More programming out west
- More cultural arts opportunities; plays, musicals, museums...
- Ability to contact staff when they are at a program with their child or at least the ability to call and update about a situation during the program
- Immediate response when registering regarding if they are in or on a waitlist
- Referrals between social service agencies
- Need more community visibility
- Stay connected to social service agencies in the community
- Become a clearing house for other resources
- Get on ABLEGRAM
- Concerned about staff training. What level of training do they receive? Lack of knowledge about sports
- Social Club and Special Events are not very unique
- Go more places that local
- Better utilization of Park District unique facilities and others

# Regional Focus Groups

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## Focus Group Feedback: West Region

### Pillar: Financial Management

- Can we afford to have a 1:1 ratio for participants?
- Costs are reasonable.
- Pursuit is more costly than other programs. Please help participants get financial assistance. Can more programs get state funding through Medicaid, like CAU and Clearbrook?

### Pillar: Operational Excellence

- Would appreciate better notification of confirmation of registration and cancellation of programs.
- Varying needs of participants impacting experience of other participants and sometimes impacting safety.
- Ratio modification for some staff to deal with individual needs. Staff should be gender specific.
- There needs to be a more defined discipline process. Staff and parents should be aware of the process, so there is no question when it has to be utilized. Elimination should be the last step and should only be done in extreme cases. Can family help in those cases (by helping at program)?
- Communication is important...need to know discipline expectations/responsibilities, what to work on at home, more feedback is needed regarding participant's experience. We want this to work, so if you tell us to reinforce what you are doing, we will!
- Put the program evaluation online and have written evaluations also. Evaluate more frequently.
- Get participants involved in the community by doing service projects.
- Make sure that NWSRA connects with independent living homes such as Clearbrook, Little City, Ray Graham, St. Coletta's and The Meadows. Concern was raised about participants losing touch with NWSRA when they start living independently. They felt that would be a great loss since many of the participants have been utilizing the services of NWSRA since they were children.

# Regional Focus Groups

60

## Focus Group Feedback: West Region

### Pillar: Promoting Leadership

- There appears to be a staff shortage. They need better training regarding discipline and policies, and specific information about participants...what works, what doesn't.
- More training on behavior management for staff.
- Allow higher functioning participants to help and serve as leaders when appropriate.
- Many of the coaches/instructors do not have enough knowledge of the sport to be coaching or teaching the sport. They could use more sports-specific training.

### Pillar: Outstanding Service

- Use parents and stakeholders as advocates for NWSRA at the local, state and national level.
- The people and staff are phenomenal.
- More programming on schools out days, especially high school test days (like Palatine High School).
- Be more responsive to complaints.
- Not enough skill development and training prior to competition. Perhaps more instruction prior to starting to compete.
- Location of games are far away, more coaching locally and less travel.
- How about transportation to practices?
- Try intrasquad/scrimmages vs. competing with communities.
- Is it social or is it sport? This should be determined when deciding on the format of the program.
- Utilize more local entertainment such as high school plays, cultural events, community theatre, concert series, trips rather than traveling far away.

# Regional Focus Groups

61

## Focus Group Feedback: West Region

### Pillar: Outstanding Service (continued)

- More “special” trips such as dinners, theatre, etc.
- Let people know about resources like the Able-Gram send out by Schaumburg for people with disabilities.
- Make sure that the futures homes of participants are connected to NWSRA.
- Serve as a site for information and referrals for services for the disabled.
- Provide networking for parents. This could serve as a support group. If your child is in sports you get to know each other, but if you are in regular program you may never meet. I would like to connect with other parents.
- Pursuit is very good.
- Better utilization of park district facilities and classes, junior college classes (collaborate!).
- Provide access to a staff cell phone number when they are on a trip so parents can call. Example was given of providing a series (A, B, C, D,) of phones for use with programs, publicize numbers so personal cell phones don't have to be used and parents have a comfort level of knowing they can call if the trip is late or child is having a bad day.
- Unified Sports aren't functioning as designed.

# Regional Focus Groups

## Focus Group Feedback: Central Region

Closer/more locations of pick-ups and drop offs

Programming for lower functioning adults

Programming for older adults

More instruction for skills

Why are there two different fees for Saturday programs?

Takes too long to get a response back after using the email on website

Love the uniforms the staff wear that makes it easy to identify them

Program leaders change a lot

More communication between Cillas, group homes and NWSRA

There is no way to sign up for programs without paying for transportation

Would love to be able to drop off participant at program site if they knew the place and time of arrival

Want to see Jr. High and High School after school programming

More opportunities for parents to network and communicate with each other

Carpooling lists?

Minimize the gaps between programs

Questions about our age breakdowns

Consistency with locations for Saturday programs

Would love a way to know who is leading the program

Need to promote Facebook as a means of up to date information

# Regional Focus Groups

63

## Focus Group Feedback: Central Region

### Pillar: Financial Management

- Fees are reasonable
- Saturday Superstars is a half hour less and costs more money. When this happens please explain why.
- Gaps between sessions should be closed and parents would be willing to pay the extra cost.
- More money should be allocated to market NWSRA. The community needs to know about what they do.

### Pillar: Operational Excellence

- Offer transportation for all events, if possible.
- Put emails of staff in brochure so they can be easily contacted if there is a question or concern.
- Publicize who is leading the program, whenever possible. Some leaders are better than others with our individual children. Familiarity gives us comfort.
- Online registration is funky.
- Registration for programs with and without transportation is confusing, at best. Sometimes the transportation is more expensive than the program!
- Good communication with NWSRA.
- Consider a quarterly gathering of parents

### Pillar: Promoting Leadership

- Staff are easily identified.
- They know participants by name.
- There is program leader turnover which requires more training or orientation of how to work with specific participants.
- Caring, supportive, helpful.
- Parents would be willing to advocate but they would need “talking points” provided about the specific topics.



# Regional Focus Groups

64

## Focus Group Feedback: Central Region

### Pillar: Outstanding Service

- Appreciate flexibility, even if it isn't an exact fit. If the choice is putting someone in a program that might be off one year, that is better than the child not having any program at all. As long as he/she isn't disruptive, why not?
- More age or ability appropriate programming. Mixing numerous ages and abilities can be tough for staff and distracting for participants
- Encourage moving toward age-appropriate programming with some tweaking, as they are moving out of high school programming. Maybe a transition program group? That's a tough step to take!
- Love that NWSRA is out in the community.
- More programs for older adults (an over 20 group and an over 30 group were mentioned). The young ones aren't necessarily comfortable hanging with the 50's and 60's.
- "Flipping" Saturday program type and location. Opening more options for more people, closer to home.
- Little more instruction with the sports programs. Competition can be too much if they don't know the sport.
- Pursuit is great.
- SILA – Stay connected with NWSRA.
- Add programs for day off of schools. These days are tough for working parents.
- CAP District 25 for junior high and high school, a camp type setting. Can we extend the camp type programming to the school year?
- Afterschool program that you can sign up for five days at once, rather than individual programs by the day. Working parents typically need the full week. Maybe take single day registration and give a break for all five days and allow to register with one transaction for the full week.
- Teach social skills with competition.
- Grateful!

# Regional Focus Groups

## Focus Group Feedback: East Region

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Continue succession planning

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Continue to make sure that staff are well trained

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Fees are low to reasonable

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Concern about families who cannot afford to pay

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Concerns about State funding and budget issues

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Appreciate scholarship funding

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More social clubs with individual options

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Parent's Night Out programs are too short – extend

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Saturday Club House is too short – extend to 4-5 hour programs

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No transportation for Little Sprouts

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Location and start times for some programs is not feasible...5 pm start times are really tough in traffic

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Interested in another PURSUIT with transportation

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Would love an aftercare option for PURSUIT or extended hours

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More Parents Night Out programs

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Provide opportunity for staff to network

---

Like the consistent staff

---

Love the front office staff

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Do not like separate flyers...want everything in the brochure

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Would possibly be willing to serve as an advocate in Springfield and with legislators

---

More informational meetings to hear what is going on at NWSRA

---

Want a way to communicate with staff when they are in the program

# Regional Focus Groups

66

## Focus Group Feedback: East Region

### Pillar: Financial Management

- Fees are reasonable.
- Appreciate scholarship funding.

### Pillar: Operational Excellence

- More programs like Night Hawks. Like that you can pay for the sessions that you want
- More options for Social Club
- Increase time for Parents' Night Out and Saturday Clubhouse. Make them more frequent and increase the duration. It's hardly time to travel to pick-up location and get grocery shopping done.
- Little Sprouts is in Bartlett. That is too long of a drive. It's hard when programs are in the outlying communities in the NWSRA service area.
- Appreciates bus pick-ups for camps.
- Be more strategic in planning program times and locations. Having a program at rush hour in a suburb on the edge of the service area is difficult.
- Swim more than one a week for swim team (came from a parent of a person in their 20's)
- Interested in Pursuit. Needs transportation, Include an after-care option.
- It would be nice if the Site Directors were accessible during the day.

# Regional Focus Groups

67

## Focus Group Feedback: East Region

### Pillar: Promoting Leadership

- When jobs become available look at people inside. Develop a succession plan.
- Park Districts appreciate being able to utilize NWSRA for training of their staff. This helps the park district and special recreation association work together as a team.
- Keep staff consistent for programs whenever possible. It helps the staff and participants develop relationships and for staff to know the participant's name and any special needs they may have.

### Pillar: Outstanding Service

- Provide more opportunities for parent networking. Sports parents get to know each other, but other parents don't get much of an opportunity to connect. It would be comforting to talk to another parent and I am sure we could share information and resources.
- In brochure, put all the Social Club information on one page. Make it easier to read. (TGIF, Night Hawks)
- Possibly make a separate flyer for this information, since it's the nuts and bolts of the adult programming.
- Review it and Register for all of it in one place.
- Always include location so we can determine if transportation is needed
- Utilize parents as advocates for NWSRA and individuals with disabilities
- Schedule periodic (not just during Strategic Plan) meetings to solicit input and to provide information to parents and participants.

# Regional Focus Groups

## Focus Group Feedback: North Region

Some facilities are much better than others...some space we have for programs is way in the back.

Try to keep staff, especially entry level

Preparedness for tough behaviors is much better

Safety concerns: behaviors, non-verbal participants need more engagement with staff

More collaboration between staff and parents

Setting up one to one meetings prior to programs

Late afternoon or early evening Night Hawk programs

Need more non-verbal participant programs like camp connections

Clarification on ages -> why the breakdown that we use?

Camp Connection on Saturdays?

More "blended programs" like Zumba with the park districts

Making inclusion more visible to all parents and participants and explained

Afterschool care for junior high and up during the week

Rich variety of staff!

What is the training & staffing that goes on?

More volunteer/service opportunities

Gluten/Dairy Free/Vegan Cooking class

Use your respite worker to program

# Regional Focus Groups

## Focus Group Feedback: North Region

Getting a hold of someone after hours

High School Transition Programs – more of them!!!!

Replicate the PURSUIT Model but allow lower ratios

Programming for Asperger/High Functioning individual -> do not want typical NWSRA programs -> stigma

Why the age groups/ why can't we be flexible? 20 and up and 30 and up are too broad...needs to be more of a peer group for higher functioning

Fees a little too high

Underserved community Medicaid and folks who can't afford programs and services



# Regional Focus Groups

70

## Focus Group Feedback: North Region

Adult ages (young adults 19-25)

Saturday programs are essential!!!

Better age breakdowns

Replicating Saturday program line-up for adults & young adults

Rotating programs throughout all 17 communities

Rotate programs on different days seasonally?

Well-structured activities are preferred especially during waiting/downtimes

Questions about behavior management abilities

Yes, they would advocate in Springfield

Work with Uber and ride sharing agencies

# Regional Focus Groups

71

## **Focus Group Feedback: North Region**

### **Pillar: Financial Management**

- “Extra” costs are impacting the quality of the programming because the dollars are having to stretch further.
- Fees are fair to high, especially transportation. Sometimes transportation is more than the program.
- Fees too high for Medicaid participants.
- Transportation is too expensive.
  - -Look for partnership opportunities
  - -Uber is used in San Francisco as a cost saving measure for group travel.
- There is staff turnover due to hour restraints and financial issues.
- When extra assistance is needed for a participant, or a program is full, and the program can’t be expanded due to staff availability, NWSRA might consider allowing family members or the families’ personal workers (that they hire to help their family) to go on the trip to fill the supervision/ratio gap.

### **Pillar: Operational Excellence**

- The “aging out” rule needs clarification. Why? This presents a problem for families. There is a gap for those kids in their 20’s once they no longer receive services from high school. This is tough transition.
- Wait Lists – Expand when possible. Seriously consider adding programs when there are constant wait lists rather than taking wait lists every time.
- Assist with transition to next age group of programming. This is a hard time to navigate for parents and participants.
- Saturday programs are essential, 10 am-1:45 pm is a good time slot and good program duration.
- Too wide of an age group for adult programming. Considering breaking down to young adults and older adults for social activities and sports. The large age span often has a negative impact on the experience for the participants, especially the younger ones.
- Rotate days/times/seasons of programs at schools so each school gets the opportunity to host a program
- Utilize parents advocate at local, state and federal level
- Let people know that they can consult with their PD and NWSRA for placement of adults and children in park district programs. While NWSRA programs are always available, inclusion can be considered when appropriate and safe for the participant.
- No afterschool care for young adults with working parents. Incorporate into existing programs as a five- day option, rather than having to separately register for individual daily programs. Also, please add programs for days off of school. It is very difficult for working parents to cover days off.



# Regional Focus Groups

72

## Focus Group Feedback: North Region

### Pillar: Promoting Leadership

- Staff at NWSRA are fantastic.
- Structured programs make handling behavior issues easier and allow for easier transition when there is staff turnover.
- Staff are prepared. They have come a long way since my child was younger.
- More training is needed for staff as to how to communicate with non-verbal participants and how to effectively deal with discipline.
- Encourage collaboration between parent and staff, problem-solving and being proactive
- Provide staff with detailed information and plan for each participant. Share with new staff and volunteers so they don't have to "reinvent the wheel" every time there is a staff change. Volunteers could benefit from the information also. More feedback when things don't go well would be appreciated. Then, the parent and staff can work together to problem solve or reinforce good behavior.
- Set up automatic meeting with parent and staff when a new staff person comes on board, especially when there have been issues or challenges with the participant.
- Offer consultation with a staff person when a parent is concerned about transitioning into a new program, a new age group or when there is a new participant.
- Encourage park districts and other community businesses to hire individuals with disabilities. Kudos for Buffalo Grove Park District for hiring an individual who was a frequent visitor to one of their facilities.

# Regional Focus Groups

73

## Focus Group Feedback: North Region

Pillar: Outstanding Service

- Find places in the community for individuals to continue their interests once they age out of park district or NWSRA programming.
- It would be nice to be able to get ahold of someone after hours or at camp during the day when our child is on a trip or in a program.
- More programs at Rolling Meadow Community Center. The staff are great.
- Increase Pursuit opportunities. It's a great program and, if possible, include adults that require more support. Open it to more people.
- Programming is needed for participants with Asperger's Syndrome and other higher functioning individuals.
- Offer the opportunity for higher functioning participants to register for park district programs with assistance. Educate families about this option.
- Well-structured programs are most enjoyed and effective. Routine is good!
- Some park district facilities don't treat us as if they want us there. They stick us in a back room. We love Rolling Meadows and Wheeling!
- Don't like Prospect Heights. We don't feel welcome there.
- Start a mentoring program for 20-something participants. Have a blended program with their peers.
- Non-verbal participants don't always fit in.
- Nighthawks and like programs, please start and end earlier and offer Saturday programs. The nights get late for working parents.
- There is concern about safety in programs due to the actions of more difficult kids.
- Include NWSRA cooperative programs in the park district brochures.
- Park Districts should host special recreation open houses so people can learn about NWSRA.
- Offer less food-related programs. If there is food, offer a gluten-free and dairy-free options.
- Increase and improve school district special education departments' communication with NWSRA to ensure a smooth transition from school year to summer, or to new age group once they age out of high school programming.
- Offer more service-related programs. Not everything has to be social. Get the kids involved in the community. They need to learn to work and to contribute to the community.

## Purpose of the Focuses

The process of developing the Focuses resulted in:

- Zeroing in on where NWSRA should put its effort and energy
- Allow NWSRA specific areas in which the goals and objectives will be developed
- Focus directly relates to what the customer wants

Upon completion of the Regional Focus Groups, focuses were recommended under each Pillar.

## Pillar: Financial Management

### Recommended Focuses:

- Fee Analysis for Programs and Transportation
- Alternate Funding Sources for Pursuit
- Marketing

# Pillar: Financial Management

## Fee Analysis for Programs and Transportation

- While you can't change reality, and the true cost of programs, find a way to educate the participants of what the real costs are for programs.
- Look for a transportation partner to decrease costs.
- Is NWSRA ready for a major partner or sponsor? Discover ways to involve financial partners in the agency as sponsors, not donors through the Foundation.

## Alternate Funding Sources for Pursuit

- Explore funding mechanisms for additional Pursuit opportunities

## Marketing

- Explore the allocation of additional funding for the marketing of NWSRA, increasing the awareness of NWSRA in the group home, independent living, and social service arenas.

## Pillar: Operational Excellence

### Recommended Focuses:

- Adult Programming
- Youth and High School Programming
- Communications and Publicity

# Pillar: Operational Excellence

## Adult Programming

- Transition assistance for participants just coming into adult programming from high school.
- Explore the viability of offering programs for young adults (20's and 30's) separately from older adults (40 and up)
- Work with parents to make transition to the independent living environment, ensuring connection to NWSRA.
- Assess adult sports programming, measuring the amount and quality of instruction prior to participants transitioning into a competitive environment and determining if level of competition is necessary and appropriate. Also determine, philosophically, if the program is social or competitive. This will bring the right people to the program and will reduce potential conflict.
- Determine if the format of some youth and high school programming could be modified for young adults that have aged out of high school programming or if the format used for some of the high school programming could be extended to young adults.
- Work to add Pursuit programming opportunities to accommodate need. Determine if the program could be offered for lower functioning adults.
- Develop a service-based program for adults teaching the importance of volunteerism and the concept of "service over self".
- Consider more opportunities for higher functioning (e.g. Asperger's Syndrome) adults independent of other adults with more severe disabilities.
- Increase opportunities for Pursuit, allowing for more individuals to participate.

## Pillar: Operational Excellence

### Youth and High School Programming

- Analyze gaps in programming such as: between program seasons, days off of school, test days, etc. and fill in gaps when possible.
- Explore a community service program for youth promoting the concept of “service over self”.
- Look at day, time, location and duration of programs to allow for easier access to programs, more time to travel and for additional respite for caregivers.

### Communication and Publicity

- Simplify the brochure and registration process, specifically with programs that have multiple program options, plus transportation. Consider adding program leader names when available.
- Provide a better communication vehicle for program registration confirmation, cancellations, evaluations and feedback/collaboration/contact between parent and staff.
- Publicize all the great things that NWSRA does: the success stories, the training, the number of people you employ, all of your partnerships, etc. Don't stop telling your story.



## Pillar: Promoting Leadership

### Recommended Focuses:

- Training
- Succession Planning
- Public Relations
- Service Leadership

# Pillar: Promoting Leadership

## Training

- More specialized (and publicized) training in the areas of behavior management, communicating with non-verbal participants, and sports-specific skills.
- Refine and train staff a specific method of communication between staff as one takes over a program from another, regarding participants as they transition from one program to another and between parent and staff when issues arise.

## Succession Planning

- Develop a succession plan to retain good staff and help the agency through transitions.
- Make sure processes and customer service techniques are agency-specific, not staff-specific.
- Cross train and develop opportunities for staff to be involved in the level above their classification for training purposes

# Pillar: Promoting Leadership

## Public Relations

- Educate staff and participants about the restraints put on the agency so they are aware of why hours are limited at NWSRA and not at other, smaller SRAs, and other impactful laws, restrictions and mandates.
- Within confidentiality restraints, tell the stories of the bonds between staff and participants, and the rewards of working with individuals with disabilities. This is a positive public relations tool, as well as a job recruiting tool.

## Service Leadership

- Develop opportunities for staff, volunteers and, when appropriate, participants to get involved in service projects within the service area.
- Educate all about the value of service and volunteerism.
- Develop service partners within the NWSRA communities, allowing for the name, mission and values of NWSRA to be visible in each region.

## Pillar: Outstanding Service

### Recommended Focuses:

- Parent and Stakeholder Feedback, Education and Networking
- Community Outreach
- Facility Usage and Location Analysis

## Pillar: Outstanding Service

### Parent and Stakeholder Feedback, Education and Networking

- Utilize parents and stakeholders as advocates for NWSRA and for people with disabilities by educating them and other stakeholders about legislative issues and other relative topics, and by providing specific “talking points” and contact information when advocacy is needed.
- Provide opportunities for parents and stakeholders to meet, connect and communicate through a network, periodic meetings and/or electronic communication.
- Offer more frequent evaluation opportunities for parents, both in written and electronic form.

## Pillar: Outstanding Service

### Community Outreach

- Become more involved in member communities by offering social outings to concerts in the park, plays, and other community events, thus increasing the awareness of NWSRA in its member communities and providing a low cost program option for participants.
- Increase networking with special education personnel in member community school districts.
- Continue to educate member agencies about the role and value of NWSRA and the importance of the services they provide and how they are an extension of their agency.
- Encourage Park Districts to host an Open House for parents of children and adults with disabilities, working closely with the school districts to identify families, providing an overview of the relationship between the two agencies and the types of programming available.
- Take advantage of program and partner opportunities at junior colleges and other education institutions.
- Continue to look for partnership and collaboration opportunities within the NWSRA service area and through the state and region.

## Pillar: Outstanding Service

### Facility Usage and Location Analysis

- Inventory and evaluate usage of member agency facilities.
- Establish equitable way to assign locations to programs taking into account the location of participants and availability of facilities
- Determine procedure for accounting for hours of usage in each member community, making sure that there is a fair and equitable process for compensating those that are used more than others.
- Continue to educate member agency staff that NWSRA is an extension of the park district. Encourage them to provide a welcoming environment and an atmosphere of teamwork when working with NWSRA staff, participants and volunteers.



**Program, Participation and  
Facility Usage Analysis  
Facilitated by NWSRA Staff**





# Program, Participation and Facility Usage Analysis

As the Regional Focus Groups provided important external input related to program offerings, NWSRA will conduct an internal analysis of program offerings, participation and facility usage. Data collected through the analysis will provide future direction for NWSRA programming. Future direction will ensure that:

The needs and interests of individuals with disabilities throughout the NWSRA service area are being met

Subsidized, break-even and profitable programs are offered at financially sustainable levels

Local competitors become collaborative partners through diverse, innovative and forward thinking programming

Following are the key data points that NWSRA will use to determine future programming:

## 2015 Program participation numbers by program type:

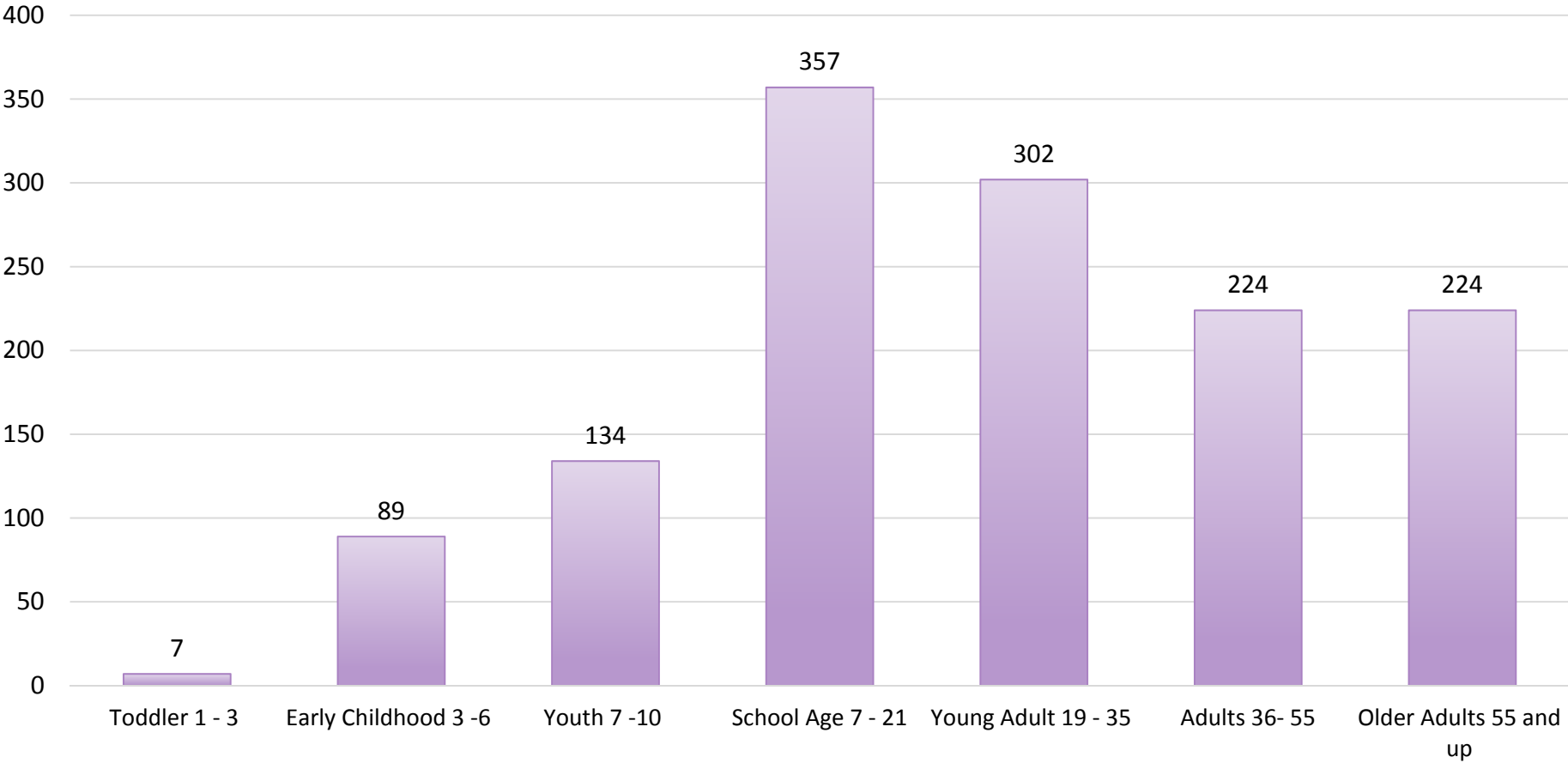
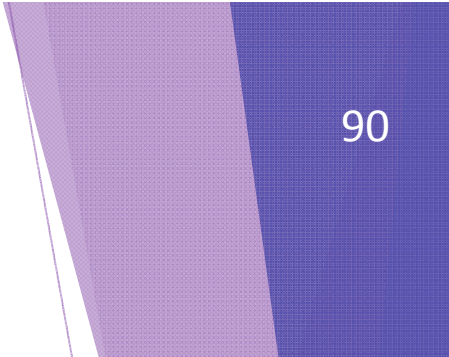
	Total Registrations*	Total Programs Offered**	Total Programs Delivered***
After School	114	16	14
After Workshop	238	31	27
General Rec	1,280	201	148
Saturday General Rec	539	53	42
Saturday Traveling	234	0	24
Sports	2,186	226	140
Special Events	865	93	71
Clubs	3,117	159	135
Day Camps	355	45	35
Leisure Education	2750	269	269
Trips	86	7	6
<b>Total</b>	<b>11764</b>	<b>1100</b>	<b>911</b>

\*Total Registrations = total number of registrations for each program type

\*\*Total Programs Offered= total number of programs offered

\*\*\*Total Programs Delivered= total number of programs that actually ran

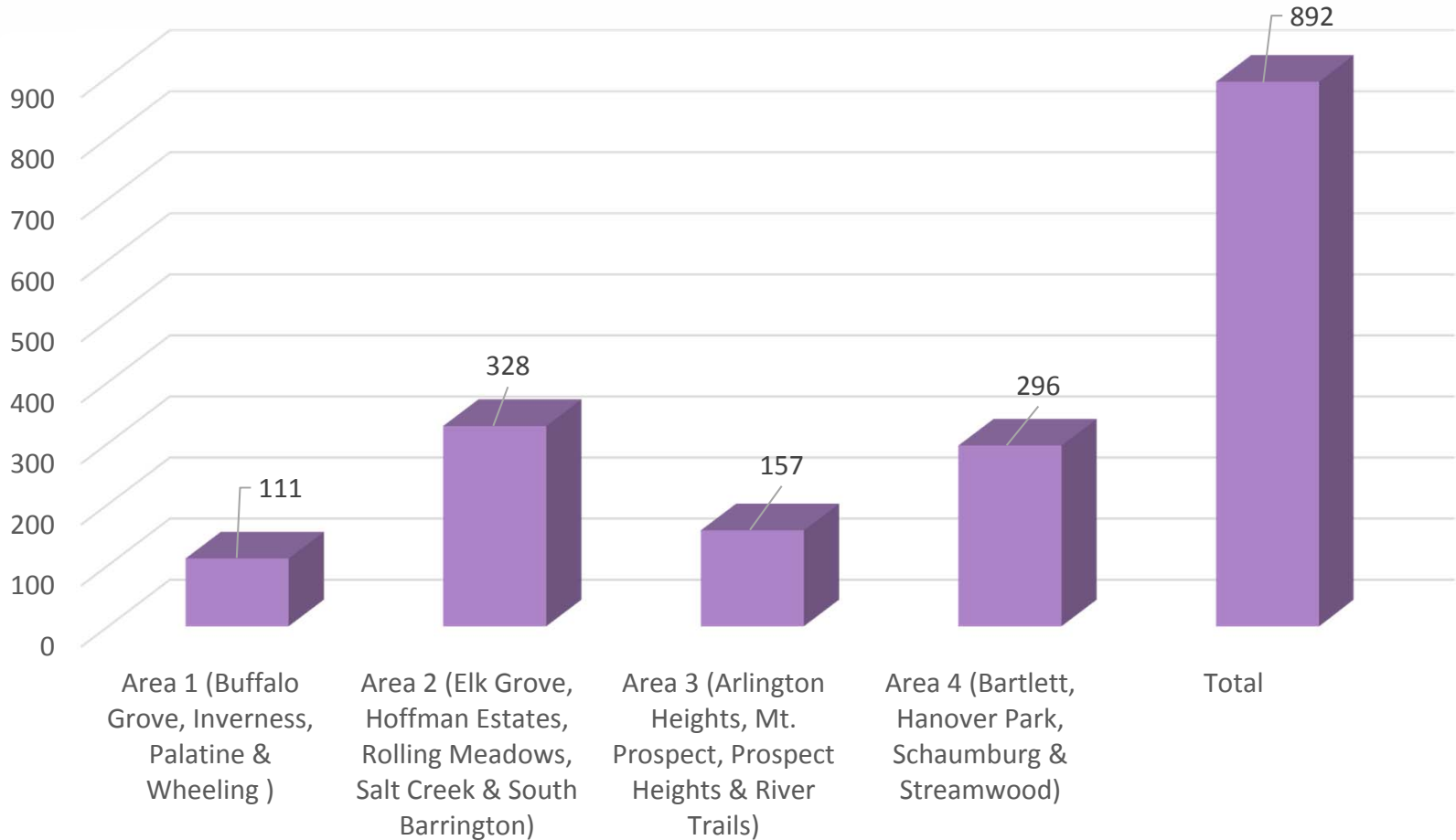
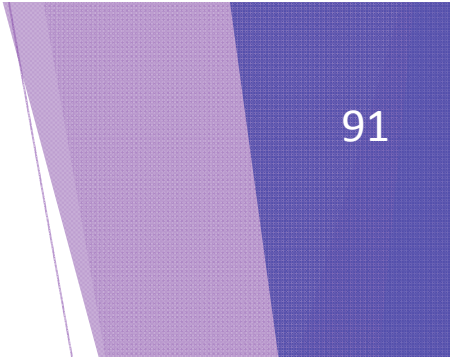
# 2016 Number of program offerings by age group



■ Total Programs Offered\*

\*Based on 2016 age group categories recommended in the Focus Groups.

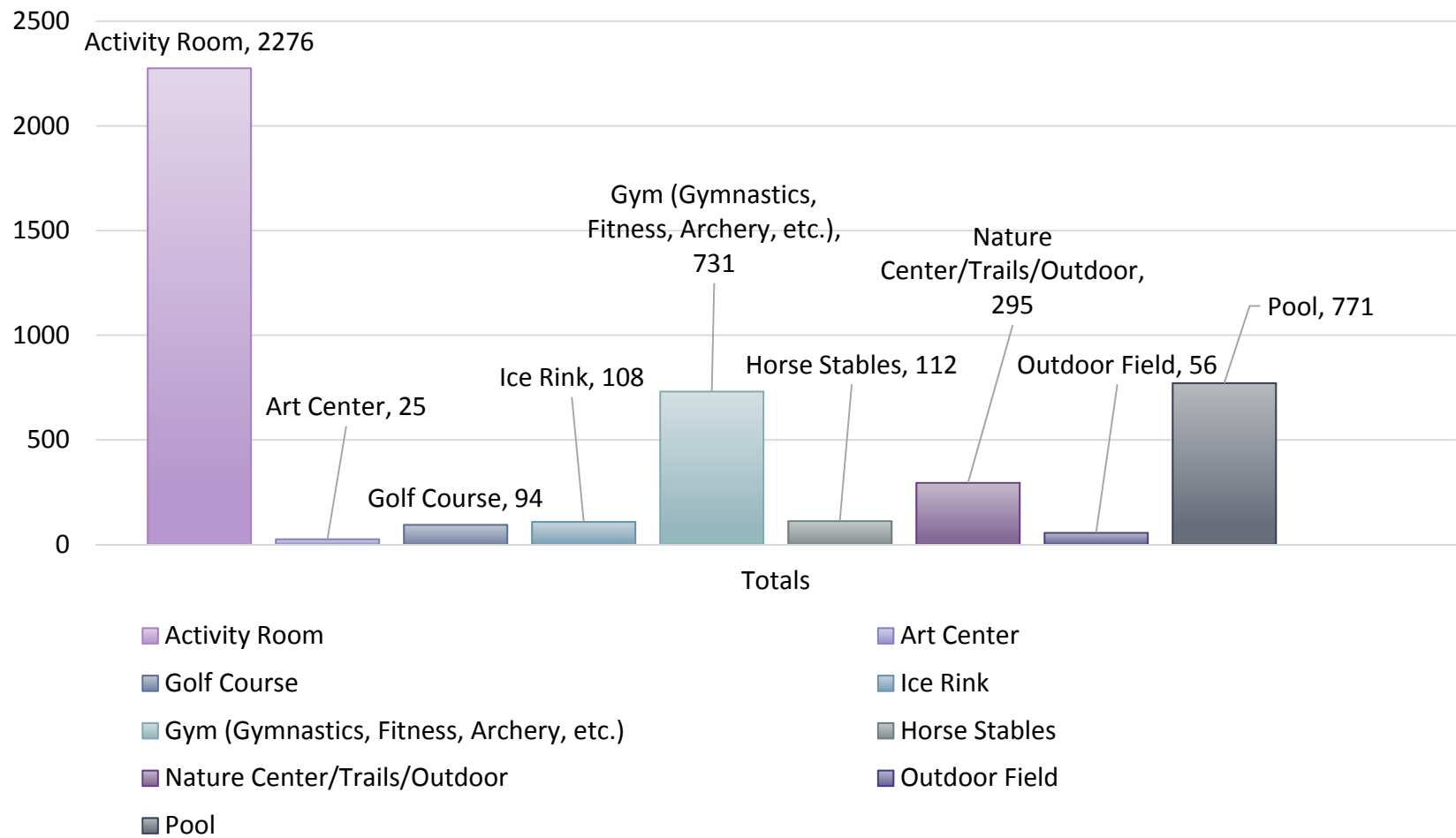
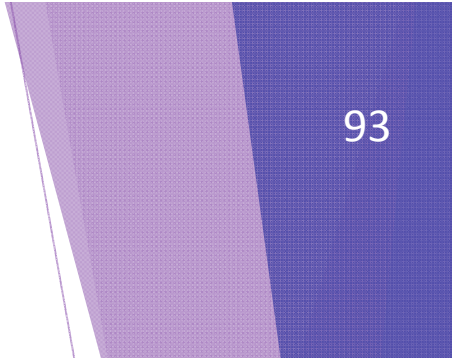
# 2016 Number of Programs by Area



# 2015 Hours of facility usage by facility type

	Activity Room	Art Center	Golf Course	Ice Rink	Gym (Gymnastics, Fitness, Archery, etc.)	Horse Stables	Museum	Nature Center/ Trails/ Outdoor	Outdoor Field	Pool
Arlington Heights	114							6	17	112
Bartlett	478							32		13
Buffalo Grove	83	21			9		4		9	
Elk Grove	51		26		8				6	68
Hanover Park	56				90			4		1
Hoffman Estates	9			90	60			4		1
Inverness					13					
Mount Prospect	184		6		8			33		93
Palatine	39				77	112			21	100
Prospect Heights	59		6		8					
River Trails	22		31		36					37
Rolling Meadows	865			18	74			37		21
Salt Creek			25					83		
Schaumburg	105				133			96		115
South Barrington					4				3	45
Streamwood	58				53					84
Wheeling	153				158					81
<b>Totals</b>	<b>2276</b>	<b>21</b>	<b>94</b>	<b>108</b>	<b>731</b>	<b>112</b>	<b>4</b>	<b>295</b>	<b>56</b>	<b>771</b>

# 2015 Hours of facility usage by facility type



## 2015 Hours of facility usage by program type

	Weekly Programs	Special Events	Day Camp	Clubs	Leisure Education	Total
<b>Park District</b>						
Arlington Heights	152	2	43	48	3.75	248.75
Bartlett	130	78	284	2	57.25	551.25
Buffalo Grove	91	5	24	6	0	126
Elk Grove	227	21	5	0	10.25	263.25
Hanover Park	100.5	8	21	4	17	150.5
Hoffman Estates	118.5	0	22	0	34.75	175.25
Inverness	7	0	0	0	6.25	13.25
Mount Prospect	184.75	68.5	25	2	43.5	323.75
Palatine	233.5	30	80	0	6.25	349.75
Prospect Heights	70	0	0	0	2.5	72.5
River Trails	64.5	3.5	35	12	10.5	125.5
Rolling Meadows	490	16.5	398	52	58.9	1015.4
Salt Creek	37	0	40	8	22.5	107.5
Schaumburg	176	16	57	16	119.25	384.25
South Barrington	49	0	0	0	2.5	51.5
Streamwood	189.75	0	0	0	6.25	196
Wheeling	338	77	0	2	4.5	421.5
<b>Total Hours</b>	<b>2658.5</b>	<b>325.5</b>	<b>1034</b>	<b>152</b>	<b>405.9</b>	<b>4575.9</b>



**Step 4: Staff Planning Retreat  
Facilitated by Mike Clark**



# Staff Planning Retreat

Hosted at the Jack Claes Pavilion in Elk Grove Village, staff attended a Strategic Planning Retreat. The purpose of the retreat was to review the established Pillars, and address the Focuses identified by the community during the Regional Focus Groups. Then staff developed goals under each Focus that would be incorporated into the Comprehensive Strategic Plan. The retreat consisted of three sections:

Review of each Pillar to establish their definitions of the Pillars

Review of the Focuses that were identified by the Regional Focus Groups

Brainstorming of goals under each Focus

## Reviewing each Pillar

A blank sheet of paper was posted on the wall for each of the established Pillars. Staff were asked to think about what each of the Pillars meant to them. Each staff member then wrote words or phrases under each Pillar that they felt identified closely with the Pillar. The following pages highlight the words and phrases presented by staff. The words were then used to create Pillar definitions.

# Staff Definition of Pillars: Financial Management

Trustworthy

Anchor to our  
agency

Accurate  
forecasting

Sustainable  
fee structure

Stewardship

Responsible  
spending

Investing for  
the future

Stability

Collaboration

Training

Responsibility  
to customers

Knowledge of  
expectations

Responsibility  
for resources

# Staff Definition of Pillars: Operational Excellence

Creating systems to ensure success

Standardization of processes

Going above and beyond programming expectations

Acceptance of all ideas

Striving to be and deliver the best we can

Creative, cutting edge

Teamwork

Functional

Flexibility

Communication without threats

Teaching and learning

Responsibility to customers

# Staff Definition of Pillars: Promoting Leadership

Continual training

Creating additional programming opportunities

Highlighting strengths, providing support to overcome weaknesses

Utilizing staff in most efficient manner

Ensuring best practices

Leaving your legacy

Being your own leader

Succession planning

Open communication at all levels

Mentoring opportunities

Encouraging independence

Retaining amazing staff

Continuing education

Individual growth= agency growth

# Staff Definition of Pillars: Outstanding Service

Always positive,  
trying to find a  
solution, smile

Prompt responses

Consistent

Set the bar high

Gaining  
relationships

Promptness

Respect (both  
ways)

Trust

Always being there  
to help

Meet participants  
where they are at

Patience- going the  
extra mile

Be the best!!

Allow mistakes and  
learn from them

Follow-up

Always prepared

Responsibility to  
internal and  
external customers

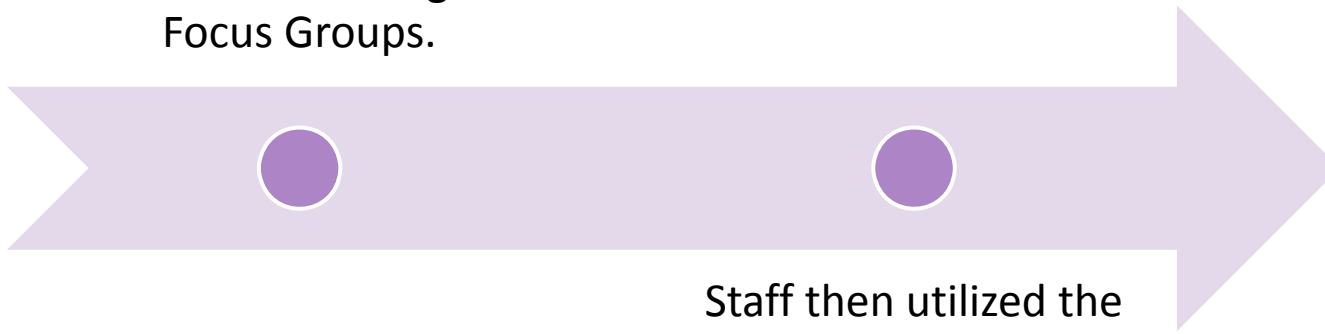
Life long customer  
service excellence

Consistent  
communication

Listening

# Review of Identified Focuses

Staff reviewed the Focuses under each Pillar that were identified at the Regional Focus Groups.



Staff then utilized the Focuses to brainstorm goals.

# Focuses Reviewed:

## Pillar: Financial Management

- Fee Analysis for Programs and Transportation
- Alternate Funding Sources for Pursuit
- Marketing

## Pillar: Operational Excellence

- Adult Programming
- Youth and High School Programming
- Communications and Publicity

## Pillar: Promoting Leadership

- Training
- Succession Planning
- Public Relations
- Service Leadership

## Pillar: Outstanding Service

- Parent and Stakeholder Feedback, Education and Networking
- Community Outreach
- Facility Usage and Location Analysis



# Brainstorming of goals under the Recommended Focuses

A sheet of paper was placed on the wall for each Focus.

Staff brainstormed goals that would help achieve the identified Focus.

Staff wrote each recommendation on a piece of paper that was then attached to the appropriate Focus.

# Brainstormed Goals by Staff

Pillar: Financial Management



Focuses:

- Fee Analysis for Programs and Transportation
- Alternate Funding Sources for Pursuit
- Marketing

Restructure individual program budgets and create financial forecasting tools for staff

Increase collaborations with partners to ensure financial stability while growing or creating new programs

Increase funding opportunities and financial stability for PURSUIT II through collaborations with other agencies and additional fundraising opportunities including sponsorships and individual donations

Provide consistent, continual budget training throughout the year, focusing on how program and departmentally based budgets affect the overall budget

Partner with high school teams to increase opportunities for facility space and volunteer coaching for athletics

Provide an annual SLSF report at an all staff meeting

Investigate fund balance policy and determine if current reserves are appropriate for building/facility emergency repairs

Invest in the future through opening more programming space dedicated to PURSUIT and all programs

Investigate possibility of moving program supplies to the main NWSRA office

Create rack cards- Relationship with Pediatricians, Therapists, Clinic, ITOSP?

Create system of approval for pricing decisions

Communicate the financial and non-financial advantages of participating in NWSRA programs to families and potential participants

Complete a program analysis of programs that are profitable and the % of each category (subsidized, break even and profitable) that NWSRA can offer to stay financially sound. Create a break down of programs into categories

# Brainstormed Goals by Staff

## Pillar: Financial Management



### Focuses:

- Fee Analysis for Programs and Transportation
- Alternate Funding Sources for Pursuit
- Marketing

Create a system of measurement and formulas to determine the true cost of a program. Set reasonable fees for transportations and programs. Investigate what other Park Districts and competitors are charging

Increase program profitability

Provide featured programs for specific participants (i.e. early childhood, group homes)

Stay competitive with part time staff payroll to retain staff

Design consistent mechanism to evaluate and implement competitive pay scale

Develop a structure for PT staff pay increases that are based on merit

Create a realistic formula for budgeting part time staff that includes correct pay rates, bus aides and set up and takedown time at programs

Create a process that educates staff about resources/financial assets that NWSRA currently has and ensuring longevity of the assets

Implement bulk purchasing of program supplies and administrative needs, and make purchases through Amazon Smile to build SLSF income

Host an annual Program Staff and Coordinator "Budget Lock In"

Discuss budget expectations with full time staff

Develop individual ownership of budgets so that staff understand the creation, implementation and actual spend of each program

Share information with part time program leaders on current resources/financial assets and ensuring longevity of assets

Enhance understanding of programs that should be developed or grown, and programs that should be cut

Set and share expectations with part time program leaders to utilize budgets for programs accurately and appropriately

Collect data and provide information on program needs to SLSF for new and available grants

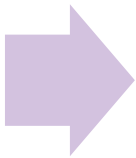
Stick to the minimums/maximums in programs because it affects transportation, staff needs, participant to staff ratio and other expenses

Plan ahead for program supply needs

Based on new pricing for programs, effectively communicate information to participants and answer related questions

# Brainstormed Goals by Staff

Pillar: Operational Excellence



- Focuses:
- Adult Programming
  - Youth and High School Programming
  - Communications & Publicity

Determine a way to have emergency contact with leaders after hours (and a weather hotline)

Develop a program matrix within database so staff can easily see what programs are offered by ages and disabilities

Collaborate with independent living and high schools to utilize facility space, as well as staff and students as volunteers

Create online questionnaire integrated with the database that will provide program suggestions based on demographics

Streamline data info collection and sharing, make information more functional and hold parents accountable for updates through database

Review and implement forms/processes that can be completed electronically onsite using iPads or other mobile devices. Examples: attendance, lesson plans, accident forms, bus checklist, pre-program checklist, etc.

Assist office staff, program staff

Outstanding customer service to coworkers, allowing for feedback in department meetings and/or one on one meetings.

Tech savvy- more program reports and contact done at or after programs

Add disciplinary and Fair Play electronic sign-off to online registration

Photos/write ups on Facebook of staff involved in training (examples: Pinning Ceremony, CTRS/CPRP certification, First Aid trainings)

Create guidelines/process for open communication environment and allowing staff to be heard without repercussions.

Provide feedback and education to our staff at an all staff meeting so that they may understand why the start and end dates for camps are the way they are

Host Voice of the Customer meetings to provide information on programs, whys, staff training information and background on issues.

Focus on marketing the uniqueness of NWSRA- TR Referrals, Paralympic/Adaptive, CTRS

Implement participant care guidelines and Fair Play

Create consistency in the implementation of the part time staff evaluation communication. Provide training on the rating system involved with part time staff evaluation

Work with coaches and players to come up with survey questions for feedback to re-categorize age/skill/maturity/ability. Find out what external customers would prefer. Analyze answers and make appropriate changes

Propose new job responsibilities for Program Staff to have specific program. Early childhood, Sports, Adults, etc.

Advertise inclusion more. Parents/schools, Park District Advertise- NWSRA Inclusion

# Brainstormed Goals by Staff

Pillar: Operational Excellence



Focuses:

- Adult Programming
- Youth and High School Programming
- Communications & Publicity

- 
- Provide Park District training for facilities to ensure that front office staff is welcoming, that they know we are coming
- 
- Work on "Team" between NWSRA and partner Park Districts. Guidelines/process, procedure/timeline/groups, accountability
- 
- Grow the Behavior Team- set clear expectations of each person's role. Provide opportunities for continued training for the team.
- 
- Create Mentoring program for new full time staff
- 
- Develop guidelines for how long programs run
- 
- Develop process to occur at 6 month review for new full time staff to have more input on confusion/deficiencies
- 
- Revamp the brochure. Assign staff to oversee programs in the brochure. Look at programs. Take out club flyers
- 
- Start a Rec league for Sports. Different leagues by age or ability level
- 
- Increase Early Childhood programs through weekly programs, day camp, Special Events and Leisure Eds
- 
- Investigate facility availability for sports skills development and trainings to provide skills-based programming
- 
- Create snapshot flyers of programs available for target populations (i.e. Early Childhood, transitioning adults)
- 
- Stay cutting edge- develop collaborations with competitors
- 
- Communicate with community about longer day programming and factors such as cost and staff needed
- 
- Create ratio definitions- parent input plus professional input equals participant ratio
- 
- Update Facebook more frequently with various programs and pictures. Ensure ways for participants to connect with NWSRA.
- 
- Determine staff levels corresponding to participant levels. Example: Level 4 staff with a level 4 participant. Hold part time assistants accountable
- 
- Ensure appropriate groups within programs with various ages. Plan ahead and accommodate.
- 
- Build programs from ground up that staff are passionate about.
- 
- Update forms to "type in" forms and performing an audit of all forms to ensure they are fillable
- 
- Ensure that the official welcome packet for new families is updated annually
- 
- Review process for preparing quarterly/end of the year statistics and update to ensure maximum efficiency

# Brainstormed Goals by Staff

Pillar: Promoting Leadership



Focuses:

- Training
- Succession Planning
- Public Relations
- Leadership

Lead by example, give clear expectations

Consider different levels of training for inservices (example: Tract 1= Program Staff, Tract 2= 5+ years, Tract 3= 7+ years)

Reach out to specialized Park District staff (lifeguards, cultural arts staff, etc.) to work for NWSRA programs

Clearly communicate that SWOT analysis and mentoring is available to all staff members

Utilize succession plan to create opportunities for advancement over next 5 years. Develop what the plan looks like based on position.

Provide more trainings specifically on trends and issues in Therapeutic Recreation during inservice week. Incorporate typical inservices such as First Aid and CPR into staff meetings. Revamp full time trainings

Develop and distribute a positive message regarding hour limitations

Implement a training tool that has clear expectations, for each level of employment of their knowledge of the budget process and financial management

Create a coaching clinic during inservice week

Coordination of specific program areas by Program Specialists

Utilize outside trainers for inservices

# Brainstormed Goals by Staff

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Pillar: Promoting Leadership



Focuses:

- Training
- Succession Planning
- Public Relations
- Leadership

Initiate Mentoring program for part time staff

TR model is not always accomplished due to program load. Determine what programs really use the model (re: Swim Lessons).

Utilize program staff to assist with trainings for Part Time staff and Park Districts

Create an "Aktion Club" within Adult Programming with Kiwanis Club to provide a community service opportunity

Add to post program list- if changes are needed on the class list

Collaborate with other agencies who train to swap trainings for free (i.e. social workers at schools, admin agencies, medical professionals)

Host a Program Specialist Pow-Wow

Allow staff to try new ideas and support in the process. Foster a culture of teamwork

Discuss success and feel good stories in Department meetings, and share with Communications staff for dissemination

Investigate re-structuring of program assignments of full time staff to allow for growth of additional adult day programs

Offer video trainings and webinars to staff online for extra training. Create in-house videos and utilize existing videos from external agencies

Review staff retention rates and reasons for leaving. This information will help to guide training and recruitment strategies.

Create a procedure for ensuring consistency of program leadership over the course of two sessions.

Increase pool of part time staff through leadership working at NWSRA

Determine Part Time Program Leader pool. Take programs away from full time. Qualifications- type programs

Create available resources for conducting an effective Leisure Ed for new staff, including lesson plans and Summer's book

Provide continual training for program success. Program Leader model, train and re-train, follow and develop goals, follow up with staff

Utilize Part Time staff with expertise and see what they can provide to Part Time leader and Part Time Program staff trainings

# Brainstormed Goals by Staff

Pillar: Promoting Leadership



Focuses:

- Training
- Succession Planning
- Public Relations
- Leadership

Promote leadership by supporting Program Specialists for writeups. For Nicole staff- A-M, JL for her staff

Develop Part Time training support systems that standardize skills in order to mitigate effects of turnover

Post program checklist updates to program participant class lists so they are accurate based on experiences

Have part time staff set goals for their own improvement and for program specific improvement

Create a flowchart relating to what a staff needs to do in order to improve their performance. "Creating a Leader" flowchart

Create and promote a process that will provide improved information for Program Leaders to know the why, goals and needs of our Part Time staff

Ensure equality across the board in Part Time staff management related to accountability and discipline

Ensure more oppportunities to train Park District staff on issues related to individuals with disabilities. Utilize Specialty instructors, educate staff on disability specific issues

Educate community on full time staff skills, training and certification. Ensure that community knows that staff are qualified to meet the needs of participants, promote independence and support participants in their recreational goals

Identify and provide an incentive for part time staff who have potential to provide long term value

Teach accurate budget forecasting for accurate budgeting.

Utilize program goals and create a participant progress report. Document results weekly and at the end of the session



# Brainstormed Goals by Staff

Pillar: Outstanding Service



Focuses:

- Parent and Stakeholder Feedback, Education and Networking
- Community Outreach
- Facility Usage and Location Analysis
- Program Service Analysis and Development

Provide opportunities for stakeholders to provide constant feedback through Open houses, NWSRA Village

Create parent ambassador tool kits for legislative efforts

Attend a parent meeting at District 54 for Early Childhood parents about the new Early Childhood Day camp in 2017

Create an online portal for parents to update participant information

Transition to online program evaluations

Partner with pediatricians, therapists, hospitals, etc. to make them aware of NWSRA and services

Understand the whys and explain the whys of policies, procedures and processes

Continue commitment toward high standards of certification

Create communication standards that must be followed for every level of communication by every department

Add a "How are we doing?" form on the NWSRA Home page for people to constantly give feedback.

Making staff aware of succession planning opportunities by promoting open communication at all levels

NWSRA to provide NWSRA training to Park District employees and interns about our services

Park Districts to offer open houses in collaboration with NWSRA. To learn about our services, meet our staff, learn about our relationship with the member park district, etc. Options including: inclusion and NWSRA registration procedures

# Brainstormed Goals by Staff

Pillar: Outstanding Service



Focuses:

- Parent and Stakeholder Feedback, Education and Networking
- Community Outreach
- Facility Usage and Location Analysis
- Program Service Analysis and Development

Minority patrons outreach. Provide central location to learn about NWSRA and sign up for programs

Ensure that programs match write-ups and participants register for appropriate programs with appropriate ages and ratios

Promote growth development plans for staff. Include SWOT analysis when appropriate

Increase referral rate from outpatient facilities once individuals are discharged, encourage them to register for programs to help with their physical, mental and social needs.

Use NWSRA programming space as a central location for morning care at camps

Pair up with social workers at schools for open houses

Tour more Park District facilities and collaborate with potential donor agencies for program space

Continue training for full time staff for outstanding services. Low #'s program, low #'s trans

Ensure appropriate times/locations for programs. Host longer Parent Night Outs

Explore reaching program leaders after hours through cell phones, on call phone or other means

Assign two program staff each meeting to review a specific, creative lesson plan they implemented in detail. Or Plan & Creative Experience/Outing

Host quarterly support group meetings. Discuss new program ideas or new programs to promote

Create a mini checklist for program leaders to utilize as they are communicating with their substitutes

# Brainstormed Goals by Staff

Pillar: Outstanding Service



Focuses:

- Parent and Stakeholder Feedback, Education and Networking
- Community Outreach
- Facility Usage and Location Analysis
- Program Service Analysis and Development

Identify required and elective Full Time trainings. Decrease unnecessary elective trainings while providing more trainings based on interest/need of staff member

Put procedures in place to ensure a positive relationship with the participants and families. Contact before program, establish positive rapport, notify them of changes, greet them each time, return e-mails and voicemails in a timely manner, etc.

Establish guidelines for respite workers. More 1:1 therapy

Request different Park District facilities than normal.

Continually expand list of facilities offered for various programs.

Notify other staff of new facilities in the area

Promote and inform staff and parents about the option to evaluate programs online.

Create a hand out for parents/guardians of nearby coffee shops or restaurants for parents to pair up and socialize while children are in a program

Always respond within 24 hours and respond within the same medium that they were approached with

Campaign to get more electronic communication



## *Step 5: Finalizing the Strategic Plan*

# Finalizing the Strategic Plan



The NWSRA Administrative Team finalized the Comprehensive Strategic Plan through the following approach:

- Creating the definition for each Pillar
- Re-evaluation and establishment of Focuses
- Creation of SMART Goals
- Assignment of completion dates to Goals
- Reporting goals

# Defining the Pillars

Staff utilized the feedback from the stakeholders and staff to create a set of common words and themes related to the corresponding Pillar as identified below:

- **Financial Management:** Stewardship, maximizing capacity, stability, sustainable, responsibility for resources
- **Operational Excellence:** Creation of systems, efficiency, preparedness, monitoring, functional, flexibility
- **Promoting Leadership:** Engagement, development, leadership, independence, best practices, overcoming weakness, best practices
- **Outstanding Service:** Collaboration, communication, quality service, community access, customer-oriented, consistent, trust, positive

# Defining the Pillars

Staff then utilized the common words and themes to create the Pillar definitions below:

- **Financial Management:** Strategic stewardship of revenues and expenses to build capacity and maximize the financial stability of the Association.
- **Operational Excellence:** Creation, establishment and monitoring of polices, procedures and systems to increase efficiency and organizational preparedness.
- **Promoting Leadership:** Staff engagement and continued development to create independent leaders who are informed, capable and ready to implement best practices.
- **Outstanding Service:** Delivery of quality service and community access through effective communication and collaboration with customers, including participants, families, donors, Board Members and partnering organizations.

# Re-evaluation of Focuses

All feedback received throughout the Strategic Planning process was carefully reviewed and considered. The following steps took place toward the re-valuation of the Focuses:

- The recommended Focuses were evaluated to ensure that they were sufficiently broad enough to encompass the recommended Goals.
- Focuses that were deemed too narrow in scope were broadened.
- The previously recommended Focus then became a Goal under the newly broadened Focus.
- Reviewed previous Strategic Plan to ensure that any unaccomplished Focuses were moved into the new Strategic Plan



# Establishment of Focuses

The following Focuses were established:

## Pillar: Financial Management

- **Focus:** Budget Training/Analysis
- **Focus:** Alternate Funding Sources
- **Focus:** Program Fee & Budget Analysis
- **Focus:** NWSRA Investment Portfolio- Capital Replacement Plan, Operating and Capital Reserve Funds for Long Range Planning

## Pillar: Operational Excellence

- **Focus:** Adult Programming
- **Focus:** Youth and High School Programming
- **Focus:** Communications & Publicity

## Pillar: Promoting Leadership

- **Focus:** Training
- **Focus:** Succession Planning
- **Focus:** Public Relations
- **Focus:** Service Leadership

## Pillar: Outstanding Service

- **Focus:** Parent and Stakeholder Feedback, Education and Networking
- **Focus:** Community Outreach
- **Focus:** Facility Usage and Location Analysis
- **Focus:** Program Service Analysis and Development

# Creation of SMART Goals



The Admin Team then compiled all of the feedback from stakeholders and staff members to develop and finalize the Goals that would fall under each established Focus.

- Each goal was created to be specific, measurable, achievable, relevant and time-bound (SMART).
- Several recommendations from the stakeholders were not included as a goal:
  - These recommendations were either already accomplished or NWSRA is currently in the process of achieving.
  - To ensure that no recommendation is left behind, NWSRA will engage with its stakeholders throughout 2017-2021 to provide education relating to the recommendations.

# Assignment of Completion Dates for Goals

Utilizing the SMART Goal setting system, all goals were assigned completion dates to ensure that they could be measured within a specific time frame. Goals were categorized by the following:

**Short Term Goals:**  
Initiatives that will be completed by the end of 2018

**Mid Term Goals:**  
Initiatives that will be completed between 2019 - 2020

**Long Term Goals:**  
Initiatives that will be completed by the end of 2021

**Ongoing Goals:**  
Initiatives that will occur through the life of the Strategic Plan



# Reporting goals

Staff developed the following process for Goal reporting:

- Annually, staff will review the Goals set for the upcoming year and measurable Action Items will be identified and assigned.
- Completion dates for each Action Item will be identified by Quarter.
- Action Items and Goals will be monitored, and progress will be reported on a quarterly basis to the NWSRA Board of Trustees from each Department.
- Staff will work with their supervisors to create Individual Work Plans that will reflect the Goals in which they are responsible for completing.



**Balanced Scorecard: Measure of Success**

# Balanced Scorecard- Background

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 NWSRA's case, its Board members and participants) a more "balanced" view of organizational performance.

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

# Balanced Scorecard- Background

Drs. Kaplan and Norton's Balanced Scorecard includes four perspectives: Financial, Internal Processes, Customer, and Learning and Growth.



A Balanced Scorecard should result in improved processes, motivated/educated employees, enhanced information systems, monitored progress, greater customer satisfaction and increased financial usage



# Balanced Scorecard- Perspectives

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NWSRA's  
Balanced  
Scorecard  
framework  
includes four  
perspectives:

- **Financial:** To succeed financially, how should we appear to our stakeholders?
- **Internal Processes:** To satisfy our guests, which internal processes must we excel at?
- **Learning and Growth:** To achieve our vision, how will we sustain and expand our ability to change and improve?
- **Customer:** To achieve our mission and vision, how should we appear to our customers?

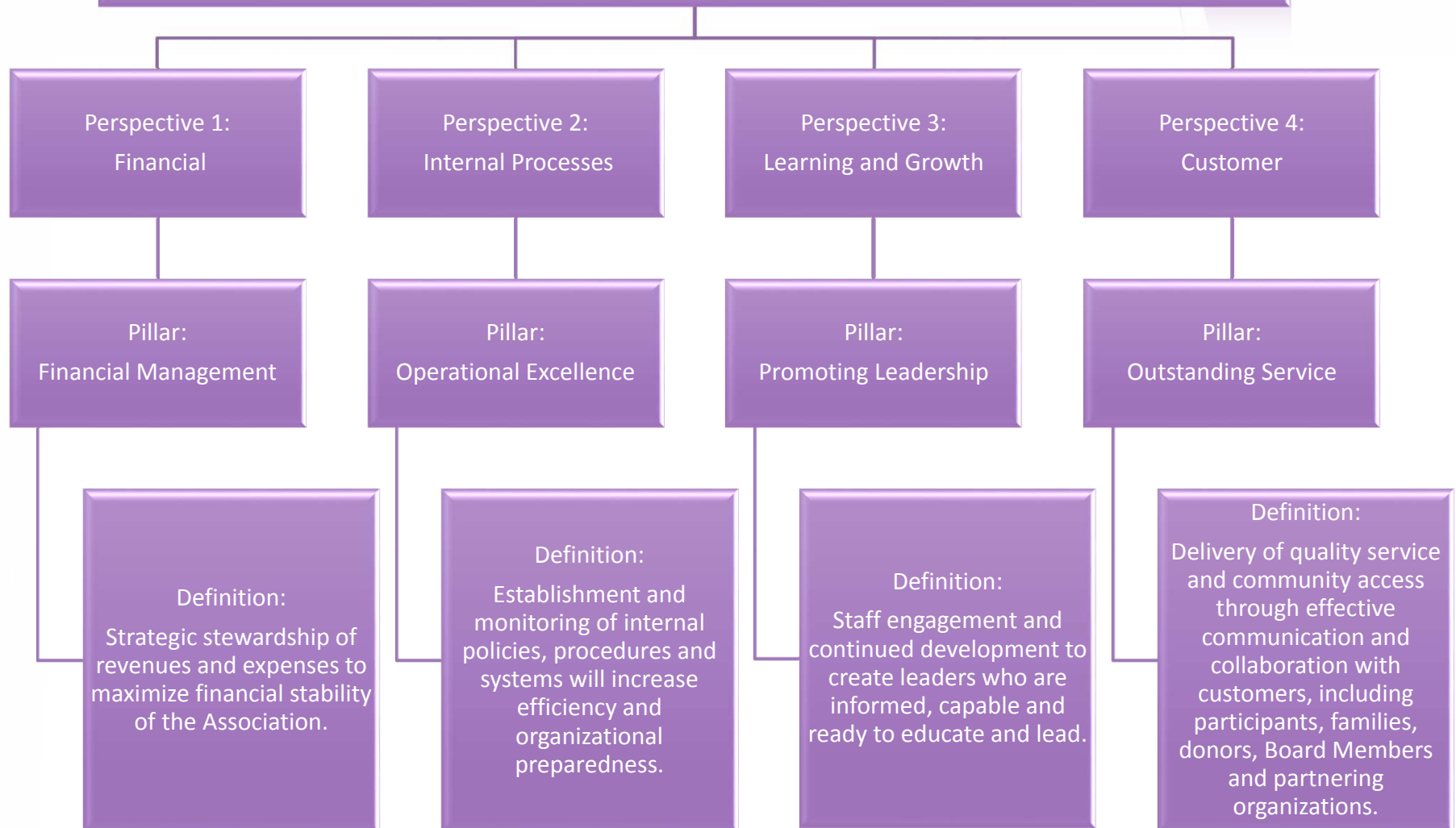
(Adapted from Robert S. Kaplan and David P. Norton, "Using the Balanced Scorecard as a Strategic Management System," Harvard Business Review (January-February 1996): 76.

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



# Balanced Scorecard with Strategic Plan Pillars

In using the Balanced Scorecard, NWSRA identifies the strategic Pillars that are essential principles that lay the foundation for aligning the Association's Mission with its Vision:



# NWSRA Use of the Balanced Scorecard

- ▶ The Perspectives, Pillars and Focuses have been previously identified through the Comprehensive Strategic Plan.
- ▶ Measures in the Balanced Scorecard will be tied directly to the measurable Action Items. As such, each Measure within the Balanced Scorecard will be reported on annually through the Action Item reporting process previously identified within this Strategic Plan.
  - ▶ Measures are developed to identify areas of improvement, expansion and change.
- ▶ Outcomes are overall endpoints as identified within the Balanced Scorecard and corresponding Strategic Plan Pillar.

# NWSRA Balanced Scorecard

		Pillars	Focuses	Measures	Outcomes
<b>Perspectives</b>	Financial	1. Financial Management	1A. Budget Training/Analysis		Maximize capacity to deliver
			1B. Alternate Funding Sources		
			1C. Program Fee & Budget Analysis		
			1D. NWSRA Investment Portfolio- Capital Replacement Plan, Operating and Capital Reserve Funds for Long Range Planning		
	Internal Processes	2. Operational Excellence	2A. Adult Programming		Increase efficiency
			2B. Youth and High School Programming		
			2C. Communications & Publicity		
	Learning and Growth	3. Promoting Leadership	3A. Training		Create leaders who are informed, capable and ready
			3B. Succession Planning		
			3C. Public Relations		
			3D. Service Leadership		
	Customer	4. Outstanding Service	4A. Parent and Stakeholder Feedback, Education and Networking		Enhance delivery of outstanding programs and services.
			4B. Community Outreach		
			4C. Facility Usage and Location Analysis		
			4D. Program Service Analysis and Development		



TEAMWORK • RESPECT • ENTHUSIASM • COMMUNICATION • COLLABORATION  
**TOGETHER**  
2017-2021 NWSRA STRATEGIC PLAN

**2017-2021 Comprehensive Strategic Plan**

# Pillar 1: Financial Management

**Definition:**  
Strategic stewardship of revenues and expenses to maximize financial stability of the Association.

**Words:**  
Stewardship, maximizing capacity, stability, sustainable, responsibility for resources

**Focuses:**

1A. Budget Training/Analysis

1B. Alternate Funding Sources

1C. Program Fee & Budget Analysis

1D. NWSRA Investment Portfolio-Capital Replacement Plan, Operating and Capital Reserve Funds for Long Range Planning



# Pillar 1- Financial Management:

Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
1B	Evaluate existing collaborative programs to establish funding opportunities to ensure financial stability	Admin	Managers/SLSF Team	January 1, 2017	December 31, 2017
1B	Educate staff on and implement bulk purchasing program	Managers	Coordinators	January 1, 2017	December 31, 2017
1C	Ensure a balance of profitable, break-even and subsidized programs	Managers	Admin	January 1, 2017	December 31, 2017
1C	Create a system of measurement and formulas to determine the true cost of a program and transportation	Managers	Admin	January 1, 2017	December 31, 2017
1D	Prepare for new programming space at Hanover Park	Admin	Managers, Coordinators	January 1, 2017	December 31, 2017
1C	Maximize capacity of programs through effective budgeting	Admin	Managers, Coordinators	January 1, 2017	December 31, 2018
1C	Revise formula for budgeting PT staff including competitive pay rates, aides, setup and takedown	Admin	Managers	January 1, 2018	December 31, 2018
1A	Restructure individual program budgets so they clearly connect to the overall agency budget	Admin	Managers, Coordinators, Program Specialists	January 1, 2018	December 31, 2019

# Pillar 1- Financial Management

Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
1A	Set and share expectations with PT program leaders to utilize budgets for programs accurately and appropriately	Coordinators	Managers	January 1, 2018	December 31, 2019
1C	Investigate transportation partners to decrease costs	Managers	Coordinators	January 1, 2018	December 31, 2019
1D	Create a financial analysis to support the expansion of the PURSUIT adult day program	Admin		January 1, 2018	December 31, 2019
1C	Analyze costs of lease versus purchase of vehicles	Coordinators	Admin	January 1, 2019	December 31, 2020
1A	Enhance staff knowledge of department budgets in relation to the overall budget.	Admin	Managers	Ongoing	Ongoing
1A	Educate staff about resources/financial assets/cash flow policies	Admin		Ongoing	Ongoing
1A	Explore the allocation of additional funding for the marketing of NWSRA	Admin		Ongoing	Ongoing
1B	Increase collaborative programs by partnering with other agencies to address increased programming needs	Managers	Admin	Ongoing	Ongoing
1D	Allocate appropriate funding to cover anticipated/unanticipated building repairs in owned/leased NWSRA spaces	Admin		Ongoing	Ongoing

# Pillar 2: Operational Excellence

### Definition:

Establishment and monitoring of internal policies, procedures and systems to increase efficiency and organizational preparedness

### Words:

Creation of systems, efficiency, preparedness, monitoring, functional, flexibility

### Focuses:

2A. Adult Programming

2B. Youth and High School Programming

2C. Communications & Publicity





# Pillar 2- Operational Excellence



Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
2A	Evaluate adult sport offerings, paying attention to skill development and transitioning to competitive levels.	Managers	Program Staff	January 1, 2017	December 31, 2017
2A	Re-evaluate age-group breakdowns.	Superintendents	Managers	January 1, 2017	December 31, 2017
2A	Develop PURSUIT II	Admin	Managers	January 1, 2017	December 31, 2018
2C	Improve communication between direct staff and caregivers.	Admin	Managers	January 1, 2017	December 31, 2019
2C	Strengthen the part-time and seasonal staff evaluation process.	Coordinators	Managers	January 1, 2018	December 31, 2019
2C	Improve accuracy and effectiveness of the preparation process for quarterly and year-end statistics.	Admin	Managers	January 1, 2017	December 31, 2019
2B	Analyze current offerings for school age students.	Managers	Superintendents	January 1, 2018	December 31, 2020
2B	Enhance special event offerings to meet the interests of participants.	Managers	All Staff	January 1, 2018	December 31, 2020
2B	Investigate growth of early childhood programming.	Managers	Superintendents	January 1, 2018	December 31, 2020
2A	Investigate programs for higher functioning adults.	Managers	Superintendents	January 1, 2019	December 31, 2021

# Pillar 2- Operational Excellence



Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
2C	Improve ease of registration, information sharing, confirmations, cancellations, participant information updates and more through implementation of database.	Admin	All Staff	January 1, 2018	December 31, 2021
2C	Strengthen the parent/guardian evaluation process.	Managers	Admin	January 1, 2018	December 31, 2021
2C	Enhance visibility of the NWSRA name, vision and mission through new partnerships and collaborations with community agencies.	Admin	Managers, All Staff	January 1, 2017	December 31, 2021
2A	Enhance service-based opportunities in adult programming.	Managers	Superintendents All Staff	Ongoing	Ongoing
2C	Ensure that new families are aware of all NWSRA services.	Superintendents	Managers	Ongoing	Ongoing
2C	Ensure cost-effectiveness and quality design of all marketing materials.	Admin	Managers	Ongoing	Ongoing
2C	Publicize NWSRA staff achievements and program highlights, training, certifications, etc. on web site, Facebook, and other social media outlets.	Admin	Program Staff, Coordinators, Managers	Ongoing	Ongoing
2C	Promote NWSRA and its programs and services through sharing of personal stories on social media, website and other media.	Admin	All Staff	Ongoing	Ongoing

## Pillar 3: Promoting Leadership

### Definition:

Staff engagement and continued development to create leaders who are informed, capable and ready to educate and lead.

### Words:

Engagement, development, leadership, independence, best practices, overcoming weakness, best practices

### Focuses:

3A. Training

3B. Succession Planning

3C. Public Relations

3D. Service Leadership



# Pillar 3- Promoting Leadership



Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
3A	Develop a process to ensure participant documentation from session to session is properly shared and communicated.	Managers	Coordinators	January 1, 2018	December 31, 2019
3D	Effectively evaluate Part Time seasonal staff training	Coordinators	Managers	January 1, 2017	December 31, 2019
3D	Increase part time staff and volunteer pool through further development of recruitment and retention strategies.	Coordinators	Managers Superintendents	January 1, 2018	December 31, 2020
3D	Determine necessary levels of staff support for programs through evaluation (i.e. PT lead or FT lead)	Admin & Managers	Coordinators	January 1, 2018	December 31, 2020
3A	Develop levels of training specific to staff's longevity and/or position	Admin	Managers	January 1, 2019	December 31, 2021
3A	Improve communication and program effectiveness through use of the TR model in the APIE+D process	Managers	Admin	January 1, 2017	December 31, 2021
3A	Provide training to full time program staff on consistency in staff discipline, accountability, supervision and management of part-time and seasonal staff.	Managers	Coordinators	January 1, 2017	December 31, 2021

# Pillar 3- Promoting Leadership

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Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
3D	Develop and implement the mentoring program for Full Time, Part Time and Volunteers	Admin	Managers and Coordinators	January 1, 2017	December 31, 2021
3A	Offer new and innovative training opportunities through collaboration with other community agencies.	Admin	Managers	Ongoing	Ongoing
3A	Include topics in annual in-service Calendar: TR Trends, TR model, FLSA Laws, Budgeting, Financial Management, Coaching Clinic, behavior management, Communication with non-verbal participants, Program Staff Pow-Wow, Part Time Staff Training and Supervision, policy and procedure review, succession training, agency communication policies and expectations,	Admin	Managers	Ongoing	Ongoing
3A	Ensure proper training on leisure education resources for new FT staff. This may include lesson plans and the LED facility notebook.	Facility Coordinator	Managers	Ongoing	Ongoing
3A	Effectively train Park District staff on NWSRA programs, services and employment opportunities.	Coordinators	Managers	Ongoing	Ongoing

# Pillar 3- Promoting Leadership

Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord	Start	Complete
3B	Create opportunities for advancement through utilization of the succession plan.	Admin	Managers	Ongoing	Ongoing
3C	Effectively communicate factors that may affect program services including new legislation, regulations, etc. to the participants and families.	Admin	Managers	Ongoing	Ongoing
3D	Create individualized work plans for all staff, focusing on improvement and implementation of Comprehensive Strategic Plan goals.	Admin	Managers	Ongoing	Ongoing
3A	Enhance opportunities for training through the use of webinars, online training and outside speakers	Admin	Managers	Ongoing	Ongoing

## Pillar 4: Outstanding Service

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**Definition:**  
Delivery of quality service and community access through effective communication and collaboration with customers, including participants, families, donors, Board Members and partnering organizations.

**Words:**  
Collaboration, communication, quality service, community access, customer-oriented, consistent, trust, positive

**Focuses:**

4A. Parent and Stakeholder Feedback, Education and Networking

4B. Community Outreach

4C. Facility Usage and Location Analysis

4D. Program Service Analysis and Development



# Pillar 4- Outstanding Service



Focus	Goal	Department		Target	
		Lead	Cross Coord.	Start	Complete
4A	Further development of the behavior management team	Admin	Managers, Coordinators	January 1, 2017	December 31, 2017
4C	Enhance internal use of NWSRA program space at RMCC	Admin	Managers	January 1, 2017	December 31, 2019
4D	Accommodate the needs of participants utilizing respite and nursing services.	Admin	Managers	January 1, 2017	December 31, 2019
4C	Maximize program capacity by ensuring equitable and targeted use of member Park District facilities.	Admin	Managers	January 1, 2018	December 31, 2020
4D	Ensure appropriate program delivery related to age groupings, ratios, and communication of program related information	Managers	All Staff	January 1, 2018	December 31, 2020
4A	Maintain and achieve agency accreditations	Admin	All Staff	January 1, 2017	December 31, 2021
4A	Increase advocacy efforts for parents and stakeholders toward legislative issues.	Admin		January 1, 2017	December 31, 2021
4B	Enhance outreach efforts to minority patrons.	Managers	Coordinators	January 1, 2017	December 31, 2021



# Pillar 4- Outstanding Service

Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord.	Start	Complete
4B	Strengthen agency impact in the community by providing opportunities toward community involvement for staff, volunteers and participants.	Managers	All Staff	January 1, 2017	December 31, 2021
4C	Increase use of facilities by fostering relationships with independent living facilities and area businesses	Admin/Managers	Coordinators	January 1, 2017	December 31, 2021
4A	Establish a culture of excellence through staff core certification requirements and training.	Admin	All Staff	Ongoing	Ongoing
4A	Enhance two-way communication and identify necessary areas for growth through continued stakeholder feedback efforts.	Admin	Managers	Ongoing	Ongoing

# Pillar 4- Outstanding Service

Short Term

Mid Term

Long Term

Ongoing

Focus	Goal	Department		Target	
		Lead	Cross Coord.	Start	Complete
4A	Improve internal and external customer service	Admin	All Staff	Ongoing	Ongoing
4A	Effectively communicate NWSRA's Fair Play guidelines and the participant care guidelines to parents.	Managers	All Staff	Ongoing	Ongoing
4B	Foster and develop relationships with other agencies that provide services for people with disabilities. (therapists, hospitals)	Admin	Managers	Ongoing	Ongoing
4B	Foster existing relationship with school districts and higher education institutions for innovative programs and opportunities for outreach.	Admin	Managers & Coordinators	Ongoing	Ongoing
4C	Increase facility usage in new park district facilities	Managers		Ongoing	Ongoing



TEAMWORK • RESPECT • ENTHUSIASM • COMMUNICATION • COLLABORATION  
**TOGETHER**  
2017-2021 NWSRA STRATEGIC PLAN

## Capital Replacement Plan

<u>NWSRA</u>							
<u>Capital Replacement Plan</u>							
Capital Replacement Type	Fleet #	Description	2017	2018	2019	2020	2021
<u>Vehicles</u>	-						
	501	CDL - 2007 Glaval Titan - Heavy Duty		85,000.00			
	502	CDL - 2006 Ford Starcraft - Medium Duty Paratransit	70,000.00				
* Approved and waiting	503	2003 Dodge Caravan Minivan***					
	505	CDL - 2005 Bluebird - Heavy Duty Bus		95,000.00			
Pending Grant approval	506	2005 Ford Starcraft - Medium Duty					
	507	CDL - 1992 Ford - Heavy Duty Bus					
	509	2011 Ford -Medium Duty Paratransit					68,000.00
Max 2 purchase	511	2003 Dodge Caravan Minivan***					
	513	Chrysler Town and Country 2008 Minivan			25,000.00		
	514	2010 Ford Medium Duty Paratransit				68,000.00	
	518	2008 Ford Eldaroado Medium Paratransit *IDOT				68,000.00	
	519	2006 Ford E450 - Medium Duty Paratransit	65,000.00				
	520	2008 Ford E450 - Medium Duty Paratransit			68,000.00		
	521	2009 Ford 450 E Medium Duty Paratransit			68,000.00		
	522	2011 Ford -Medium Duty Paratransit					68,000.00
	523	2002 Ford E350 - Medium Duty Paratransit*I DOT					
	524	2003 Ford Eldorado - Medium Duty Paratransit**Grant					
	525	2003 Ford Eldorado - Medium Duty Paratransit***IDOT					
Vehicles Total			135,000.00	180,000.00	161,000.00	136,000.00	136,000.00
<u>IT</u>	-	Server replacement hardware lease	-	0 \$	4,200.00	\$ 4,200.00	\$ 4,200.00
		Server Replacement labor lease	-	0 \$	3,100.00	\$ 3,100.00	\$ 3,100.00
		Computer and Equipment purchase lease	-	0 \$	4,300.00	\$ 4,300.00	\$ 4,300.00
		PURSUIT computer/hardware	1,340.00				
		PURSUIT cabling	1,100.00				
		iPads	5,500.00	2500 \$	1,000.00	\$ 1,000.00	\$ 1,000.00
IT-Total			7,940.00	2,500.00	12,600.00	12,600.00	12,600.00
<u>Rent/Lease</u>	-	RMCC - Annual Rent	136,674.81			150,342.29	
		RMCC - Maintenace and Custodial	12,959.52			14,255.47	
		*Rent, Maint. And Custodial will be paid for from the Investment accounts					
Rent/Lease Total		PROPOSING 2020 payment out of Investments, total amount based on 10% increase	149,634.33	-	-	164,597.76	-
General Equipment					*		
		Equipment HPCC Programming space	50,000.00				
Gen. Equipment Total		*Equipment HPCC will be paid for from the Investment accounts	50,000.00	-	-	-	-
Subtotal			342,574.33	182,500.00	173,600.00	313,197.76	148,600.00
Payments from Investments			200,000.00			165,000.00	
Payments from SLSF							
GRAND TOTAL		Remaining Capital Liability payments from Capital Reserve	142,574.33	182,500.00	173,600.00	148,197.76	148,600.00

# Capital Replacement Plan

This plan is developed through the annual budget preparation process in November. In Fall 2016, the 2017 budget preparation process begins. During this process, the rolling Capital Replacement Plan will be updated to include the years of 2017-2021 to align with the 2017-2021 Comprehensive Strategic Plan.





Through the insight, perceptions and contributions of stakeholders like you, NWSRA will achieve new heights in the next five years. Thank you for your time and commitment toward guiding the development of Core Values, Pillars, Focuses and Goals that will help achieve the Mission and Vision. Through your continued partnership, NWSRA will ensure sound financial management, achieve operational excellence, promote leadership and provide outstanding service.

**Together, we will achieve.**



CELEBRATE ABILITY  
**NWSRA**  
NORTHWEST SPECIAL RECREATION ASSOCIATION



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