

Pillar 1: Financial Management

Strategic stewardship of revenues and expenses to maximize financial stability of the Association Focus

Focus 1A: Clarify Financial Model

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Educate and increase the understanding of how the Association's planning and budgetary priorities are supportive of the mission	1. Create an annual budget snapshot to be posted on the website with quarterly updates to educate participants, families, and stakeholders about budget priorities	Tom Draper (Admin)	Currently working on content and charts -will be available on our website Q3.
	2. Implement 4 budget trainings within staff meetings to equip staff with the knowledge to educate the community on NWSRA's budget and how we are funded	Darleen Negrillo (Admin)	Once the new Finance Team from Lauterbach and Amen were hired, ED conducted a first quarter and second quarter budget report training with the new Finance Team for the Admin Team.
	3. Create language within the brochure under general information on NWSRA budget and funding to be featured in the fall 2022 brochure	Tom Draper (Admin)	This information will be highlighted in our winter/spring brochure .
2. Establish a clear post-pandemic financial picture that equitably outlines goals and best practices for NWSRA's operations, reserve fund, capital fund, and member district assessments	1. Implement reserve fund and capital plan policies	Darleen Negrillo (Admin)	Reserve Fund was approved in 4th quarter 2021. Enacted in 1st quarter 2022.
	2. Contact with a financial firm to assist with financial services within NWSRA to enable better reporting and monitor financials	Darleen Negrillo (Admin)	Completed in January 2022. Contracted with Lauterbach and Amen.

Focus 1A: Clarify Financial Model

Strategic Goal	Objectives	Lead / Department	Quarter Completed
3. Implement the maintenance and replacement plan for vehicles	1. Implement scheduled maintenance plan for current fleet of vehicles and report quarterly	Darleen Negrillo (Operations)	Created first quarter using Fleetio software and the first quarter report is being reviewed by the Operations Manager.
	2. Follow Capital Plan for replacing vehicles as scheduled over the next five years	Darleen Negrillo (Operations)	Completed and approved with the FY 2022 budget in March 2022. Still waiting for the FY 2022 Budgeted vehicles.
	3. Research future transportation needs to support the regional programming approach and the implementation of transportation hub system	Darleen Negrillo (Operations)	June 2022, met with Steven Andrews with PACE to discuss potential collaborations regarding CDL Drivers, CDL Driver Training and the regional transportation approach as well as other PACE opportunities.
4. Create a maintenance and replacement plan for NWSRA programming spaces including specialty rooms	1. Revamp current equipment and supplies checklist for all NWSRA programming spaces to be electronic	Darleen Negrillo (Operations)	Completed in June 2022
	2. Inventory all equipment, supplies and technology within each NWSRA programming spaces	Tom Draper / Darleen Negrillo (IT and Operations)	In progress - A majority of technology and equipment has been inventoried. We will complete smaller items in Q3
	3. Create a maintenance and replacement plan for all equipment and supplies within NWSRA programming spaces and specialty rooms	Tom Draper / Darleen Negrillo (IT and Operations)	In progress - A technology replacement plan has been created
	4. Based on the replacement schedule determine which items will be added to the Capital Replacement Plan	Darleen Negrillo (Operations)	Completed and approved with the FY 2022 budget in March 2022.

Pillar 2: Operational Excellence

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

Focus 2A: Restore In-Person Programming

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Revamp current program evaluation processes across all departments	1. Research outside and partnering agency evaluation systems to compile effective questions to improve/enhance programming	Rachel Hubsch (Program Development)	In Progress, Program Development team is reviewing the current system for evaluations and compiling outside evaluation systems to review in the 3rd quarter.
	2. Create a new evaluations processes to be accessed electronically	Rachel Hubsch and Tom Draper (Program Development / Marketing)	In Progress, working with Marketing
	3. Contact participants and families who have not accessed in person programming within the last two years	Alexis Bell (Management Team)	Completed 2/28/2022; program staff contacted over 500 participants. About half of the participants have participated in the last year or so in some way.
	4. Host 4 "Voice of the Customer" Focus Groups for the newly established regional areas	Rachel Hubsch (Program Development)	Met with a parent to discuss the PV population to discuss programs and services will be scheduling a voice of the customer in the summer of 2022

Focus 2B: Recruit and Retain Staff

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Determine an effective way to motivate all employees and volunteers	1. Create and distribute each quarter an all staff survey with questions pertaining to job satisfaction	Darleen Negrillo (Human Resources)	Analyzing results of the 1st quarter survey
	2. Review survey results each quarter and implement strategies to address staff satisfaction	Darleen Negrillo (Admin)	Reviewing results and discussing ways to address results.
	3. Conduct once a year open forum discussion for employment levels	Darleen Negrillo (Admin)	In planning stages for 4th quarter.
	4. Create a full and part time staff recognition program for employees to recognize their peers	Rachel Hubsch / Alexis Bell (Staff Enrichment / Support Services)	In Progress, NWSRA does the game ball recognition at staff meeting as well as Kudo cards for Full Time, working on Part Time recognition in 3rd quarter.
	5. Implement electronic performance system to streamline communication and for employees to give and receive immediate feedback	Darleen Negrillo (Human Resources)	PerformYard was purchased and implemented in January 2022

Focus 2C: Remain on the Path to Meet Adult Programming Needs

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Ensure current adult program offerings are meeting the needs of the community	1. Analyze current adult program offering per day within each season	Rachel Hubsch (Program Development)	Will be addressed at the next Programming Development meeting in August.
	2. Create a survey for participants and families who are currently registered for adult programs	Rachel Hubsch (Program Development)	
	3. Conduct a focus group with current senior population including participants who will be seniors within three years	Rachel Hubsch (Program Development)	
	4. Meet 2 time annually with QIDP's within local residential facilities to ensure needs are being met of adult residents	Alexis Bell (Support Services)	In Progress; AB contacted Clearbrook Director 3/21/22
2. Enhance marketing efforts to increase awareness of adult programs offered at NWSRA	1. Create a recruitment and outreach campaign to highlight unique adult programming	Tom Draper (Marketing)	In progress - marketing team meeting with program development team in Q3.
	2. Create marketing materials to promote registration nights at residential facilities and NWSRA regional programming sites	Tom Draper (Marketing)	We will pilot this with local group homes for Fall registration with the goal of expanding to member agencies in winter/spring
	3. Create marketing videos promoting participant success and/or testimonials in current adult programs	Tom Draper (Marketing)	In progress, will complete in Q3
	4. Collaborate with member agencies for joint marketing for adult programs for individuals with disabilities	Tom Draper (Marketing)	In progress, currenting working with Arlington Heights and will reach out to others in Q3 and Q4

Focus 2D: Reaffirm NWSRA Programming Operations and Sites

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Reestablish Research Outreach Initiative (ROI) to evaluate the census, school and stakeholder statistics	1. Create a report on individuals on disabilities within NWSRA footprint using the census from Member Districts as well as school and stakeholder statistics	Tom Draper / Andrea Griffin (Outreach)	Meetings set to begin this process in 3rd quarter
	2. Analyze the data within the report findings to determine outreach, marketing and programming needs	Tom Draper / Andrea Griffin (Outreach)	Will complete after meetings take place
	3. Develop action steps to address the needs for services within the NWSRA footprint based on the report findings	Tom Draper / Andrea Griffin (Outreach)	Will complete after meetings take place
	4. Distribute findings and action steps to all stakeholders	Tom Draper (Marketing)	Will complete after meetings take place

Focus 2E: Cultivate Strategies and Controlled Growth

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Increase awareness of financial scholarships to remove financial barrier to participation	1. Create marketing materials on financial scholarships in English and Spanish	Tom Draper (Marketing)	In progress - will be rolled out in winter/spring season.
	2. Include financial scholarship marketing materials into the Summer and Fall Brochure	Rachel Hubsch / Tom Draper (Marketing / Brochure)	Completed - The back cover of our fall brochure highlights our scholarship offering.
	3. Use social media platforms to bring awareness to SLSF ability to provide NWSRA scholarship dollars for participants and families.	Tom Draper (Marketing)	In progress, will drive awareness of scholarships ahead of Fall Registration

Focus 2E: Cultivate Strategies and Controlled Growth

Strategic Goal	Objectives	Lead / Department	Quarter Completed
2. Research, develop and implement a Technology Plan to meet the demand of current trends	1. Inventory current technology infrastructure and equipment	Tom Draper (Technology)	In Progress - All computers, mobile devices, and iPads have been inventoried in detail. In Q3 we will complete the inventory remaining hardware.
	2. Research new and emerging technologies to transfer hosted servers to cloud based solutions	Tom Draper (Technology)	Completed
	3. Update current internal communication plan to streamline processes and safeguard data	Tom Draper (Technology)	In Progress - performing necessary software and hardware updates ahead of updating communication plan
	4. Implement a device management platform to track all agency mobile devices	Tom Draper (Technology)	Completed - Almost all has been implemented across all iOS and tvOS platforms. In Q2 agency iphones were added.
3. Reestablish partnerships with agencies that align with NWSRA's mission and vision to maximize resources	1. Research 5 Member Districts specialized programming to combine resources and offer unique programming for participants while promoting community integration	Rachel Hubsch (Program Development)	Program Development team will be reaching out to member districts in the 3rd quarter
	2. Establish 2 new relationships within local High School Athletic Departments to enhance Lightning Athletics	Janae Winston (Lightning Athletics)	New Manager of Athletics is working on this in the 3rd quarter
	3. Research 2 new contracted swim instructors for individual swim lessons	Alexis Bell (Support Services)	In Progress
	4. Research 2 new contracted music instructors for individual lessons in drum, voice, guitar and piano	Alexis Bell (Support Services)	In Progress; a drum instructor has been secured for summer, piano/voice instructor is returning

Pillar 3: Promoting Leadership

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

Focus 3A: Everybody Always: NWSRA's Doors are Always Open

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Revamp Core Values based on survey results	1. Develop a new core value statement for Diversity	Tracey Crawford (Admin)	Completed 4/2022 and will be presented to the NWSRA Board for approval at the 5/2022 Board meeting
	2. Review feedback from Core Values and add additional definitions for "Enthusiasm"	Tracey Crawford (Admin)	In Progress
	3. Distribute and market updated Core Values to all stakeholders	Tracey Crawford/Tom Draper (Admin)	Will be addressed in the 4th quarter
2. Create a committee to address diversity, equity and inclusion	1. Established committee will implement a process to evaluate diversity, equity and inclusion within the agency	Tracey Crawford (Admin)	New DEI Committee established 1st Quarter 2022 and has met twice.
	2. Develop a diversity, equity and inclusion statement for the agency	Tracey Crawford (Admin)	Completed 4/2022 and will be presented to the NWSRA Board for approval at the 5/2022 Board meeting
	3. Create training and education opportunities on diversity, equity and inclusion for staff and stakeholders	Tracey Crawford (Admin)	Finalizing in the 4th quarter
3. Strengthen relationships among Board Members and between Board Members and Staff	1. Work with Board to contract an outside association consultant to conduct a Board retreat to improve communication	Tracey Crawford (Admin)	The Board Chair hosted a Board Retreat Lunch on 4/25/2022.
	2. Work with the consultant to establish boardmanship guidelines for an association	Tracey Crawford (Admin)	The Board Chair has made contact with a consultant and is waiting for confirmation. (4/2022)

Focus 3A: Everybody Always: NWSRA's Doors are Always Open

Strategic Goal	Objectives	Lead / Department	Quarter Completed
4. Expand knowledge and understanding of the partnerships between NWSRA and Member Districts	1. Partner with Member Districts on 5 outreach events to showcase the unique SRA design	Andrea Griffin / Darleen Negrillo (Outreach / Recruitment)	NWSRA staff have attended 16 outreach events within the 1st and 2nd quarter within its 18 Member Park District communities
	2. Implement a Tid Bit Tuesday on Social Media to highlight SRA and Member District partnership	Tom Draper (Marketing)	
	3. Establish relationships with each Member Districts marketing team to create joint marketing materials and provide marketing opportunities for NWSRA	Tom Draper (Marketing)	
	4. Revamp NWSRA orientation and training materials for Member District staff	Andrea Griffin (Inclusion)	The first step has been completed. Updating the ADA website
5. Increase awareness of the field of Therapeutic Recreation and the Recreation Therapy Services provided by the Association to participants, families, staff and stakeholders	1. Participate in Recreation Therapy month as an agency with American Therapeutic Recreation Association (ATRA)	Rachel Hubsch / Tom Draper (Staff Enrichment / Marketing)	Completed - Created memes, reels, photos and more which featured our staff and participants
	2. Create Recreation Therapy materials to drive awareness of the field Therapeutic Recreation at NWSRA outreach events	Tom Draper (Marketing / Therapeutic Recreation)	In Progress
	3. Create video content highlighting Recreation Therapy success stories within the agency and NWSRA local, state and national involvement	Tom Draper (Marketing / Therapeutic Recreation)	In Progress - a plan has been created to publicize how we utilize TR at NWSRA through the end of the year.
	4. Utilize all marketing resources to educate stakeholders on the field of Therapeutic Recreation and the practice of Recreational Therapy	Tom Draper (Marketing / Therapeutic Recreation)	In Progress - information about TR was included in our NWSRA Now Newsletter and will continue to be included in each edition.

Focus 3B: Empower Staff Through Training

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Enhance current training opportunities for specialty programs and facilities for staff	1. Research new trainings for each specialty room and program	Andrea Griffin / Rachel Hubsch (All Specialty Teams)	Garden Team members attended new trainings at Chicago Botanical Gardens in 1st quarter. In 2nd quarter the garden team toured 6 Greenhouses researching and learning about see growth within a greenhouse
	2. Research new contacts with other professionals who have skills and talents within each specialty room and program	Andrea Griffin / Rachel Hubsch (All Specialty Teams)	In Progress, research is underway
	3. Expand each team by surveying full time staff on their talents and interests to bring in more knowledge and resources	Rachel Hubsch (Program Development)	Survey to staff to be sent out in August
2. Increase knowledge of job roles across all departments	1. Each department head will host a training with members of their team to address job roles and professional representation within that department	Andrea Griffin (Management Team)	Meetings have been set within teams to begin the process
	2. Each department will present on major job roles and responsibilities at all staff meetings to educate the entire agency	Rachel Hubsch (All Departments)	Staff will be presenting at the All Staff Meeting in October, November and December
	3. Review and revamp current timelines and "how to manuals" and revisit job descriptions and responsibilities within all departments	Darleen Negrillo (All Departments)	Job Descriptions Completed - Timelines in Progress - All manuals updated except Operations Manual starting in August 2022

Focus 3B: Empower Staff Through Training

Strategic Goal	Objectives	Lead / Department	Quarter Completed
3. Create a comprehensive training program for all staff	1. Attend training courses on Power DMS in order to maximize all features of the system for staff training	Darleen Negrillo (Admin)	Self training complete - rolling out to FT in August
	2. Evaluate the training needs of staff based on trends in programming, program development, risk management and distinguished accreditation	Darleen Negrillo (Admin)	In Progress
	2. Create a training schedule, materials and resources for all levels of full and part time staff	Darleen Negrillo (Admin / Support Services)	In Progress
	3. Determine the platform of delivery for each training that has been selected for each level of full and part time staff	Darleen Negrillo (Admin / Support Services)	Not started will review in 3rd quarter

Focus 3C: Encourage Current Succession Plan

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Create a Professional Development program and incentive program for part time staff to encourage growth and advancement	1. Create a Path Program Leader course for part time staff who are seeking more responsibility	Alexis Bell (Support Services)	In Progress
	2. Create a training on becoming a NWSRA Lightning Athletic Coach	Janae Winston (Lightning Athletics)	In Progress
	3. Survey full time staff with over two years of experience on strengths in programming as well as interest in mentoring part time staff	Alexis Bell (Support Services)	In Progress; survey will be administered post summer season
	4. Create an incentive program to retain part time staff to increase longevity and attract future hires	Alexis Bell (Support Services)	In Progress; program plan drafted on 4/6/22. Needs reviewing/editing

Focus 3C: Encourage Current Succession Plan

Strategic Goal	Objectives	Lead / Department	Quarter Completed
<p>2. Executive Director will conduct SWOT analysis to create individual professional development plans with staff who have completed one year of service, or veteran staff who have chosen a career path and are actively pursuing advancement</p>	<p>1. Create a Jot Form to survey staff on where they are professionally to discover who is seeking advancement and in what areas</p>	<p>Tracey Crawford (Admin Team)</p>	<p>This began in January has been completed for three Coordinators seeking advancement. Will be opened up to Recreation Specialists over the summer.</p>
	<p>2. Select staff from the survey that have over a year of service and looking for advancement to create professional development plan</p>	<p>Tracey Crawford (Admin Team)</p>	<p>Three Professional Development Plans have been created for three Coordinator level staff. Completed 5/2022</p>
	<p>3. Present at an all staff meeting on SWOT/SOAR to introduce all new staff to the process and how staff can actively practice professional development</p>	<p>Tracey Crawford (Admin Team)</p>	<p>Will take place in the 4th quarter</p>
<p>3. The Professional Development Committee will present and role out the full time mentoring program for staff actively seeking advancement</p>	<p>1. Present at an all staff in-service on the new full time mentoring program and how to apply for mentorship</p>	<p>Andrea Griffin (Professional Development)</p>	<p>Will be presented on at September All Staff meeting.</p>
	<p>2. Select full time staff who meet the qualification each year for the mentoring program</p>	<p>Andrea Griffin (Professional Development)</p>	<p>4 staff have been selected to trial the mentorship program during the summer. Two mentees and two mentors. The program will be opened to all staff in the fall.</p>
	<p>3. Report on mentorship program for each staff quarterly at Admin Meetings</p>	<p>Andrea Griffin (Professional Development)</p>	<p>Reported at the May Admin meeting sharing the plan to trial the program over the summer</p>

Pillar 4: 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

Focus 4A: Sustain PURSUIT Community Adult Day Program & Satellite Programming

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Collaborate with Member Districts and Clearbrook to incorporate vocational services to PURSUIT Community Adult Day Program	Create qualifications for clients to utilize vocational services in PURSUIT	LJ Jevaney / Katrina Wiegand (Collaboratives)	Trail PURSUIT location selected, meetings held with the trial Park District, introducing the concept and types of vocational jobs PURSUIT clients can do.
	Establish list with Park Districts on available jobs that clients would qualify for	LJ Jevaney / Katrina Wiegand (Collaboratives)	Completed
	Survey current clients to gauge interest in vocational services	LJ Jevaney / Katrina Wiegand (Collaboratives)	Survey is being created
2. Research, create and implement the program model for PURSUIT Plus with collaborative partner Clearbrook	Research and Identify similar programs to PURSUIT and tour each location	LJ Jevaney / Katrina Wiegand (Collaboratives)	PURSUIT Managers and two Coordinators meet with 3 day programs that are geared for seniors.
	Create PURSUIT Plus program blueprint in collaboration with Clearbrook	LJ Jevaney / Katrina Wiegand (Collaboratives)	Town Hall Meetings for those interested in discussing senior day programming needs held in September to help NWSRA staff create a blueprint for a collaborative program.
	Survey current NWSRA participants who met the qualifications of PURSUIT Plus for interest	LJ Jevaney / Katrina Wiegand (Collaboratives)	Survey created to go out to NWSRA and Clearbrook participants regarding senior programming.

**Focus 4B: Support Innovative and Specialized Programming
(2023)**

Focus 4C: Stand Behind Transportation Needs

Strategic Goal	Objectives	Lead / Department	Quarter Completed
1. Assess and evaluate transportation usage	1. Investigate reports within the transportation software Fleetio to better utilize existing resources	Darleen Negrillo (Operations)	In Progress
	2. Conduct meetings with each programming department that utilizes transportation to collect data on transportation usage each month	Darleen Negrillo (Operations)	In Progress
	3. Complete a report on current transportation usage in order to utilize for budgeting and projection of vehicle maintenance and repair	Darleen Negrillo (Operations)	In Progress
2. Assess future transportation/vehicle needs	1. Conduct meetings with each programming department that utilizes transportation to survey on future growth in transportation needs	Darleen Negrillo (Operations)	In Progress
	2. Research how to implement a transportation hub system to reflect a regional approach	Darleen Negrillo (Operations)	In Progress
	3. Analyze transportation survey results to address future transportation needs and collaborative opportunities	Darleen Negrillo (Operations)	In Progress