

# Financial Management

Focus 1A. Budget Training				
Goal	Department	Point Person	Quarter Completed	Objective Completed
1. Create budget resource materials to enhance all staff knowledge of department budgets in relation to the overall budget	Director's Work Plan	Darleen Negrillo	4th quarter	
2. Create budget training modules to be uploaded into Power DMS that stem from the budget resource materials	Admin	Darleen Negrillo	4th quarter	
Focus 1B. Alternate Funding Sources				
Goal	Department	Point Person	Quarter Completed	Objective Completed
3. Increase collaborative/cooperative programs by partnering with other agencies to combine resources	Program Development	Emily Nock	4th Quarter	Program Development team has established a partnership with Lakeshore Gymnastics in order to enhance the Lightning Gymnastics team with seasoned coaches as well as proper space and equipment.
4. Research partnerships with Corporate agencies that require volunteers hours in order to submit for Grant funding	Program Development	Emily Nock	In Progress	A community grid has been created that includes a lists of companies able to and have a grant program that goes along with volunteering. The grid also included programs and special events for companies to select which volunteer opporutnies works in their schedule
5. Investigate and establish programs that could be fully or partially sustained by part-time staff and overseen by a CTRS	Program Development	Emily Nock	Ongoing	Pending qualifying lists for specilaity programs. Once staff are taken off furlough, they will be served for speciality skills and comfortablility with instructing.
Focus 1C. Program Fee & Budget Analysis				
Goal	Department	Point Person	Quarter Completed	Objective Completed

# Financial Management

6. Develop a transportation hubs system to decrease cost and vehicle usage	Director's Work Plan	Darleen Negrillo	2nd Quarter	A Hub system has been created for Saturday programs beginning Summer 2021. The transportation survey and report will be reviewed during the Strategic Planning process. A second part survey question has been added to the Survey to stakeholders and families to discuss costs associated with transportation.
7. Create qualifications for door to door transportation service and cost	Management	Manny Aguilar	Quarter 1	The Admin team has approved guidelines and a Jot form will be created for the application process for families to complete to see if they qualify for Door-to-door transportation. New program will be rolled out in the Fall of 2021.

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

Goal	Department	Point Person	Quarter Completed	Objective Completed
8. Create appropriate funding in Capital plan to continue to cover both anticipated and unanticipated building repairs, rental increases and deep cleaning in owned/leased NWSRA spaces	Director's Work Plan	Darleen Negrillo	2nd Quarter	Through the Financial Task Force, NWSRA staff created a five year Capital Plan that includes Park Central maintenance, repairs, deep cleaning and facility costs as well as rental increases, repairs, maintenance and deep cleaning for all 6 sites rented from the Member Districts for NWSRA programming Space.
9. Continue to financially analyze the expansion of NWSRA Program Spaces	Director's Work Plan	Andrea Griffin	In Progress	Moving into the bidding phase with Hoffman Estates Park District & WT Engineering for the 6th NWSRA Programming Space at the Hoffman Estates Park District Voegel House.
10. Implement ADA transition plan items	Director's Work Plan	Brian Selders	In Progress	A Park Central Condo meeting has been scheduled to address the implementation of ADA transition plan items. Working with the RM staff to create a fund for the Condo repairs.

## Financial Management

<p>11. Implement Board Finance Committee Task Force</p>	<p>Director's Work Plan</p>	<p>Darleen Negrillo</p>	<p>1st Quarter</p>	<p>The Task Force has held the first Task Force meeting on February 10, 2021 to review the NWSRA monthly financial documents, Fund Balance policy and the NWSRA bank accounts. NWSRA staff has created a 5 year rolling Capital Plan and General Reserve Plan for the Financial Task Force to review. A second meeting was held on July 12 at the Park Central Building. During the meeting the Capital Plan was reviewed and a meeting was set to further tier the capital projects for the next five years. Two Fund Balance Policies were reviewed and a revised policy was created. Other Task Force recommendations included closing two accounts, creating two Funds, (one for Operations and one for Capital) and using all reserve and investments funds for capital expenditures. .</p>
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## Operational Excellence

Focus 2A. Adult and Senior Programming				
Goal	Department	Point Person	Quarter Completed	Objective Completed
1. Investigate and develop senior programming model and partnerships for the aging adults within PURSUIT	Director's Work Plan	Andrea Griffin	In Progress	A site analysis has been completed to determine the max number of clients per site based occupancy of the facility space. Identified NWSRA participants that range from 45+, broke out the interest list participants by year the service will be needed. Investigated Senior Disability programming nationally and locally. Staff created two models for potential senior day programming. In early July, staff presented the models to Clearbrook staff and assigned tasks for both agency staff to research to continue discussion to solidify future plans.
2. Evaluate existing NWSRA programs/ service and develop new offerings for Active Adults/Seniors	Director's Work Plan	Jacki Moore	In Progress	The summer brochure is currently in progress and will include one new senior programming program called Chair One Fitness for ages 45 and older.
3. Develop and implement the sixth NWSRA Program Space	Director's Work Plan	Andrea Griffin	In Progress	Staff are moving into the bidding phase for construction for the Programming Space at Vogelei House with Hoffman Estates Park District & WT Engineering. Completion of the space should be done in December 2021.
4. Create participants eligibility guidelines for traveling trips and overnights	Management	Jacki Moore		In progress
5. Implement Chair One Fitness programs schedule to add to adult and senior programming	Management	Jacki Moore		1) Chair One Fitness program was added to summer brochure and is geared towards seniors aged 45 and up. 2) Creating contacts at local nursing homes to offer cooperative programming 3) PURSUIT in the planning stages of the layout of PURSUIT Plus a collaboration with Clearbrook

## Operational Excellence

6. Create a marketing and promotional plan for Club Wellness, the new licensed fitness and nutrition program	Management	Manny Aguilar Mackenzie Irelan		Program Development team has established a partnership with Lakeshore Gymnastics in order to enhance the Lightning Gymnastics team with seasoned coaches as well as proper space and equipment. The Pursuit Adult Day Program started participating in Club Wellness at the beginning of 2021. In January, each participant started off the program by completing a pre-test assessment and setting a personal health goal. Throughout the year, participants will work on completing their goal by participating in the program. Club Wellness includes a fitness component, wellness tip, and mindfulness activity. In February, the program really took off and participants started get actively involved! Each month the program adds a new fitness skill to the lesson, which helps increase the clients endurance. Not only do they focus on working out to build muscle, they also learn a wellness tip. These tips help participants learn about healthy eating, hygiene, how to protect themselves from the sun, and much more. At the end of the lesson, they complete a mindfulness activity such as calm breathing, meditation, and self-motivation.
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### Focus 2B. Early Childhood and School Age Programming

Goal	Department	Point Person	Quarter Completed	Objective Completed
7. Evaluate and expand current NWSRA programs offerings for Early Childhood and School Age participants	Management	Jacki Moore		1) Created flyers for early childhood Snoezelen 2) Outreach event with Kineely geared towards early childhood registrations

### Focus 2C. Communications and Publicity

Goal	Department	Point Person	Quarter Completed	Objective Completed
8. Continue to publicize NWSRA staff achievements and certifications that enhance programs and services	Programming	Brian Selders	Ongoing	NWSRA staff achievements have been highlighted on various social media platforms, including staff of the month, ITRS Awards including the Rising Star Award for Lauren Jevaney and the Outstanding Program Award for the Dream Lab. New staff certifications posted on website and in brochure
9. Promote NWSRA programs and services through sharing of participant and families personal success stories	Programming	Brian Selders		Personal success stories have been shared through a variety of media, including social media, online participant highlights, and website presence to thousands of stakeholders.

## Operational Excellence

10. Create and implement procedure manual for CIVI CRM database	Admin	Brian Selders	1st Quarter	Procedure manual for CiviCRM database has been completed and is saved in NWSRA G: drive (shared files), and available for all staff for reference
11. Develop timeline and procedure for the creation and implementation of a new NWSRA Strategic Plan for 2022-2024	Director's Work Plan	Tracey Crawford	In Progress	In January, the Camp Fire Connection Consulting Firm was hired to create a three year Strategic Plan for 2022 - 2024. An online survey was created and sent to all families, staff and stake holders to be completed by the end of April. The Board members will be asked to schedule a time to meet with strategic planner Jarrod Scheunemann. Professor, Jeremy Robinett, from Western IL University will conduct the 4 Regional focus groups scheduled for community stake holders, participants and families in June. Focus groups will also be held with staff in June.
12. Reach out to Park District Executive Directors for invitation to Member District board meetings	Director's Work Plan	Tracey Crawford	In Progress	Due to COVID-19, inperson Board Meetings continue to be on hold in the first quarter for many of the NWSRA Member Districts and for those having meetings, outside guests are limited. Staff has scheduled South Barrington, Prospect Heights and Hoffman Estates for the 3rd quarters and 4th quarter.

# Promoting Leadership

Focus 3A. Training				
Goal	Department	Point Person	Quarter Completed	Objective Completed
1. Create and implement new orientation program for new Park District staff on NWSRA	Director's Work Plan	Andrea Griffin	In Progress	Creating a power point training with audio in fall on who NWSRA is and the what NWSRA does to be shared with all new full time staff during their orientations at their districts.
2. Revamp part-time staff evaluations in order to provide specific feedback and identify staff ready for a leadership role	Management	Emily Nock	1st Quarter	Completed and in an electronic format
3. Develop position specific manuals for Admin and Managers	Director's Work Plan	Darleen Negrillo Emily Nock	In Progress	Requested Timelines/task list from all managers and superintedents due in July. Once received, will compare to operations manual and request any procedure we do not have.
4. Finalize procedural manual for Management positions	Director's Work Plan	Darleen Negrillo	In Progress	This will be part of the Operations Manual
5. Prepare and start process for DA reaccreditation for 2022	Director's Work Plan	Tracey Crawford	In Progress	A DA preparation team has been created containing employees from various departments throughout the agency. The team meets monthly to review each section and the materials to be uploaded into Power DMS to address the standard.
6. Create a tier level of training to incorporate all levels to train staff on certain topics based off longevity and/or position	Admin	Rachel Hubsch	In Progress	Program Development team has established a partnership with Lakeshore Gymnastics in order to enhance the Lightning Gymnastics team with seasoned coaches as well as proper space and equipment.

## Promoting Leadership

7. Reevaluate PT staff trainings to ensure new safety protocols are put in place in order to have staff effectively trained	Admin	Emily Nock	In Progress	In Progress and will be rolled out in Summer of 2021
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### Focus 3B. Succession Planning

Goal	Department	Point Person	Quarter Completed	Objective Completed
8. Continue to offer professional development and SWOT opportunities for full-time staff over a year of longevity	Director's Work Plan	Tracey Crawford	On Going	Individual SWOTs and Professional Development meetings have been set up for all Recreation Specialists interested in interviewing for the open Coordinator positions that were frozen during 2020. Three Administrative staff are mentoring teams of 2 - 3 Recreation Specialists as they complete the newly created Coordinator Development Series booklets. As departments see an increase in participation numbers, Coordinator interviews will be conducted.
9. Create mentoring committee for full-time staff and send out survey to assess staff needs for mentoring	Admin	Andrea Griffin	In Progress	The Mentoring Committee has established a mentor and mentee process, guidelines, expectations and resources. The committee will roll out the Mentor/Mentee program in fall.

### Focus 3C. Public Relations

Goal	Department	Point Person	Quarter Completed	Objective Completed
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## Promoting Leadership

10. Effectively communicate factors that may affect program services including new legislation and regulations to participants, families, board members and the community	Director's Work Plan	Brian Selders	In Progress	Strategic Plan survey has been sent to all stakeholders and Focus Groups held to gather information and determine priorities that will be outlined within the 2022-2024 NWSRA Strategic Plan later in the year.
11. Educate new legislators on NWSRA programs, services, needs and opportunities	Director's Work Plan	Brian Selders	In Progress	NWSRA attended the virtual IAPD Joint Legislator's Breakfast in February to stay abreast of latest legislation and share information on NWSRA activities. Sent letters to Legislators regarding COVID-19 relief and expansion of programming space to Hoffman Estates Vogeley House. Attended Town Hall/networking event in June.

### Focus 3D. Service Leadership

Goal	Department	Point Person	Quarter Completed	Objective Completed
12. Implement a goal within each agency committee to incorporate community service within Member District communities	Admin	Rachel Hubsch	1st Quarter	Completed, each committee has a community service goal submitted

## Outstanding Service

### Focus 4A. Parent / Stakeholder Feedback, Education and Networking

Goal	Department	Point Person	Quarter Completed	Objective Completed
1. Create a recruitment campaign to portray the benefits of working at NWSRA	Recruitment	Jake Joyce		
2. Create a questionnaire to collect feedback on program/services from registration to the completion of a program	Director's Work Plan	Emily Nock		Questions were included in the Strategic Planning Survey that went to parents and participants.
3. Enhance outreach efforts to minority patrons within all member districts	Admin	Andrea Griffin Jacki Moore	In Progress	Identifying school programs and support groups geared for minority students and families.
4. Develop a referral program for program/ services for participants and families	Program Development	Emily Nock	1st Quarter	Refer a friend program will start with Summer 2021 registration season
5. Foster and develop relationships with support groups or non for profit agencies providing resources for children and adults with disabilities	Collaborative	Andrea Griffin	Completed	Staff have reached out to current non-profit parent support groups, created a support list, and identified staff to make connections to begin building relationships. Will begin presenting and attending support group meetings in fall 2021 and throughout

### Focus 4B. Community Outreach

Goal	Department	Point Person	Quarter Completed	Pending qualifying lists for speciality programs. Once staff are taken off furlough, they will be
6. Establish meeting schedule with group home caregivers to brainstorm how to incorporate leisure into group home participants lifestyle and ease the process of registration	Collaborative	Katrina Wiegand Lauren Jevaney	Completed	Staff are working with CILA Directors and have created individual CILA programming for two homes in May. NWSRA has meet with CILA Directors to discuss the registration forms and the registration processes for their clients and will continue to work with them on selction of programs for thier clients.
7. Strengthen agency impact in the community by providing community service involvement opportunities	Staff Enrichment	Rachel Hubsch		

## Outstanding Service

8. Enhance visibility of the NWSRA programs and services	Outreach	Brian Selders	On Going	Visibility of NWSRA programs has been enhanced through the implementation of a variety of tactics including month-to-month brochures, new flyers and brochures, new online pages, and outreach to new families, businesses and organizations
9. Continue to enhance social media presence for NWSRA	Marketing	Brian Selders	On Going	Since January 2021, Facebook has a monthly average post reach of over 22,000, Instagram has experience a 10.7% increase in followers, LinkedIn followers has increased by 6.8% (over 1,000 followers now), Twitter is averaging over 3,000 impressions/month, 3,600 searches/month on Google and over 9,000 website page views/month
10. Create registration days for agencies servicing the lifespan of people with disabilities to ease the registration process for QIDP's	Collaborative	Andrea Griffin	In Progress	Working with service providers to determine the easiest and best way for NWSRA staff to ease the registration process.
11. Host ribbon cutting for the Sensory Garden and invite potential partnerships	Collaborative	Andrea Griffin	In Progress	Open House for the Community Sensory Garden will take place on July 20th.

### Focus 4C. Facility Usage and Location Analysis

Goal	Department	Point Person	In Progress	Objective Completed
12. Maximize use of Member Park District facilities to ensure participants are included within the community	Director's Work Plan	Darleen Negrillo	In Progress	During the past year, due to the COVID-19 restrictions, staff hosted all in person programs and services at the five NWSRA programming locations within the Member Park Districts. This allowed more participants and parents to access the sites and their many unique offerings right in their communities. NWSRA has had limited access to the Member District sites outside of our programming spaces and Day Camp.

## Outstanding Service

13. Develop a procedure to establish collaborations with schools, public and/or private agencies for facility spaces	Facility Operations	Darleen Negrillo		A Park Central Condo meeting has been scheduled to address the implementation of ADA transition plan items. Working with the RM staff to create a fund for the Condo repairs.
14. Revamp facility usage reports	Director's Work Plan	Darleen Negrillo		In progress
15. Investigate more outdoor / nature facilities to be able to provide more outside programming	Program Development / Facility Operations	Darleen Negrillo	In progress	A new program called Trail Travelers for Seniors will visit a different and/or nature sites within member districts.

### Focus 4D. Program Service Analysis and Development

Goal	Department	Point Person	Quarter Completed	Objective Completed
16. Share Transportation Report results in conjunction with Connect to Community	Director's Work Plan	Brian Selders	In Progress	NWSRA reached out to stakeholders with the 2022-2024 Strategic Plan survey, which will outline priorities for future direction. Within the process of creation of the overall Strategic Plan, the Transportation Report results will provide direction on creating an action plan to address transportation barriers and needs.
17. Analyze Transportation Report results to develop an action plan for NWSRA to address transportation barriers and needs	Director's Work Plan	Darleen Negrillo	In Progress	A Hub system has been created for Saturday programs beginning Summer 2021. The transportation survey and report will be reviewed during the Strategic Planning process. A second part survey question has been added to the Survey to stakeholders and families to discuss costs associated with transportation.
18. Create electronic forms for staff to use with iPad at program. (Van checklist, attendance, pre/post program checklist, hazard conditions report, etc.).	Admin	Darleen Negrillo	In Progress	Team has been created and is currently reviewing program forms. They are being updated and then being converted to digital format. Will then move to facility checklist and vehicle forms.

## Outstanding Service

<p>19. Establish consistency in program leaders for each program. Create a list of full and part time staff that are qualified to run each specialized program</p>	<p style="text-align: center;">Program Development</p>	<p style="text-align: center;">Emily Nock</p>	<p style="text-align: center;">In progress</p>	<p>With PT returning for summer 2021 programs consistency within programs will become more accessible. In Fall 2021 the list of specialized leaders will be created when the majority of PT leaders have returned to programs.</p>
<p>20. Evaluate the process of how participant information file (PIF) information is documented and shared season to season to program leaders</p>	<p style="text-align: center;">Program Development</p>	<p style="text-align: center;">Emily Nock</p>	<p style="text-align: center;">Completed</p>	<p>Andrea and Brian have completed written procedures and will be rolled out in Summer of 2021</p>