

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)	Developed content about NWSRA funding and posted on website..will continue in 2023
	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)	Completed - Budget info is included in the 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. FY2022 Budgeted vehicles awarded in September 2022 ordered in October 2022.
	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 - All technology and equipment has been inventoried. Carrying over to 2023
	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. Carrying over to 2023
	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)	Completed
	2. Create a new evaluations processes to be accessed electronically	Rachel Hubsch and Tom Draper (Program Development)	Carrying over to 2023
	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. Carrying over to 2023

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)	Questionnaire started in 2022. Goes out every other month. Have reviewed with superintendents and Managers. Will continue to review after each questionnaire is complete.
	2. Review survey results each quarter and implement strategies to address staff satisfaction	Darleen Negrillo (Admin)	Superman team have reviewed results. Will review dull year results in Nov and create plan of action for programs in 2022
	3. Conduct once a year open forum discussion for employment levels	Darleen Negrillo (Admin)	HR will be scheduling for December 2022
	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. Carrying over to 2023
	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
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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)	Completed
	3. Conduct a focus group with current senior population including participants who will be seniors within three years	Rachel Hubsch (Program Development)	Carrying over to 2023
	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)	First meeting was in May 2022. 2nd Meeting December 2022. Carrying over to 2023
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 Q4. Carrying over to 2023
	2. Create marketing materials to promote registration nights at residential facilities and NWSRA regional programming sites	Tom Draper (Marketing)	We will pilot this in 2023 with local group homes. Carrying over to 2023
	3. Create marketing videos promoting participant success and/or testimonials in current adult programs	Tom Draper (Marketing)	Completed video content was incorporated into the Gala impact video.
	4. Collaborate with member agencies for joint marketing for adult programs for individuals with disabilities	Tom Draper (Marketing)	In progress will carry over to 2023
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)	Census data has been pulled and we are working to present it in a graphical and streamlined format.
	2. Analyze the data within the report findings to determine outreach, marketing and programming needs	Tom Draper / Andrea Griffin (Outreach)	Data is being analyzed along with NWSRA Year End Statistics to determine outreach for 2023 and assist with marketing and programming needs in identified communities
	3. Develop action steps to address the needs for services within the NWSRA footprint based on the report findings	Tom Draper / Andrea Griffin (Outreach)	With analyzed data, Program Development Committee will focus in 2023 on providing services in identified locations within NWSRA's footprint
	4. Distribute findings and action steps to all stakeholders	Tom Draper (Marketing)	Carrying over to 2023

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)	Completed - 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)	Completed

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)	Completed - All agency IT equipment has been inventoried in detail.
	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. Carrying over to 2023
	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. Carrying over to 2023
	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. Carrying over to 2023
	3. Research 2 new contracted swim instructors for individual swim lessons	Alexis Bell (Support Services)	Contracting Swim Instructors not feasible at this time. Have found part-time employees who are willing and trained to do swimming with a higher rate. These employees active as of July 2022
	4. Research 2 new contracted music instructors for individual lessons in drum, voice, guitar and piano	Alexis Bell (Support Services)	Completed: a drum instructor & piano/voice instructor have been secured. Carrying over to 2023

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)	Completed
	3. Distribute and market updated Core Values to all stakeholders	Tracey Crawford/Tom Draper (Admin)	Completed
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)	Completed
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 over 25 outreach events highlighting the unique design of NWSRA within its 17 Member Park Districts. NWSRA also attended 12 recruitment fairs within colleges, high schools, communities and member park districts.
	2. Implement a Tid Bit Tuesday on Social Media to highlight SRA and Member District partnership	Tom Draper (Marketing)	Content is being created. Will carry over to 2023
	3. Establish relationships with each Member Districts marketing team to create joint marketing materials and provide marketing opportunities for NWSRA	Tom Draper (Marketing)	In progress - NWSRA marketing team has built relationships with a number of member district marketing teams. Staff continues to build relationships and have worked with them to promote NWSRA hiring and programs.
	4. Revamp NWSRA orientation and training materials for Member District staff	Andrea Griffin (Inclusion)	Completed. The ADA website has been updated
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. Carrying over to 2023
	3. Create video content highlighting Recreation Therapy success stories within the agency and NWSRA local, state and national involvement	Tom Draper (Marketing / Therapeutic Recreation)	Completed
	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)	Information about TR was included in our NWSRA Now Newsletter and will continue to be included in each edition. - Completed

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. The Behavior Management Team has gone through Mental Health 1st Aide Training . Talking with Sprout By Design for Special Needs for Sensory Garden and Greenhouse Trainings
	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. Connected with a PHD Student, CTRS with a background in Music Therapy for the Music Room. Carrying over to 2023
	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 sent to staff and is currently being reviewed
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)	Each Supervisor reviewed new job descriptions during each staff's annual evaluation. Review and highlight of Recreation Specialist & Coordinator roles, duties and job descriptions for all program staff to hear and gain an understanding how departments fit together and what skills are needed to move to other departments at the December In-Services
	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 updates in September 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 - FT system training completed in August 2022. Moving Job descriptions and Manuals to system as only source of information completed in September 2022
	2. Evaluate the training needs of staff based on trends in programming, program development, risk management and distinguished accreditation	Darleen Negrillo (Admin)	Safety committee first to review their needs will be complete in 2022. DA needs reviewed and completed as of August 2022. Programming and Program development now being reviewed.
	2. Create a training schedule, materials and resources for all levels of full and part time staff	Darleen Negrillo (Admin / Support Services)	Safety committee started with Safety training in March 2022. Roll-out of specific trainings to team in December 2022
	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)	Will determine as each training is revised and uploaded into PowerDMS. Safety & DA requirements will be complete by December 2022

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)	Move to 2023 due to new Coordinator in position and will be crafting program.
	2. Create a training on becoming a NWSRA Lightning Athletic Coach	Janae Winston (Lightning Athletics)	In Progress. Carrying over to 2023
	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. Carrying over to 2023
	4. Create an incentive program to retain part time staff to increase longevity and attract future hires	Alexis Bell (Support Services)	New Incentive Plan Implemented in May 2022.

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>Presented at the December All Staff Meeting. Program will begin in 2023</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 are continuing with being part of the Mentorship Program into 2023. Committee will look for new Mentors and Mentees throughout 2023.</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 & December Admin meeting</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)	Completed - Qualifications created
	Establish list with Park Districts on available jobs that clients would qualify for	LJ Jevaney / Katrina Wiegand (Collaboratives)	Completed. Working with Buffalo Grove Park District to determine jobs clients would qualify for.
	Survey current clients to gauge interest in vocational services	LJ Jevaney / Katrina Wiegand (Collaboratives)	Survey is being created On Hold.
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. Toured Misacordia's senior day program
	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. Three program layouts have been created
	Survey current NWSRA participants who met the qualifications of PURSUIT Plus for interest	LJ Jevaney / Katrina Wiegand (Collaboratives)	Survey completed and send to families in October

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)	Reports have been reviewed and created for departments that need information. Completed July 2022.
	2. Conduct meetings with each programming department that utilizes transportation to collect data on transportation usage each month	Darleen Negrillo (Operations)	This is tracked in Fleetio and not need as a meeting. Able to pull report on all usage points as of March 2022.
	3. Complete a report on current transportation usage in order to utilize for budgeting and projection of vehicle maintenance and repair	Darleen Negrillo (Operations)	Report created March 2022
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)	Operations Coordinator to schedule for December with all department Managers.
	2. Research how to implement a transportation hub system to reflect a regional approach	Darleen Negrillo (Operations)	Working with Pace to see what they can provide and incorporate into our HUB system.
	3. Analyze transportation survey results to address future transportation needs and collaborative opportunities	Darleen Negrillo (Operations)	Current needs for Vogelei House have been addressed and filled. Upcoming needs are part of Capital Plan. 5 years approved by board additional 5 years completed.