

2023-2028

Strategic Plan

Revision Record

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A department of MPS

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Introduction

Milwaukee Recreation collaborated with Dick Horton Consulting to update the Department’s Strategic Plan.

Stated Goals for the development of the 2023-2028 Strategic Plan:

1. To identify unmet goals, objectives, and initiatives from the 2017-2022 Strategic Plan and include in the 2023-2028 Strategic Plan update
2. To develop new/additional themes, objectives, and initiatives
3. To update the Department’s vision, mission, and values
4. To facilitate a SWOT analysis with staff
5. To develop implementation guidelines that are aligned with the findings that surfaced during the planning process
6. To reframe the Department’s 10-year Master Plan as the highest-level guiding document (listing Department Goals and Objectives). Remove actionable items from the Envision section (of the Master Plan) and frame them as tactics in the 2023-2028 Strategic Plan.
7. To develop a visual “linkage” map to show the interrelationship between all Department plans

Planning Process for the 2023-2028 Strategic Plan:

The planning process was participatory in nature and was conducted between April 4, 2022 and May 5, 2022. Leadership staff, managers, and supervisors were engaged in the process, resulting in a meaningful document for the Department. Table 1 reflects the meetings that were conducted to gather staff input.

Table 1:

Strategic Planning Meeting/Focus	Meeting Date(s)
SWOT Analysis	April 4, 2022
Existing Strategic Plan Initiatives Review	April 5-7, 2022
Mission and Vision Review	April 18-19, 2022
Values Review	April 21, 2022
CAPRA Integration	May 3 and May 5, 2022
Goals, Objectives, Initiatives, & Tactics Review	Oct. 17, Dec. 6, & Dec. 19, 2022; Jan. 12, Jan. 26, & Feb. 13, 2023
Tactics Priority Rankings	Feb. 22, Mar. 7, Mar. 27, Mar. 29, 2023

The Milwaukee Recreation Strategic Plan includes the following areas:



Mission, Vision, and Values

Staff input into the review of the 2023-2028 Strategic Plan’s vision, mission, and values was passionate, informed, and focused on a preferred future that staff feel the residents of Milwaukee want.

Mission

To enrich and strengthen the community through memorable recreational and educational experiences for people of all ages and abilities.

Vision

To be the leading provider of high quality and affordable recreation and community services in Milwaukee.

Values

The following are the core values that drive the work and interactions with the team and customers:



Equity

Ensuring access to recreation services for all.



Accountability

Taking individual and collective responsibility.



Memorable Experiences

Creating special, distinctive recreation experiences.



Professional Staff

Employing staff who possesses the core competencies of the department.



Quality Service Delivery

Exceeding customer expectations through responsive and respectful service delivery.



Sense of Community

Providing services that encourage personal connections and relationships.



Collaborations/Partnerships

Fostering and maintaining partnerships with individuals and organizations that benefit the community.

SWOT Analysis

Staff input generated a self-evaluation of Department strengths, weaknesses, opportunities, and threats.

Strengths

- Strong leadership and staff
- Good reputation in the District & community
- Financial resources
- Knowledgeable & experienced staff
- Pride in what we do
- Accessible programs
- Extensive community programming
- Commitment to equity
- A strong sense of teamwork
- Successful partnerships

Weaknesses

- Innovation opportunity leads to being stretched thin
- The approval process is too complex/slow
- Timing of new staff training for the Before and After School program
- Timing of staff interviews / placement in Dept.
- Decisions are not always data driven
- Lack of workplace flexibility for staff
- Marketing team responsibility but no authority
- Inconsistent message on Dept. platforms
- Inconsistent policy / procedures among divisions
- Aging infrastructure
- Staff retention
- Lack of diversified funding sources

Opportunities

- Generation of outside funding sources
- Renovation / construction of new facilities
- Identify / remove barriers to participation
- Improve staff retention by investing in them in creative ways
- Using technology to get real-time feedback from participants
- To identify and pursue untapped markets
- To expand our branding / promote our story
- To leverage the focus given to us by CAPRA accreditation

Threats

- Potential district reorganization could affect resources and community reach
- Aging infrastructure pushes participants to other providers
- Negative impacts from COVID have affected participation and disposable income
- Dept. growth has affected bandwidth and office space
- Other providers are filling niches that the Dept. used to fill

The SWOT analysis is an important element in the development of strategy. These areas were kept in mind in the development of the Department's strategic initiatives.

Key Findings

The participation of staff in the development of the 2023-2028 Strategic Plan is seen in their knowledge, experience, and passion for the Department's mission, vision, and values. The Strategic planning process relied heavily on staff input and a summary of that input is referred to as key findings.

1. The positive impact of CAPRA accreditation on the Department's operations and management.
2. The challenge of managing numerous Department planning documents, each with its own set of action items that need to be monitored, resourced, and executed.
3. Staff-related issues such as staff retention, the timing of staff training and alignment with program schedules, the timing of staff recruitment, and the actual placement on the job.
4. Department growth which affects operations from a reduced bandwidth and office space perspective.
5. Aging infrastructure.
6. Management processes:
 - a. The decision-making process is complex and slow.
 - b. Inconsistent policies and procedures among teams.
 - c. Inefficient on-site customer feedback (inability to collect real-time data).
 - d. Potential loss of community-wide messaging from the Department due to organizational placement of the Marketing team.
7. Customer barriers to program participation.
8. Fear of losing market share to other providers, private or not-for-profit.
9. Lost opportunities for earned income by not pursuing grants, donations, sponsorships, and advertising partners.

Strategic Plan Hierarchy

The Plan includes a hierarchy of elements that starts with the most macro level of strategy and moves to a more micro level (moving from strategic to tactical).

The starting point for any strategic planning process is the review of the mission, vision, and values. Upon review, the mission, vision, and value statements remained virtually the same.

Subsequent to the development of mission, vision, and value statements, strategic themes, goals, objectives, and initiatives were finetuned and/or developed. Tactics were then fine tuned and/or developed. Each successive element of strategy more specifically details the premise of the four themes.

The Balanced Scorecard hierarchy is presented by the pyramid shown in the following figure.



The Balanced Scorecard / Strategic Themes

The Milwaukee Recreation Strategic Plan is based on the Balanced Scorecard, a strategy framework that emphasizes the cause-and-effect relationships among distinct yet interrelated perspectives: customer, financial, internal business, and personnel learning and growth needs. The Scorecard focuses on the key drivers of success that lead to the achievement of the Department’s mission and vision.

The Department utilized the Balanced Scorecard in the development of the 2017-2022 Strategic Plan; thus, it was utilized in the development of the 2023-2028 Strategic Plan.

STRATEGIC THEMES

- **Customer:** To achieve our mission and vision, how should we appear to our customers?
- **Financial:** To succeed financially, how should we appear to our taxpayers?
- **Internal Business:** To satisfy our customers, which business practices must we do extremely well?
- **Learning and Growth:** To achieve our mission and vision, how will we sustain our ability to change and improve, and develop leaders among the staff?

Descriptions of the strategic theme elements are further defined below:

Customer: Exceeding Customer Expectations (Goal 1)

- Product/service attributes such as price, programs, quality, and availability of services
- Customer relationships
- Service qualities such as access mechanisms, service standards, customer requirements and encounters
- Partnerships

Learning and Growth: Staff Empowerment (Goal 2)

- Human capital (workforce competencies)
- Information capital (organizational knowledge)
- Organization capital (culture, work environment, and leadership)

Financial: Financial Sustainability (Goal 3)

- Revenue growth
- Productivity
- Financial results
- Cost recovery
- Efficiency
- Tax versus non-tax revenue percentages

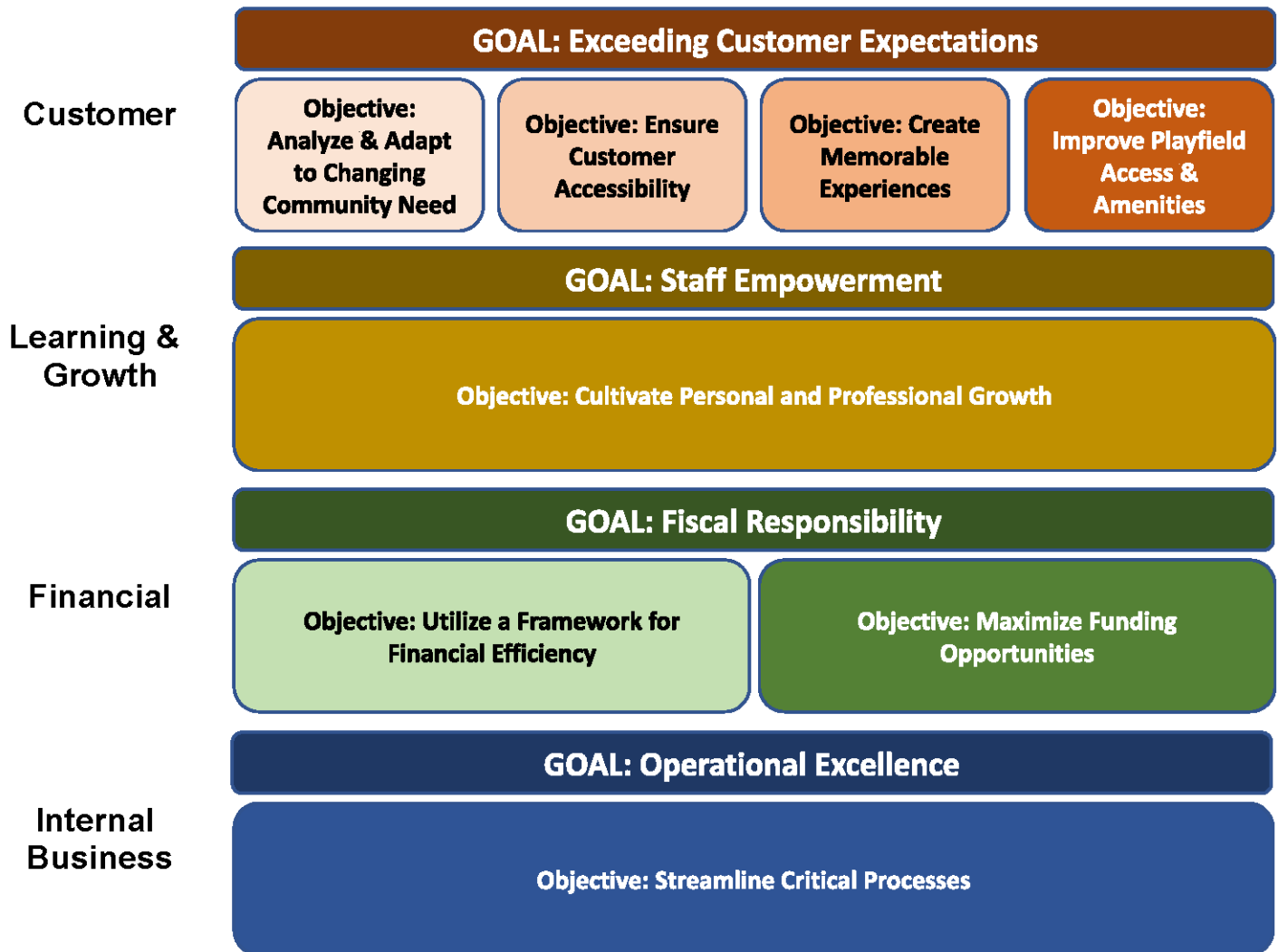
Internal Business: Operational Excellence (Goal 4)

- Operations Management (maintenance practices, program development, and park design)
- Customer management processes (support systems and technology)
- Innovation processes
- Regulatory and social processes (safety and environmental)

Following the review of themes, strategic objectives were reviewed, modified, and/or developed. The objectives are aligned with the themes and demonstrate how the Department will work toward its strategic direction. Objectives are more specific elements of strategy the Department must do well in support of the four themes listed above.

Strategy Map

The following diagram shows the strategic themes, goals, and objectives in a strategy map.



Department Goals and Objectives

The following section lists the objectives in support of the strategic themes (goals). These definitions were created to ensure common understanding of the intended meaning of the objective. The majority of objectives have remained the same from the previous Strategic Plan.

GOAL 1: EXCEEDING CUSTOMER EXPECTATIONS

Objective 1 - Analyze and Adapt to Changing Community Need

The Milwaukee community is constantly changing and requirements for services change as well. It is Milwaukee Recreation's goal to stay ahead of changes and adapt offerings to the various needs of the community. This includes knowing the customer through demographic information, measuring customer satisfaction, continuously asking for customer feedback, and refreshing the community needs assessment survey.

Objective 2 - Ensure Customer Accessibility

Milwaukee Recreation values ensuring access to recreation opportunities and strives to make services as affordable as possible. Strategic initiatives are focused on emphasizing free and low-cost programs including expanding the scholarship program, researching program partnerships in underserved communities, and identifying physical barriers to facility access.

Objective 3 - Create Memorable Experiences

This objective provides guidelines and practices that create lasting impressions in the minds of customers through the creation of distinctive recreation experiences. This, in turn, results in retention of customers. This objective also includes the development of standards for managing first and last impressions, developing a process for ensuring program quality, and continuous improvement to the overall service system.

Objective 4 - Improve Playfield Access & Amenities

Milwaukee Recreation recognizes the importance of having accessible playfields with varying amenities. Strategic initiatives include the continuation of playfield revitalization projects and ongoing assessment of athletic fields and their use.

GOAL 2: STAFF EMPOWERMENT

Objective 5 - Cultivate Personal and Professional Growth

One of the values of Milwaukee Recreation is employing professional staff members who utilize best practice approaches and have awareness of industry trends. As a result, growth and development opportunities are integral toward the achievement of this value. This includes identifying training opportunities, improving core competencies, and identifying future human resource requirements.

GOAL 3: FINANCIAL SUSTAINABILITY

Objective 6 - Utilize a Framework for Financial Efficiency

Financial accountability results when clear policies and controls are in place and helps to ensure excellence in financial decision-making. This also results in the ability of the Milwaukee Recreation to adapt to changing financial positions and sustain operations.

Objective 7 - Maximize Funding Opportunities

Milwaukee Recreation will review methods to maximize non-tax funding opportunities. This includes the development of a system-wide approach to garnering alternative revenue opportunities with a focus on identifying potential funding gaps in budget planning over the next 3 to 5 years.

GOAL 4: OPERATIONAL EXCELLENCE

Objective 8 - Streamline Critical Processes

Effectively managing critical processes is an important element in achieving operational excellence. Critical processes will be identified and documented. Strategic initiatives include improving organizational efficiency and effectiveness, developing methods to recruit and retain quality staff, developing a system to measure organizational performance, and developing parameters for equitable systems and programs.

Strategic Initiatives and Tactics

The following lists Milwaukee Recreation's Strategic Plan goals, objectives, initiatives, and tactics. The objectives under each goal contain a series of initiatives and tactics that provide the specificity of how the objective will be met. The tactics also include any associated CAPRA standards.

THEME: Customer

GOAL 1: Exceeding Customer Expectations

OBJECTIVE 1: Analyze and Adapt to Changing Community Need

Initiative 1: Research & Identify Customer Market Opportunities

Tactic 1: Refresh Needs Assessment in 2023. (CAPRA 2.9, 3.4.2, 10.4)

Initiative 2: Expand Programs Based on Community Interests

Tactic 2: Emphasize and expand youth fitness and swim, adult fitness and aquatic exercise, wellness, STEM, and cooking programs. (CAPRA 6.1, 6.2, 10.1, 10.2, 10.3, 10.4)

Tactic 3: Continue to establish partnerships with agencies to offer programs on topics such as obesity, mental health, and overall fitness. (CAPRA 6.1, 6.2, 10.1, 10.2, 10.3, 10.4, 10.6)

OBJECTIVE 2: Ensure Customer Accessibility

Initiative 3: Emphasize Free and Low-Cost Programs

Tactic 4: Explore the expansion of the scholarship program to include adults. (CAPRA 3.4.2, 3.4.3, 6.3.1, 10.1, 10.3)

Tactic 5: Research program partnerships to better serve underserved communities. (CAPRA 6.3.1)

Tactic 6: Identify physical (building) accessibility issues and develop a priority list of projects to be financed with the 35% 'set-aside' funds generated from seasonal facility permit payments to DFMS.

OBJECTIVE 3: Create Memorable Experiences

Initiative 4: Develop a system-wide service system

Tactic 7: Develop quality assurance training and process to monitor staff adherence to standards. (CAPRA 1.6.1, 10.6.1)

Tactic 8: Review participant/customer codes of conduct for core program areas, fill gaps, and streamline. (CAPRA 6.5, 9.1.1)

Tactic 9: Utilize a system-wide approach to measuring customer satisfaction. (CAPRA 10.1, 10.3)

Tactic 10: Improve program/services to achieve customer satisfaction rating of 4 or above (out of 5). (CAPRA 10.1, 10.3)

Initiative 5: Collaborate with DFMS to Address Facility Concerns

Tactic 11: Work to provide inclusive bathrooms including ADA and gender neutral. (CAPRA 2.10)

OBJECTIVE 4: Improve Playfield Access and Amenities

Initiative 6: Continue Playfield Revitalization Projects

Tactic 12: Conduct detailed athletic field assessments and develop rotational processes to improve conditions, efficiency, and usage.

Tactic 34: Develop a cyclic maintenance plan for renovated playfields.

THEME: Learning & Growth

GOAL 2: Staff Empowerment

OBJECTIVE 5: Cultivate Personal and Professional Growth

Initiative 7: Develop and Overall Approach to Career Growth, PD, and Succession Planning

Tactic 13: Further develop training opportunities for current core competencies. (CAPRA 4.1.10, 4.6.1)

Initiative 8: Provide Opportunities for Mentoring and Coaching

Tactic 14: Develop a part-time orientation program. (CAPRA 4.6, 4.6.1)

THEME: Financial

GOAL 3: Fiscal Responsibility

OBJECTIVE 6: Utilize a Framework for Financial Efficiency

Initiative 9: Establish and Maintain Best Practices

Tactic 15: Develop an equipment and supply inventory system. (CAPRA 2.4, 5.5.2, 7.11, 10.3)

OBJECTIVE 7: Maximize Funding Opportunities

Initiative 10: Identify Potential Funding Gaps in 3 to 5 Year Budget Projections

Tactic 16: Develop a risk assessment of school operations funded programs. (CAPRA 5.1.4, 10.1, 10.3)

THEME: Internal Business

GOAL 4: Operational Excellence

OBJECTIVE 8: Streamline Critical Processes

Initiative 11: Improve Organizational Efficiency and Effectiveness

Tactic 17: Identify the most critical external customer processes in need of improvement. (CAPRA 9.1.1, 9.3)

Tactic 18: Develop trainings for FT Employee Training program content (where needed) and utilize an LMS system for training delivery (where applicable). (CAPRA 2.10, 3.4.2, 3.4.3.2, 4.1.14, 4.6, 4.6.1, 7.7, 7.10, 8.4.1, 8.6.1, 9.1.3, 10.1.2)

Tactic 19: Continue developing the facility permitting process. (CAPRA 10.1, 10.3)

Tactic 20: Utilize a 'Fishbone' diagram to identify major causes of Recreation barriers. (CAPRA 10.1, 10.3)

Tactic 21: Develop systematic forms/workflow process.

Initiative 12: Develop Methods to Recruit and Retain Quality Staff (including PT)

Tactic 22: Identify turnover rates of FT and PT staff (SP18) and develop solutions for high turnover areas/positions. (CAPRA 4.4.1, 10.1, 10.3)

Tactic 23: Update all position descriptions to ensure additional applicability (including PT). (CAPRA 4.3, 10.1, 10.3)

Tactic 24: Add position titles to PeopleSoft.

Initiative 13: Create a System to Measure Org. Performance

Tactic 25: Create an annual report.

Tactic 26: Develop a data dashboard inclusive of the systematic evaluation program (including perf. measures & outcomes assessments), Department plan progress (MP), and overall reaccreditation progress. (CAPRA 1.4.1, 2.4, 2.5, 2.10, 3.4.2, 3.4.3, 6.1, 6.2, 7.2.1, 7.5, 7.5.2, 7.6, 7.7, 7.8, 7.9.1, 7.10, 7.11, 8.5, 10.1, 10.2, 10.3, 10.4)

Tactic 27: Research Risk consultants (Hays?, CVMIC?) and contract to develop risk assessment tool/process and general yearly maintenance. (CAPRA 9.1.1, 10.1)

Tactic 28: Assess systematic evaluation matrix (who's using what, evals occurring, etc.) and transition survey tools to the desired system (staff alignment). (CAPRA 1.6.1, 2.4, 3.4.2, 3.4.3, 4.5, 4.6.1, 5.1.1, 6.1, 6.2, 6.4, 9.1.1, 10.1, 10.2, 10.3, 10.4, 10.5.1, 10.6)

Initiative 14: Develop Parameters for Equitable Systems and Programs

Tactic 29: Review Level of Service analyses (from MP) with programming focus; cross-reference with EPM; use data to update program and service priorities. (CAPRA 2.4, 2.10, 7.2.1, 9.1.1, 10.3.1)

Tactic 30: Design and construct a stand-alone northside community center. (CAPRA 3.4.2, 3.4.3, 7.8, 7.9.1, 10.1, 10.3)

Tactic 31: Translate website into multiple languages. (CAPRA 2.10, 3.4.3)

Tactic 32: Update website with accessibility recommendations from ADA Transition Plan. (CAPRA 2.10, 3.4.3, 10.1, 10.3)

Tactic 33: Identify major deferred maintenance projects. (CAPRA 7.11)

Staff Rankings of Tactics

The following lists the tactics by priority based on staff feedback from the February 22, March 7, March 27, and March 29, 2023 staff feedback sessions. Scoring is based on a rating scale where 1 = Highest Priority. Ratings between 1 and 2.99 are considered Priority 1; ratings between 3 and 4.99 are considered Priority 2; ratings above 5.0 are considered Priority 3. The aim is to complete all tactics within all 3 priorities by the next strategic plan refresh in 2028.

#	Tactic	Avg. Staff Rating	Priority	Initiative	Objective	Goal	CAPRA
22	Identify turnover rates of FT and PT staff (SP18) and develop solutions for high turnover areas / positions (NEW)	1.31	1	12. Develop Methods to Recruit and Retain Quality Staff	8. Streamline Critical Processes	4. Operational Excellence	5.0
14	Develop a part-time orientation program (SP18)	1.58	1	8. Provide Opportunities for Mentoring and Coaching	5. Cultivate Personal & Professional Growth	2. Staff Empowerment	4.0
5	Research program partnerships to better serve underserved communities (NEW)	1.67	1	3. Emphasize Free and Low Cost Programs	2. Ensure Customer Accessibility	1. Exceeding Customer Expectations	6.0
2	Emphasize and expand youth fitness, youth swim, adult fitness, aquatic exercise, wellness, STEM, and cooking programs (MP)	2.17	1	2. Expand Programs Based on Community Interests	1. Analyze and Adapt to Changing Community Need	1. Exceeding Customer Expectations	6.0
3	Continue to establish partnerships with agencies to offer programs on topics such as obesity, mental health, overall fitness (MP)	2.17	1	2. Expand Programs Based on Community Interests	1. Analyze and Adapt to Changing Community Need	1. Exceeding Customer Expectations	6.0
18	Develop trainings for FT Employee Training program content (where needed) and utilize an LMS system for training delivery (where applicable) (NEW)	2.27	1	11. Improve Organization Efficiency and Effectiveness	8. Streamline Critical Processes	4. Operational Excellence	4.0
16	Develop a risk assessment of school operations funded programs	2.29	1	10. Identify Potential Funding Gaps with 3 to 5 year Budget Projections	7. Maximize Funding Opportunities	3. Fiscal Responsibility	5.0
4	Explore the expansion of the scholarship program to include adults (NEW)	2.40	1	3. Emphasize Free and Low Cost Programs	2. Ensure Customer Accessibility	1. Exceeding Customer Expectations	5.0/6.0
30	Design and construct a stand-alone northside community center (MP)	2.50	1	14. Develop Parameters for Equitable Systems and Programs	8. Streamline Critical Processes	4. Operational Excellence	7.0
17	Identify the most critical external customer processes in need of improvement (SP18)	2.60	1	11. Improve Organization Efficiency and Effectiveness	8. Streamline Critical Processes	4. Operational Excellence	3.0
7	Develop quality assurance training and process to monitor staff adherence to standards	2.96	1	4. Develop a System-wide Service System	3. Create Memorable Experiences	1. Exceeding Customer Expectations	4.0/10.0

	(SP18)						
28	Assess systematic evaluation matrix (who's using what, evals occurring, etc.) and transition survey tools to the desired system (staff alignment) (NEW)	3.17	2	14. Create a System to Measure Org. Performance	8. Streamline Critical Processes	4. Operational Excellence	10.0
13	Further develop training opportunities for current core competencies (SP18)	3.19	2	7. Develop an Overall Approach to Career Growth, PD, and Succession Planning	5. Cultivate Personal & Professional Growth	2. Staff Empowerment	4.0
33	Identify major deferred maintenance projects	3.27	2	14. Develop Parameters for Equitable Systems and Programs	8. Streamline Critical Processes	4. Operational Excellence	7.0
21	Develop systematic forms/workflow process	3.46	2	11. Improve Organization Efficiency and Effectiveness	8. Streamline Critical Processes	4. Operational Excellence	
9	Utilize a system wide approach to measuring customer satisfaction (SP18)	3.52	2	4. Develop a System-wide Service System	3. Create Memorable Experiences	1. Exceeding Customer Expectations	3.0
12	Conduct detailed athletic field assessments and develop rotational process to improve conditions, efficiency, and usage (MP)	3.63	2	6. Continue Playfield Revitalization Projects	4. Improve Playfield Access & Amenities	1. Exceeding Customer Expectations	7.0
6	Identify physical (building) accessibility issues and develop a priority list of projects to be financed with the 35% 'set-aside' funds generated from seasonal facility permit payments to DFMS	3.65	2	3. Emphasize Free and Low Cost Programs	2. Ensure Customer Accessibility	1. Exceeding Customer Expectations	7.0
10	Improve program/services to achieve customer satisfaction rating of 4 or above (out of 5) (MP)	3.75	2	4. Develop a System-wide Service System	3. Create Memorable Experiences	1. Exceeding Customer Expectations	10.0
15	Develop equipment and supply inventory system	3.83	2	9. Establish and Maintain Best Practices	6. Utilize a Framework for Financial Efficiency	3. Fiscal Responsibility	5.0/7.0
26	Develop a data dashboard inclusive of the systematic evaluation program (including perf. measures & outcomes assessments), Department plan progress (MP), and overall reaccreditation progress (NEW)	4.04	2	12. Create a System to Measure Org. Performance	8. Streamline Critical Processes	4. Operational Excellence	10.0
11	Work to provide inclusive bathrooms including ADA and gender neutral (MP)	4.13	2	5. Collaborate with DFMS to Address Facility Concerns	3. Create Memorable Experiences	1. Exceeding Customer Expectations	2.0/7.0
31	Translate website into multiple languages (NEW)	4.17	2	13. Develop Parameters for Equitable Systems and Programs	8. Streamline Critical Processes	4. Operational Excellence	3.0
25	Create an annual report (SP18)	4.19	2	12. Create a System to Measure Org. Performance	8. Streamline Critical Processes	4. Operational Excellence	3.0

32	Update website with accessibility recommendations from ADA Transition Plan (MP)	4.27	2	14. Develop Parameters for Equitable Systems and Programs	8. Streamline Critical Processes	4. Operational Excellence	2.0/3.0
19	Continue developing the facility permitting process (MP)	4.67	2	11. Improve Organization Efficiency and Effectiveness	8. Streamline Critical Processes	4. Operational Excellence	7.0
1	Refresh Needs Assessment in 2023 (NEW)	5.17	3	1. Research & Identify Customer Market Opps	1. Analyze & Adapt to Changing Community Need	1. Exceeding Customer Expectations	10.0
8	Review participant / customer codes of conduct for core program areas, fill gaps, and streamline (SP18)	5.50	3	4. Develop a System-wide Service System	3. Create Memorable Experiences	1. Exceeding Customer Expectations	6.0
29	Review Level of Service analyses (from MP) with programming focus; cross-reference with EPM; use data to update program and service priorities (NEW)	6.67	3	14. Develop Parameters for Equitable Systems and Programs	8. Streamline Critical Processes	4. Operational Excellence	2.0/10.0
24	Add position titles to PeopleSoft	6.81	3	12. Develop Methods to Recruit and Retain Quality Staff	8. Streamline Critical Processes	4. Operational Excellence	
20	Utilize a 'Fishbone' diagram to identify major causes of Recreation barriers (SP18)	6.90	3	11. Improve Organization Efficiency and Effectiveness	8. Streamline Critical Processes	4. Operational Excellence	
27	Research Risk consultants (Hays?, CVMIC?) and contract to develop risk assessment tool/process and general yearly maintenance (NEW)	6.96	3	13. Create a System to Measure Org. Performance	8. Streamline Critical Processes	4. Operational Excellence	9.0
23	Update all position descriptions to ensure additional applicability (including PT) (MP)	7.17	3	12. Develop Methods to Recruit and Retain Quality Staff	8. Streamline Critical Processes	4. Operational Excellence	4.0

Staff/committee work on general tactics involves developing necessary details and steps to complete each initiative. General deliverables are established early on in the process and may change during the committee work as the initiative and tactic focus is refined.

Implementation Guidelines

The following is a listing of suggestions for successful implementation of the 2023-2028 Strategic Plan. It represents the commitment and discipline required to integrate the process into daily operations.

- The Strategic Plan becomes the guidepost for the Department. When decisions or responses to the community are needed, the Plan becomes the reference point for decision making and whether or not new issues or responses to the community are of higher importance than what's been established as the existing direction.
- New ideas/needs identified throughout the year are tracked by the Coordinator of Program Compliance and, pending admin team discussion, may be added during the next scheduled Strategic Plan review.
- Strategic Plan information is included as part of the new employee orientation program.
- The Strategic Plan is accessible to Department staff. Progress on the completion of plan initiatives and tactics will be visible on the Department's dashboard.
- The Coordinator of Program Compliance is responsible for being the project manager or "champion" of the Plan's implementation to ensure success. This individual is responsible for monitoring the Plan's progress and works with staff to effectively integrate the Plan with operations.
- Initiatives and tactics are executed based on agreed upon priority rankings via staff input.
- Each initiative/tactic generally requires a cross-functional team of employees to work on completing tactics and is headed by the Coordinator of Program Compliance or designee who is responsible for the tactic's completion.
- Cross-functional teams report tactic progress to the Coordinator of Program Compliance on a predetermined basis.
- Regular reporting of the Plan's progress occurs during bi-weekly Department admin and quarterly all-staff meetings.
- Update major stakeholders on the Plan's implementation and results on an annual basis.
- Complete an annual just-in-time review of the next year's Initiatives/Tactics to determine if priorities have changed. This can be included at an annual retreat in which successive years' initiatives are discussed as part of the annual budget process. Initiatives should tie into the budget process.
- Team staff meetings regularly include discussion of strategy. This will help to emphasize the Plan's importance and the Department's commitment to execution.
- The Strategic Plan is reviewed annually for progress/completion and relevance of initiatives and tactics.

Definitions

The following list of key words describes the definition of the terminology used for the Strategic Plan. They are listed according to how they fall within the hierarchy of strategy, from the most macro to the most micro elements.

Mission – describes the business of the organization. The mission also defines the core purpose of the organization and why it exists.

Vision – desired future of the organization. The vision should be a “stretch” for the organization but possible to achieve in approximately 5 years. It should state a measurable achievement.

Values – describes the way the Department operates. Values are meaningful expressions of describing what is important in the way we treat our employees and guests and relates to the internal culture of the organization.

Balanced Scorecard – the 4 perspectives include Customer, Financial, Internal Business, & Learning & Growth. The perspectives demonstrate cause and effect relationships in the completion of strategy. All of the Strategic Themes, Goals, Objectives, and Initiatives are aligned with these perspectives.

Strategic Themes – broad brushed, macro-oriented organizational sense of direction that relates to the 4 Balanced Scorecard perspectives.

Strategic Goals – slightly more focused statements within each Strategic Theme that are supported by objectives, initiatives, and tactics.

Strategic Objectives – concise statements describing the specific elements an organization must do well in order to execute its strategy.

Strategic Initiatives – the specific programs, activities, projects, or actions an organization will undertake in an effort to meet performance targets. The Strategic Initiatives are detailed with specific tactics or work activities needed to complete the initiative.

Tactics – subordinate to the initiatives and detail the steps necessary to complete an initiative.