

**Berkeley Park District Strategic Plan Development**  
**December 2023 – January 2024**



**Facilitated by Ray Ochrowicz**  
**Executive Decisions Consulting**

# Berkeley Park District Strategic Plan

## Summary

In December 2023 the Board of Commissioners of the Berkeley Park District engaged Executive Decisions Consulting to facilitate the development of a strategic plan. The desired outcome was to create a mission statement, primary longstanding goals for each major function area (Administration and Finance, Recreation, Parks and Maintenance), and specific measurable objectives for year one implementation.

Undoubtedly, the greatest obstacles facing the park district are the lack of funding and the lack of staff. These two ingredients drive all else. Nevertheless, program growth and success can occur, but will be dependent on collaboration, partnerships, and volunteers.

The objectives stated under each goal of this plan are reasonable and achievable with the current staffing count. As they are implemented, they should lead to increased community support and buy-in while expanding services and improving maintenance.

Increased programming using, among other strategies, contracted instructors should increase net programming revenue. Additionally, volunteer instructors, businesses and service clubs can help expand the program menu at little cost and help improve the bottom line.

Volunteerism is essential in the early stages. Today, park district staffing is limited to one, permanent part time person working as administrator, programming staff, and maintenance person. Other part-time staff (working a minimal number of hours), help with marketing and accounting. What they can accomplish is extremely limited. Without staff and financial support, it is difficult to maintain safe and clean parks and facilities while adding programs.

The demands of the job require knowledge and expertise in administration, finance, maintenance, programming, marketing, and communications to operate a district within the legalities of the Illinois Park District Code. It is therefore recommended that a qualified full-time director be hired at a fair wage, as administrator of the district. Further, that an accurate job description be developed with an emphasis on building collaboration, utilization of volunteers, and enhancing revenue.

The role of the elected board member is generally a policy making one; one that is not involved in the everyday operation of the district. In small communities, however, elected representatives are expected to serve in volunteer capacities that keeps the agency viable. These roles often include opening, closing and supervising buildings, park clean up, mowing, janitorial services, marketing, communications and program instruction. As time goes on, the intent would be to move more of this type of activity towards paid staff or other volunteers so the Board can focus on big picture concerns like policies, budget, and planning.

Development of the Strategic Plan is one of those concerns. In this instance, the park district planned three community engagement meetings. Two meetings were targeted towards residents, and one was targeted towards community leaders. During these meetings attendees were asked a series of questions:

## MISSION STATEMENT DEVELOPMENT

*What is the purpose of the Berkeley Park District?*

*Why does it exist?*

## VALUES

*What are the standards of behavior under which we should operate?*

*What will be our guiding principles?*

## BROAD BASED OVERARCHING GOALS

*What is the chief function or purpose of each of the main business departments of the district?*

*Administration & Finance*

*Recreation*

*Parks and Maintenance*

Subsequently a SWOT (Strengths, Weaknesses, Opportunities, and Threats) assessment was conducted.

The final step in the community engagement process had attendees select which statements and issues were most important or impactful.

The collective information was tabulated, summarized, analyzed and formulated into the draft mission statement, values and overarching goals. The final step is to establish several measurable objectives to achieve each goal. Severable objectives were recommended, but the final determination must be made by the Park Board who should know best what is realistic and achievable within one year.

## OBJECTIVES

*What is to be done?*

*Who is to do it?*

*When is it to be done by?*

# DRAFT

## MISSION STATEMENT DEVELOPMENT

To provide opportunities for enjoyment & self-development of residents and visitors in safe well-maintained parks and facilities.

## VALUES

- Customer Service & Satisfaction
- Diversity / Equity / Inclusion
- Accountability
- Collaboration
- Togetherness / Community
- Transparency
- Integrity

## DEPARTMENTAL & 2024 OBJECTIVES

### **Administration & Finance**

#### Goals:

- To provide strategic direction, leadership, and financial management within the policies of the Board of Commissioners.

#### Objectives (*What is to be done? Who is to do it? When will it be done by?*):

1. Seek alternate sources of revenue and apply for funding from a minimum of two sources.
2. Competitively bid for the highest return on park district investments (bonds, depository, etc.)
3. Secure additional labor (via grants, partnerships, collaborations, volunteers, etc.) to achieve park district objectives to increase programming and improve maintenance.
4. Develop a capital asset replacement plan.

### **Recreation**

#### Goal:

- To offer a variety of affordable recreational programs and special events for all ages and interests.
- Uphold high standards of quality and service.

#### Objectives (*What is to be done? Who is to do it? When will it be done by?*):

1. Pursue an agreement to use school facilities by \_\_\_\_\_(date)
2. Increase recreation programming opportunities by:
  - a. Expand programming by adding three new programs per season using independent contractors (12/year)
  - b. Adding at least one outdoor recreation program per season (4/year)
  - c. Adding one new program per quarter utilizing the business community as a programming partner (4/year)
  - d. three
3. Pursue joint programming agreements with three other community organizations for specific activities community wide activities by \_\_\_\_\_(date)
4. Initiate a volunteer program to assist with program development and supervision.
5. Develop a measurable marketing and communications plan with emphasis on social media and bilingual implementation by \_\_\_\_\_(date)

### **Parks & Maintenance**

#### Goals:

- To maintain safe clean parks and facilities for community enjoyment.
- To remove and replace worn or unsafe equipment as soon as possible.
- To improve park and facility appearances and conditions as resources allow.

#### *Objectives (What is to be done? Who is to do it? When will it be done by?):*

1. Conduct monthly safety inspections of all parks and facilities, recording all deficiencies.
2. Make repairs or take out of service as soon as possible.
3. Seek a formal written agreement for maintenance collaboration with other local governments.
4. Recruit volunteers to assist with light duty maintenance and clean up.
5. Recruit volunteers to plant, weed and water flower beds and shrubs and to improve the overall beautification of the parks and facilities.



# Berkeley Park District

## Strategic Plan 2024

### MISSION STATEMENT

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## Goals

### Administration & Finance

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### Recreation

- Offer a variety of affordable recreational programs and special events for all ages and interests.
- Uphold high standards of quality and service.

### Parks & Maintenance

- Maintain safe clean parks and facilities for community enjoyment.
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## STRATEGIC PLANNING INITIATIVE - ADMINISTRATIVE FINANCE

The Board will provide strategic direction, leadership, and financial management that assures accountability and transparency.

Objectives	Quarter to be Complete	Priority	Comments
The park district will assure transparency in finances by posting its annual budget and other financial documents on its web site.	A	High	For ease of access the website may need to be modified.
The park district will draft a Revenue Policy that will focus on how program fees and charges are set.	B	High	There are many elements that go into setting fees. Fees should reflect the capacity of the community, while still recognizing the need for surplus revenues.
The park district should consider the creation of a capital improvement plan that works hand in hand with projected taxes, program revenues, and expenses.	C	Moderate	Though operational costs are consistent, costs for improvements are not. They should be planned out with an eye to cash flows.
The park district should create a line item budget with the back up detail included to demonstrate how those amounts are determined.	A or D	High	This is consistent with how most park districts present their respective budgets. With a grant to administer, this projects major deviations.
The Park District Board should immediately require the creation of monthly comparison reports showing revenues and expenses for each line item.	A	High	For the Board to make financial decisions and to monitor operations, it needs to see this type of report.
The park district should hire a clerk/board recording secretary to maintain park district records.	A	High	Following the document disposal, records may be the best they have been in years. It takes constant attention to keep them in order.

### SOURCE DOCUMENTS:

Strategic Planning -  
 Grant Administration - Internal Controls Policies  
 Government Efficiency Report - Admin. Specialist Assessment (Sept 23)  
 Consulting Directors Assessment (Sept '23)

Qtr A - January-March  
 Qtr B - April-June  
 Qtr C - July-Sept  
 Qtr D - Oct-Dec



## STRATEGIC PLANNING INITIATIVE - RECREATION DEPARTMENT

The Park District Board will seek ways to provide a wide variety of quality programs, special events and services to the community with consideration to building community and togetherness.

Objectives	Quarter to be Complete	Priority	Comments
The park district will continue its efforts to gather input from residents through the use of satisfaction surveys at programs and events.	A, B, C, D	Moderate	Satisfaction surveys should be sought during each season of a program or following each special event.
Staff will present an annual Recreation Department Report to the Board on programs offered and held as well as their revenues. It will also recommend new programs.	B or D	Moderate	This is basic self analysis. If you combine your experiences with information from surveys, you have a better idea on where to go.
Staff will seek to collaborate on at least two, new community wide special events	B or C	High	Communitywide with a focus on bringing the community together.
Staff will seek to initiate two, new special events for families.	A,B, C, D	Moderate	
The strategic planning initiative brought forth the need to consider variety, ages, wide ranges of interests, partnerships and collaboration in program mix.	A,B, C, D	Moderate	Obviously, this not written as a goal. It should be a consideration whenever the new planning cycle begins for programs.
A comprehensive Marketing Plan should be developed that considers brochure schedule and social media considerations.	B or C	High	Though a marketing consultant is being considered, an annual brochure calendar should be developed to better support programming.
Staff will approach the School District to secure facilities that could be used for programs and events.	B or C	Moderate	
Staff will approach neighboring park district to explore collaborating on programs or events.	B or C	Moderate	

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## STRATEGIC PLANNING INITIATIVE - PARKS

The Park District Board will assure safe parks and facilities for the enjoyment of the community.

Objectives	Quarter to be Complete	Priority	Comments
Contractors will be hired to provide regular maintenance of parks and facilities and staff will regularly inspect their performances as well as park/amenity safety.	A, B, C, D	High	In a system where we don't have the resources to do the work, we must inspect to assure performance and to assure visitor safety and favorable experience.
Contractor will be hired to completely a quarterly, deep cleaning of the Lind Park facility	A, B, C, D	Moderate	Though surface cleaning is done by staff, a regular deep cleaning of the facility is recommended.
Staff/Consultants should develop a capital replacement plan for equipment, facility amenities, park amenities and so on. Updated on an annual basis as part of budget	C	High	This should be done as a preliminary, information gathering piece of the budget.
Staff/Board will work collaboratively with the Village and the IDNR in the successful completion of the Bikeway Grant and the ballfield relocation.	A, B, C	High	The Village is a valued partner in this effort and will help to assure successful completion of both projects.
Staff will work with Legat Architects to complete the Lind Building assessment and will present a comprehensive plan for improvements.	B	Moderate	Legat will present improvement options by priority along with the projected costs.
The Park District Staff and Board will continue to seek opportunities and implement solutions to improve and beautify Berkeley parks and facilities.	A, B, C, D	Moderate	IDNR and private grants, collaboration with the Village and Library, volunteer groups, are all opportunities that should be sought out.

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## GOVERNMENT EFFICIENCY REPORT

The Park District will strive to complete the following objectives to fulfill the recommendations of the Decennial Committee.

Objectives	Quarter to be Completed	Priority	Comments
The Park District will hire a firm to complete an American with Disabilities Transition Plan to review access to parks, facilities, and programs.	B	High	The Transition Plan is a requirement of the Federal Government and must be completed every ten (10) years or risk substantial legal consequences.
The Park District Board of Commissioners will establish new rental policies to balance providing resident access while recognizing staff and financial limitations.	B	Moderate	This may require adding staff specifically for weekend coverage. Providing this coverage will impact costs so fees should be reviewed as well.
The Board will adopt a financial/business practices manual.	C	Moderate	The Treasurer or Board Member should not feel the need to write this from scratch. Materials for this document could be obtained from other agencies.
With the mandated initiation of the "paid time off" policy by the state, the Park District should take this opportunity to draft an appropriate Employee Handbook.	C	Moderate	This would include policies on right to know, evaluations, discrimination, disciplinary action, filing a complaint and other related personnel issues.
In order to update the community on park district initiatives, the Board should consider writing an annual report. Or writing quarterly updates in the brochure.	B,C,D	Moderate	Staff may need to provide input to the Board President to complete this/these report(s).
The Board will create a method of drafting annual long range and short term goals and objectives and will review them on a quarterly basis.	A	Moderate	
The Board should consider updating existing inter-governmental agreements with the Memorial Park District on non-resident fees.	C	High	Agreement exists but is several decades old. should be updated
The Board should consider updating existing inter-governmental agreements with the Memorial Park District on services to individuals with disabilities.	C	High	Agreement exists but is several decades old and should be updated. This certainly come up in the ADA Transition Plan.

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## ADMINISTRATIVE REVIEW

These are items identified by Gov HR staff during its reviews of practices and procedures. These objectives reflect the challenges of operating a governmental agency with limited financial and staff resources.

Objectives	Quarter to be Complete	Responsibility	Comments
Accounting practices will be modified to provide the Board with monthly, comparison reports of revenue and expenses by line item.	B	Treasurer	Monthly reports of revenue and expenses is expected within any governmental organization. Steps must be taken to protect the assets of the community.
With the recent attempt by the county to mandate a "paid time off" policy it is recommended that we draft an appropriate Employee Handbook.	C	Attorney/Staff iParks Support	This would include policies on right to know, evaluations, discrimination, disciplinary action, filing a complaint and other related personnel issues.
Complete the State of Illinois Document Disposal process. Follow that up with establishing sound "record keeping" practices for agency records.	B,C	Staff	Application for disposal of records will be submitted in Quarter 1. Disposal should be initiated as soon as approval is received from the State of Illinois.
Opportunities for securing support for functions such as program registration, building maintenance, accounting, marketing and any other support that could help	A,B,C,D	Staff Board	Its all in deciding the service level we wish to maintain along with our financial resources. We cannot sustain without program revenue.
Now that the Board Secretary is assigned, hire a recording secretary to take minutes and maintain agency records.	A,B,C,D	Board	

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