



PROPOSAL

Waukesha, WI Department of Parks, Recreation & Forestry Strategic Plan

BerryDunn

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Proposal Due Date:

August 7, 2023

August 7, 2023

Rebecca Pederson Communications and Engagement Manager
City of Waukesha
201 Delafield St.
Waukesha, WI 53188

Sent via email to: rpederson@waukesha-wi.gov

Dear Rebecca Pederson and Selection Committee:

We appreciate the opportunity to serve the City of Waukesha (the City) by providing strategic planning services for the Department of Parks, Recreation, and Forestry (the Department). We understand that the City has recently updated its strategic plan and the Department would like to update its strategic plan to be in alignment with the City's.

BerryDunn is a leading consulting firm founded in 1974 with a specialized Parks, Recreation, Libraries Practice led by parks and recreation experts and former practitioners, who use their backgrounds to provide grounded and actionable recommendations to clients like the Department. In selecting BerryDunn for this effort, you can rely on our team to provide the following key benefits:



The City will benefit from our consultants' experience working in the public-sector—we understand your challenges and priorities because we've held similar positions.

Each of our proposed team leaders has decades of experience working in local government park and recreation agencies. We leverage these experiences to provide best practices and coaching related to developing high-performance teams, delivering remarkable customer experiences, maximizing cost recovery, establishing innovation hubs, and more.



We bring a national reach and local touch.

BerryDunn's team members have worked all over the country to help agencies assess their operational and organizational environments and set plans to develop in a healthy way. This perspective can help our team provide recommendations to the Department that are based in nationwide practices. Concurrently, we believe that organizational development work is only as strong as on-the-ground involvement and knowledge. Our holistic perspective will be complemented by an approach designed to solicit feedback from internal stakeholders and staff involved in providing services.



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1. About BerryDunn

Helping clients strengthen operations, innovate, and enhance services that benefit their communities.

BerryDunn provides management consulting, planning, and organizational development services to clients around the country. Since BerryDunn's founding as a certified public accounting firm in 1974, we have grown and adapted with our clients in response to a changing world. Our dedicated team of public-sector consultants use proven methodologies and best practices designed to help clients meet today's demands while planning for tomorrow's opportunities.

Our **Parks, Recreation, and Libraries Practice** builds upon our firm's strong foundation and decades of success in the public sector to assist municipal parks, recreation, and library agencies across the country with master and strategic planning projects, community engagement, operational and organizational assessments, staffing and culture assessments, change management, business planning, financial analysis and cost recovery, feasibility studies, and service quality assessments.

We offer our clients deep industry expertise built upon decades of experience working in and with agencies similar to the Department. Our team leverages this experience to help departments push the limits of what they think is possible and achieve their management and planning goals. We pride ourselves on applying our understanding of the field to our analyses beyond what "looks good on paper." Our academic and practical backgrounds in parks, recreation, and libraries are a cornerstone from which we approach all projects.

The primary strength of our assembled team is our combined experience in providing on-the-ground services and managing agency operations, as well as assisting parks and recreation agencies in Wisconsin and nationally on similar initiatives. We will leverage this work to develop strategic recommendations for how the Department can set measurable goals for a bright future.

2. Proposed Project Team

Our proposed project team members bring valuable perspectives from their experiences working in parks and recreation agencies, as well as supporting agencies through strategic planning, cost recovery, and master planning projects. On the following pages, we have provided snapshots of their backgrounds and qualifications to facilitate the Department's Strategic Plan.

BerryDunn at a Glance

Name: Berry, Dunn, McNeil & Parker, LLC (dba BerryDunn)

Primary Contact:

Dannielle Wilson
Project Manager
dwilson@berrydunn.com

Parks, Recreation Libraries Services:

- ▲ Strategic planning
- ▲ Master planning
- ▲ Community engagement
- ▲ Needs assessments
- ▲ Leadership development
- ▲ Executive coaching
- ▲ Organizational change management
- ▲ Organizational assessments
- ▲ Business process improvement
- ▲ Performance measurement



Dannielle (Dannie) Wilson, Prosci® CCP
Project Manager

Home base: Oswego, Illinois

As the **project manager**, Dannie will serve as the Department's primary point of contact. She will monitor project progress, track the initiation and completion of tasks and milestones, and manage the strategic planning process.

Dannie is a manager in BerryDunn's Parks, Recreation, Libraries Practice. She has spent more than 18 years in positions of progressive responsibility for parks and recreation agencies or as a consultant to these agencies. Dannie served as superintendent of recreation for the West Chicago Park District. She currently focuses on providing consulting for master planning, strategic planning, and recreation program assessments. Dannie is a strategic thinker who encourages the utilization of technology and data to progress the field of parks and recreation.

Highlighted Experience

Iowa City, IA – Recreation Facilities and Programs Comprehensive Master Plan

Washington Township Recreation Department, OH –Strategic and Business Development Plan

Western DuPage Special Recreation Association, IL – Strategic Plan

Wilmette Park District, IL - Strategic and Master Plans

Education and Credentials

MS, Recreation Administration, Indiana University

BS, Recreation and Leisure Studies, Winona State University

Prosci® Certified Change Practitioner (CCP)

Affiliations

National Recreation and Park Association

NRPA Revenue Development and Management School

Illinois Park and Recreation Association

Oswegoland Park District Commissioner



Elsa Fischer, CPRP

Subject Matter Expert

Home base: Evanston, Illinois

As the **subject matter expert**, Elsa will assist with engagement and development of strategic recommendations.

Elsa is a manager in BerryDunn's Parks, Recreation, Libraries Practice. She brings more than 30 years of experience in parks and recreation, a majority of which in senior leadership roles. Her comprehensive experience in recreation programming, facility management, fiscal management, collaboration, and capital project involvement infuses itself into all aspects of her consulting project work.

Highlighted Experience

Loudoun County, VA – Parks, Recreation, and Community Services Department Strategic Plan

Washington Township Recreation Department, OH – Strategic and Business Development Plan

Pottstown Area Regional Recreation Committee, PA – Five-Year Strategic Plan

Wheeling Park District, IL – Parks and Recreation Comprehensive Plan

Wilmette Park District, IL – Strategic and Master Plans

Education and Credentials

MS, Recreation Administration, Aurora University

BS, Leisure Studies, University of Illinois

Certified Parks and Recreation Professional (CPRP)

Affiliations

IPRA Professional Development School

NRPA Rocky Mountain Revenue Management School

3. Proposal of Approach

We are proposing a four-phase work plan, illustrated in Figure 1, to develop the Department's Strategic Plan. Our goal is to build upon institutional knowledge in a way that continues to foster growth and innovation and operationalizes the Strategic Plan. The intent is to make this a meaningful exercise for the Department leadership and staff by defining key participatory points and consistent opportunities for giving feedback on developing recommendations.

Figure 1: Work Plan Overview



Proposed Tasks

Below and on the following pages, we provide details of our work plan previously outlined in Figure 1.

Phase 1 Discovery

1.1 Lead an initial planning call with Department leadership. Preceding a larger, team-wide kickoff, we will meet with Department leadership via teleconference to make introductions; confirm the kickoff meeting date; and review the preliminary engagement outline and schedule, project goals, timeline, and expectations.

1.2 Conduct a thorough data review. One key element of the strategic planning process will be to gain a deeper knowledge of the Department's leadership and staff. This knowledge will be crucial in enabling a collaborative relationship with the Department, and in working to create robust strategic initiatives. We will review current and historical data, including the existing Parks, Recreation, and Forestry Strategic Plan 2018 – 2022.

1.3 Facilitate a virtual kickoff meeting. We will conduct a virtual kickoff meeting with Department leadership and staff to identify project milestones and expectations. We will introduce our team, discuss our proposed project schedule, work plan, and roles and responsibilities, clarify project goals and objectives, identify known project constraints, previous initiatives, and refine the schedule or tasks as appropriate. Furthermore, we will discuss our approach for managing communications between BerryDunn and the Department.

1.4 Develop the Project Work Plan and Schedule. Based on the information gathered from our initial project planning call and kickoff meeting, we will develop the Project Work Plan and Schedule. This will

Phase 1 Discovery

outline the tasks, timelines, and expected involvement from Department staff. We will provide draft versions to the project manager to finalize the Project Work Plan and Schedule.

Deliverable 1 – Project Work Plan and Schedule

Phase 2 Engagement

2.1 Develop and administer a part-time and seasonal staff survey. We will develop and administer a web survey to gather input from part-time and seasonal staff. As part of this survey, we will test the current mission and the vision. Department employees' perspectives are extremely important, and our approach intentionally involves staff throughout the entire process, as they will have responsibility for implementing the Strategic Plan.

Deliverable 2 – Part-time and Seasonal Staff Survey (Survey Monkey)

2.2 Lead internal engagement activities. BerryDunn will conduct the following internal stakeholder engagement meetings:

- One with the Leadership Team to review vision, goals, operations, and other relevant topics.
- Six staff focus groups to conduct a strengths, weaknesses, opportunities, and threats (SWOT) analysis with key staff in recreation (2), administration, grounds, buildings, and forestry.
- Two focus groups with external stakeholders to obtain feedback regarding the Department.

2.3 Develop an Engagement Feedback Summary and review with Department leadership. We will synthesize information gathered from leadership engagement, the staff survey, six staff meetings, and two focus groups and document our findings in an Engagement Feedback Summary, which will inform our subsequent analysis and visioning activities. After the Strategic Planning Team reviews engagement feedback, we will update and finalize the Engagement Feedback Summary.

Deliverable 3 – Engagement Feedback Summary

Phase 3 Strategic Planning Framework

3.1 Conduct a Strategic Planning Workshop. BerryDunn will host an in-person strategy framework workshop with Department leadership and staff. During this workshop, we will discuss:

- Connection to previous strategic planning initiatives
- Key influencers of strategy:
 - Changes in business practices, such as the use of technology
 - Changes stemming from the COVID-19 pandemic and related funding shortfalls
 - Current cost recovery philosophies and practices
 - Changes in customer preferences and markets

- Community demographics
- Attention to diversity, equity, and inclusion (DEI)
- Industry trends and the culture elements needed to support continuous change
- Mission and vision validation

3.2 Lead a strategy development workshop. BerryDunn will lead a virtual strategy development workshop with the Department staff. In this workshop, participants will develop strategic goals, objectives, and initiatives and discuss key performance indicators. We recommend holding this session within three to four weeks after the strategy framework workshop, so the topics are still fresh.

Our team utilizes best practices from the Malcolm Bridge National Quality Award Criteria for Performance Evaluation, as well as the Balanced Scorecard approach, which is a leading framework for strategy development. The Balanced Scorecard approach includes a review of relationships among customer, financial, internal business processes, and organizational learning and growth. This results in a thorough review of organizational direction. In addition, a dashboard of metrics will be developed as a way of measuring strategic performance. The elements included in strategy discussion are outlined below:

Balanced Scorecard Approach
Customer Perspective
Product/service attributes (programs, quality, accessibility, availability)
Relationships (customer loyalty)
Program offerings
Service quality
Brand and image
Financial Perspective
Productivity, growth, financial results
Earned revenue
Efficiency
Internal Perspective
Operations Management (maintenance practices, program development)
Customer Management processes (support systems and use of technology)
Innovation processes
Regulatory and Social processes (safety, environmental)
Learning and Growth Perspective
Human capital (skill sets and competencies)
Information capital (management of organizational knowledge)
Organization capital

If a different strategy framework is desired, we will adapt our process to one that best suits the Department's needs.

3.3 Finalize the strategic themes, objectives, initiatives, and action plan. Following the workshops, BerryDunn will assist with finalizing the mission and vision, strategic themes, objectives, and initiatives that will allow the Department to continue adding value to the community. A tailored action plan for short-term initiatives will be demonstrated and the mid- and long-term initiatives will be outlined. The action plan will include key performance indicators aligned with a clear timeline for implementation.

Deliverable 4 – Strategic Themes, Objectives and Initiatives, and Corresponding Action Plan

Phase 4 Draft and Final Report

4.1 Develop Draft Strategic Plan. BerryDunn will develop a Draft Strategic Plan documenting the project's process, findings, recommendations, and resulting action items. The finalized strategic goals, objectives, action plan, key performance indicators, and implementation guidelines will be outlined within the report contents. We will provide the Draft Strategic Plan to Department leadership and provide an opportunity to make edits and comments.

Deliverable 5 – Draft Strategic Plan

4.2 Final Strategic Plan. We will incorporate suggested changes and produce the Final Strategic Plan. This will serve as the Department's roadmap for the next five years. The final report will be in a formatted Word document.

Deliverable 6 – Final Strategic Plan

4. Proposed Schedule

In Table 1 below, we outline our proposed timeline for the Department's requested work effort. We anticipate that the final schedule will be developed during the initial planning call.

Table 1: Proposed Project Schedule

	Sep	Oct	Nov	Dec	Jan	Feb
Phase 1						
Phase 2						
Phase 3						
Phase 4						

5. Proposed Fees

In Table 2, we detail our itemized costs for completing the Department's requested scope of work. Our fees are firm and fixed, which includes all expenses.

Table 2: BerryDunn's Proposed Fees

Phase		Cost
1	Discovery	\$3,530
2	Engagement	\$8,790
3	Strategic Planning Framework	\$7,007
4	Draft and Final Plan	\$5,590
Total		\$24,917

We developed our costs based on the following factors:

- Our detailed work plan narrative presented in our proposal
- Our staffing plan and resource allocation, which provides the Department with the appropriate number of resources and the ideal level of expertise to complete the tasks
- Our experience conducting projects of similar scope and size
- Our in-depth knowledge of the parks and recreation industry

6. References

Below and on the following page, we provide reference information for clients who can speak to the quality of BerryDunn's work, as well as our commitment to maintaining clear, consistent, positive communication throughout projects and keeping project timelines and budgets on track.

Western DuPage Special Recreation Association (WDSRA) | Strategic Plan

Dan Leahy

danl@wdsra.com | 630-681-0962

BerryDunn is currently working with the Western DuPage Special Recreation Association on a Strategic Plan. This plan offers a balance of internal and external engagement, interactive visioning and action-planned development, well-defined implementation strategies, and connectivity to the heart of life in WDSRA's member districts of Bloomingdale, Carol Stream, Glen Ellyn, Naperville, Roselle, Warrenville, West Chicago, Wheaton, and Winfield. The project consists of a blend of virtual and in-person engagement, a survey of key partners, a mission and vision workshop, and development of a new mission and vision. Once completed, this plan will provide direction for WDSRA to continue providing community-based social and recreational programs for area residents with special needs.



Wilmette Park District, IL | Comprehensive and Strategic Plan

Steve Wilson, Executive Director

swilson@wilpark.org | 847-256-9617

BerryDunn is currently working with the Wilmette Park District on a Comprehensive and Strategic Plan. At the time of this plan, the District had seen a shift in usage due to the COVID-19 pandemic as more people sought parks and facilities as a respite. The Strategic Plan will offer the District a clear path forward. It includes robust community and stakeholder engagement, an assessment of the District's leadership infrastructure, and strategies for sustainable operations into the future. The project includes internal and community engagement, an organizational assessment, a mission and visioning workshop, and creation of an action plan.



Channahon Park District, IL | Golf Course Strategic Plan

Mike Leonard, Executive Director

mleonard@channahonpark.org | 815-521-3119

Dannie Wilson helped the Channahon Park District Team create their "P.A.R." plan, or the Partners in Active Reinvention of Golf: A strategic planning initiative for Heritage Bluffs Public Golf Club. The strategic planning process supported the thoughtful review of the District's existing golf course program, operation, and food and beverage service. In an era of golf decline, CPD staff wanted to explore the possible reinvention of its golf identity with innovative, data-driven ideas that would shift golf into a thriving recreational opportunity. The intended outcome of the project was the desire for a golf course strategic plan that would provide direction for Heritage Bluffs Public Golf Club's immediate future.



Wheeling Park District, IL | Parks and Recreation Comprehensive Plan

Jan Buchs, Executive Director

jbuchs@wheelingparkdistrict.com | 847-465-2935



BerryDunn is currently completing a Parks and Recreation Comprehensive Plan for the Wheeling Park District. The District and its operations had been impacted by COVID-19, and our team is developing strategies to navigate a post-COVID reality. For this plan, our team created a detailed strategy to engage all facets of the District's diverse community, offering multiple virtual and in-person points of engagement in a variety of ways. Our planning process used the NRPA's Diversity, Equity, and Inclusion (DEI) model as part of our planning process. Our team is building on results from inventory and engagement to create recommendations that will drive the District forward.