

2023-24 Annual Work Plan and Quarterly Reports
 Key Initiatives – Major policy initiatives to be implemented by the district during the fiscal year

| #1 Work with Project/Construction Management Company on Bond Projects | | | |
|---|----------|---|--|
| Lead Staff: All | | Other Divisions Involved: All | |
| Projected Milestones | On Track | Status and Comments | |
| Select Project/Constr. Management Company by Ad Hoc Committee | Yes | Q1: Selection of the Cumming Management Group took place this quarter. The Advisory Board approved the agreement that is now onto the Board of Supervisors,10/24. | |
| Work with Project/Constr. Management Company on agreement. | | | |
| Have Advisory Board review and vote to approve agreement | | | |
| Confirm all projects that were on the Bond Project list for Series I funding and agree on scope of work, along with the initial soft costs. | | | |

| #2 Staff Re-organization Plan | | | |
|---|----------|---|--|
| Lead Staff: All | | Other Divisions Involved: | |
| Projected Milestones | On Track | Status and Comments | |
| Implement Recreation and Administration Divisions staffing needs | Yes | Q1: First meeting took place with Admin and Rec Managers in September. The Benefit Committee also met in September. Both will be moving forward with additional meetings to put plans together. | |
| Staff Benefit Committee to explore different options for attracting and retaining employees | | | |
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| #3 Recruitment of new District Administrator | | | |
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| Lead Staff: Mike Blondino | | Other Divisions Involved: | |
| Projected Milestones | On Track | Status and Comments | |
| Appoint a sub-committee to work on details of the recruitment | Yes | Q1: Ad Hoc committee appointed made up of Chair Carroll and Director Levine working with DA for recruitment. Verbiage for the job announcement was completed after Chair Carroll and Director Levine met with the 3 managers for input. | |
| Review and select a search firm that fits our needs | | | |
| Start recruitment in early 2024 | | | |
| Have new District Administrator in place working on July 1 st . | | | |

| #4 | Research and Select New Registration Software System | | |
|----|---|---|--|
| | Lead Staff: Ingrid and Alaina | Other Divisions Involved: Administration and Recreation | |
| | Projected Milestones | On Track | Status and Comments |
| | Create focus group with staff who perform different functions/jobs in the registration system | Yes | Q1: Research scheduled to start end of November. |
| | Research registration software systems and select three to present their product to the focus group | | |
| | Received feedback from focus group and management team | | |
| | Select new registration software system, build, train, and implement. | | |

Q1: July – September Report: October
 Q2: October-December Report: January

Q3: January – March Report: April
 Q4: April – June Report: July

Projects and Operations

PARKS

| #1 | Productive Parks software | | |
|----|--|---------------------------|--|
| | Lead Staff: James Perry | Other Divisions Involved: | |
| | Projected Milestones | On Track | Status and Comments |
| | Set up demo with District Administrator and staff. | No | Q1: Need to make time to review software with the District Administrator before the end of December then, hopefully, purchase and begin populating software with District items/amenities. |
| | Purchase software/create CRPD assets w/rep assistance. | | |
| | Train staff and fully implement | | |

| #2 | Non-Bond Projects | | |
|----|---|--|---|
| | Lead Staff: James Perry | Other Divisions Involved: Administration | |
| | Projected Milestones | On Track | Status and Comments |
| | Garfield Lower Walkway | YES | Q1: After advertising and inviting contractors, the job walk was conducted on June 30 th , bids were received July 7 th and a contractor was selected after review. The contract was signed August 1 st and contracted work began on August 21 st . Contracted work on the walkway wrapped up on September 13 th . Staff then moved in material to restore area around new pathway and finished the project on September 28 th . Project: COMPLETE |
| | Build Contract Documents and advertise project. | | |
| | Select contractor and complete contract. | | |
| | Construction of lower walkway | | |
| | Final Detail Area to complete project | | |
| | Tennis Court Lighting | NO | Q1: With the Cummings group on now we anticipate working with them to get this project back on track for possible Spring 2024 completion. |
| | Locate lighting engineer and get specs for replacement. | | |
| | Use specs for bids. | | |
| | Select contractor for project. | | |
| | Del Campo/Glancey Oaks Booster Pump replacement | NO | Q1: Same as above, will be working with Cummings group to get this project back on track with a hopeful completion in Spring 2024. |
| | Procure booster pumps and install them at both sites. | | |

ADMINISTRATIVE SERVICES

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| #1 | Audit FY2022-23 | |
| | Lead Staff: Ingrid Penney | Other Divisions Involved: Administration |
| | Projected Milestones | On Track |
| | Schedule and Engagement | Yes |
| | Cull Records, Prepare Schedules & Complete Questionnaire | |
| | Fieldwork, Pull Samples, Confirmations | |
| | Draft Audit Report Review and MD &A | |
| | Advisory Board Presentation, Final Audit Report | |
| | | Status and Comments |
| | | Q1: Scheduled field work to start 10/16. Engagement Letter signed by DA and AB Chair. Culled Records, started schedules and Trial Balance and Split Ledgers downloads for all Fund Accounts. |

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| #2 | PPE Program and Assessment - CCR 3380 | |
| | Lead Staff: Ingrid Penney | Other Divisions Involved: ALL |
| | Projected Milestones | On Track |
| | Hazard Assessment Checklist of Work Environment | Yes |
| | Identify Personal Protective Equipment Requirements | |
| | Compliance | |
| | Communication | |
| | Training & Instruction | |
| | | Status and Comments |
| | | Q1: PSM Perry and RSM Lofthus scheduled to attend a CAPRI Workshop on topic 10/11 & 10/12. |

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| #3 | State Cal Card Program | |
| | Lead Staff: Ingrid Penney | Other Divisions Involved: ALL |
| | Projected Milestones | On Track |
| | Investigate authority and feasibility | No |
| | If feasible, apply to the program | |
| | Develop policies and procedures for AB Approval | |
| | Training and Implementation of the program. | |
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| | | Status and Comments |
| | | Q1: Nothing to Report. |

| #4 | Recruit and Select a Finance Supervisor/Analyst | | |
|----|--|--|--|
| | Lead Staff: Ingrid Penney | Other Divisions Involved: Administration | |
| | Projected Milestones | On Track | Status and Comments |
| | Following re-org of the Division, pursue filling position: | No | Q1: Still in process on re-org recommendation. |
| | Develop Job Description | | |
| | Recruit | | |
| | Interview, Select, Post-offer screening | | |
| | Logistics - work area, tools, and software licenses | | |
| | Onboarding and Training | | |

RECREATION

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|-----------|---|-----------------|---|
| #1 | Revise Facility Rental Policy and Update Rental Fees | | |
| | Lead Staff: Alaina | | Other Divisions Involved: |
| | Projected Milestones | On Track | Status and Comments |
| | Staff input on facility rental policy and update fee Create and implement Special Event Application Have revised Facility Rental Policy and Fee Schedule reviewed by subcommittee and approved by the Advisory Board. | Yes | Q1: Staff input on Facility Rental Policy and Fees is completed. Pending Budget committee review. On track for November Advisory Board meeting. |

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| #2 | Develop Recreation Division | | |
| | Lead Staff: Alaina | | Other Divisions Involved: |
| | Projected Milestones | On Track | Status and Comments |
| | Continue to train new Recreation Supervisors and Coordinators Review and update job descriptions Work with Customer Service Representatives on Standard Operating Procedures, training and enhancing services. Work with the team to set priorities and goals | Yes | Q1: Recruiting a new Recreation Coordinator for youth development programs. Provided training in Excel to Customer Service Representative. Developing budgetary goals with Supervisors. |

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| #3 | Create and Grow Sponsorships for Events and Programs | | |
| | Lead Staff: Alaina | | Other Divisions Involved: |
| | Projected Milestones | On Track | Status and Comments |
| | Develop and implement Annual Sponsorships and new individual event sponsorship packets. Explore advertising options in Johnson Gymnasium Explore program sponsorships (i.e. pickleball). | Yes | Q1: Annual Sponsorship and individual event sponsorship packet for 2024 complete. Confirmed two new annual sponsors. |