

| General | | |
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| #1 | Recreation Software (CivicRec) Implementation | |
| | Lead Staff: Alaina | Other Divisions Involved: Administrative |
| | Projected Milestones | Status and Comments |
| | 1) Begin processing all new facility rentals in CivicRec. | Q1: Facility rental reservations started on CivicRec as planned on 8/1/25. Staff continue to learn and adjust the system as needed. Two additional staff members have been trained on registration and rental intake to help with customer service representative/office coverage. |
| | 2) Monitor system for errors and address issues. | |
| | 3) Train recreation and administrative staff in system. | |
| | 4) Process all agreement -related invoices through system. | Q2: CivicRec meetings and trainings have occurred with staff as we work toward the implementation of entering accounts and the ability to collect payments for leases, contracts, agreements, and sponsorships with the new software system. |
| | 5) Implement payment tracking and overdue reminders. | |
| | 6) Create customer feedback survey for rentals, programs, and classes and configure the system to automatically send surveys after rental/program/class. | |
| | | Q3: |
| | Q4: | |

| General | | |
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| #2 | Complete Foundation Funded Improvements | |
| | Lead Staff: Alaina & James | |
| | Other Divisions Involved: Stacey | |
| | Projected Milestones | |
| | Status and Comments | |
| | 1) Receive updated quotes for audio and video improvements for the John Smith Hall and Clubhouse | Q1: New portable PA system has been purchased as well as new community garden signage. Researching new audio and video companies as previous company is no longer a viable option for improvement projects. |
| | 2) Contract with selected company for audio and video installation | |
| | 3) Purchase new portable PA system | Q2: New portable PA system was used at the Tree Lighting event and worked great. No progress on the on the audio/video improvement project. Foundation has reaffirmed funding for replacing two existing drinking fountains after not receiving a grant. The fountains are located at LSCC Kids Hang Out and the CP Clubhouse. We will look to order the df, supporting installation materials and install them by Summer 2026. |
| | 4) Purchase and install new drinking fountains for CP Clubhouse and LSCC KHO | |
| | | Q3: |
| | Q4: | |

| General | |
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| #3 | Measure G Bond Projects Series 2023 and 2025 |
| | Lead Staff: All |
| | Other Divisions Involved: All |
| | Projected Milestones |
| | Status and Comments |
| | <p>1) Work with Landscape Architects, consultants and contractors for projects at Carmichael Park, La Sierra, Glancy Oaks, Jan Park, O'Donnell Park and Cardinal Oaks</p> |
| <p>2) Complete plans, bidding, contracts, and then construction of projects at all sites</p> | <p>Q2: Projects at Carmichael Park, Glancy Oaks and La Sierra continued throughout this quarter. Glancy Oaks and HVAC/Roofing at La Sierra are nearing completion and will have ribbon cuttings in January. Cardinal Oaks is out of permitting at the end of Q2 and will have an RFP going out in January. Portions of Carmichael Park and the field at La Sierra are complete but there are still portions of the project that will continue throughout Q3.</p> |
| <p>3) Promote all projects to the community and hold Grand Openings</p> | <p>Q3:</p> |
| | <p>Q4:</p> |

| Parks | | |
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| #1 | John Smith Hall | |
| | Lead Staff: James Perry | Other Divisions Involved: |
| | Projected Milestones | Status and Comments |
| | 1) Update quotes for door and concrete work | Q1: While this project/improvement is still desired, the District's general fund balances may not support it at this time. Discussion may be had to instead use Bond interest funds to complete this improvement. |
| | 2) Select contractors for said work | |
| | 3) Replace concrete approach and install new ADA doors. | |
| | | Q2: No discussions have been had to this point. Project is still desired to be completed. |
| | | Q3: |
| | Q4: | |

| Parks | | |
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| #2 | O'Donnell/Patriots Parks Basketball Court Resurfacing/Striping | |
| | Lead Staff: James Perry | |
| | Other Divisions Involved: | |
| | Projected Milestones | |
| | Status and Comments | |
| | 1) Procure quotes from contractors | Q1: With the available project funds within the O'Donnell/Heritage Park Improvement Bond project we have included this aspect into the overall O'Donnell project to be completed in Spring/Early Summer 2026. |
| | 2) Select contractors | |
| 3) Schedule/complete the Project | | |
| | Q2: O'Donnell restriping is built in to the series 2025 bond project. As for Patriots, we'll likely do the same thing and add this to the series II bond project for Patriots Park renovation. | |
| | Q3: | |
| | Q4: | |

| Recreation | | |
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| #1 | Assess the fit, function, and effectiveness of the Customer Service Representative positions. | |
| | Lead Staff: Alaina and Matt | Other Divisions Involved: |
| | Projected Milestones | Status and Comments |
| | 1) Assess the Fit - Whether the role matches district needs and aligns with the district's mission, culture and customer expectations. (Ex: Do the CSR job duties reflect what the community needs from front-line staff? Is staffing level appropriate?) | Q1: The HR Section Manager, Recreation Services Manager, and CSR have met over the past two months to assess the fit, function, and effectiveness of the Customer Service Representative position. Two additional meetings are scheduled, and a management survey is being developed to gather broader feedback to inform next steps and potential recommendations. |
| | 2) Assess the Function - How well are the positions' responsibilities and processes carried out day-to-day. (ex: Are CSRs equipped with the right tools and workflows to process rentals, registrations, and customer inquiries efficiently?) | Q2: The HR Section Manager, Recreation Services Manager, and CSR had an additional meeting. One of the CSR has been on leave however, so additional input is scheduled for Q3 of 2026. |
| | 3) Assess the Effectiveness - The impact and outcomes of the position (Ex: Are CSRs resolving customer issues, meeting service standards, and contributing to overall customer satisfaction?) | Q3: |
| | 4) Create a new Customer Service Representatives Standard Operating Procedure Manual | |
| | 5) Evaluate new Standard Operating Procedures and make necessary adjustments. | Q4: |
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| Recreation | | |
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| #3 | Increase class and/or program offerings | |
| | Lead Staff: Alaina | Other Divisions Involved: |
| | Projected Milestones | Status and Comments |
| | 1) Identify gaps in existing offerings and set goals in offering categories. | Q1: Staff are working with several companies and independent contractors on classes, camps, and sport programs planned for late winter/early spring. |
| | 2) Identify and recruit qualified instructors and/or companies. | |
| | 3) Evaluate current facility schedules for open time slots and necessary equipment. | Q2: Staff are working with instructional contractors for Spring and Summer camps and classes. |
| | 4) Pilot new class types to gauge community interest. Integrate seasonal and trend based offerings | |
| | 5) Launch targeted marketing campaign to promote new classes. | Q3: |
| | 6) Evaluate class performance. Retain successful classes and phase out low-interest ones. | |
| | | Q4: |
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2025-26 Annual Work Plan and Quarterly Reports

Key Initiatives – Major policy initiatives to be implemented by the district during the fiscal year

| Finance | | |
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| #1 | Annual Budget FY 2026-2027 | |
| | Lead Staff: Matt | Other Divisions Involved: All |
| | Projected Milestones | Status and Comments |
| | 1) Create a more streamlined budget spreadsheet | Q1: No movement on this goal to date. FSM left in October 2025. |
| | 2) Research and evaluate accounting software | |
| | 3) Review FY 2025-2026 Budget | |
| | 4 Prep & AB Retreat - Feb 2026 | Q2: Worked on updating and streamlining the existing budget spreadsheet. Preparing for end of first six-months and presentation of mid-year budget to Management and the Board. |
| | 5) Mid-Year Budget - Feb 2026 | |
| | 6) Meet with Management Team to review YE projections, create proposals for FY 26-27 | |
| | 7) Meet with AB Budget Committee - March | Q3: |
| | 8) Present recommended Budget to full AB - March | |
| | 9) Submit Budget to Analyst in OCE | |
| | 10) Board of Supervisors Budget Approval - June | |
| | | Q4: |

| Finance | | |
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| #2 | Tenant Updates | |
| | Lead Staff: Matt & Ty | Other Divisions Involved: Stacey, Alaina |
| | Projected Milestones | Status and Comments |
| | 1) Update the San Juan USD agreement | Q1: No updates in Q1. |
| | 2) Evaluate all existing lease agreements | |
| | 3) Review Utility costs for CRPD & Tenants | |
| | | Q2: Reviewed all tenants. Adjusted rents for 2026 as per existing contracts. Two needed updated contracts: Chautauqua (to be discussed in Jan 2026) & Common Kettle (farmers' market host). |
| | Q3: | |
| | Q4: | |

| Finance | | |
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| #3 | Audit for FY 2024-2025 | |
| | Lead Staff: Matt | |
| | Other Divisions Involved: Stacey, Ty | |
| | Projected Milestones | |
| | Status and Comments | |
| | 1) Schedule & Train on Audit Procedures | Q1: FSM left in October 2025. Audit has had slow progress into Q2, mostly spearheaded by Ty and Matt. Questionnaires were started in September 2025. |
| | 2) Review outstanding Audit issues | |
| | 3) Prepare records, complete questionnaire | |
| | 4) Pull samples, fieldwork with auditor | Q2: Significant work on the audit. Records, files, and most fieldwork is complete. Some outstanding issues will roll into Q3 as information needs to be gathered, or reports need to be created. Audit is still on track to complete in Q3 of the fiscal year. |
| | 5) Draft Audit report, prepare MD&A | |
| 6) Present to AB, Submit to Sac County DOF | | |
| | Q3: | |
| | Q4: | |

| Human Resources | | |
|-----------------|--|---|
| #1 | Finance Section Manager | |
| | Lead Staff: Matt | Other Divisions Involved: Stacey |
| | Projected Milestones | Status and Comments |
| | 1) Onboard the new FSM | Q1: FSM was onboarded successfully, registered for all accounts, and had functioning electronics. Unfortunately, the candidate was not a successful fit for the position once working in it and left in early October 2025. |
| | 2) Ensure all electronics are prepared and ready | |
| | 3) Train in COMPASS, sign off from County | |
| | 4) Set up as Unit Program Coordinator for P-Card | Q2: The Administrative Division was re-evaluated with the departure of the FSM. After research and coordination with the County, the Board approved a restructure of the division with the HRSM moving to Administrative Services Manager, the Finance Tech moving to Administrative Analyst, and the goal of hiring a new Finance Technician in Q3 of 2026. |
| | 5) Register for all sites, bank accounts, etc | |
| | | Q3: |
| | | Q4: |

| Human Resources | | |
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| #2 | Update and Implement an Annual Review System | |
| | Lead Staff: Matt | Other Divisions Involved: All Managers |
| | Projected Milestones | Status and Comments |
| | 1) Determine review groups: Managers, Seasonal, etc | Q1: Tested using Bamboo to create and track reviews with the Summer Seasonal staff. It was well received by staff and supervisors. More work will need to go into stronger questions for FT and leadership staff, as well as establishing if reviews can go to multiple levels. |
| | 2) Create reviews, possibly using Bamboo's system | |
| | 3) Create a policy for reviews, how many levels up? | |
| | 4) Implement new system throughout the District. | |
| | | Q2: No progress was made in this quarter. With the departure of the FSM, labor was instead focused on contracts and other financial duties. |
| | | Q3: |
| | | Q4: |
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| Human Resources | | |
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| #3 | Staff Development | |
| | Lead Staff: Matt | |
| | Other Divisions Involved: Fun Brigade | |
| | Projected Milestones | |
| | Status and Comments | |
| | 1) Restart regular Social Committee (Fun Brigade) meeting | Q1: Held a meeting, (10/1/25) and had a fun trivia lunch that was partnered with trainings and Open Enrollment information. |
| | 2) Look at possible on or offsite gatherings | |
| | 3) Staff Recognition - Wall of Fame | |
| | 4) Team explorations of Measure G projects: ex, learn to play pickleball on the new Carmichael Park courts | Q2: The Clubhouse Lobby was cleaned and most of the awards and recognitions of the District were posted up on the walls. CRPD took home Six awards from the Chamber of Commerce "Best of Carmichael" which were celebrated at both the Thanksgiving Stuffing Competition and CRPD Annual Holiday Party. |
| | | Q3: |
| | Q4: | |

| Human Resources | | |
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| #4 | Personnel Training and Incentives | |
| | Lead Staff: Matt | Other Divisions Involved: Stacey |
| | Projected Milestones | Status and Comments |
| | 1) Complete Personnel Policy & rollout to staff | Q1: Personnel Policy was approved by the Advisory Board in August 2025 and rolled out to all staff. In early September an online suggestion box was created on the website, as well as cleaning up the Contact Us sections. There have been a few external suggestions sent in. |
| | 2) Review employee incentives (District discounts? General discounts as a Parks employee?) | |
| | 3) Create a "suggestion box" program | Q2: Open Enrollment was completed and staff was signed up appropriately. For those with HSA accounts the amount for 2026 was set at 75% and the employees were appropriately notified of the benefit. The "box" continues to receive community input. |
| | 4) Create a Quarterly Training Calendar | |
| | 5) Stay on top of Benefits Projections. | |
| | | Q3: |
| | | Q4: |