

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	<p><b>Q1:</b> 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.</p> <p><b>Q2:</b> Staff has provided existing site plans/topos/surveys which if not already digitized, will be; Sample RFQ/Ps; Contractor List. Also, Staff and the Cumming Group are working through the bond project list for Series I to confirm current costs. We should have those figures in January and as of our last meeting they looked on target. We met with County Staff in Q2 and except for labor compliance, we will not be running projects over \$1 million by them, which will save us money that had been set aside for that. This could expand the projects we can undertake.</p> <p><b>Q3:</b> Staff continues to work with the Cumming Group on finalizing projects for the Series 2023 bond, qualifying the budget and schedule. The Advisory Board decided to move the Pickleball courts to Series 2023 and push Del Campo field project back to Series II. RFQ/RFPs solicited for Site Surveys and Landscape Architects.</p>
	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	<p><b>Q1:</b> 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.</p> <p><b>Q2:</b> Additional meetings took place in Q2, and the initial plans were presented to the Advisory Board, which were supportive of them. The Recreation Division re-org is set. Any changes will be made after a year of seeing the impact of growing rentals. In the Admin Division we worked on the concepts for division of functions/duties and implementation schedule; plan to bring it to the Board in January.</p> <p><b>Q3:</b> The Advisory Board approved the re-organization plan for the Admin Division at the January meeting. The Managers are meeting with Ty, who is facilitating the Benefit Committee, to work on a list of items that the committee would like to see implemented, including how to stabilize medical benefits.</p>
	Staff Benefit Committee to explore different options for attracting and retaining employees		

#3 Recruitment of new District Administrator			
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	<p><b>Q1:</b> 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.</p> <p><b>Q2:</b> Current DA will extend his contract and stay on until Dec 30, 2024. The recruitment timeline was revised with the hiring of a recruitment firm happening in the spring and recruitment in the summer/fall of 2024.</p> <p><b>Q3:</b> Some tweaks to the schedule as the current DA retirement date is now Dec 6, 2024. The timeline has been moved up a month for the recruitment to start.</p>	
Review and select a search firm that fits our needs			
Start recruitment in June 2024			
Have new District Administrator in place working on Nov 4 <sup>th</sup> .			

#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	<p><b>Q1:</b> Research scheduled to start end of November.</p> <p><b>Q2:</b> Performed system requirement analysis, researched market for vendors, shared needs information and scheduled demos with eight registration software companies for January.</p> <p><b>Q3:</b> I. Penney and A. Lofthus attended registration system demos from seven companies and narrowed selection to top three. Scheduled follow-up demos for April with the top three companies for more staff to participate and provide input.</p>	
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.	Yes	<p><b>Q1:</b> Need to make time to review software with the District Administrator before the end of December then, hopefully, purchase and begin migrating data of district inventory.</p> <p><b>Q2:</b> Several meetings have taken place and we have purchased the Productive Parks software, started system overview, and migration of data. Staff have started getting familiar with the site and its functions. This is going to take some time to get fully up and running but we all believe is going to be a great tool for the maintenance staff and resource for all divisions of the district.</p> <p><b>Q3:</b> While there is still data to input on the system, maintenance staff are utilizing this software daily and becoming more familiar with it. Extracting data is my next area to learn.</p>
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
<b>Garfield Lower Walkway</b>	Yes	<p><b>Q1:</b> After advertising and inviting contractors, the job walk was conducted on June 30<sup>th</sup>, bids were received July 7<sup>th</sup> and a contractor was selected after review. The contract was signed August 1<sup>st</sup> and contracted work began on August 21<sup>st</sup>. Contracted work on the walkway wrapped up on September 13<sup>th</sup>. Staff then moved in material to restore area around new pathway and finished the project on September 28<sup>th</sup>. Project: COMPLETE</p>
Build Contract Documents and advertise project.		
Select contractor and complete contract.		
Construction of lower walkway		
Final Detail Area to complete project		
<b>Tennis Court Lighting</b>	Yes	<p><b>Q1:</b> With the Cummings group on now we anticipate working with them to get this project back on track for possible Spring 2024 completion.</p> <p><b>Q2:</b> We now have the Cumming Group working with us on finding contractors and getting estimates for upgrading the lighting. We should have more to report in Q3.</p> <p><b>Q3:</b> Whittington Electric has been selected to do the work and we are currently working on getting a vendor number so we can pay them. We will finalize a contract PO in Q4 and should wrap up by the end of this fiscal year.</p>
Locate lighting engineer and get specs for replacement.		
Use specs for bids.		
Select contractor for project.		

Del Campo/Glancy Oaks Booster Pump replacement	Yes	<p><b>Q1:</b> Same as above, will be working with Cummings group to get this project back on track with a hopeful completion in Spring 2024.</p> <p><b>Q2:</b> Same as above with the tennis court lights.</p> <p><b>Q3:</b> Contractor has been selected for both sites and will be bringing these to the Board in Q4 for discussion and authorization to proceed. Unknown project completion date at this time. Will provide more details in Q4.</p>

**ADMINISTRATIVE SERVICES**

<b>#1 Audit FY2022-23</b>		
Lead Staff: Ingrid Penney		Other Divisions Involved: Administration
Projected Milestones	On Track	Status and Comments
Schedule and Engagement	Yes	<p><b>Q1:</b> 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.</p> <p><b>Q2:</b> Field work, review and testing. Bond review new and more involved. Fixed Assets review completion remains. Draft Report in February for review and preparation of the MD&amp;A in the Q3.</p> <p><b>Q3:</b> Draft Report reviewed/MD&amp;A completed. Presentation scheduled w/AB on 4/18/24.</p>
Cull Records, Prepare Schedules & Complete Questionnaire		
Fieldwork, Pull Samples, Confirmations		
Draft Audit Report Review and MD &A		
Advisory Board Presentation, Final Audit Report		

<b>#2 PPE Program and Assessment - CCR 3380</b>		
Lead Staff: Ingrid Penney		Other Divisions Involved: ALL
Projected Milestones	On Track	Status and Comments
Hazard Assessment Checklist of Work Environment	Yes	<p><b>Q1:</b> PSM Perry and RSM Lofthus scheduled to attend a CAPRI Workshop on topic 10/11 &amp; 10/12.</p> <p><b>Q2:</b> No additional work performed during the quarter. Work to continue in the Q4.</p> <p><b>Q3:</b> Nothing new to report.</p>
Identify Personal Protective Equipment Requirements		
Compliance		
Communication		
Training & Instruction		

<b>#3 State Cal Card Program</b>		
Lead Staff: Ingrid Penney		Other Divisions Involved: ALL
Projected Milestones	On Track	Status and Comments
Investigate authority and feasibility	No	<p><b>Q1:</b> Nothing to Report.</p> <p><b>Q2:</b> Nothing to Report.</p> <p><b>Q3:</b> Nothing to Report.</p>
If feasible, apply to the program		
Develop policies and procedures for AB Approval		
Training and Implementation of the program.		

#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:	Yes	<p><b>Q1:</b> Still in process on re-org recommendation.</p> <p><b>Q2:</b> Re-organization affecting hiring priorities and schedule change developed for presentation to AB in January. Division job titles and descriptions updated, submitted to County Personnel Management for review and input.</p> <p><b>Q3:</b> Re-organization plan implementation. Recruitment for the first of several positions started. Interviews scheduled in April for the HR Technician.</p>
	Develop Job Description		
	Recruit		
	Interview, Select, Post-offer screening		
	Logistics - work area, tools, and software licenses		
	Onboarding and Training		

**RECREATION**

<b>#1</b>	<b>Revise Facility Rental Policy and Update Rental Fees</b>		
	Lead Staff: Alaina	Other Divisions Involved:	
	<b>Projected Milestones</b>	<b>On Track</b>	<b>Status and Comments</b>
	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.	Complete	<b>Q1:</b> Staff input on Facility Rental Policy and Fees is completed. Pending Budget committee review. On track for November Advisory Board meeting. <b>Q2:</b> Approved by Advisory Board in November. All ongoing renters and regular user groups were met with and notified of changes. All documents and fees were changed over on last workday of December (12/29/23) to be effective January 1, 2024. <b>Q3:</b> Completed and continue implementation
<b>#2</b>	<b>Develop Recreation Division</b>		
	Lead Staff: Alaina	Other Divisions Involved:	
	<b>Projected Milestones</b>	<b>On Track</b>	<b>Status and Comments</b>
	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	<b>Q1:</b> Recruiting a new Recreation Coordinator for youth development programs. Provided training in Excel to Customer Service Representative. Developing budgetary goals with Supervisors. <b>Q2:</b> Hired and training new Recreation Coordinator for youth development. Recruited marketing and special event volunteer to help the district while a staff member is out on maternity leave. <b>Q3:</b> Continue to train staff on new roles as the recreation division navigates team members on leave. The recreation team works collaboratively on setting priorities to ensure continuity of services to our community.
<b>#3</b>	<b>Create and Grow Sponsorships for Events and Programs</b>		
	Lead Staff: Alaina	Other Divisions Involved:	
	<b>Projected Milestones</b>	<b>On Track</b>	<b>Status and Comments</b>
	Develop and implement Annual Sponsorships and new individual event sponsorship packets. Explore advertising options in Johnson Gymnasium Explore program sponsorships (i.e. pickleball).	Yes	<b>Q1:</b> Annual Sponsorship and individual event sponsorship packet for 2024 complete. Confirmed two new annual sponsors. <b>Q2:</b> Worked with Chamber Vice-President on potential partnership matches within their membership for sponsorships. <b>Q3:</b> Continue outreach for more annual sponsors for 2024 event season. Fulfill marketing requirements for committed annual sponsorships.