

**OLD BROOKLYN
COMMUNITY DEVELOPMENT
CORPORATION**

**2009-2012
STRATEGIC PLAN**

July 28th, 2009

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Strategic Planning Process

The process ran from December, 2008 to May, 2009 and the groups included:

Steering Group: A group that met between major steps in the planning process to keep the planning on track

Key Result Area Teams: Six teams anchored by Planning Committee board and staff members that also engaged non-Planning Committee members to do planning work between Planning Committee meetings. Teams worked with formats to define: current state and strengths/weaknesses, issues and then recommended 2009-2012 Key Results, 2009-2012 Strategies, and 2009-10 Priority Work and the investment needed to implement the plans ... facilitated by the KRA Team Leaders coached and guided in terms of process by the consultant.

Planning Committee: A larger, organizationally representative group facilitated by the consultant that built consensus on assessment, direction and approach through a series of major planning meetings.

The setting of the Key Results and Strategies in this Plan was preceded and informed by a comprehensive strategic assessment that is available in a separate Strategic Assessment Report.

Major Components of the Strategic Plan

The Strategic Plan is expressed through the following major components:

- Mission: A statement, brief enough to know by heart, of the purpose for which the CDC exists.
- Functions: A list of the major focal points of work for the CDC
- Performance Scorecard: A short list of the major Key Results the CDC is trying to achieve in three years.
- Key Result Areas: The six major areas where the CDC will focus its strategic energies.
- Key Results: The most important outcomes in each Key Result Area that the CDC is committed to achieving by 2012.
- Strategic Work: The major approaches and methods within each Key Result Area designed to address issues and opportunities over the next three years and achieve the Key Results.
- First Year Priorities: The actions and initiatives that will be implemented first.
- Costs & Revenues of Initiatives in KRA's: An estimation of major “do differently” costs and revenues of new strategies and initiatives.
- Keys to Implementation: What the CDC needs to do to ensure staying on the Plan in a focused, accountable manner.

Our Mission

**To develop and revitalize the community
by uniting and empowering residents, business leaders and government
around plans and initiatives that achieve social, economic and civic improvement**

Our Major Functions

- *Community Building:* Ensure active and effective communication with service area residents, businesses and institutions regarding plans and actions of OBCDC and its partners.
- *Retention and Preservation:* Work to preserve and maintain the historical characteristics of the neighborhoods of Old Brooklyn and Brooklyn Centre.
- *Economic Development:* Function as the business resource center for Wards 15 and 16, recruiting businesses, listing available space, and working with existing businesses to retain and improve the area's economic base.
- *Revitalization:* Actively manage the available real estate stock in the service area to include redevelopment of critical properties, restoration, renovation, and leasing of properties

Our Key Result Areas

Key Result Area 1: Residential Services

Key Result Area 2: Commercial Services

Key Result Area 3: Green Space & Natural Resources

Key Result Area 4: Community Relations/ Marketing

Key Result Area 5: Finances/Fund Development

Key Result Area 6: Our People

OUR PERFORMANCE SCORECARD: MAJOR 2012 KEY RESULTS

- INCREASE IN NUMBER OF PEOPLE RECEIVING CDC SERVICES FROM 2750 TO 4,200
- \$900,000 IN RESIDENTIAL INVESTMENT FACILITATED BY CDC.
- \$500,000 IN NEW COMMERCIAL INVESTMENT FACILITATED BY CDC
- 15 NEW GREEN SPACE INITIATIVES AND EVENTS FACILITATED BY THE CDC
- ACTIVE PROMOTIONAL ALLIANCES WITH THE ZOO AND METROHEALTH
- INCREASE IN NUMBER OF PEOPLE ENGAGED WITH THE CDC FAMILY FROM 4800 TO 8,500 (BOARD, STAFF, VOLUNTEERS, CLIENTS, WEB VISITORS, MEMBERS)
- INCREASE IN MEMBERSHIP FROM 235 TO 400

OUR KEY RESULT AREAS AND THEIR MAJOR FOCUS

KEY RESULT AREA	MAJOR FOCUS
Key Result Area 1: Residential Services	We will increase the value and stability of our neighborhoods by expanding the scope and scale of our residential services while developing under-valued real estate.
Key Result Area 2: Commercial Services	We will increase economic activity and improve residents' access to key services by fostering commercial development.
Key Result Area 3: Green Space & Natural Resources	We will have a positive environmental impact and increase the green space our residents and visitors have access to by being opportunistic with our assets and community initiatives.
Key Result Area 4: Community Relations/ Marketing	We will increase the number of people in the “CDC family” and the number of people enjoying our neighborhood by building alliances with our two major area institutions and enhancing community relations.
Key Result Area 5: Finances/Fund Development	We will diversify our funding sources and minimize our reliance on public funding by mobilizing our board, developing our fund raising capability, and establishing an endowment.
Key Result Area 6: Our People	We will increase our overall capacity and proficiency by adding key staff competencies, setting and tracking performance goals, enhancing board and staff satisfaction and recruiting and utilizing more volunteers.

OUR KEY RESULT AREAS/LEADERS/TEAMS

KRA	BOARD LEADER	STAFF LEADER	MEMBERS
Key Result Area 1: Residential Services	Jeff Rhodes	Robyn Sandys	Ed Pryll, David Fox, Lori Peterson, Sheila Walter, Nancy Schultz
Key Result Area 2: Commercial Services	Greg Huth	Tom Collins	Bruce Page, Robyn Sandys, Sheila Walter, Anthony Petti
Key Result Area 3: Green Space & Natural Resources	John Jenkins	Tom Collins	Tom Pukelnick
Key Result Area 4: Community Relations/Marketing	Terrell Cole	Barb Spaan	Alice Ratka, Dane Reich, Lori Peterson, Donn Heckelmoser
Key Result Area 5: Finances/Fund Development	T.J. Lewarchick	Robyn Sandys	
Key Result Area 6: Our People	Lynea Derwis	Donn Heckelmoser	Ed Pryll, Sandy Worona

KRA 1 RESIDENTIAL SERVICES

FY 2012 Key Results

1. An increase from 775 to 900 homeowners and home investors served (550 residentially-related and 350 code-related) through a residential services program that includes a housing team
2. An increase in residents receiving information on home maintenance and upkeep and financial planning/credit counseling from 100 a year through referrals only to 450 people a year (with at least 250 of them served through workshops).
3. Providing 30 landlords a year education on how to maintain property and find and keep quality renters through 2-3 workshops a year.
4. Development of 17 houses over the three year period through a housing acquisition, rehab and sell or rent program of our own and/or in partnership with private investors/developers (most likely more if turn over houses to qualified private developers).
5. An increase in people receiving foreclosure prevention assistance annually from 75 currently (referrals only) to 250 served through proactive outreach as well as referral.
6. 350 customers a year served through a “Handyperson” that recovers 30% of its \$60,500 costs through customer fees with the balance covered by government and private grant support.
7. Updating of print and web-based residential (coincides with KRA 4) information on the residential services provided by the CDC on at least a semi-annual basis.

2012 Key Result	Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
1. An increase from 775 to 900 homeowners and home investors served (550 residentially-related and 350 code-related) through a residential services program that includes a housing team	Housing Team includes code manager and housing resources staff.	Housing Team Manager, Housing Code Manager	Have existing program with baseline of current clients served: Code related is 300 clients a year, residential services related is 475 a year	In code area services to 320 clients a year and residential services to 500 a year.	In code area to 330 a year (if our area size decreases then may not increase), residential services to 525 a year.

2012 Key Result	Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
<p>2. An increase in residents receiving information on home maintenance and upkeep and financial planning/credit counseling from 100 a year through referrals only to 450 people a year (with at least 250 of them served through workshops).</p>		<p>Housing Team Manager</p>	<p>Currently refer people to other agencies for this approximately 100 a year.</p>	<p>Have in place a full service program where we are either conducting our own workshops or referring people systematically to other programs.</p> <p>At least 2 workshops a year serving 150 people, referring another 100</p>	<p>Developed the services further if needed or tweak current program, hold at least 3 workshops a year serving 200 people and referring another 150.</p>
<p>3. Providing 30 landlords a year education on how to maintain property and find and keep quality renters through 2-3 workshops a year.</p>	<p>Maintain property means not having any code violations on the property, including landscaping. Finding quality renters means teaching them the tools to find reliable renters. (emphasis on those out of compliance)</p>	<p>Code Specialist</p>	<p>Currently may refer people who need help to other agencies but we are not proactive in this arena. Refer about 20 landlords per year</p>	<p>Develop proactive program providing workshops on this subject with at least 2 a year. Will confer with current landlords to develop the program and will serve at least 20 landlords a year.</p>	<p>Tweak program after evaluation with landlords and possibly change and increase number if needed. Will hold at least 2 workshops a year serving 25-30 landlords</p>
<p>4. Development of at least 17 houses over the three year period through a housing acquisition, rehab and sell or rent program of our own and/or in partnership with private investors/developers. (most likely more if turn over houses to developers)</p>	<p>Partnership means an actual signed agreement with potential investors/general contractors that will provide a clear definition of their roles and responsibility.</p>	<p>Real estate manager/ executive director</p>	<p>Have developed a business plan that was approved by the board, working with the City to obtain HUD homes, conferred with potential private partners, hope to have first home by spring of 09. Will have 1 home in development.</p>	<p>Have a program in place where we are either developing homes on our own and or with private investors/developers - at least 4 or more homes a year.</p>	<p>Working program with output of at least 7 homes a year.</p>

2012 Key Result	Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
<p>5. An increase in people receiving foreclosure prevention assistance annually from 75 currently (referrals only) to 250 served through proactive outreach as well as referral.</p>	<p>Foreclosure prevention is information to potential clients in need of refinancing, or evaluating current loan situation.</p>	<p>Housing team manager</p>	<p>Refer people only without any specific contact information. Reactive as opposed to proactive. Refer approx. 75 people a year.</p>	<p>Have in place a proactive outreach/referral program based on lists of potential homeowners in need provided by CWRU. Serving at least 100 people a year.</p>	<p>Have in place a proactive outreach/referral program based on lists of potential homeowners in need provided by CWRU. Serving at least 200 people a year.</p>
<p>6. 350 customers a year served through a "Handyperson" that recovers 30% of its \$60,500 costs through customer fees with the balance covered by government and private grant support.</p>	<p>Handyperson program is a newly proposed program that includes very low cost to no cost simple household repairs for income qualified people, others will pay a fee on a sliding scale basis</p>	<p>Housing Team Manager</p>	<p>A grant application has been completed and will be submitted before the end of the fiscal year 2008/09. Also considering a partnership with two other CDC's, Ohio City and Tremont.</p>	<p>The program will be up and running servicing at least 150 customers a year. Expenses will be reduced by approximately 20% because of fees earned.</p>	<p>The program will provide services to 250 customers a year and expenses will be reduced by 30% because of fees earned.</p>

2009-2012 Strategic Work

1. Assess work load of current Housing Team staff which includes the Residential manager, Residential/marketing specialist and Housing Code Manager and Community Outreach Manager to determine what they are working on now and if and how they would take on additional responsibilities as outlined in the planning for this area. If they can not, then we will determine two things with their input: which current programs we may want to cut back or eliminate; and which one's we would want add. Then determine if the current staff as assigned would handle the new job functions or if we would need to hire additional part or full time personnel, work with consultants and if volunteers would be involved.
2. Determine the funding sources for the new Handyperson program either through possible collaboration with other CDC's. Funding would potentially come from private foundations, council support and fees for service.
3. Determine the services that are currently available for people who want to improve their credit, need help with mortgages, general home repair, and other housing related issues in order to understand the market of services provided and to potentially coordinate with those providing those services. This background information will also help us determine if we will develop our own workshops and seminars or refer people to existing programs. Also will determine how much it will cost to both refer and or develop our own services in these areas.
4. Utilize a survey product that is web based like Survey Monkey as well as a print/phone survey that we could use for those that don't have access to the internet that would help us track the following: the residential service needs are in the market; the utilization of our current services; concerns people have about the overall residential needs of the market area. Survey customers, members and potential customers if possible at least once a year, or do mini-surveys on particular products or services provided in order to improve programming more than once a year.
5. Continually assess the housing market through market analysis of how much homes are being sold for within the areas served, the trends based on age of home, type of home, size, how long on the market, foreclosure rates, etc. Quarterly analysis will help to determine the best location to purchase,, rehab and sell homes. Track the homes we buy and sell as the program evolves. Continually update where the best market niche will be based on both need and market viability based on the ability to sell and profit we can earn.
6. Assess the viability of developing homes for sale as the owner vs. working with a partner developer in terms of the number of homes that can be rehabbed in one year and how much revenue we can generate on this effort. The goal is not only generate revenue for the CDC but also to increase the homes rehabbed and sold as possible in order to upgrade the viability of the neighborhoods as places that people want to stay and also move to. A developer partnership agreement would include some funds for the CDC, but would not be as potentially profitable as buying, rehabbing and selling on our own.

2009-10 Priority Work

1. A full service program where we are either conducting our own workshops on home maintenance and credit counseling/home buying or referring people systematically to other programs. At least 2 workshops serving 150 people, referring another 100.
2. A purchase/rehab/sell program in place where we are either owning or selling the homes on our own and or with private investors/developers, doing at least 4 or more homes a year by 2012.
3. A proactive outreach/referral program based on lists of potential homeowners in need of existing or potential foreclosure assistance with lists provided by CWRU or others, serving at least 150 people a year.
4. Handyperson program servicing at least 100 customers a year. Expenses will be reduced by approximately 20% after the first year because of fees earned.
5. Implementing and evaluating all current residential, commercial, outreach/safety services that relate to the CDBG contract and other services that relate to other funded projects like Lead Abatement, Home Weatherization, Home Repair.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
A full service program where we are either conducting our own workshops on home maintenance and credit counseling/home buying or referring people systematically to other programs. At least 2 workshops serving 150 people, referring another 100. Costs include marketing, materials, mailings, staff.	\$1,500	\$2,000	\$2,500	\$6,000
A purchase/rehab/sell program in place where we are either owning or selling the homes or with private investors/developers, doing at least 3 or more homes a year (after 2011). Costs include staff, home purchase, marketing/sales expense, holding costs. Rehab costs will be a reimbursable expense after house sells so did not include (only OBCDC purchase costs included, on the high side)	\$3,000 per home, w/up to 2 with a total possible expense of <u>\$6,000</u> . But plan is to recoup these costs w/profit.	\$3,000 per home, w/up to 3 with a total possible expense of <u>\$9,000</u> . But plan is to recoup these costs w/profit.	\$4,000 per home, w/up to 5 with a total possible expense of <u>\$20,000</u> . But plan is to recoup these costs w/profit.	\$34,000

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
A proactive foreclosure prevention outreach/referral program based on lists of potential homeowners in need of existing or potential foreclosure assistance with lists provided by CWRU or others, serving at least 150 people a year. Expenses relate to staff, marketing, mailings.	\$8,000	\$9,000	\$10,000	\$27,000
Handyperson program servicing at least 150 customers a year. Expenses will be reduced by approximately 20% after the first year because of fees earned. Expect grants and Council funding for this program.	\$70,000	\$60,000	\$50,000	\$180,000
TOTALS	78,000	69,000	\$60,000	\$207,000

MAJOR ADDITIONAL REVENUE	FY2010 Add Revenue	FY2011 Additional Revenue	FY2012 Additional Revenue	TOTAL Additional Revenue
Purchase rehab, sell program after expenses (net) plus potential developer fees if sell homes after acquire for them to rehab.	\$25,000	\$40,000	\$60,000	\$125,000

KRA 2 COMMERCIAL SERVICES

FY2012 Key Results

1. “Gateway to the Zoo” is a recognized brand and the logo serves as a “mark of excellence” among local retailers
2. Extension of the Old Brooklyn Business Revitalization District South along Pearl Rd to Biddulph Ave
3. Acquisition of at least one parcel on the North side of Broadview Rd between Pearl and West 24th St
4. Board commitment to acquisition of a pre-identified property fronting on Pearl Rd between Broadview Rd and State Rd and development of a “Town Green”
5. An OBCDC business recognition program honoring businesses for particular achievements
6. Implement Pedestrian Retail Overlay District over portions of the Business Revitalization District
7. Redevelopment of a Commercial and/or Mixed-Use property

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
1. “Gateway to the Zoo” is a recognized brand and the logo serves as a “mark of excellence” among local retailers	“Gateway to Zoo” logo is awarded to retailers that provide a superior level of customer service and/or unique tie-in to the zoo	Commercial Manager/ Logos in public view	Logo exists but is not commonly used and is not keyed to any performance standard or unique service.	Work with local retailers to establish performance criteria	Begin awarding logos early in year or late 2010 (as part of business recognition event?); should be a competitive process
2. Extension of the Old Brooklyn Business Revitalization District South along Pearl Rd to Biddulph Ave	BRD as defined in City of Cleveland ordinance	Commercial Manager/ Action step chart	Old Brooklyn BRD established in 2000, South boundary is at State Road/ Pearl Rd intersection	Inventory commercial properties impacted. Secure support of City Council Representative	Draft legislative language, introduce to City Planning Commission for approval. Introduce to City Council for approval

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
3. Acquisition of at least one parcel on the North side of Broadview Rd between Pearl and West 24 th St	Parcel secured	Executive Director/Action step chart	OBCDC does not own any property	Identify at risk or strategic properties. Engage owner is exit terms	Secure funds for acquisition and maintenance.
4. Board commitment to acquisition of a pre-identified property fronting on Pearl Rd between Broadview Rd and State Rd and development of a "Town Green"	Site identified and current owner willing to negotiate	Executive Director/Action step chart	No parcels cleared or in public domain	Identify/prioritized desired parcels. Estimate costs of acquisition/demolition/Construction.	Identify public/private funding. Engage owner in negotiations
5. An OBCDC business recognition program honoring businesses for particular achievements	Develop award categories and minimum standards	Commercial Manager/A recognition event	None	Host first awards recognition event	Host second awards recognition event
6. Implement Pedestrian Retail Overlay District over portions of the Business Revitalization District	Pedestrian Retail Overlay District defined in Cleveland City ordinance	Commercial Manage/Action Step Chart respecting extension of BRD	None	Identify target area as a subset of the BRD. Secure support of City Council representative(s).	Draft legislative language, introduce to City Planning Commission for approval. Introduce to City Council for approval
7. One Commercial and/or Mixed-use Property is redeveloped and 25% occupied	CDC is landlord	ED and Commercial Manager	None	ID a property, develop pro-forma, ID financing options	ID at least one commercial tenant and broker to market residential units

2009-2012 Strategic Work

1. Develop a funding strategy to buy parcel(s) in central business district on behalf of City of Cleveland/OBCDC/Trust for Public Land, etc. to begin land assembly.
2. Identify/hire an (summer) intern to assist w/commercial activities; may be able to get credit for college course.
3. Implement the Federal Economic Stimulus Package for Infrastructure into our Streetscape plan.
4. Expand the Storefront Renovation Program as a marketing tool to businesses considering locating in the service area or relocating within the City.
5. Develop a funding strategy to take the “storefront renovation” concept indoors.
6. Develop branding criteria for Gateway to the Zoo program and identify potential qualifying businesses
7. Develop award categories for the Business Recognition program (e.g., best window dressing, job creation, significant community support) and create ranking standards
8. Identify a specific commercial project that would require specialized skill; identify a consultant with necessary skill; identify funding to support consultant

2009-10 Priority Work

1. Work with local retailers to establish performance criteria for the Gateway to the Zoo program
2. Secure support of City Council Representative and community to extend the Old Brooklyn Business Revitalization District South along Pearl Rd to Biddulph Ave.; begin inventory of commercial properties impacted.
3. Identify at risk or strategic properties along the north side of Broadview Rd between Pearl and West 24th St.; and engage owner to negotiate terms.
4. Identify/prioritized desired parcels fronting on Pearl Rd between Broadview and State for development of a “Town Green”; estimate costs of acquisition/demolition/construction.
5. Host the first OBCDC business recognition event.
6. Identify target area for implementation of a Pedestrian Retail Overlay District as a subset of the BRD; secure support of City Council representative(s).
7. ID one commercial and/or mixed-use property; develop pro-forma, ID financing options.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
1. Gateway to the Zoo branding	\$1,000	\$1,000	\$1,000	\$3,000
2. Extension of Old Brooklyn BRD	\$500	\$200	\$200	\$900
3. Acquisition of at least one parcel on Broadview	\$100,000	\$150,000	\$200,000	\$450,000
4. Acquisition of property on Pearl for town green	\$100,000	\$150,000	\$200,000	\$450,000
5. Business recognition program	\$1,000	\$1,000	\$1,000	\$3,000
6. Pedestrian Retail Overlay District	\$500	\$200	\$200	\$900
7. Redevelopment of a Commercial and/or Mixed-use Property	\$2,500	\$300,000	\$100,000	\$402,500
TOTALS	\$205,500	\$602,400	\$502,400	\$1,310,300

MAJOR ADDITIONAL REVENUE	FY10 Add Revenue	FY11 Addl. Revenue	FY12 Addl. Revenue	TOTAL Addl. Revenue
1. Sale of at least one parcel on Broadview	\$00	\$00	\$450,000	\$450,000
2. Lease income from Redevelopment of a Commercial and/or Mixed-use Property	\$00	\$00	\$50,000	\$50,000
TOTALS			\$500,000	\$500,000

KRA 3 GREEN SPACE & NATURAL RESOURCES

FY2012 Key Results

1. Completion of engineering & construction drawings for Towpath Trail Connection
2. Transition of Henninger landfill surface to a natural native landscape
3. Planting of natural native plants, trees, grasses on at least three selected public properties (one per year)
4. Acquisition by adjoining owner occupied residents of 5 residential land bank parcels annually
5. Creation and functioning of a permanent standing Committee of the Board, OBCDC Green Spaces Committee, whose mission is compatible with the City Plan: Re-Imagining a More Sustainable Cleveland

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
1. Completion of engineering & construction drawings for Towpath Trail Connection	Contract with deliverables & completed construction plans	Executive Director/RFP issued, consultant under contract	Brownfield Phase II underway on preferred trail alignment	\$ identified & secured for engineering consultant	Contract awarded
2. Transition of Henninger landfill surface to a natural native landscape	Owner agreement and site access	Executive Director & Green Spaces Committee/ Progress in securing owner cooperation	Private ownership, no access	Present proposal to owner and secure agreement. Identify appropriate natural native plants/trees.	Identify funding sources for natural native plantings

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
3. Planting of natural native plants, trees, grasses on at least three selected public properties (one per year)	Preservation and/or restoration of green spaces	OBCDC Green Space Committee/Complete target goals for each year	Public properties identified, specific areas within properties not identified.	1st site Identify specific sites. Secure necessary permissions/permits. Identify appropriate natural native plantings	2nd site Raise funds for purchase of natural native trees, plants and grasses. Recruit neighborhood "stewards" for continuing maintenance.
4. Acquisition by adjoining owner occupied residents of 5 residential land bank parcels annually	Inventory of available parcels matched to adjacent owner occupied homes	Executive Director and Green Space Committee/ Match land bank parcels with adjoining owner occupied homes	Changing inventory of approximately 80 parcels in service area.	Inform owner occupied home owners of availability of land bank parcel. Provide green space information/assistance. 5 land bank parcels transferred to owner occupied adjoining property	Provide practical assistance in green space plantings and maintenance for acquired land bank parcels 5 additional land bank parcels transferred to owner occupied adjoining property
5. Creation and functioning of a permanent standing Committee of the Board, OBCDC Green Spaces Committee, whose mission is compatible with the City Plan: Re-Imagining a More Sustainable Cleveland	Permanent committee recognized in OBCDC code of regulations	Ad Hoc Committee Chair/ OBCDC board approval ratified in annual membership meeting	Non existent	Approved and functioning	Guiding and reporting on each of the other initiatives cited in the OBCDC Strategic Plan Green Spaces section.

2009-2012 Strategic Work

1. Have the OBCDC board appoint an ad hoc committee for green space initiatives in order to establish a permanent standing green space committee recognized in the OBCDC code of regulations and maintain and support that Committee in its leadership of KRA 3.
2. Develop a mission statement that integrates green space environmental practices into OBCDC programs and use it in the community to help identify OBCDC as the “go to” organization in the service area for green space best practices
3. Recruit, build, maintain and support a base group of volunteers and stakeholders to advocate and implement green initiatives.
4. Prepare a budget to support key results and conduct the fund raising necessary.
5. Prepare and distribute a local user’s guide for low maintenance natural, non-evasive, vegetation, plants and trees.
6. Conduct a quarterly land bank review of available parcels and inform adjacent owner occupied property owners of process for acquiring.
7. Cultivate coalitions with other green interest groups that will enhance the OBCDC programs.
8. Ensure completion of engineering & construction drawings for the Towpath Trail Connection
9. Steward the transition of the Henninger landfill surface to a natural native landscape

2009-10 Priority Work

1. Tow Path Trail Connection:: Generate an RFP for a consultant to prepare engineering and construction drawings for issue once funds are identified for the trail connector construction.
2. Henninger Landfill: Develop a proposal for the landowner seeking an agreement allowing the planting of native, non-evasive plants and trees making a natural landscape. Identify the types of plants and trees. Recruit volunteer stewards to plant and monitor the plant growth.
3. Planting on Selected Public Properties: Survey three sites and select one site for the first project. Secure necessary permissions and permits. Identify appropriate native non-evasive plantings for the specific site. Recruit volunteer stewards for planting and continuing maintenance.
4. Land Bank Parcels: Begin informing owner occupied neighbor property owners of the opportunity to acquire land bank parcels adjoining their property via letter and offering green space information and assistance.
5. Green Space Committee: Present resolution to the OBCDC Board of Directors for a permanent standing Green Space Committee whose mission is compatible with the Cleveland plan “Re-Imagining a More Sustainable Cleveland. Identify/recruit committee members.
6. Solicit Volunteers: Form volunteer groups that are interested in green space projects or tasks, e.g. Wild Ones, Friends of the Park, Block Clubs, Civic Associations.

- 7. Explore Possible Revenue Streams: Obtain funding for green space activities and materials, e.g. Neighborhood Connections, Area Banks, County Extension Programs, Donations, etc.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
1. Towpath Trail Connection Engineering & Construction Drawings	\$30,000	TBD	TBD	\$30,000 estimate
2. Henninger Landfill Natural Vegetation (Non-evasive native plants and trees)	\$3,000	\$3,000	\$3,000	\$9,000
3. Planting public properties with non-evasive native plants and trees.	\$2,000	\$2,000	\$2,000	\$6,000
4. Administrative costs and operating expenses for all green space initiatives	\$5,000	\$5,000	\$5,000	\$15,000
TOTALS*	\$40,000	\$10,000	10,000	\$60,000

*Most of the expenses are rough estimates

KRA 4 COMMUNITY RELATIONS/MARKETING

FY 2012 Key Results

1. Increase in Residential Membership from 195 to 300.
2. Increase in Commercial Membership from 40 to 100.
3. Increase in total event attendance from 10 to 50 percent and evolution of the Housing Fair to a signature, more broadly conceived event that has at least 4 major (over \$1,500) sponsors.
4. Marketing is playing a pivotal promotional role in attracting new users of key CDC services so all of the “numbers served” Key Results in this Plan are achieved.
5. Developing more folksy content for the newspaper that includes features about local people, places, events, special activities, etc.
6. Co-branding partnerships with the Zoo/Metroparks and MetroHealth that provide positive OB exposure to zoo visitors and hospital patients/visitors.
7. Improve community relations to create more synergy around shared programming, events and activities in order to incorporate the entire community

2012 Key Result	Major Definitions	Who/How to Track	2008-9 Baseline	2010 Target	2011 Target
1. Increase in Residential Membership from 195 to 300.	Residential Membership = Signup and paid memberships	Office manager	195	230	265
2. Increase in Commercial Membership from 40 to 100	Commercial Membership = Signup and paid memberships	Office manager	40	58	98

2012 Key Result	Major Definitions	Who/How to Track	2008-9 Baseline	2010 Target	2011 Target
3. Grow attendance all types of events from 10-50% depending on the type of event .Housing Fair to a signature, more broadly conceived event that has at least 4 major (over \$1,500) sponsors.	<p>Definition of event is Crime Fair/Safety night/ Fundraisers (which according to fund development is going to increase)</p> <p>Event- a community program that benefits/entertains residents/merchants or promotes Old Brooklyn.</p>	Marketing/Residential Manager	Increase by 10%	Increase by 20%	Increase by 40%
4. Marketing is playing a pivotal promotional role in attracting new users of CDC services so all of the “numbers served” in Key Results in this Plan are achieved.	CDC Services are all services provided in the residential, commercial, outreach/safety and general community involvement and events areas.	Tracked by managers in each service area, i.e. Residential, commercial, overall by ED	No real analysis or way to evaluate how CDC reaches out to obtain new customers	Develop and start to implement a clear promotional plan in place that attracts new users by utilizing all CDC products such as the newspaper, web, etc.	Implementation of promotional plan to gain customers for CDC programs and services.
7. Updating of print and web-based information on CDC services provided by the CDC and community assets on at least a semi-annual basis for CDC services, annual or every 2 -3 years for the community.		Housing team/marketing manager	Currently have simple residential services brochure is also on the web site. Recently updated.	Develop higher quality print pieces and more information on the web site about CDC services and the community.	Continue to upgrade information as resources change for CDC services

2012 Key Result	Major Definitions	Who/How to Track	2008-9 Baseline	2010 Target	2011 Target
5. Co-branding partnerships with the Zoo/Metroparks and MetroHealth Main Campus and Senior Health and Wellness Center that provide positive OB neighborhood exposure to zoo visitors and hospital patients/visitors.	Co-branding partnership = Engage in an event with the Zoo/ to promote OB. Can be a new event or in conjunction with current efforts. Combine forces so that marketing strategies are maximized and work in conjunction with each other	Residential Marketing Specialist	None	Participate with the All Access Co-brand with MetroHealth's Senior Health and Wellness Center/Zoo on one event	Hold OB event @ Zoo Permanent linkage on Cleveland Metroparks Zoo, Brookside, Senior Health and Wellness Center's website.
6. Improved community relations that create events and activities that incorporate the community Improve relationships with civic associations, block clubs and individual residents to work cohesively.	Partner with area orgs/civic groups for event creation and information distribution Relationships=working together for the betterment of the community	Community Outreach Manager	Listed events in Monthly Newspaper	List on Website Community Calendar; OB representation at Events Civic Association, Block Club, individual residents or CDC work together/volunteer/cross promote events.	Provide opportunities to cosponsor events and activities
7. Having more folksy content for the newspaper that includes features about local people, places, events, special activities, etc. And when applicable cross-promote on web site		Newspaper Editor	Currently have some of this type of content but not enough on people and places	At least 2 stories on people and 2 stories on events or businesses., start cross-promotion on web site	Gain more personal stories about people, places and businesses from the perspective of those in the community and cross promote on the web.

2009-2012 Strategic Work

1. Develop survey methods and schedule to measure knowledge of CDC programs against various demographics (e.g., existing homeowners, prospective homeowners, elderly) and measure knowledge of OB (residents, businesses, visitors).
2. Review the overall marketing function at the CDC, who responsible now and who moving forward along with specific job description that incorporates the strategies developed in this KRA.
3. Review, prioritize and evaluate existing promotional events outreach/safety activities to determine which should be grown, modified and adds the greatest value and meets the greatest needs in the community. (not specific program services related).
4. Inventory existing marketing materials; map out when/how/marketing materials are used (at various events, meetings, partnerships) evaluate existing materials to measure whether they match programs which can be grown or add the greatest value to the community (focus on service; not comprehensive list of services) and then redesign/update materials and distribution methods as needed
5. Leverage the changes in membership requirements by ensuring that customer information is obtained at every contact, i.e., that every event and customer contact ends with a sign up or contact information for email blasts or other marketing services.
6. Review membership benefits and determine what will entice people to become members and then work to provide those enticements.
7. Evaluate the desire for community people to volunteer to write for the paper who would want to write about people, places and events in the area from a more personal perspective. If volunteering is not possible, determine how much we would have to pay writers to make this a key part of our program.
8. Develop a more compelling value proposition for businesses to join OBCDC (e.g., joining gets advertising ; translate into foot traffic; provides access to Business Directory; connects to the Website, which is a value added service for area businesses and organizations)
9. Develop cross promotional opportunities that highlight the neighborhood and strategize with Cleveland Metroparks, Zoo and SHWC events that are logical to cross promote. Such as, developing and sharing print pieces and more information on organizational web sites regarding all related services as well as the overall attributes of the CDC service area as a quality place to live.
10. Increase event attendance through marketing, board outreach, community involvement and utilizing volunteers.
11. Collaborate with institutional members and utilize the website to cross-promote. Develop professional e-mail blast with a professional template that is consistent with our branding i.e. Constant Contact

2009-10 Priority Work

1. Evaluate, review and prioritize existing programs in this area and decide how current services will either be maintained, increased or decreased and how new suggested programs and services will be added keeping in mind which will provide the greatest value to the community and the CDC as well as staff capacity.
2. See to it that every event and customer contact ends with a sign up or contact information for email blasts or other marketing services.
3. Inventory and determine quality of existing marketing materials, map out when/how/marketing materials are used (at various events, meetings, partnerships)
4. Create, Update/redesign print materials and web site to match OBCDC programs and that promote area assets in terms of housing, attractions, businesses, etc. as well as CDC programming and services.
5. Membership growth and development that includes ideas for developing specific benefits of being a member and make sure that each staff person is well-versed on benefits/advantages of membership to encourage membership sales at every opportunity.
6. Research the events that the Zoo and the Senior Health and Wellness Center (SWHC) are planning within the next year and determine the ones that make sense to cross-promote and strategies for doing so.
7. Look at each CDC sponsored event, develop appropriate material, determine demographics to target, and evaluate programs to establish what works and what needs to be changed.
8. Compile list of contacts from each staff person, develop listserv, and create template identifying logo to disseminate information via email blasts.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
With the changes to membership requirements, every event and customer contact should end with a sign up or contact information for email blasts or other marketing services; obtain customer information at every contact (Constant Contact)	\$400	\$400	\$400	\$1,200
Review and prioritize existing programs which can be truly grown and adds the greatest value to the community and CDC	None	None	None	None
Map out when/how/marketing materials are used (at various events, meetings, partnerships)	None	None	None	None
Evaluate existing materials to measure whether they match programs which can be grown or add the greatest value to the community (Focus on Service; not comprehensive list of services)	None	None	None	None
Developing print pieces and more information on the web site regarding all residential and related services as well as the overall attributes of the CDC service area as a quality place to live. To include any cross promotion with area attractions. First year expense higher because of new print pieces and revamp of web site. Other years printing and maintaining.	\$7,500	\$4,000	\$3,500	\$15,000
TOTALS	\$7,900	\$4,400	\$3,900	\$16,200

KRA 5 FINANCES/FUND DEVELOPMENT

FY 2012 Key Results

1. An increase from \$3,000 to \$15,000 in special event revenue
2. An increase in foundation grant revenue from \$30,000 to \$85,000
3. A 60% increase (to \$2400) in net revenue generated through the newspaper with a 30% decrease in CDBG support from \$4,000 to \$2,800. and a 30% overall increase in ad sales
4. Increase from \$600 to \$5,000 a year secured through the board in the form of donations and gifts directly secured by board members.
5. Positive annual net income of at least \$8,000 with net assets of \$30,000.
6. An endowment fund for operating expenses of at least \$10,000 in place

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
7. An increase from \$3,000 to \$15,000 in special event revenue	Special event is any activity that involves the community and/or members for a project or fund raising activity where revenue would be projected.	Marketing staff and Exec. Director	One event revenue \$3,000	Two events \$9,000	2-3 events \$12,000
8. An increase in foundation grant revenue from \$30,000 to \$85,000	Foundation/institutional is any type of organizational funding of the CDC.	Exec. Director/Board	3 grants totaling \$30,000	Total grant revenue of \$70,000	\$85,000

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
9. A 60% increase (to \$2400) in net revenue generated through the newspaper with a 30% decrease in CDBG support from \$4,000 to \$2,800. and a 30% overall increase in ad sales	Business plan will include details on how to increase revenue and possibly cut expenses so net is higher. If not possible, the plan may recommend cutting back or providing another type of communication tool. The plan will be reviewed each year to determine feasibility of the OBN over next 3 years.	Exec. Director, OBN staff	Net revenue is approximately \$1,500 a year but with subsidy from CDBG. Current subsidy is \$10,000. Current ad sales \$48,000 a year	20% increase in net revenue (\$1,800) with a decrease in CDBG support of 20% (from \$10,00 to \$8,000). 20% overall increase in ad sales.	30% increase in net revenue (\$1,950) with a decrease in CDBG support of 50% (from \$8,000 to \$4,000). 25% overall increase in ad sales.
10. Increase from \$600 to \$5,000 a year secured through the board in the form of donations and gifts directly secured by board members.	Support means the donation of funds by the board member or their solicitation of funds from other individuals, foundations, businesses, etc.	Board with staff (office manager, ED) follow-up	\$600	Plan developed; \$2,500 secured	\$4,000 secured.
11. Positive annual net Assets of at least \$30,000.	Net revenue means any funds that are remaining that are not restricted funds. Positive performance means no problems with the audit, and receivables.	Executive director and office manager	Year ending June 2008: Unrestricted Net Assets 20,000	Annual net assets of at least \$25,000	Annual net assets of at least \$25,000

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
12. An endowment fund for operating expenses of at least \$10,000 in place	Endowment means restricted funds that can be used only for operating expenses with permission from the board.	Executive director and office manager	No fund exists now	Start the fund with pledges from the board for obtaining at least \$100 each.	Pledges from the board of at least \$100 each plus their obtaining at least another \$500 from other sources each.

2009-2012 Strategic Work

1. Develop a business plan for the newspaper that focuses on increasing revenue through the hiring of a part-time sales person who would be salaried and commission based. Clearly determine how much revenue is needed to break even without gov. subsidy and what it would take if even possible to do so in terms of number of pages of ads vs. editorial. Then develop a ramp up plan for how to decrease subsidy by increasing advertising as well as gaining the right editorial-advertising mix. Also determine if the paper can be home delivered to all or a sector of the market area and what it would cost to do so. One approach would be to increase advertising rates for example.
2. Provide board members with the tools to enhance their donations through their own personal funds or through those they know by collecting information on key business and community leaders in the area and who they may know that would provide donations or support for community events.
3. Tie budgeting to program goals each year, especially as related to staffing needs as they relate to programming goals. Continually assess each year to make sure matching programmatic and other goals outlined in the strategic plan.
4. Develop concepts and do research on types of special events that will work for the service area based on what other CDC's and similar nonprofits do in the area and around the country. Assess costs and staff/volunteer capacity as well as financial feasibility.
5. Research and assess what potential private grant opportunities are available for either special projects or general operating for the CDC. If have difficult time obtaining these types of grants that will need to reassess programming association with or potentially reliant on these funds.
6. Research how other similar nonprofits have developed and maintained endowment programs and how they specified the purpose of the endowment funds, meaning we may want to target the funds raised in order to market this type of fund raising tool.
7. Meet with incumbent Council and candidates to educate them and review programming and associated funding.

2009-10 Priority Work

1. Conduct two special events with net revenue of \$9,000.
2. Develop and submit grants to private or government entities that will achieve total grant revenue to cover new programming if not provided by other resources.
3. Research the best way to achieve a 20% increase in net revenue for newspaper advertising either through the hiring of a sales person on commission, or part-time contract person.
4. Develop a fund raising plan that includes educating the board around annual giving. .
5. Research and then start an endowment fund with pledges from the board for obtaining at least \$100 each.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
Two special events with net revenue of \$9,000 to \$15,000 total per year. (staff and event/marketing expenses)	\$12,000	\$14,000	\$20,000	\$46,000
Total grant revenue of \$70,000- \$85,000 (staff time)	\$4,000	\$5,000	\$6,000	\$15,000
20- 30% increase in net revenue for newspaper advertising (staff time/commission based on NEW advertisers)	\$5,500	\$6,500	\$7,500	\$19,500
TOTALS	\$21,500	\$25,500	\$33,500	\$80,500

MAJOR ADDITIONAL REVENUE	FY2010 Add Revenue	FY2011 Additional Revenue	FY2012 Additional Revenue	TOTAL Additional Revenue
Special event net revenue (minus expenses)	\$9,000	\$12,000	\$15,000	\$36,000
Grant revenue	\$70,000	\$75,000	\$85,000	\$230,000
Newspaper revenue	\$58,000	\$72,000	\$90,000	\$220,000

TOTALS	\$137,000	\$159,000	\$190,000	\$486,000
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KRA 6 OUR PEOPLE

FY 2012 Key Results

1. Measurable Increased capacity of staff in the form of the following additional competencies: real estate management, volunteer management, marketing & sales.
2. Staff performance goals that are aligned with the strategic plan and results oriented with 100% of staff achieving at least 80% of their annual goals.
3. Board performance goals aligned with the Strategic Plan with annual improvement on the board's self-assessment of its performance against those goals.
4. Increased board and staff satisfaction with OBCDC as a place to work and volunteer, respectively.
5. Measurable increase in traditional volunteer hours, while decreasing the amount of individual Court Community Service hours to focus on a more crew based approach.

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
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2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
<p>1. Increased capacity of staff in the form of the following additional competencies: real estate management, volunteer management, marketing & sales.</p>	<p>This key result is broken down into three major areas or competencies; it has been decided that these areas are in need of growth or initiation. These actions would lead to viable growth within the agency.</p>	<p>The executive director would track the increased capacity of any of these positions.</p>	<p>The real estate management is on a 40 hour a month level. Volunteer management is dealt with on a very limited level with the Residential Specialist taking responsibility. Marketing & Sales is only dealt with as it relates to the yearly business directory, newspaper sales is not solicited.</p>	<p>The Executive Director and any appropriate staff will decide on the feasibility and develop a job description for the positions that merit OBCDC moving forward. These positions will also be ranked in order of importance for future steps</p>	<p>At least two of the competency areas would be represented in our staffing.</p>
<p>2. Staff performance goals that are aligned with the strategic plan and results oriented with 100% of staff achieving at least 80% of their annual goals.</p>	<p>Improved staff performance will lead to improved agency performance in terms of production and growth.</p>	<p>The Executive Director will track all performance measures. The executive director will work with the Board to review existing performance measures and develop new ones when necessary</p>	<p>Bi-yearly staff reviews are conducted with the Executive Director. Annual goals that are based on contract goals (not strategic)</p>	<p>Executive Director will design and develop a new goal set for staff based on the goals laid out in the strategic plan.</p>	<p>Staff will have been reviewed according to the new performance measures developed. Based on these results future goals will be set to improve upon the performance test (if need be).</p>

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
3. Board performance goals aligned with the Strategic Plan with annual improvement on the board's self-assessment of its performance against those goals.	The board will be in charge of developing, implementing and measuring performance goals from year to year in order to improve the effective and efficiency of the agency (as it relates to the board)	The board executive committee will track all performance measures.	Code of regulations states that board members must attend a minimum number of meetings.	The board will design, and implement a set of performance measures based on the outcomes of the strategic planning process with board review.	The board will have been reviewed for the second time, and based on the outcome of these reviews future goals will be set to improve on the performance test (if need be).
4. Increased board and staff satisfaction with OBCDC as a place to work and volunteer.	Higher moral leads to increased productivity, efficiency and effectiveness.	The executive director will track all strategic planning satisfaction efforts	There is no measurement of staff satisfaction	The Executive Director will have conducted the proper research to develop and implement a device to measure staff satisfaction and a baseline will be established	Improvement on the 2010 baseline through building on strengths and addressing concerns

2012 Key Result	Major Definitions	Who/How to Track	2008-9/Current Baseline	2010 Target	2011 Target
<p>5. Measurable increase in traditional volunteer hours, while decreasing the amount of individual Court Community Service hours to focus on a more crew based approach.</p>	<p>Traditional volunteer means one who is not forced to volunteer or who is completing educational based volunteer requirements. Individual CCS hours are performed at the office and supervised by the Residential Programs Manager, crew based CCS workers are set up by the Residential Programs manager in conjunction with CCS, Inc. and supervised by CCS employees.</p>	<p>Residential & Marketing Specialist will track all traditional volunteer hours until decisions are made to increase volunteer management competencies by hiring a volunteer manager. Then the duties would be transferred.</p>	<p>A volunteer program is codified.</p> <p>OBCDC posts opportunities on the volunteer match website.</p> <p>Staff does not currently solicit or track volunteers</p>	<p>OBCDC will begin to record volunteer hours, track volunteer and maintain a volunteer database. OBCDC will develop a volunteer manager job description develop a funding strategy for a volunteer manager and budget appropriately</p>	<p>OBCDC will post the job description, Hire a volunteer manager. This volunteer manager will have developed a volunteer database of at least 15 reoccurring volunteers or volunteer sources within their first year.</p>

FY 2009-2012 Strategic Work

1. Develop a needs assessment based on current staff capacities in order to determine how new positions may rank in order of strategic importance.
2. Develop and utilize two new performance management/goal setting tools (for staff and board).
3. Develop a satisfaction survey and conduct annual surveys of staff and board, making improvements on the basis of themes identified.
4. Develop a rough draft of a “new” staff structure that would include job descriptions, and any new positions that have been deemed appropriate
5. Recruit volunteer and volunteer sources while maintaining a database of volunteers willing to volunteer at events through the entire year. Research and recruit retired people with skills needed as well as those that are currently unemployed.

2009-10 Priority Work

1. Form a staff working group within one month of the completion of the strategic plan, the working group will begin to formulate a rough draft needs assessment of current staff capacities. This working goal will have a 6 month deadline for the completion of a rough draft.
2. The Executive Director will set a goal of 6 months from the completion of the Strategic plan to have a first draft staff evaluation package to include strategic goal as well as performance goals.
3. The Executive Committee of the board will set a goal of six month from the completion of the strategic plan to have a first draft of a board evaluation package to include strategic as well as performance goals.
4. The Executive Director will consult with other CDC's, non-profits and private sectors businesses as to best practices for staff & board satisfaction surveys within 3 months of the completion of the strategic plan and create a recommendation for the board and staff.
5. Develop a volunteer tracking system (hours & people & sources) either via OBCDC's existing database or a simple excel spreadsheet as well as volunteer activities.
6. Form a committee to review Old Brooklyn CDC's organizational policy manual for strategic changes and changes to that would alleviate road blocks to implementing the strategic plan.

Projected Costs & Revenue of Strategic Initiatives

MAJOR STRATEGIC INITIATIVES WITH COST IMPLICATIONS	FY2010 Expense	FY2011 Expense	FY2012 Expense	TOTAL Expense
Increased capacity of staff in the form of the following additional competencies: real estate management, volunteer management, marketing & sales, and associate executive leadership – Cost = \$10,800/year (30 hrs/month @ \$30/hr)	\$7,200/year (\$30/hr @ 50 hr/month)	\$16,200/year (\$30/hr @ 75 hours/month) \$35,000/year for another staff person (position to be determined)	\$42,000 per year salary based on a fulltime (40 hours/week) real estate manager \$36,000/year for another staff person (position to be determined)	\$136,400

SUMMARY OF STRATEGIC INVESTMENT IN KRA'S & ADDITIONAL REVENUES

KRA	FY2010 Revenue/(Expense)	FY2011 Revenue/(Expense)	FY2012 Revenue/ (Expense)	TOTAL Revenue/(Expense)
Key Result Area 1: Residential Services	(78,000) \$25,000	(69,000) \$40,000	(\$60,000) \$60,000	(\$207,000) \$125,000
Key Result Area 2: Commercial Services*	(\$205,500)	(\$602,400)	(\$502,400)	(\$1,310,300) \$500,000
Key Result Area 3: Green Space & Natural Resources	(\$40,000)	(\$10,000)	(10,000)	(\$60,000)
Key Result Area 4: Community Relations/ Marketing	(\$7,700)	(\$4,200)	(\$3,750)	(\$15,650)
Key Result Area 5: Finances/Fund Development	(\$21,500) \$137,000	(\$25,500) \$159,000	(\$33,500) \$190,000	(\$80,500) \$486,000
Key Result Area 6: Our People	(\$7,200)	(\$51,200)	(\$78,000)	(\$136,400)
TOTALS	(\$389,900) \$162,000	(\$782,300) \$199,000	(\$701,650) \$250,000	(\$1,873,850) \$1,111,000

*** The majority of the funds expended in commercial are for the purchase of property**

THE KEYS TO OUR IMPLEMENTATION

1. It will be *The Plan*: Implementing our strategic plan is not a “side project.” It will be the essential template for the Governance and Management of the CDC. Implementation will be led by the Board and Exec so it is clear that it is *the Plan*.
2. We will communicate our *Written Plan*: The strategic plan is an opportunity to let everyone know where the CDC is headed. We will make sure every stakeholder gets a summary copy of the plan in the appropriate format.
3. We will make the *Story of the Plan Visible in a Sustained Way*: The Mission, Key Result Areas and Performance Scorecard lend themselves to being captured on mailers, board agendas, screen savers, etc., i.e., visibly. The more the strategic plan is seen as a kind of “campaign” and given notoriety, the better.
4. We will *Integrate the Plan into our Budget*: The strategic plan has to be integrated into the budget and its priorities.
5. We will have *Up-to-Date Action Plans*: The strategic plan must be backed up by actions plans with clear timeframes and accountabilities at the staff and board committee level. Action plans need to be updated at regular intervals during the year (at least semi-annually). Current status should be reported through the last column of an action plan grid.
6. We will *Integrate the Plan with Performance Management*: The accountability and work assigned in the strategic plan and action plan has to be integrated into performance goals, evaluation and recognition on both the staff and board sides. Without this integration, the strategic plan is a vehicle without fuel.
7. We will *organize Board Meetings and Staff Meetings around the Plan*: The fundamental structure of all such meetings should be the same as the Key Result Areas (KRA’s) in the strategic plan. The strategic plan (and the corresponding action plan) needs to be monitored at such meetings regularly. Board committee structure will be aligned with the KRA’s.
8. We will *Implement Visible, Do-Able Actions Early to Gain Momentum*: People will be watching to see if this is really going to happen or not. Early successes that are visible and that matter will let people know that leadership is serious about the plan.
9. We will *do Regular and Honest Reports on our Progress*. All stakeholders should get simple, easy to understand one page written updates on the CDC’s performance on the Performance Scorecard at least semi-annually; the Board at each meeting.
10. We will *Take Advantage of Every Opportunity to Celebrate Progress*: All opportunities for recognizing, celebrating and rewarding progress and achievement should be taken advantage of, e.g., verbal praise at meetings, e-mail and voice mail congratulations, blurbs in written material, recognition at major events or meetings, etc.

EVALUATION OF THE PLANNING PROCESS

STRENGTHS OF THE PROCESS

- Board/staff interaction... development of relationships
- Creative brainstorming/synergy; working off of each other
- The collective, step by step molding of the plan
- Worksheets provided a structure
- Logical structure of the plan
- 3rd party facilitation
- The sense of crystallizing things
- Having built a shared vision
- Shared ownership

OPPORTUNITIES FOR IMPROVEMENT

- More explanation early in the process about our the CDC's contractual obligations and constraints
- A lot of new board members and volunteers, which required addressing the learning curve
- Need clearer picture of steps and worksheets
- May need instructions while we're fresher or perhaps follow up instructions
- Need to date the worksheets (otherwise versions are confusing)
- The timeframe for some worksheets felt rushed
- Need better engagement by KRA Team members
- Could have accessed the consultant between meetings more