Ohio Conference of Community Development

Strategic Planning Project

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OHIO UNIVERSITY | VOINOVICH SCHOOL OF LEADERSHIP AND PUBLIC AFFAIRS

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Executive Summary

OCCD has traditionally been an organization able to nimbly adapt to changes in the community development landscape, quickly detecting and adjusting to changes in Federal and State policies, regulations, and programs and flexibly tuning trainings and member support services to changing trends, innovations, and evolving best practices. Nevertheless, the overriding strategic imperative for OCCD is to adapt to fundamental change. The most central challenges to the OCCD organization stem from transitions currently taking place both internally and externally. Internally, OCCD is facing a generational change as the organization's founders, leaders, prime movers, and most knowledgeable and experienced community development professionals are retiring and leaving active engagement in the sector. Externally, there are relationship, policy, programmatic, and budgetary changes at the State (and even Federal) level weakening previously close relationships of mutual support and cooperation with OCCD while other statewide community development organizations have emerged over the years creating a more competitive landscape supporting community development practitioners. There is a need to refresh and revitalize the OCCD mission, to render it more attuned with a new generation's professional goals, learning styles, and approaches to impactful community development, while at the same time there is a need for OCCD to revitalize its value proposition and enhance perceptions of its importance and contribution to the community development sector.

Strategic themes requiring OCCD attention and Board decision making emerging in the course of this project that include the following topics with key takeaways indicated:

1. **Financial Sustainability** – As State funding declines in volume and grows in uncertainty, there is a need to increase and diversify OCCD revenue sources. The need for increased revenues is not just to maintain the status quo and also to fund new strategic initiatives required for OCCD's continued viability.

2. **Membership & Membership Services** – OCCD needs to streamline its traditional delivery systems for professional development trainings, conferences, and network opportunities to adjust to the more hectic pace of time-and-money constrained member organizations. Training presentations need to less about sharing stories and more about articulating replicable best practices. Content for drawing upon the collective knowledge and experience of members to solve practical problems, answer pressing questions, and advance professionalism of frontline community developers needs to be more accessible and immediate to member needs. Young professionals need to be more fully engaged, with trainings that leverage digital literacy, learning styles, and communication tools. OCCD affiliation needs to offer credentials advancing careers and increasing leadership roles for rising community development professionals. OCCD needs to make greater use of technology in its service delivery models, networking opportunities, and professional community development.

3. **Organizational Structure** – OCCD current reliance on an active, committed, volunteer Board has been its hallmark means of ensuring a lean organization focused on the frontline needs and concerns of diverse practitioners dedicated to community development values and impacts. This structure has served OCCD well during an era where quarterly multi-day member meetings, annual conventions, and in-person training events defined the standard

for content delivery, professional development, and networking opportunities. The goals of the organization could be fulfilled with volunteer bandwidth from experienced professionals. As professional worlds transition from "analog" to "digital" models, the diversity and intensity of activities required to keep pace with changing needs and demands for new initiatives strain the capacity of even the most dedicated and efficient board-level leadership. Moreover, the supporting resources upon which the OCCD Board has relied (most notably, long-term talented, part-time staff support along with a stable, enduring relationship network) are themselves in transition and disappearing. OCCD needs to find ways to draw ever more productive activity out of its current Board structure while also considering staffing solutions, including the possibility of moving toward an Executive Director model. Regular Board leadership turnover (as well as demands of active professions) creates challenges for momentum and continuity, while a dedicated staff member managing activities, solving problems, creating and delivering stakeholder value, and advancing organizational goals sustains viability. There is just too much that needs to be done.

4. **Partnerships** – One way to conserve bandwidth and expand capacity is to leverage partnerships with mission-aligned organizations. While the effort to find, establish, cultivate, and maintain effective partnerships is daunting, partnering with other organizations can accelerate strategic objectives, leverage resources, and accomplish more than solitary pursuits. Partnerships related to financial sustainability might entail collaborations on grant applications that can contribute to organizational overhead while creating member value or promoting sector interests, with OCCD able to contribute connectivity to a statewide network of community developers, data relevant to program evaluation, or pilot locations for innovations, testing, and impact measures. Universities, community nonprofits, municipalities, and other entities represent potential partners for grant-funded projects. Partnerships related to the creation and delivery of member value can also serve strategic objectives. Institutions of higher education might provide infrastructure for certifications, "stackable" certificates, and accredited continuing education credits while OCCD might deliver subject matter expertise, curriculum development, and recruitment of practitioners seeking enhanced professional credentials. Such partnerships might also entail revenue sharing agreements to serve financial sustainability goals. Partnerships with other mission-aligned community development organizations might jumpstart an OCCD advocacy program by piggybacking on initiatives already in progress, signing on to policy statements already researched and formulated, contributing a community development perspective to educational materials aimed at enhancing awareness and understanding among public officials, sharing media lists for press releases, and other contents and channels for marketing and messaging.

5. **Advocacy** – OCCD members participating in this project were unanimous in supporting a more active role by OCCD in advocating for community development interests and values. Most took a wider view than simply lobbying on issues or advancing policy positions, and many noted the potential for becoming embroiled in divisive disagreements over 'hot' issues. The solution was for OCCD to not engage in lobbying, but in a broader campaign of continuous education of both policy makers as well as the general public to promote increased awareness, understanding, and appreciate of the field of community development, the values it embodies, and the impacts it has on community life and economies. This broader notion of advocacy also speaks to the professional development

goals of members and member interest in elevating the profession. For OCCD to take the lead in defining, articulating, promoting, and defending "Community Development" is a mission that differentiates OCCD from other organizations, positions it as a thought-leader in the field, and serves to inform and shape public discourse affecting policy, funding, and impact of community development efforts. This would be a brand worth having.

6. **Brand Messaging and Marketing** – As a part of advocacy—but also as part of OCCD's charge to serve the community development sector with professional development, training, member networking and association—OCCD's identity, "brand," and messaging needs to reflect its compelling value proposition and be strategically aligned with its vision, mission, and values. There is a general lack of awareness about the Community Development sector (relegated to a not-well-understood status secondary to 'economic development'), the contributions made by its projects and programs, the values it represents, and the impacts it has on the communities it serves. There is no statewide champion of Community Development. If one of the core missions of OCCD is to serve professional development of practitioners, then elevating the profession is a necessary component of that mission. It is also a potent opportunity to message the value and importance of OCCD as an organization of practitioners. The opportunity to create the language describing community development and define the core values it represents is identical to promoting OCCD's own value proposition. The work of community development addresses the prerequisites, enablers, and determinants of life quality and economic prosperity in our local communities. OCCD can be branded as taking the leading role in championing professional community development, enhancing the effectiveness of practitioners, and advancing local, regional, state, and national priorities.

7. **Business Model and Strategic Framework**—At the beginning of this project, an all-day session with OCCD's current support staff yielded a rough initial business model and strategic framework expressing OCCD's current status quo. This initial pre-work is attached in Appendix I.

   At the center of the business model is OCCD's basic value proposition (the problem addressed, and solution offered). The right side of the model depicts the delivery of value (to beneficiaries, via channels, and by means of a relationship brand/identity). The left side of the model depicts the creation of value (via activities, resources, and partnerships). The bottom portions capture the double bottom line results of the model (in terms of revenue and expense and social benefits and costs).

   This initial Strategic Plan Framework developed during that working day is also contained Appendix I. It is an expression of OCCD's current status quo "Mission / Vision / Values" statement.

Appendix I also provides a suggested revision/update of both the Business Model and the Strategic Framework reflecting work products of this strategic planning process with the suggested draft Strategic Framework depicted below:

STRATEGIC FRAMEWORK: OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

MISSION	OCCD is a membership organization that supports and sustains a high-performing, adaptive, professional community development sector comprised of agencies, organizations, and community development professionals engaged in helping Ohio communities be better places to work, live, and enjoy life. OCCD delivers professional development opportunities for community development practictioners while promoting awareness of the public, social, and economic value created by community development projects in Ohio.
VISION	OCCD envisions a network of community development professionals sharing knowledge and expertise to improve conditions that enable healthy local economies providing full employment at good wages, stable housing at affordable prices, producive community facilities, suitable industrial and commercial development, and strong public support for human needs. OCCD envisions all local Ohio communities collabaorating with each other, with widespread public support, to design and implement intentional community development projects and programs to support and complement its economic development strategies.
VALUES	Core values guiding OCCD: Collaboration: Collaboration among community development professionals fosters best practices, effective programs and projects, high-performing public service, and maximized impact on the quality of local community life and economies. Collaboration between federal and state programs and local community development practictioners ensures effective implementation of policy goals that meet local needs while satisfying national, state, and regional priorities. Economic Opportunity: Impactful community development projects enable economic development by addressing structural obstales to business attraction, retention, and expansion and creating conditions that enable and encourage economic opportunities in local communities. Innovation: OCCD is committed to finding new and innovative ways to effectively achieve community development goals in response on changing contexts for our work. Inclusion: Community development professionals seek to create inclusive communities where all people are welcome. OCCD seeks a community development filed reflective of the people we serve. Performance & Accountability: OCCD promotes the highest standards of professionalism and best practices in community development, including impact measures and return on investment.

OBJECTIVES *in words*	**GOALS** *in numbers*	**STRATEGIES** *in words*	**MEASURES** *in numbers*
Increase & Diversify Revenue Sources	For each revenue source, determine dollar value goals sufficient to support an operating budget for adopted/approved strategic objectives	Review and revise existing pricing for membership categories/fees, meetings/conferences/trainings. Seek new grant funding to support increased capacity and new service delivery platforms. Develop sponsorship/advertising revenues in support of all activities/offerings	dollar value of increased income and # of distinct revenue sources
Technology Upgrades	Develop robust website that provides practictioners with immediate answers to information/training needs through curated digital library archive, regular pod casts, and interactive member-to-member communication/information exchange. Increase content availability for "informational immediacy" member needs. Use web-enabled technology to provide training and professional development via means other than in-person training sessions.	Digital resource library expansion; pod cast program; interactive web-based communication and service delivery platforms	number of digital resources, pod cast subscribers, and members employing platform, and positive feedback on member surveys
Fully Engage Young Professionals	Recruit from current membership a cohort of 7-10 rising community development young professionals	While retaining existing Young Professional Committee, in order to enhance representation and enable viable succession, distribute Young Professionals throughout the Committee Structure as observers or full voting members. Additionally, employ a 'champion' model among the cohort empowering them to engage collegues in OCCD.	Age & career-years distribution balance in leadership positions, committee composition, and working group voluteers
Develop Training Templates/Guidelines	Distinguish 3-5 types of training presentations and develop appropriate template guidelines for each.	Ensure presentations of success stories, innovations, best practices, etc. cover essential professional development components of project design, funding structures, implementation, and replicable lessons.	number of templates/guidelines
Re-structure Board Committees/Working Groups	Revisit scopes of current Board committees to ensure alignment with adopted/approved strategic objectives. Augment current committee structure with flexible-structure, volunteer working groups to address each adopted/approved strategic objective that falls outside current committee structures. Encourage cross-fertilization with members serving in multiple working groups.	An active, committed, volunteer Board will continue to be the driving force of OCCD regardless of whether OCCD moves toward an Executive Director model. Committee and working group structures need to align with strategic objectives adopted and approved by the Board, and each committee needs a defining scope outlining goals, deliverables, and timelines.	timely action plan deliverables
Prepare for Executive Director staff model		Identify funding source, develop sustainability financial plan, prepare job description, scope charter, goals & objectives, reporting structure, etc.	
Partnership Development - Universities		Identify opportunities for partnering with other institutions of higher education in community development grant applications and professional development continuing education/certification propgrams	
Partnership Development - Other Community Development Organizations		Explore opportunities for shared services, earned revenue opportunities, and common advocacy activities.	
Partnership Development - Social Sector and Impact Philanthropy		Opportunities for grant contracts and aligning social sector with public sector community development projects and programs	
Advocacy		A strategic communication plan, including content development, message mapping, events, activities, partners, etc. needs to be developed to education both officials and the public about the value/importance of Community Development in order to frame public discource around policy issues as well as elevate both status and understanding of the Community Development sector and the role its practictioners play in stronger local communities and economies.	

Project Background

The Voinovich School of Leadership & Public Affairs at Ohio University was contracted to assist the Ohio Conference of Community Development (OCCD) with their strategic plan development. The Voinovich School team has a long history of engagement with community and economic development in Ohio, helping to ideate, design, align, implement, and evaluate programs across the spectrum of organizational entities from small towns and villages, cities, counties, and regional partnerships to non-profits, NGO, and private sector initiatives. The Voinovich School team is experienced in facilitating strategic planning processes and brings an approach that is process-driven (facilitating surveys, workshops, interviews, and working sessions), inclusive (ensuring wide consensus and co-creation) and disciplined (enabling implementation and measurable results). This project aimed to create conceptual frameworks that capture mission alignment while guiding pragmatic implementation, yielding deliverables with both intellectual and practical value by providing compelling communications and messaging frameworks with managerial tools for accomplishments. This report was designed to not only document findings and recommendations, but also provide tools for visualizing, communicating, charting, and monitoring the carrying-out of the strategic plan adopted.

The project team from the Voinovich School of Leadership and Public Affairs included:

- Dr. Jason Jolley, Assistant Professor & MPA Director
- Dr. Christelle Khalaf, Economist
- John Glazer, Senior Executive in Residence for Strategic Development
- Faith Knutsen, Director of Social Innovation and Entrepreneurship

Dr. Jason Jolley oversaw all tasks and phases of the project, providing consultation and guidance. Mr. John Glazer served as the project lead contact as well as primary implementer, responsible for collecting and analyzing content derived from materials review, surveys, working sessions, interviews, independent research, and other process inputs. Ms. Faith Knutsen served as primary group process facilitator and strategic planning consultant ensuring mission-oriented materiality, relevance, and value to stakeholders. Dr. Khalaf provided expertise in survey and questionnaire-based data-collection methods, data analytics, and interpretative services.

Methodology

Material Review

At the project's start, the strategic planning committee and staff members provided relevant materials developed previously for review. These included previous work on strategic planning, preliminary SWOT analyses, historical financial information, best practices worksheets, results from the 'survey monkey' member questionnaire conducted in 2016, OCCD Constitution and By-Laws, organizational structure, staff job descriptions, Board committee work, prior working group assignments and recommendations, member lists, and other background materials. These were reviewed and informed both the structure of the new member, working sessions with staff and Board members, and later member interviews.

Early Interviews

After a review of background material, interviews with the then Board President and Chair of the Strategic Planning Committee served create historical context, identify major issues of concern, deepen understanding of challenges and opportunities, and set the goals for this strategic planning project. The Executive Committee had previously initiated a great deal of effort around the strategic planning process, and the results of that work became the starting point for the current project. The roles of member survey input and Board decision making for specific strategic goals and objectives rendered the framing of questions, identification of priorities, charting alternative pathways, and revisiting the organization's mission more important than specific or definitive recommendations. Considerable effort went into gathering inputs to co-create the membership questionnaire which underwent multiple iterations before the survey was finalized and distributed.

Staff Meeting

An all-day meeting with Pat Richards, Debra Mayes, and Jack Riordan provided historical context, current status discussion, and a working session to build a Business Model and Strategy Framework reflecting existing OCCD operations and mission statements. This initial business model and strategy framework reflect, as accurately as possible, the current state of OCCD and is meant as a baseline against which to compare the updated and revised Business Model and Strategy Framework resulting from this project. Both the current 'status quo' Business Model and Strategy Framework as well as the revised Business Model and Strategy Framework are included in this report as Appendix I. The revised model and framework represent a high-level view of the current work product.

Membership Survey

The final version of the membership questionnaire was distributed to both members and newsletter subscribers in July 2019. 1,003 surveys were distributed, with 4 'bouncing back' as undeliverable, resulting in a survey target population of 999 members and subscribers. The final number respondents totaled 118 and was comprised of 93 members and 25 subscribers yielding a response rate of 11.8%. This reflects a high level of participation among OCCD members and subscribers. Survey results were shared with the Executive Committee, reported to the Board at its July 23, 2019 meeting, and highlighted in a presentation to membership at the July 24, 2019 Member Meeting.

The member survey collected data and member input into OCCD's current value propositions around meetings and trainings, professional development, and networking as well as information relevant to additional activities and offerings of value to members including technical assistance, strategic partnering, certifications and continuing education credits, advocacy, funding sources, and land banks. Additionally, members were surveyed for qualitative input around the challenges and opportunities facing OCCD at the present time.

A PowerPoint Presentation, entitled "OCCD 2019 Survey Results" and attached as Appendix II to this report, provides a comprehensive report of the survey findings including both data analytics and organization of qualitative comments collected.

Board Working Session and Membership Meeting Interactive Presentation

On July 23, 2019 a working session was held with the OCCD Board of Directors reporting preliminary results of the Member Survey and engaging in a co-creation and brainstorming process around strategic themes and initiatives. The Board used the Business Model Canvas and Strategic Plan Framework to address topics that included challenges of transitions and successions both internal and external the organization, revisiting and refreshing components of OCCD's mission and vision statements, financial stability, member services, partnerships, advocacy roles, organizational structure, an updated SWOT analysis, and a variety of exploratory "big ideas." A copy of the PowerPoint Presentation that guided this working session with the Board is attached to this report as Appendix III.

On July 24, 2019, a presentation at the Membership Meeting providing an overview of the results of the Member Survey and an update on the strategic planning process to-date. Members present provided input and engaged in brainstorming around the same set of topics covered in the previous day's Board Meeting. A copy of the PowerPoint Presentation that guided this working session with the Members is attached to this report as Appendix IV.

Phone Interviews

Following recommendations from OCCD Executive Committee as well as staff members, a series of follow-up telephone interviews was conducted to gather more focused input and explore emerging strategic themes in greater detail. Recommended interviewees included seasoned community development professionals with a long-term history of OCCC involvement, younger rising community professional actively engaged in OCCD activities, and State officials and administrators whose programs and funding have historically been the backbone of OCCD's training and member services. Whole the State did not respond to interview invitations—and this remains a serious gap in the strategic planning process—the OCCD members interviewed were generous with their time and openly frank about their ideas. These interviews lasted between 30 and 60 minutes and provided valuable nuance and detail to this report's work products for an updated OCCD Business Model and refreshed Strategic Framework.

Strategic Theme Detail

I. Overriding Challenge: CHANGE

a. Generational Change

- As the founders, developers, leaders, and prime drivers of OCCD are reaching retirement, a younger generation of community development professionals—with distinctively different engagement styles—is coming of age. This generational shift involves the loss of knowledge, experienced professionals steeped in OCCD's legacy, history, and institutional knowledge. It creates a challenge of continuity, knowledge transfer, and succession planning.

- This is a time for the older generation to step back and the new generation to step up, and for both to do so in a concerted, intentional, and strategically aligned manner. Current leadership needs to activate younger professionals who, in turn, need to engage.

- Specific suggestions to increase OCCD engagement among young professionals included:
  - Identify a core cohort of career-oriented professionals committed to OCCD vision. Criteria might include regular attendance at OCCD events, conferences, and trainings; graduate degrees in related fields; career professionals moving up from entry to mid-level positions.
  - Retain the Young Professionals Committee but distribute its members among all other committees either as participating observers or full voting members. Integrate Young Professionals in all aspects of OCCD deliberations.
  - Continue scholarship program and assist with placements.

b. State Changes

- Changes in OCCD's relationship with the State of Ohio stem in part from a similar transitions and turnover in personnel resulting in a loss of long-standing relationship structures, shared understandings of OCCD's role with and value-add, and both formal and informal communication channels.
- Additionally, there are policy, programmatic, and budgetary changes in State operations impacting the community development carrying with them potential fundamental impacts the industry sector.

c. Community Development Sector

- Other organizations with similar missions have emerged over time serving the community development community with professional development, networking, training, advocacy, and other services.
- The Economic Development sector has come to dominate public awareness, governmental policy, and funding impacting the image/identity/brand of Community Development diminished in importance and creating a need to elevate the perception of Community Development on the part of Federal, State, and Local political leadership as well as the general public.

II. Financial Wellbeing

The challenge to stabilize and grow OCCD's financial base is fundamental to nearly all other strategic initiatives since availability of resources is the basic limiting factor for any implementations.

Specific ideas for increasing and diversifying revenues:

- Membership Categories and Fees. Interviewees noted that membership fees for comparable organizations tend to be higher than OCCD's. All noted and supported OCCD's desire to be affordable, especially for smaller communities and nonprofits with limited budgets, but suggested that sliding-scale fee structures can accommodate affordability goals, especially for smaller communities, while increasing OCCD revenues. All recognized the need to remain competitive and retain membership while bringing fees more in line with other professional organizations.

- Expand Membership Base. Both survey comments and interview suggestions included recommendations to expand the membership base as well as the array of member offerings needed to serve a more diverse base. Suggestions were to expand services and membership categories to attract entities beyond the current base of members with professional development needs around the federal and state programs OCCD has traditionally been organized to serve. (e.g., HUD, CDBG, HOME, CHIP, etc.). Members noted that even their own professional roles were broader than administering CDBG, HOME, and related programs, and they recommend OCCD broaden its focus to wider community and economic development topics and opportunities. With an expanded vision (to uplift and serve "community development" more broadly defined), different kinds of organizations, entities, supporting companies, nonprofits, philanthropy, impact investors, public/private leaders, economic development entities, etc. become potential members who may be interested in and served by the broader community development strategies. Developing strong value propositions for different segments of the community development sector, crafting compelling messages for membership campaign, and drawing upon the existing base of motivated and supportive members were all among suggested strategies.

- Fee-for-Service Offerings. While the same cautions and considerations relating to affordable membership fees applies to the fee structure associated with OCCD trainings and events, revisiting existing program revenue fee structures and benchmarking against comparable training programs needs to be a part of financial planning going forward. In addition to current service offerings, new product offerings continue to be a strategic opportunity in need of innovation and creative thinking.

- Technical Assistance. Customized, intensive, hands-on, one-on-one technical assistance repeatedly emerged as an in-demand opportunity desired by members.

Being able to deliver such services is currently hindered by organizational capacity and staffing structures. One possibility is an Executive Director model that includes technical assistance service delivery within the scope of work that might contribute to sustainability. Another challenge is potential competition that a technical assistance service offering might represent to members engaged in consulting practices. Solutions might be found to carve out non-competing services or engage consultants in the service delivery mechanism, with care taken to manage and mitigate potential conflicts of interest. Despite challenges, members have clearly expressed an interest in technical assistance from OCCD and appear open to a fee-for-service structure. Significantly, over 79% of survey respondents indicated that their organization would utilize low-cost technical assistance services provided by OCCD, while only 40% of respondents currently engage in external fee-based technical assistance services. Survey respondents indicated that they did not need help identifying needed or fundable projects in their communities but did need help identifying funding sources and building integrated capital stacks more than they needed assistance with preparing applications or project planning and management.

- Grant Funding. As a nonprofit organization, OCCD can qualify for grant funding from both governmental and philanthropic sources. A significant, yet threatened, portion of current budgeting relies on State grant funded support for training. If OCCD diversified its programmatic base, it may well be competitive for other grant funding in support of the broad and valuable goals of community development. Capacity building grants to fund technological improvements, seed professional staffing needs, or build new product offerings are also possible. While OCCD's current organizational structure makes it difficult to apply for, execute on, and administer grant resources, building such capacity may be crucial to a financially sustainable future. Partnerships and sub-contractor relationships on grants where other organizations are the 'prime' administrator can be a source of incremental grant income. OCCD has access to sources of data, pilot programs, and community development projects that may be of great value to grant partnerships. The current volunteer-based Board organizational structure would stress an already-overburdened system, but there is opportunity for creative solutions to build internal capacity and qualify for more diverse grant revenues.

- Sponsorship / Advertising Opportunities. OCCD has previously considered monetizing its member outreach and ability to convene community development professionals through sponsorship and advertising opportunities. With staff and volunteer capacities being a limiting factor, such opportunities can be pursued especially if new digital service delivery models (e.g., rotating pod cast and webinar hosting, digital library archives, interactive communication platforms, etc.) are implemented.

- Professional Certifications, Certificate Programs, Continuing Education Credits. Members expressed interest and desire in OCCD offering different forms of professional credentials. OCCD has considered such programmatic offerings in the distant past, but new conditions and potential partnerships with education

institutions may create revenue-sharing opportunities with outsourced implementation and administration models.

III. Membership & Membership Services

- Campaigns for new members and/or new member services should leverage existing member support. Survey and interview results show that OCCD is highly regarded by its members who perceive the organization's greatest value to be related to professional development, peer-to-peer best practice exchanges, and networking. 80% of survey respondents reported that they were either satisfied (50%) or very satisfied (30%) with their OCCD membership, and over 73% indicated they were likely or highly likely to recommend OCCD membership to others. Members regard OCCD as a trusted source of timely information and a valued resource for professional development and advancement of the community development sector. Over 64% of survey respondents rated OCCD's networking opportunities at 8 or higher on a 10-point scale, and over 32% rated it a "10."

- Survey respondents rated the value of OCCD trainings as very high, with nearly 75% rating them as an 8 or higher on a 10-point scale. Members prefer shorter (viz. single day) meetings and trainings held at various locations and available on-line. Over 62% of survey respondents expressed a preference for single-day training. In addition to targeted topics relevant to professional activities and projects, members expressed interest in the organization addressing broader issues of community development including shared vision, defined outcomes, and measures of success. Survey respondent comments noted the need for trainings, presentations, and panels geared to newer practitioners and less experienced staff.

- Members expressed concern about OCCD's ability to sustain current service provision and expand offerings to meet new and emerging needs. Concerns centered around unstable revenues, aging membership, and lack of staff capacity. Members value OCCD's tradition of low cost and high accessibility. Over 55% of survey respondents rated the low-cost education opportunities at an 8 or higher on a 10-point scale, and nearly 30% rated low cost as a "10."

- Survey results suggest strong consideration of the following new or enhanced Member Services:
  - Technical Assistance – specific, hands-on, applied learning projects/programs discussed above in the Financial Well-Being section of this report
  - Partnering with other professional organizations to expand education opportunities for professional credentials (mentioned above in the Financial Well-Being section of this report). 67% of survey respondents rated the value of such partnering as 8 or higher on a 10-point scale. Members provided multiple suggestions for certification and continuing education courses they would value, and many thought continuing education opportunities would attract new members.

- Partnering with other professional organizations to strengthen advocacy efforts (discussed below in the Advocacy section of this report. 51% of survey respondents rated the value of such partnering as 8 or higher on a 10-point scale.
- Assistance in strengthening member organizational capacity and effectiveness
- Mentorship programs
- On-line service deliveries such as webinars, podcasts, electronic media, mixed media libraries of educational/training content, message boards and interactive peer-to-peer platforms.
- Marketing, messaging, and efforts to create greater visibility were also recommende by members, with some comments noting that the key obstacle to attracting new members is that potential candidates for membership do not understand the value OCCD has to offer. Such a strategic communication plan would also serve to strengthen OCCD's existing partnerships and support efforts at new partner relationships.

IV. Conferences & Trainings

- Structure of training presentations. Many best practices and innovations are presented by panels with success stories, but often the storytelling is celebratory and promotional and less educational and transferable than many members would like. They ask for an emphasis on the educational and professional development value of presentations with a focus on lessons, practices, solutions, etc. that rise above the particular success story and become learnings with practical application elsewhere.

  The suggestion is for a training session template or set of questions that all presentations should be sure to address assuring that certain basic elements of the success stories get covered. This would include an account of the capital stack and how funding was acquired/combined, how the idea/innovation/solution was formed, partnerships involved, processes needed to implement, practitioner lessons, and how success could be replicated in other contexts. This is especially important if the trainings are going to focus on delivering value to young professionals.

  Another method to assume maximal value from presentations beyond the template/rubric guidelines for presenters is for a training committee to review presentations ahead of time and make suggestions for how they might be revised/improved to create stronger member value.

- Members (especially young professionals) have information and training needs that are more immediate than quarterly meetings and scheduled training sessions can satisfy.
  - One way to address this need, while also serving to capture and transfer knowledge and experience within the organization, is to build a robust, searchable library archive of trainings, problem-solution sets, best practices, etc. These need to be easily identified, highly focused, short and crisply presented.
  - Another suggestion to build the library, regularly disseminate information, engage members, and generate potential revenue as well is to organize weekly 15-20 pod casts and TED talks on community development topics that members could access during commutes, downtimes, etc.

- Digital interactive platforms for Q&A, references, chat-type interactions are included in this desire for OCCD to move from an 'analog' to a 'digital' service delivery system.

V. Organizational Structure

- Capacity. The current organizational structure centers around an active and committed volunteer Board of Directors organizing itself through a structure of standing committees and ad hoc working groups and supported with a part-time staff serving functions of administration, training co-ordination, and program development. Current capacity is stretched and over-burdened with the growing needs, urgency, and complexity of OCCD challenges, issues, and opportunities along with increasing demands of professional work life impacting individual board members.

- Turnover. Annual leadership change is both a symptom and indicator of this challenge: it is reasonable to require just a one-year commitment for such an intensively active volunteerism, yet it is also challenging to maintain momentum and continuity with annual changeover in leadership. The overriding challenge of generational change affects both the Board and the staff as long-serving individuals are transitioning out of service. Efficiencies, effectiveness, and continuity will be negatively impacted by the pending retirements of all current part-time support staff members.

- Member Views. While the Membership Survey did not collect data about organizational structure, interviews generated the following observations regarding organizational structure:
    - There were multiple confirmations of current structure capacity challenges.
    - Many suggested a shift to an Executive Director structure with the main argument in support being the view that there was too much to do and that the nature of the work and need for progress demands continuous attention.
    - All expressed appreciation for the limits of financial resources to solve capacity challenges.

- Strategic Choice. The Board needs to decide between intensifying its current model of a volunteer, active Board or moving toward an Executive Director model where activities and organizational development are carried out by full-time staff with Board guidance and governance.

    - The alternative of retaining/intensifying the current structures demands much more activity, effectiveness, and impact on the part of volunteers to advance strategic imperatives but is limited by capacity challenges. Continuing with current active volunteer Board model calls for revaluating both committee and working group structures, mandates, and memberships as well as increasing ways to engage non-Board members to increase capacity, timeliness, and impacts.

    - The alternative of a full-time Executive Director structure is likely to accelerate implementation of strategic imperatives, enhance effectiveness, an increase impact

but would continue to require active Board engagement and is limited by financial resources. Shifting to an Executive Director model requires staged implementation to enable the acquisition of needed financial resources to support full-time staff solutions. Capacity development grant funding might accelerate transition to an Executive Director model as a sustainable business plan is developed. A staged implementation would require prior funding solutions but might start with a fulltime Executive Director supported by one part-time staff member charged with both administration and event logistics duties.

- Capacity Needs. The number and diversity of initiatives needed, the focused effort required, the timeliness of implementation, etc. strains the capacity of a volunteer Board no matter how active and committed its members. Regardless of whether the Board continues with its current active volunteer Board model or shifts to an Executive Director model, pending part-time staff turnover creates opportunities to re-evaluate functional areas beyond current areas served (administration and executive assistance, training coordinator and event planner, development specialist) to consider other functional needs of the organization currently served by committee and working group structures but slowed and hindered by capacity/bandwidth challenges.

These other functional areas might include:

- Membership engagement and expansion
- Member trainings, programs, services
- Diversifying revenues through grants and fee-for-service programs
- Website development and digital service delivery platforms
- Branding, marketing, messaging
- Partnership development
- Advocacy and educational activities.

VI. Partnerships

While opportunities for partnerships in the areas of grant funding, educational services, and advocacy are discussed elsewhere in this report, it is necessary to call out the importance of the OCCD partnership with the State of Ohio's community development administrators. State personnel did not respond to the request for interviews, and this remains an important gap in this reporting. Nevertheless, observations of strategic value have emerged from interviews.

The relationship between OCCD and State of Ohio community development program administrators is akin to the issues surrounding advocacy (discussed below in the Advocacy section of this report) in that there is a need for OCCD to educate and promote about the value and importance of the work OCCD does on behalf of the State.

OCCD's value proposition to the State needs clear and compelling articulation as well as channels for messaging broadly. Components of the OCCD value proposition to the State include both bottom-up and top-down value chains:

Bottom Up:

- Feedback channel for grassroots information flows to the State about what's happening "on the ground", what are the needs, obstacles, opportunities, successes, and—most importantly—the impacts of OCCD-assisted projects on State goals, priorities, and policy initiatives.
- As the voice of local-level program implementers, project practitioners, and community developers, OCCD provides reliable and timely information about trends, emerging issues, program effectiveness, and impact measures.
- OCCD is an independent source of authentic storytelling and data gathering to enable State officials to measure and message effectiveness, successes, and impacts on local communities.

Top Down:

- Trainings, guidance, and assistance to local communities on how to apply for, implement and administer, comply with and report on State-supported programs enables the State to be more effective in achieving its goals, to save time and money processing applications and monitoring regulatory compliance, and to pursue policy goals and initiatives.
- OCCD provides a communication channel between State and Local community development entities, assisting the State with messaging priorities, troubleshooting challenges, and finding opportunities for optimal impact.

VII. Advocacy

The member survey showed high interest levels in OCCD undertaking increased advocacy activities. 53% of survey respondents scored the importance of these activities as 8 or higher on a 10-point scale, and one quarter of all respondents rated the level of importance as a "10." Advocacy emphasized promoting the value of community development programs with a focus on policy goals and funding levels.

While nearly all OCCD members surveyed and interviewed recognize the need for and value of organized advocacy by OCCD in service to Community Development interests and goals, three concerns were repeatedly raised:

- There is a resource challenge with regard to both funding and time capacity to support concerted and effective advocacy activities.
- There are multiple organizations pursuing advocacy goals on policies and issues related to the interests and needs of the Community Development profession, and OCCD members cautioned about duplicating efforts or re-inventing wheels.
- There are wide gulfs and differences among OCCD members, their authorizing/governing entities, and other relevant stakeholders in perspectives, political affiliations, worldviews, and argumentation strategies as well as polarized and divisive partisan contexts affecting public discourse and policy making in current times.

Despite these concerns, several suggestions and ideas emerged:

- Partnerships with organizations already effectively engaged in advocacy efforts would leverage their prior work developing relevant policy statements, creating and maintaining advocacy pathways, and organizing events, campaigns, educational activities, etc. The suggestion was that it would easier to obtain member consensus to join forces with other organizations aligned with the Community Development sector (American Planning Association was cited as one example) than it would be to obtain consensus on specific policy statements related to divisive issues.

- 'Advocacy' activities might achieve member consensus and support if they were conceived not as taking positions on immediately-pending issues that emerge in the moment and may be "hot" or potentially divisive, but instead as educating government officials and the public at large generally about the value, contributions, need for, and relevance of Community Development. It was thought that increasing awareness of the impact and importance of the Community Development sector and elevating issues before they emerge as contentious would be the most effective advocacy strategy and one that bypasses the challenges of specific political differences and partisanship. This advocacy strategy is to avoid engaging in contentious fights or in mobilizing when a crisis is pending, but instead to inform public discourse and political debate ahead of time before issues emerge or potential crises loom. Informing members issues on the table is always the right thing to do, but seeking seats at the table in the midst of debate is thought of as being "too late." Being at the table "all along" as opposed to seeking a spot at the table when issues emerge is the intent of this advocacy strategy. This suggestion dovetails nicely with the suggested mission of OCCD to "elevate" as well as develop the Community Development profession. Advocacy should include broad Community Development promotional campaigns beyond policy statements, legislative education activities, and membership issue guides.

- Advocacy outreach and events

    - Efforts need to be made to attract policy makers and administrators to conferences, meetings, trainings, and other OCCD events.
    - Outreach needs to include elected officials at both state and local levels. Several interviewees thought that advocacy for community development programs at local level would be valuable and create grassroots support for messaging up. Targeting local officials as well as their key constituents for messaging about the value and impacts of Community Development projects as well as recognition/appreciation of innovative Community Development approaches.
    - Special legislative events can effectively increase awareness and elevate community development issues, topics, and concerns. An awards program that recognized on-the-ground community development successes, legislative champions of community development, and rising practitioners could be held at the Statehouse with policy makers invited to speak, present

awards to constituents, and network with the State's Community Development professionals.

VIII. Brand Messaging and Marketing

There is a general lack of awareness about the community development sector and the contributions made by community development projects. There appears to be no statewide champion of the industry. If one core mission of OCCD is to serve professional development of practitioners, then elevating the profession is a necessary component of that mission.

Goals would include:

- Promoting awareness of what community development is, what it does, the impact it has, its contribution to economic development and quality of life, and the economic impact of addressing "social determinants of economic growth and wellbeing". The community development work addresses the prerequisites and enablers of economic development.
- Re-invigorate the language, images, memes defining and representing the value of community development.
- Campaigns to include social media, press release program and earned media, public service announcements and assistance to members to place success stories in a broader community development context.
- Collaborating with both members and other organizations for integrated messaging about the value of community development.

IX. Strategic Framework: Vision / Mission / Values

Qualitative comments from the member survey and subsequent interviews suggest that components of OCCD mission statement might include:

- OCCD helps communities be better places to work, live, and play by enhancing the proficiency of agencies, entities, and individuals engaged in community development
- OCCD delivers professional development opportunities to community development practitioners to enable them to better serve their communities. It does this by providing training, professional association networking, best practices, and advocacy activities designed to increase the number, quality, and impact of community development projects.
- OCCD elevates awareness, educates, and increases understanding and appreciation of the value and importance of professional community development for both internal and external audiences.
- A strategic communication plan should include message maps for different targeted audiences, stakeholders, and beneficiaries of OCCD: federal/state/local officials, community public and private sector leaders, nonprofits and philanthropic organizations, news media, and the general public.

APPENDIX ONE

Initial and Revised Business Models and Strategy Frameworks

OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

initial business model

participants: OCCD - Jack Riordan, Debra Mayes, Pat Richards; OU - John Glazer, Faith Knutsen

KEY PARTNERS

Members

Trainers

Community development professionals

Relationship network

Government agency and program officials

Other State Agencies, associations and organizations

ACTIVITIES

Identify and research member funding opportunities
- monitoring changing policies

Training
- program design, funding, and logistics

Membership
- needs assessment
- recruitment, retention and reclamation
- orientation and engagement

State and Federal programs
- monitoring, communication, and member needs assessment

Administration
- Board and organizational support

RESOURCES

Funders

Network of knowledge and experience
- members
- State and Federal officials
- experts
- industry leaders

Personnel
- Staff
- Board members, committees, and working groups
- Emeriti

Other State Agencies, associations and organizations

VALUE PROPOSITION

PROBLEM

Local communities seek to enhance livability in Ohio through the development and preservation of well-planned, suitable, and economically-sound community facilities, housing, and industrial and commercial development. The community development sector is challenged by complex dynamics of funding, administration, and implementation requirements as they seek to maximize local impact.

SOLUTION

OCCD maximizes the impact of State and Federal funding programs related to housing, community and economic development by serving community development practitioners through trainings, meetings and events, networking, and digital communications focused on education and empowerment.

RELATIONSHIP

Sense of belonging and alignment with mission-aligned goals and values

Sense of "the sum being greater than the parts"

Feeling expressed by one voice

Trust and confidence

CHANNELS

Member meetings and annual conference

Scheduled trainings

Digital communications

Networking

BENEFICIARIES

Direct

Practioners who participate in federal and State grant programs relating to housing, community development and economic development across the state of Ohio

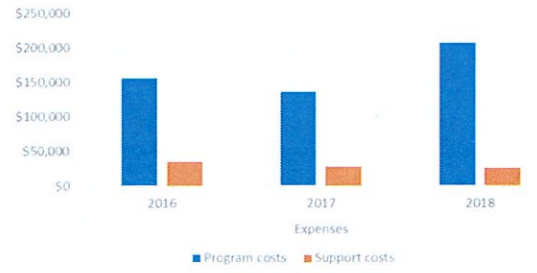
Local government, non-profits and consultants

State and Federal Funders

Indirect

Local Communities serving direct beneficiaries (improved housing, neighborhoods, industrial and commercial development, etc.)

FISCAL COST



FISCAL REVENUES

SOCIAL/ENVIRONMENTAL COST

SOCIAL/ENVIRONMENTAL BENEFITS

STRATEGIC FRAMEWORK: OHIO CONFERENCE OF COMMUNITY DEVELOPMENT
initial model

MISSION	OCCD is the State of Ohio's curator and disseminator of knowledge, experience, training, and practical assistance for best practices in field of community and economic development. OCCD is the network hub for agencies, organizations, and professionals involved in community development programs.
VISION	OCCD increases the effectiveness of local governments, non-profits, and private entities working to enhance the livability of Ohio's diverse communities by maximizing the impact of State and Federal funding programs related to housing, community, and economic development, aligning local goals and funder priorities, and improving professional standards among practitioners engaged across all phases of community development.
VALUES	OCCD values: * collaborative, flexible, and responsive bridge-builder and network enabler for its stakeholders in the field of community development. * an environment of respect which asserts the values of dignity, equality and diversity while assisting all of its members in developing their full potential. * highest standard of professionalism and best practices to make Ohio's local communities better places to live, work, and enjoy life. * the needs of its stakeholders and is dedicated to solving problems to enhance their impact.

OBJECTIVES *in words*	**GOALS** *in numbers*	**STRATEGIES** *in words*	**MEASURES** *in numbers*

OHIO CONFERENCE OF COMMUNITY DEVELOPMENT
draft final model
Strategic Plan Business Model

KEY PARTNERS

- Members
- Board Members & volunteers
- Trainers, panelists, community development professionals, and other subject matter experts
- Federal & State agencies and program officials
- Universities - collaborate on grant opportunities, training and certification programs, etc.
- Foundations, philanthropic funders, and mission-aligned social sector organizations.
- Other state organizations and associations

ACTIVITIES

- Increase and diversify revenue sources (member fees and categories, grants, earned income)
- Develop member services responsive to current needs, time & budget restaints, and need for greater access and information immediacy.
- Ongoing membership campaign to recruit, retain, reactivate, and expand membership base
- Design & conduct trainings to keep members up to date and advance professional development
- Quarterly and annual meetings for trainings, networking, advocacy, and industry and professional development
- Activate young professionals - recruit and engage on Board, Committees, Working Groups, Trainings, and events
- Develop robust digital presence (training library, pod casts, interactive communications, social media, etc.)
- Monitor and inform members of policy changes, community development trends, innovative programs/projects, funding opportunities, etc.
- Advocate for recognition/understanding of the value/importance of community development programs and projects among public, social, and private sector leaders and their constituents
- Administrative, Logistical, Board and organizational support

RESOURCES

- Members, knowledge, experience, and relationship networks
- Funders
- State and Federal officials
- Staff, Board members, committees, & working groups, emeriti
- Partners

VALUE PROPOSITION

PROBLEM

The internal and external landscapes of the community development sector undergo continuous and increasingly rapid change in the areas of policy/programs/funding requirements, turnover among professionals and public officials, and the complexity of conditions impacting quality of life and economic prosperity for local communities. Within this context, community development professionals are challenged by complex dynamics of funding, administration, and implementation requirements as they seek to serve their communities and maximize local impact of well-planned, suitable, and economically-sound community facilities, housing, and industrial and commercial development.

SOLUTION

OCCD maximizes the impact of Federal & State funding related to housing, community and economic development by serving practitioners through trainings, meetings and events, networking, and digital communications focused on education and empowerment. OCCD enables the community development sector to share knowledge and experience, provide each other with opportunities for professional development, and collectively advance the field to meet the needs of local communities and the priorities of Federal and State programs.

RELATIONSHIP

Reliable source of professional development training, skills, credentials, connections, and support.

Leveraged resource for needed information, advice, reference, referals, and other tools to increase professional effectiveness and impact.

Amplified voice of Community Development, promoting and enhancing recognition, status, and appreciation for the sector's contributions to the quality of community life and enabling conditions of economic development and shared prosperity.

Trust. Confidence. Competency. Collaborative. Innovative. Inclusive. Accountable.

CHANNELS

- Member meetings, conferences, trainings, and networking events
- Digital communications, newsletters, social media, pod casts, archives, interactive platforms
- Advocacy activities for information/education, earned media, and events.

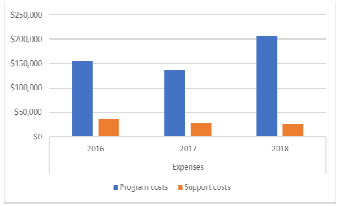
BENEFICIARIES

Direct
Community Development Professionals and Practioners working for municipalities or other local government agencies, nonprofit organizations with community development missions, private sector consulting firms in the community developement sector, and other entities or organizations who participate in federal and State grant programs relating to housing, community development and economic development across the state of Ohio.

Federal and State funders administering programs to fund community development projects for improved housing, neighborhoods, industrial and commercial development, etc.

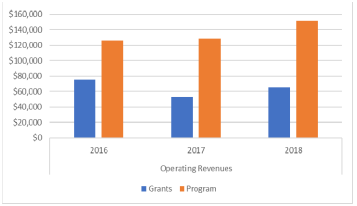
Indirect
Local Communities served by direct beneficiaries and seeking project funding for community development initiatives.

FISCAL COST



Investments needed for enhanced internal capacity, staff changes, new member outreach, expanded member services, stakeholder management, technology development/maintenance, grant administration and execution, joint ventures and partnerships, advocacy programs and marketing/messaging to elevate awareness/importance of community development sector.

FISCAL REVENUES



Expanded and diversified revenue sources needed including restructured membership categories and fees, earned income from service and training fees, expanded grant funding, sponsorship opportunities, and public support.

SOCIAL/ENVIRONMENTAL COST

- Loss of knowledge, expertise, relationships from retiring professionals leaving active engagement
- Potential for damaged relationships arising from conflicting views on issues and policies impacting community development sector
- Potential overlap with other organizations providing community development training, connectivity, and collaborations.

SOCIAL/ENVIRONMENTAL BENEFITS

- Social, environmental, and economic value of community development programs and projects
- Mnimize overlap with other community development organizations by positioning OCCD's primary focus as elevating the profession through professional development and advocacy for the field.

STRATEGIC FRAMEWORK: OHIO CONFERENCE OF COMMUNITY DEVELOPMENT
draft final model

MISSION	OCCD is a membership organization that supports and sustains a high-performing, adaptive, professional community development sector comprised of agencies, organizations, and community development professionals engaged in helping Ohio communities be better places to work, live, and enjoy life. OCCD delivers professional development opportunities for community development practictioners while promoting awareness of the public, social, and economic value created by community development projects in Ohio.
VISION	OCCD envisions a network of community development professionals sharing knowledge and expertise to improve conditions that enable healthy local economies providing full employment at good wages, stable housing at affordable prices, producive community facilities, suitable industrial and commercial development, and strong public support for human needs. OCCD envisions all local Ohio communities collabaorating with each other, with widespread public support, to design and implement intentional community development projects and programs to support and complement its economic development strategies.
VALUES	Core values guiding OCCD: Collaboration: Collaboration among community development professionals fosters best practices, effective programs and projects, high-performing public service, and maximized impact on the quality of local community life and economies. Collaboration between federal and state programs and local community development practictioners ensures effective implementation of policy goals that meet local needs while satisfying national, state, and regional priorities. Economic Opportunity: Impactful community development projects enable economic development by addressing structural obstales to business attraction, retention, and expansion and creating conditions that enable and encourage economic opportunities in local communities. Innovation: OCCD is committed to finding new and innovative ways to effectively achieve community development goals in response on changing contexts for our work. Inclusion: Community development professionals seek to create inclusive communities where all people are welcome. OCCD seeks a community development filed reflective of the people we serve. Performance & Accountability: OCCD promotes the highest standards of professionalism and best practices in community development, including impact measures and return on investment.

OBJECTIVES *in words*	**GOALS** *in numbers*	**STRATEGIES** *in words*	**MEASURES** *in numbers*
Increase & Diversify Revenue Sources	For each revenue source, determine dollar value goals sufficient to support an operating budget for adopted/approved strategic objectives	Review and revise existing pricing for membership categories/fees, meetings/conferences/trainings. Seek new grant funding to support increased capacity and new service delivery platforms. Develop sponsorship/advertising revenues in support of all activities/offerings	dollar value of increased income and # of distinct revenue sources
Technology Upgrades	Develop robust website that provides practictioners with immediate answers to information/training needs through curated digital library archive, regular pod casts, and interactive member-to-member communication/information exchange. Increase content availability for "informational immediacy" member needs. Use web-enabled technology to provide training and professional development via means other than in-person training sessions.	Digital resource library expansion; pod cast program; interactive web-based communication and service delivery platforms	number of digital resources, pod cast subscribers, and members employing platform, and positive feedback on member surveys
Fully Engage Young Professionals	Recruit from current membership a cohort of 7-10 rising community development young professionals	While retaining existing Young Professional Committee, in order to enhance representation and enable viable succession, distribute Young Professionals throughout the Committee Structure as observers or full voting members. Additionally, employ a 'champion' model among the cohort empowering them to engage collegues in OCCD.	Age & career-years distribution balance in leadership positions, committee composition, and working group voluteers
Develop Training Templates/Guidelines	Distinguish 3-5 types of training presentations and develop appropriate template guidelines for each.	Ensure presentations of success stories, innovations, best practices, etc. cover essential professional development components of project design, funding structures, implementation, and replicable lessons.	number of templates/guidelines
Re-structure Board Committees/Working Groups	Revisit scopes of current Board committees to ensure alignment with adopted/approved strategic objectives. Augment current committee structure with flexible-structure, volunteer working groups to address each adopted/approved strategic objective that falls outside current committee structures. Encourage cross-fertilization with members serving in multiple working groups.	An active, committed, volunteer Board will continue to be the driving force of OCCD regardless of whether OCCD moves toward an Executive Director model. Committee and working group structures need to align with strategic objectives adopted and approved by the Board, and each committee needs a defining scope outlining goals, deliverables, and timelines.	timely action plan deliverables
Prepare for Executive Director staff model		Identify funding source, develop sustainability financial plan, prepare job description, scope charter, goals & objectives, reporting structure, etc.	
Partnership Development - Universities		Identify opportunities for partnering with other institutions of higher education in community development grant applications and professional development continuing education/certification propgrams	
Partnership Development - Other Community Development Organizations		Explore opportunities for shared services, earned revenue opportunities, and common advocacy activities.	
Partnership Development - Social Sector and Impact Philanthropy		Opportunities for grant contracts and aligning social sector with public sector community development projects and programs	
Advocacy		A strategic communication plan, including content development, message mapping, events, activities, partners, etc. needs to be developed to education both officials and the public about the value/importance of Community Development in order to frame public discource around policy issues as well as elevate both status and understanding of the Community Development sector and the role its practictioners play in stronger local communities and economies.	

APPENDIX TWO

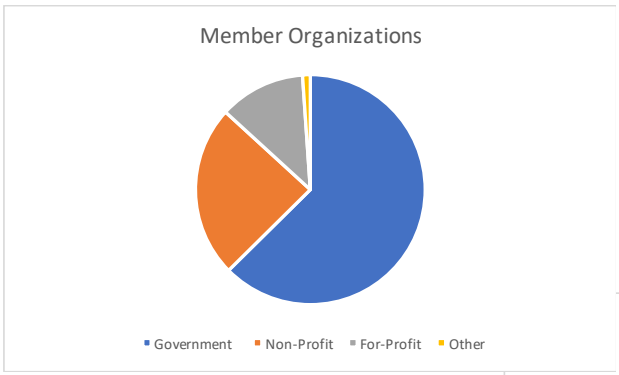
OCCD 2019 Member Survey Results

OCCD Member & Subscriber Survey Results

Strategic Plan Project

Voinovich School of Leadership & Public Affairs

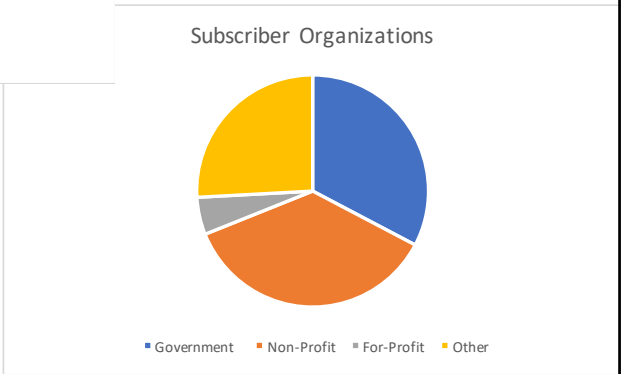
July 2019



Highlights -- Member and Subscriber Survey

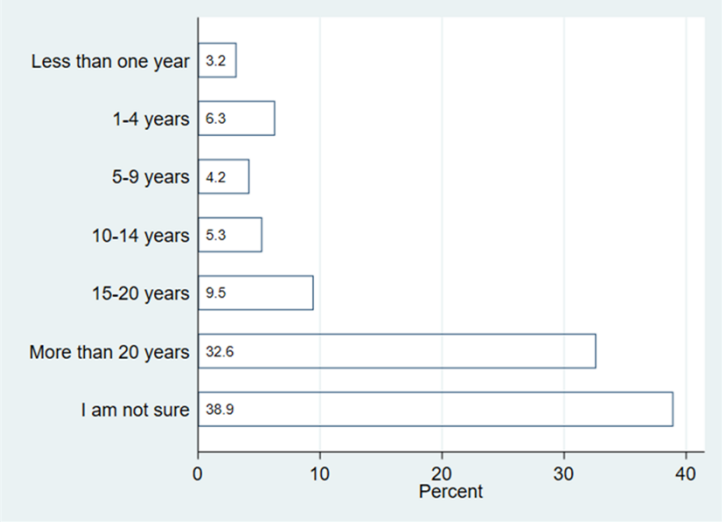
Respondents: 93 members, 25 subscribers

Member Organizations		Subscriber Organizations	
Government	62.6%	Government	30.1%
Non-Profit	24.2%	Non-Profit	33.3%
For-Profit	12.1%	For-Profit	48.0%
Other	11.0%	Other	23.8%



Highlights -- Member and Subscriber Survey

How long has your organization been a member?



Member Meetings

Which of the following meetings have you attended in the past year? ***Please select all that apply.***

	Members
Fall Quarterly Meeting	64.0%
Winter Quarterly Meeting	58.0%
Spring Quarterly Meeting	62.0%
Summer Annual Meeting	34.0%

In which of the following areas do you find significant value in attending these meetings? ***Please select all that apply.***

Learning new information relevant to my job	87.3%
Seeing how other people use their funding to accomplish goals	76.2%
Networking with other professionals in my field	68.3%
Gaining exposure that is valuable to my organization	34.9%

Member Meetings

- "Quarterly, 2-Day Model unchanged in 20 years"
  - Shorter / More locations / On-line
  - Targeted topics -- relevant to today's member activities
  - Community Development: shared vision, outcomes, success measures

If you were attending an OCCD training, which of the following would you prefer?

	Members	Subscribers
Single Day Training	62.7%	66.7%
Two Day Training	26.9%	26.7%
Three Day Training	10.4%	6.7%
Training in conjunction with Quarterly Meetings	41.8%	33.3%
Stand - alone Training	47.8%	26.7%

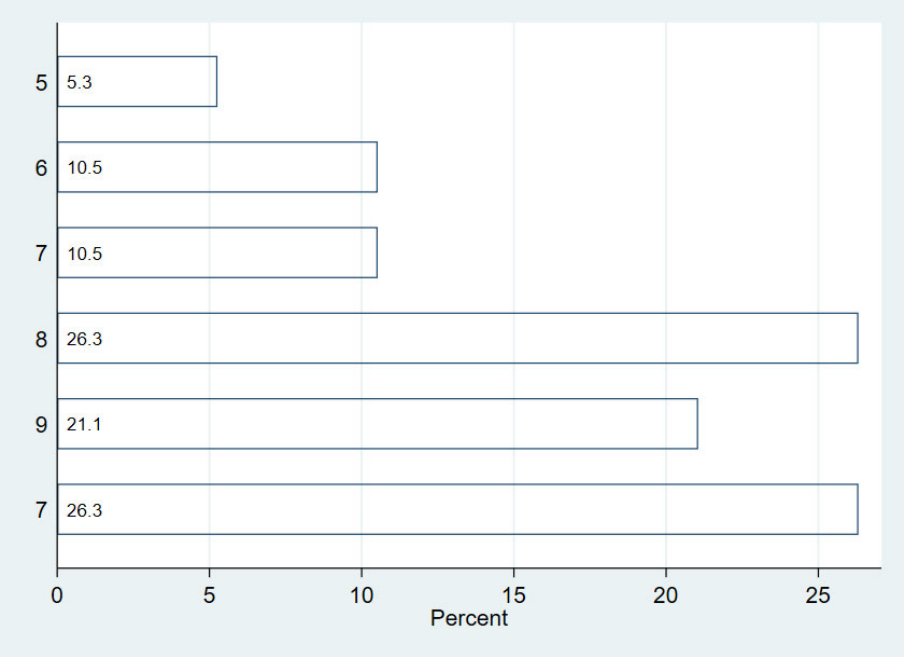
Member Value

High Levels of Satisfaction – Validates Vision, Mission, Values
80% satisfied or very; 16.7% neutral; 3.3 dissatisfied
73.3% likely to recommend; only 8.3% unlikely and 18.3% neutral

- Access to training and professional development key to membership
- Networking – 63% rate it 8 or higher
- Low cost education opportunities – 59% rate 8+
- Specific trainings - 58% rate 8+
- Source of trusted and timely information ("in the loop", "knowledgeable")
- 73% rate trainings 8+

Trainings

On a scale of 1-10, how valuable did you find these trainings?



Technical Assistance

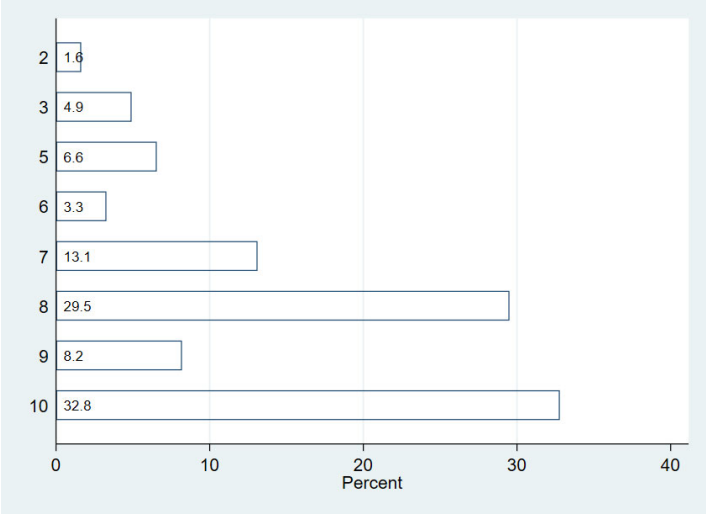
68% rate hands-on TA for specific programs 8+

Do you *agree* or *disagree* with the following statements?

	Agree	Disagree
My organization engages external fee-based technical assistance services.	40.3%	59.7%
OCCD should get more involved in the provision of reduced cost technical assistance services for its members.	81.4%	18.6%
My organization would utilize reduced cost technical assistance services provided by OCCD.	79.3%	20.7%

Technical Assistance

Hands-on assistance/instruction of specific programs or projects in community development, economic development, and/or affordable housing



Partnering

- 67% rate partnering with other associations for certification & credits 8+
- 51% rate partnering for advocacy 8+

Certification and Continuing Education

- Recommend OCCD undertake
- Would attract new and existing members
- Types wanted
  - Lots of suggestions
  - Lots of practitioner goals for certifications

If you are interested in OCCD offering continuing education credits, please let us know what courses, workshops, or training would be most valuable to you.

Members	Subscribers
NDC, IEDC, APA	ONES THAT ARE ELIBIBLE FOR AICP CEU'S
Energy/renewable energy courses & cost effective applications for residential, commercial and industrial development	Leadership-Project Management-Talent Development-Communication-Innovation & Change
Auto-CAD and GIS	Food security Governance
Enhanced computing skills - intermediate to advanced level courses	Monitoring and evaluation
Public Development and Finance	policy studies
HOME Programs	
Structured leadership training that identifies professional weaknesses and offers recommendations or specialized training.	
Continuing education for certified public accountant and attorneys.	
Real Estate CEâ€™s	
financial/public accounting; grantsmanship; project management	
AICP - planning related as well as economic development courses.	
I am not interested in credits; rather, I am interested in beneficial information. I find that the OCCD agendas tend to be full of "fluff".	
NDC trainings on finance or economic development topics.	
All training would be valuable to me since I am new to this field. I am interested in continuing to attend courses, workshops and trainings, as approved by my County.	
IDIS Training	
Contractor Recruitment	
Managing Housing Rehab	
Basically CDBG and possibly intermediate/advanced CDBG training courses	
Building HOME and more advanced HOME training courses	
Bonding and insurance requirements for state and federal construction projects.	
Economic Development Finance, Community Development - Neighborhood Revitalization, Central Business District Revitalization, Housing Solutions - Financing.	

Advocacy

- Strong desire for effective advocacy – Collective Voice
  - Funding Levels
  - Program Value
  - Policy Goals
- 53% score advocacy 8 or higher out of 10 (25% rate it a 10)
- 55% rate quarterly legislative update 8+

Challenges & Opportunities

Please list three to five challenges that you think OCCD is facing.

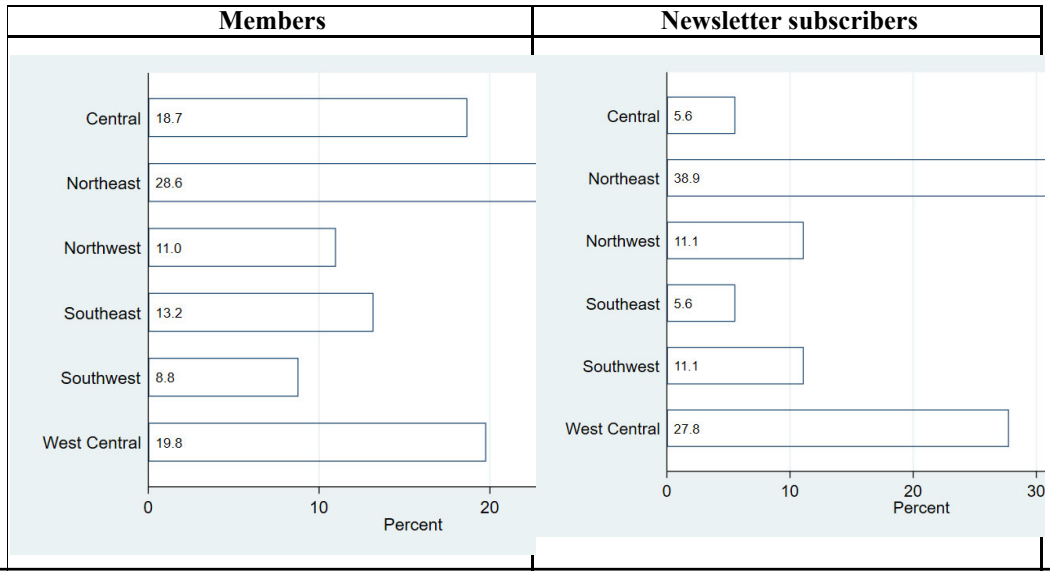
Members	Subscribers
Keeping registration fees low, while providing needed/wanted services.	Relevancy
Breakdown of centralized planning/funding orgs, larger communities need and can afford specialized services/orgs, operating/dont need smaller communities (except at elections), lack of shared/useful funding sources, fewer persons alive who know how to utilize/access programs effectively, people swinging elections (and resources) dont see expertise of older larger communities applicable to them, exportation of poverty to burbs/exurbs with few tools to address, lack of access to planning tools/knowledge, lack of respect/awareness for experiences of other communities, disconnect between planning elite and needs of real places/people, lack of shared purpose, who do we all serve, what is important/who is important. What are are shared/desired outcomes. What does success look like. How do we measure? Is CD a measurable, real thing? Who are winners/losers? What distinguishes ED from CD? Why is CD valuable? Or is it? Do we make a difference?	
Pleasing everyone, as we are all involved in different aspects of planning. Some people who have 20+ years in the field are not as engaged and could be influencing younger employees to not spend time on OCCD outside of the quarterly meetings.	
Needs to be more of an advocate for decent funding levels of programs useful to members.	
Unstable revenue, aging membership, capacity to expand programs and offerings,	
Meeting model has been the same for 20+ years (2 days and meet every quarter). This model just doesn't work anymore because communities are required to do more programming (i.e. not just CD and ED work-includes other grants management, planning, zoning, etc.) with less funding. Time lost going for 2 days, + cost of hotel is just not workable with regards to limited budget resources and time out of the office.	
agendas that don't pertain to activities that most of the membership does	
General trend of getting info from electronic formums verses meetings	
need new members	
Void (perceived) of mid-level folks - product of lower birth rates after 1970	
Staff turnover in Development Departments at the County level which affects program administration. This will require more training and education to catch new employees up to speed.	
Participation,	
low interest	
People are attending other state and national organization meetings that have similar topics; people want to travel less and are accessing online education, also many are operating with a smaller travel budget, and have less time for travel due to reduced staffing	
Changes in federal regulation and interpretation	
membership; old guard vs new guard	
Workloads, travel budgets, small staffs	
Part time staff model needs to be reviewed.	

Challenges & Opportunities

Please list three to five opportunities that you think OCCD can use to its advantage.

Members	Subscribers
Maintaining skilled and professional OCCD staff.	Strong relationships: federal-state-local
Years of shared experience. Access to members. Access to current government. Knowledge of Ohio specifically.	
OCCD still has experienced members who can provide concrete examples of planning and administering projects. Large and small jurisdictions face the same challenges with meeting grant administration requirements, but small communities have fewer staff resources.	
Another opportunity could be to draw more peer-to-peer content from the membership's vast amount of subject matter experts through sessions that focus on members (like community spotlights), webinars, even a podcast would draw more attention and participation from non-members.	
Have a strong membership so change meeting model to support today's work approach and you will keep members and likely attract new ones.	
turnover - new members (if engaged) can bring new ideas and offer basic training opportunites	
More sponsored Webnars and information via electronic media	
Need for updated information on programs and projects.	
Quickly changing world in which we live and work	
Staff turnover in Development Departments at the County level which affects program administration. This is an opportunity to train/educate new administrators, gain new insight on the programs and, potentially, expand/enhance county programs as new staff is educated and excited to take on new projects.	
Try hosting conferences in different locations. Moving the conferences around would be worth trying.	
travel to different cities with their conferences. Come to the members instead of members always coming to Columbus.	
Perhaps look into merging with another organization such as Ohio APA	
Providing a directory of contacts at all levels of member organizations	
refocusing/reimaging the organization; partnerships with other agencies	
Being the state and HUD's training arms, state and federal advocacy, OCCD Foundation	

Member Profile – JobsOhio Region

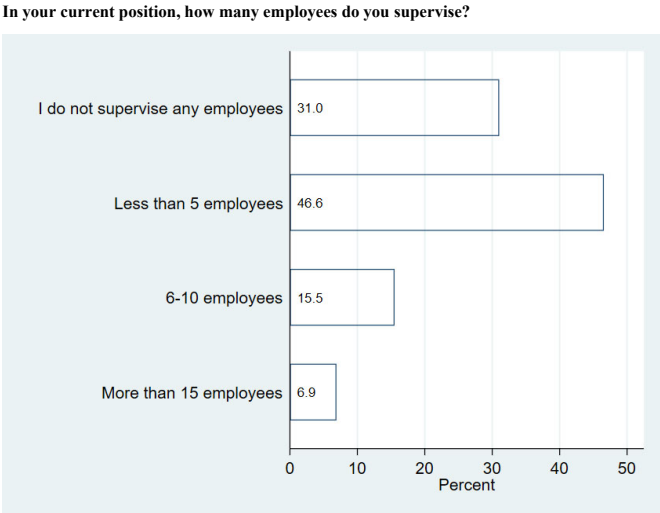


Member Profile – Organizational Affiliation

Is your organization a member of any of the following professional or industry organizations?

	Members	Subscribers
APA - Ohio Chapter	44.2%	46.2%
Mid-Ohio Development Exchange (MODE)	7.7%	
National Association of Counties	23.1%	
National Association of Housing and Redevelopment Officials (NAHRO)	7.7%	
OCMA/ICMA	11.5%	30.8%
Ohio CDC Association	23.1%	23.1%
Ohio Economic Development Association	46.2%	23.1%
Ohio Municipal League	21.2%	30.8%
Other	34.6%	30.8%

Member Profile – Size of Organization



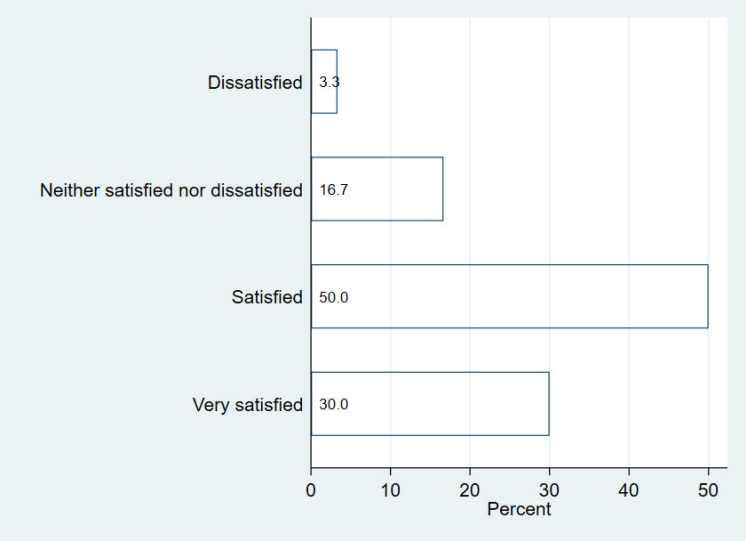
OCCD's Value Proposition

Why do you think that some organizations that can benefit from an OCCD membership are not members?

	Members
They are already a member of another professional association that meets their needs.	54.5%
OCCD is not welcoming to new members.	9.1%
They do not understand the value of an OCCD membership.	58.2%
The cost of membership is too high.	9.1%
OCCD does not provide continuing education opportunities.	21.8%
Other	23.6%

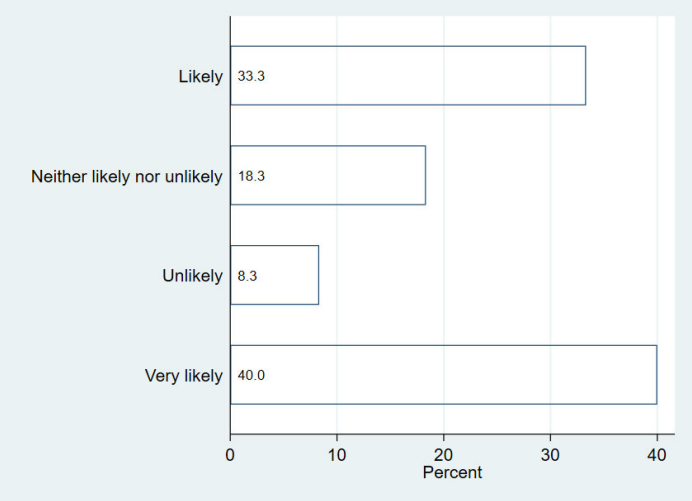
OCCD's Value Proposition

Overall, how satisfied are you with the value of your membership?



OCCD's Value Proposition

How likely are you to recommend OCCD membership to others?



OCCD's Value Proposition

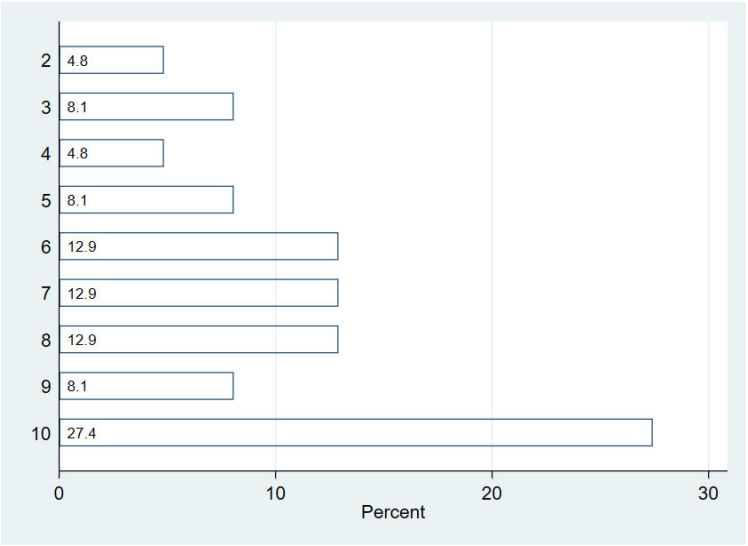
In your opinion, what would incentivize your organization to become a member of OCCD? <only subscribers>

Access to training and professional development.
I only subscribed to the newsletter out of interest in community updates. Becoming a member was not in question - but I would think having very clear benefits outlined, and the associated cost, readily available online would help.
I'm not sure I do know it is difficult as a small organization to pay for membership for several state organizations
Knowledge sharing.
Less focus on CDBG programs and a broader focus on community development/economic development. Today, many CDBG administrators wear multiple hats in their positions beyond administering CDBG programs.
Not sure if the college is a member.
The opportunity to get Continuing Legal Education credits
increase formality and operate professionally, dont rely heavily on volunteers and trailing consultants and free local government staff to operate. Make it mandatory for grant recipients. Perhaps combine with existing community and economic development statewide organizations such as OEDA or even CDFA

Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

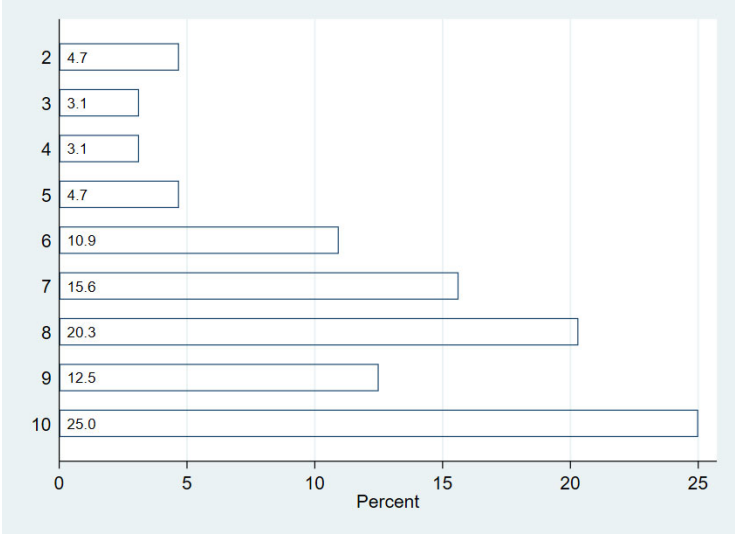
Access to directory of members with contact information



Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

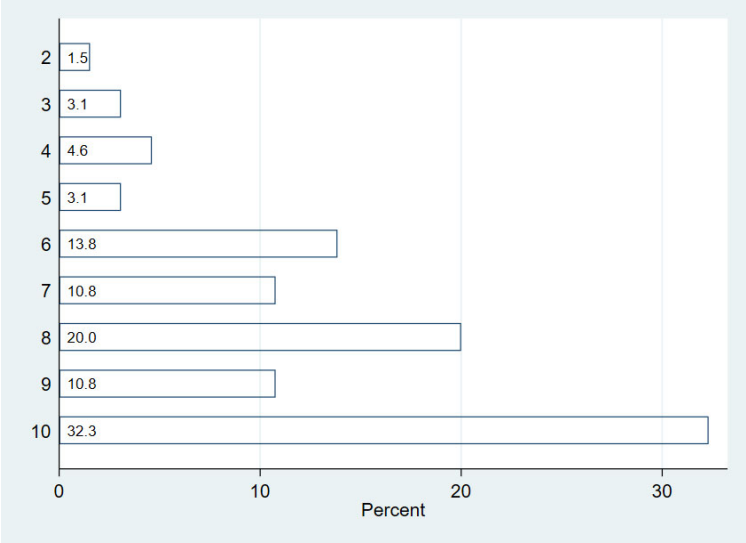
Advocacy of the organization for various programs and policies at the State and Federal level



Rating OCCD Current Value Propositions

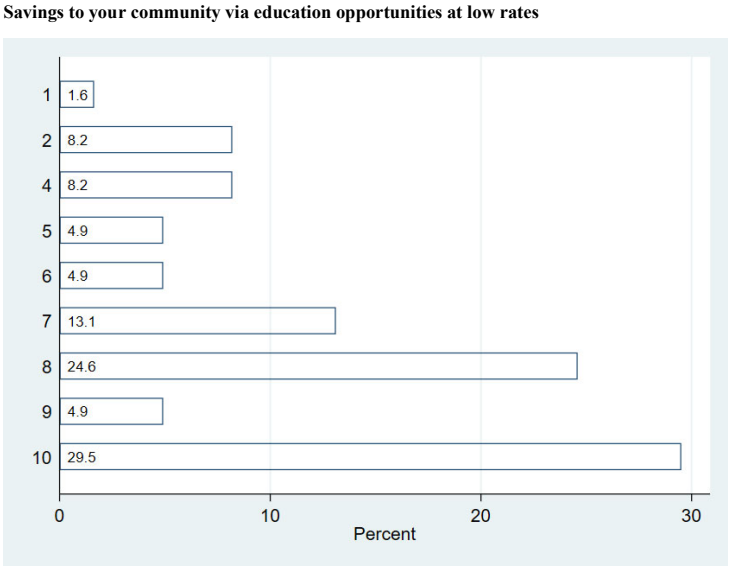
On a scale of 1-10, how valuable do you find the following OCCD aspects?

Networking with other professionals in the field



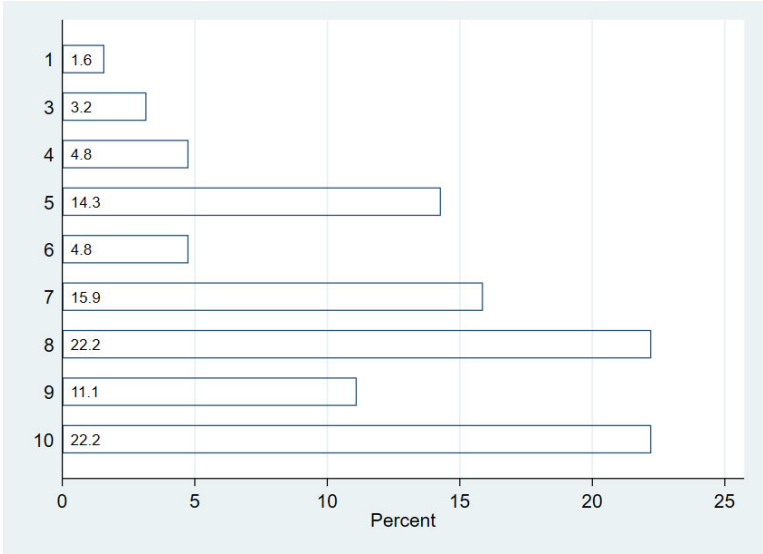
Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?



Rating OCCD Current Value Propositions

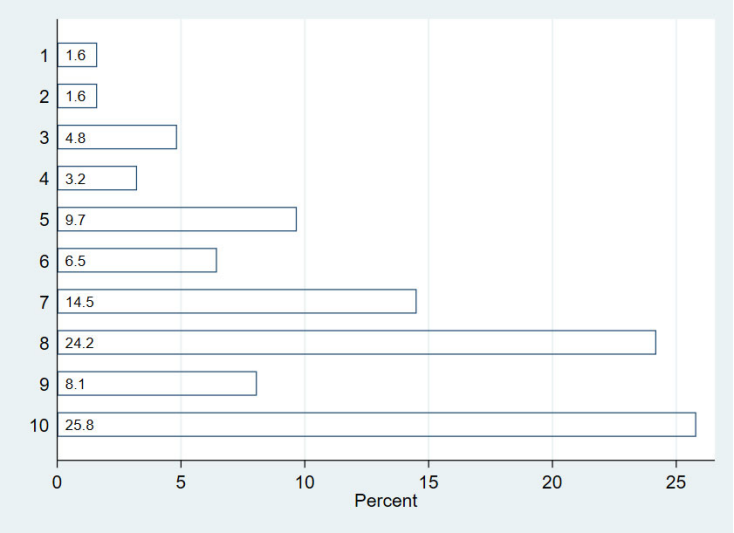
On a scale of 1-10, how valuable do you find the following OCCD aspects?



Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

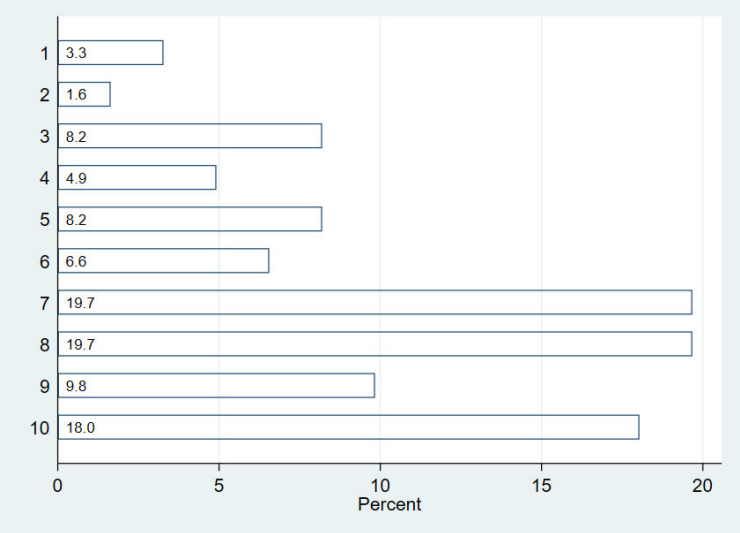
Specific training opportunities



Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

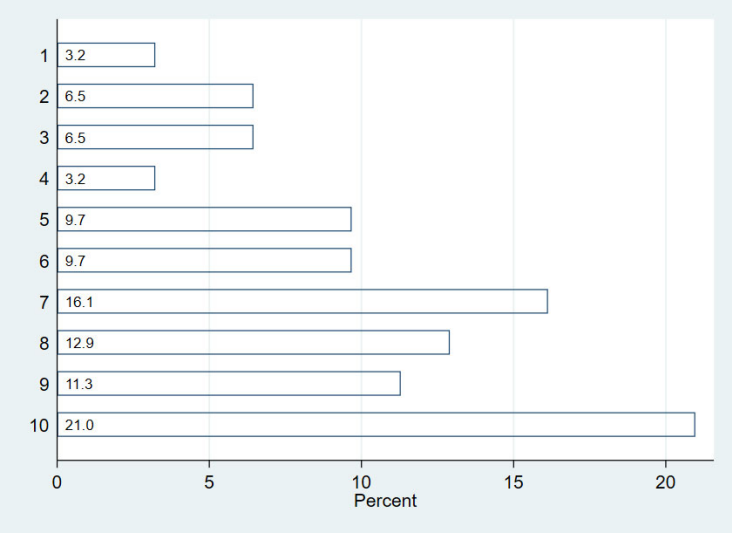
The newsletter



Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

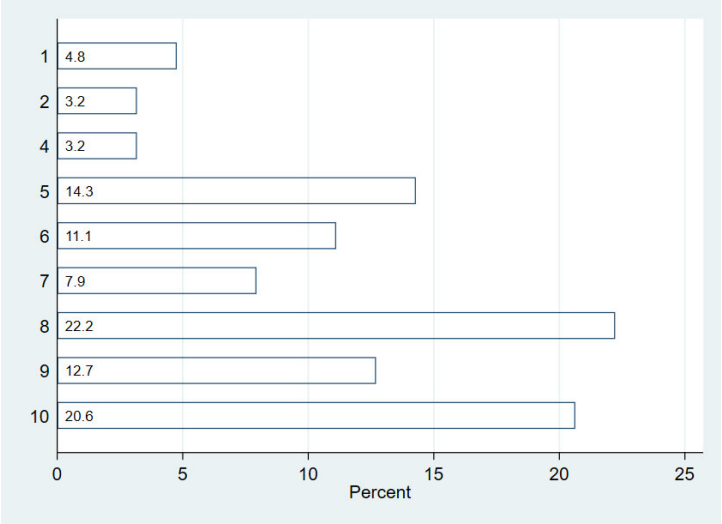
The opportunity to see what other communities are doing through site tours



Rating OCCD Current Value Propositions

On a scale of 1-10, how valuable do you find the following OCCD aspects?

The quarterly legislative update



Please list three to five characteristics of OCCD that you value.

Members	Subscribers
Networking opportunities	Predicable quarterly meeting schedule.
Establishing relationships with the Columbus Field Officer personnel	Networking opportunities.
Providing needed advocacy	Networking with other community representatives
Providing state and national information on funding	I like being able to talk face to face with my HUD folks
Keeping members "in the loop" in regard to possible future happenings in regard to our programs.	I like the updates from HUD
People. Sharing. Access to funding. Access to organizational concepts. Access to policy makers. Access to new techniques/new info.	I like that I can drive to the meetings in Columbus... but not always
Networking	Good opportunity for networking, good locations for meetings, good topics and good speakers, friendly and helpful administrators
Casual setting	Training, information sharing and networking
Inviting	networking; inexpensive to belong; access to HUD/state
Organized	Networking, Access to HUD and State Funders, Seeing other projects/programs working around the state.
Definite information specific to Ohio rules, regulations.	
Contacts at state offices and in other communities.	
State rules and legislation updates.	
low-cost training opportunities	
mix of small and mid size membership communities	
easy contact	
Training	
I value: the opportunities to meet colleagues, the access to the HUD Field Office, that it brings together communities from all over the state, the peer-to-peer information sharing, and the excellent and kind staff of OCCD.	
1)networking; 2) promoting CD & ED efforts at the state and federal level to support ongoing funding 3) some technical training opportunities.	
networking	

Comments: OCCD Current Value Propositions

access to HUD staff	
training	
organized events	
valuable information	
newsletters	
Experience of members	
Relationship with State Staff	
Statewide interest (both urban and rural)	
Staff	
Meeting presentation topics	
Networking	
Composition of membership andthose who attendmeetings	
Networking	
Presentation of cutting edge items	
Programmatic information	
Approachable, responsive, supportive, encouraging, KNOWLEDGEABLE	
accessibility, user friendly materials, and timely workshops and conferences.	
Structured	
Wide variety of topics	
very personable, easy to get to know people enough to network in a meaningful way. Easy access to the State OCD officials. Might be nice to have access to other state office administrators too.	
Relationships	
Legislative update	
Networking, I have learned a great deal from other communities vs. OCCD or ODSA	

Please list three to five characteristics of OCCD that you think can be improved.

Members	Subscribers
Understanding that some organizations believe in the benefits of OCCD/are OCCD members, while not attending meetings.	communication; value of membership; following through on suggestions/recommendations
Providing/ organizing needed continuing education for member	Making each quarterly centered around a specific topic. It may limit who comes,but may also increase attendance depending on the topic.
Looking at structuring meetings to benefit members, while not continuing to have meetings based upon "this is what we have always done".	Advocacy for industry
ways to utilize and build skills of professionals working in smaller communities	Training opportunities for small cities and rural areas-may need differing â€œtracksâ€ for communities.
More in-depth detail for selected projects.	
Shorter meetings - one day.	
Better focus on fewer topics.	
OCCD could be improved by: improving outreach via non-traditional communication, having more diversity on the Board, having more revenue to expand staff and offerings, and connecting membership to tangible benefits like savings or grant opportunities.	
Meetings could be consolidated time wise into one day. Relevance of topics needs reviewed more rather than sticking with similar quarterly schedule (i.e. always fair housing in the spring...). May need to reduce to 2-3 one-day meetings a year, but offer new training opportunities.	
more focused agendas for quarterly meetings	
more best practices that relate to common activities and projects	
less focus on large grantees, most of us are not	
TA to the local communities with site visits	
Advocacy for Local community	
Attendance	
Funding	
Cost	
Pushing the envelope as far as what, where and when things are done	
Convincing political types that their underlings should be attending sessions	

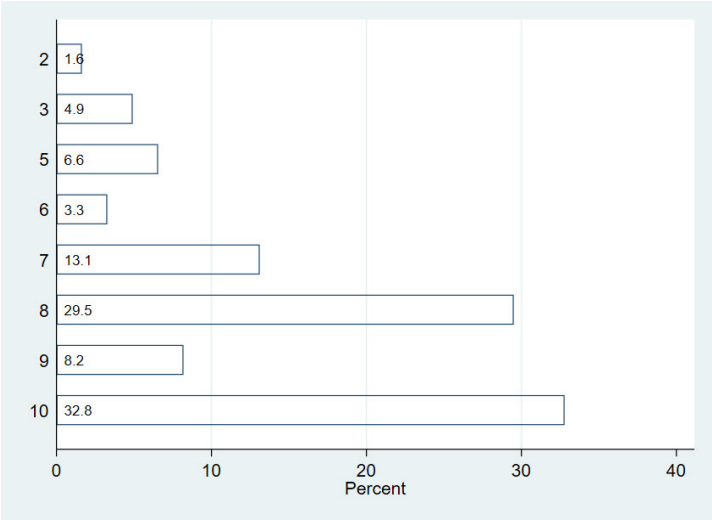
Comments: Improving OCCD Value Propositions

If we could even just claw back and get to Annual Conferences in communities that offer excitement and fun I would return. It should not be all about the technical aspects of CD. If you billed it as a party, they will come.	
Training, this has improved over the past couple of years.	
Meeting locations, change them up.	
Content provided at quarterly meetings.	
It seems OCCD has focused on broad concepts for presentations...id like it to be more in depth (i.e. Super Circular - dos and donts)	
The website	
More diversity in representation	
Reorganize agenda, more project management topics that appeal to entitlement communities	
The value of sending downline staff to offsite training at a reasonable cost.	
Doing roundtable discussions for mid-line staff	
Providing continuing education credits	

Rating OCCD Additional Value Propositions

On a scale of 1-10, how important it is to you that OCCD provides the following additional services?

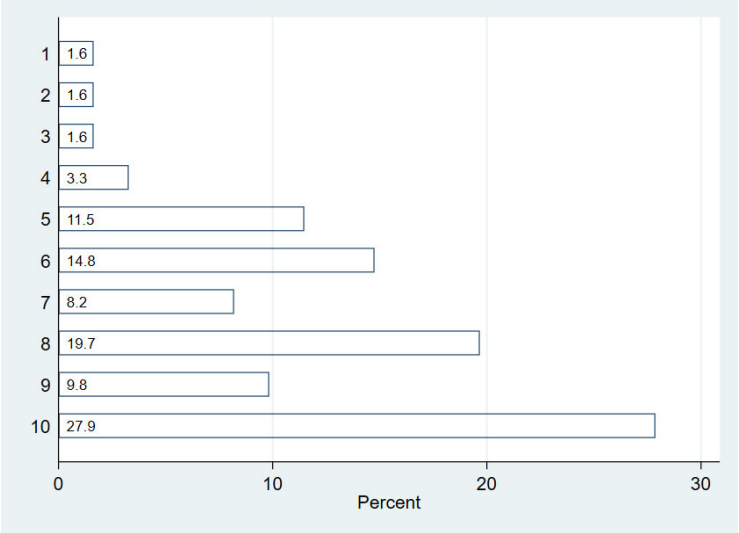
Hands-on assistance/instruction of specific programs or projects in community development, economic development, and/or affordable housing



Rating OCCD Additional Value Propositions

On a scale of 1-10, how important it is to you that OCCD provides the following additional services?

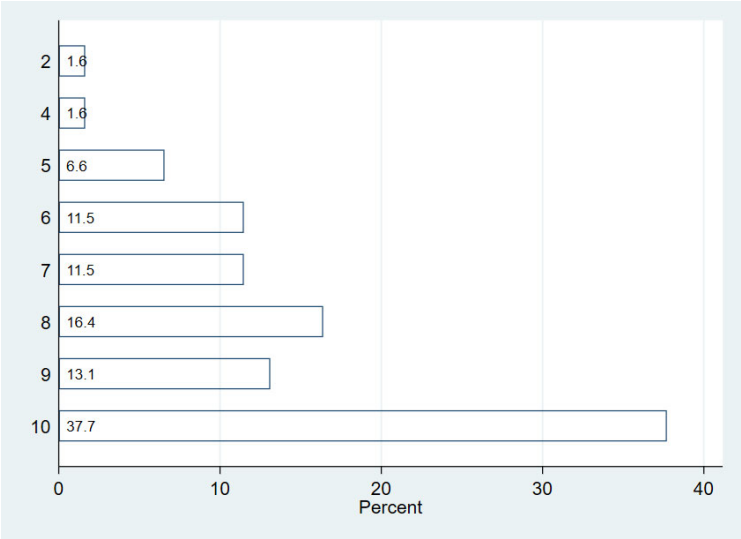
Partnering with other professional organizations to strengthen advocacy efforts



Rating OCCD Additional Value Propositions

On a scale of 1-10, how important it is to you that OCCD provides the following additional services?

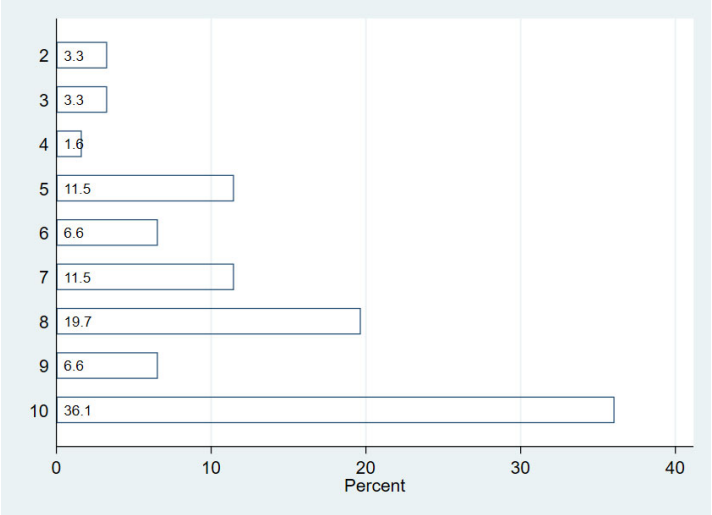
Partnering with other professional organizations to expand education opportunities



Rating OCCD Additional Value Propositions

On a scale of 1-10, how important it is to you that OCCD provides the following additional services?

Assistance in strengthening member's organizational capacity and effectiveness



Technical Assistance

Do you *agree* or *disagree* with the following statements?

	Agree	Disagree
My organization engages external fee-based technical assistance services.	40.3%	59.7%
OCCD should get more involved in the provision of reduced cost technical assistance services for its members.	81.4%	18.6%
My organization would utilize reduced cost technical assistance services provided by OCCD.	79.3%	20.7%

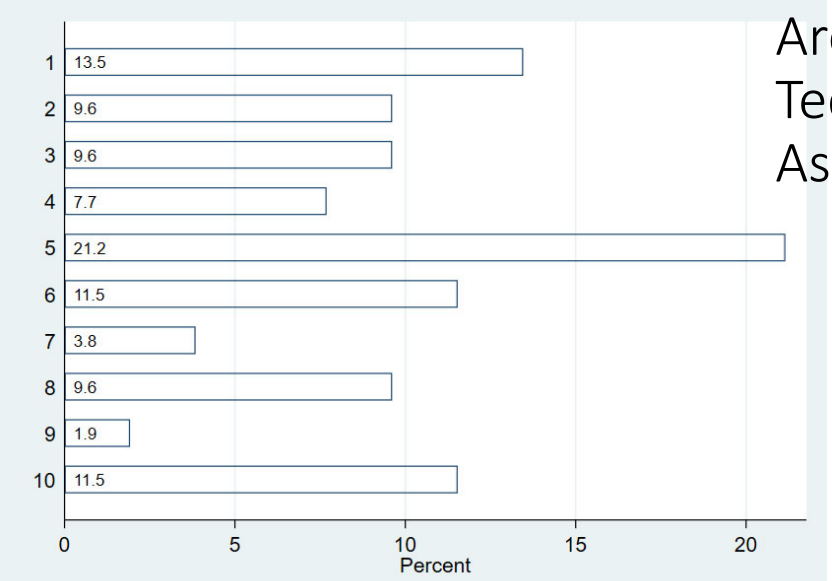
Technical Assistance

Please tell us more about your technical assistance needs. ***Where do you usually find the technical assistance you need? Where do you look for the experts who can help? Who are the providers of technical assistance available to you in the subject areas where you have needs?***

State Dev services, HUD, Heritage Ohio, OCCD
private sector consultants
architects/engineers
We have to hire outside to get technical assistance when needed. As stated before if OCCD provided more in depth training or assistance we would take advantage of that aspect. Specifically around affordable housing. Community development is important, however given the state of the lack of affordable housing, there needs to be much more emphasis on this topic.
We have very good engineering firm for guidance.
I work with the state programs so look to OCD for technical assisitance.
As older staff is nearing retirement, it is important to have newer staff gain as much knowledge as possible prior to older staff leaving. As older staff leaves, additional technical training will most likely be needed in order for the programs to continue to operate without missing a beat (or at least not too many beats). Trainings by ICF are very beneficial.
Lobbying internal and external stakeholders to make effective change throughout the community
We typically rely on our HUD rep to provide guidance, use HUD Exchange, the Ask A Question, conduct research on our own.
Les Warner and Shawn LaRue Moraille have been very helpful.
On the internet-web-based research
I ranked these categories on the higher end since the staffing in my department is all relatively new and we do not have a resource in-house to reference when it comes to these aspects. I rely heavily on an outside consultant we employ and my state representatives for assistance, training and trouble-shooting.
State STaff, Consultants
For profit and non-profit subject matter experts.
Usually go direct to ODSA/Field Reps/Staff
Mostly need technical assistance on construction management, construction project inspections.
NCDA has provided a ton of useful FAQs and assistance.

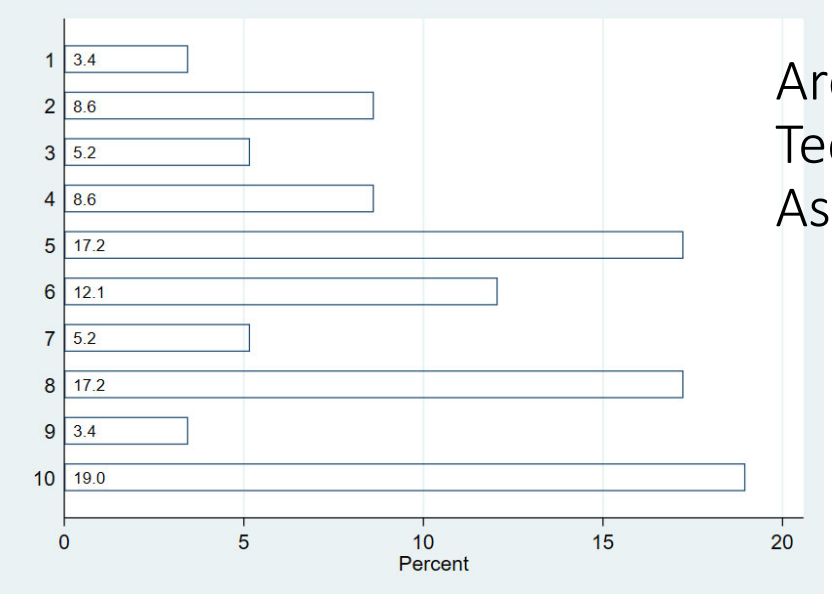
On a scale of 1-10, how much technical assistance does your organization require in the following areas?

Identifying needed/fundable projects



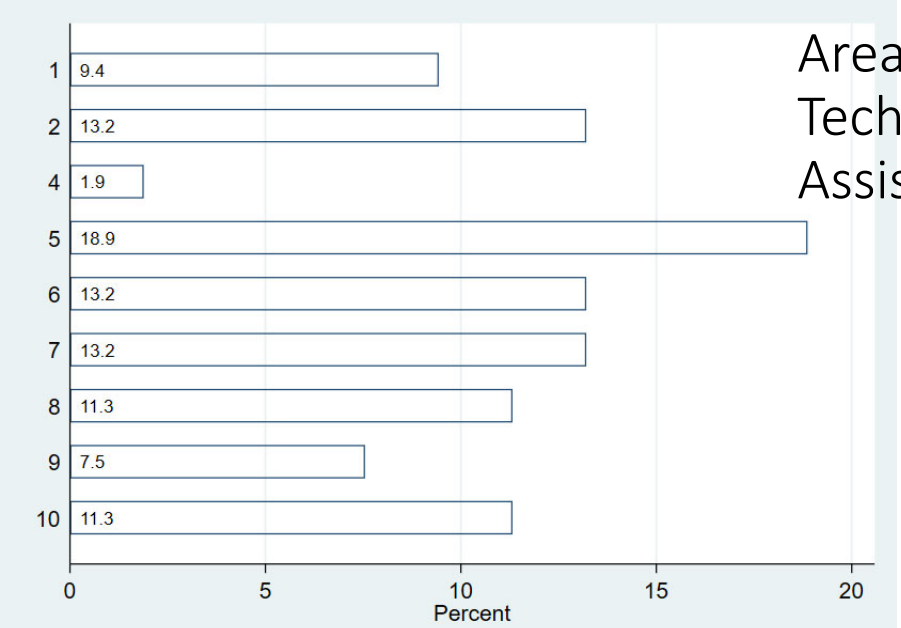
Areas of Technical Assistance

Identifying funding sources for needed projects



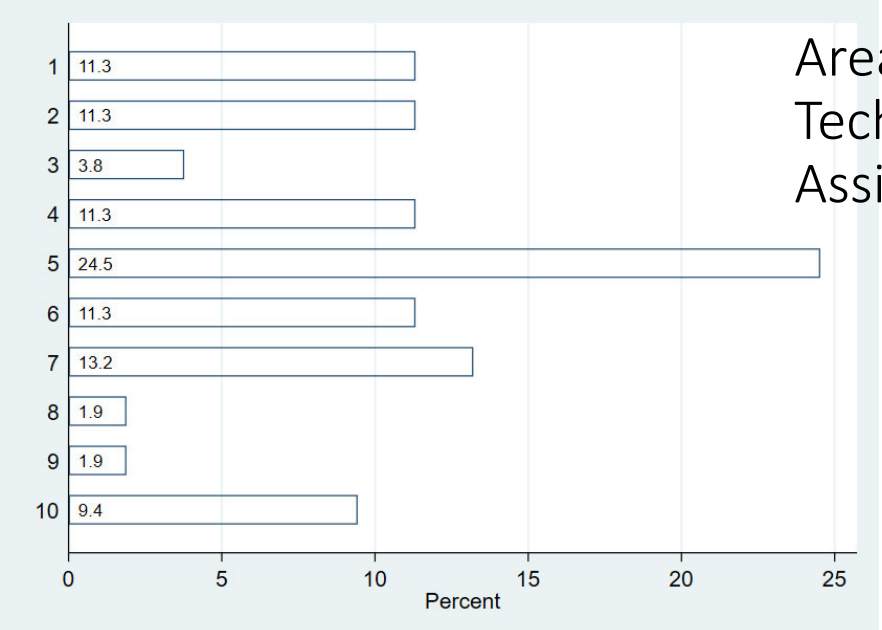
Areas of Technical Assistance

Preparing competitive applications for funding



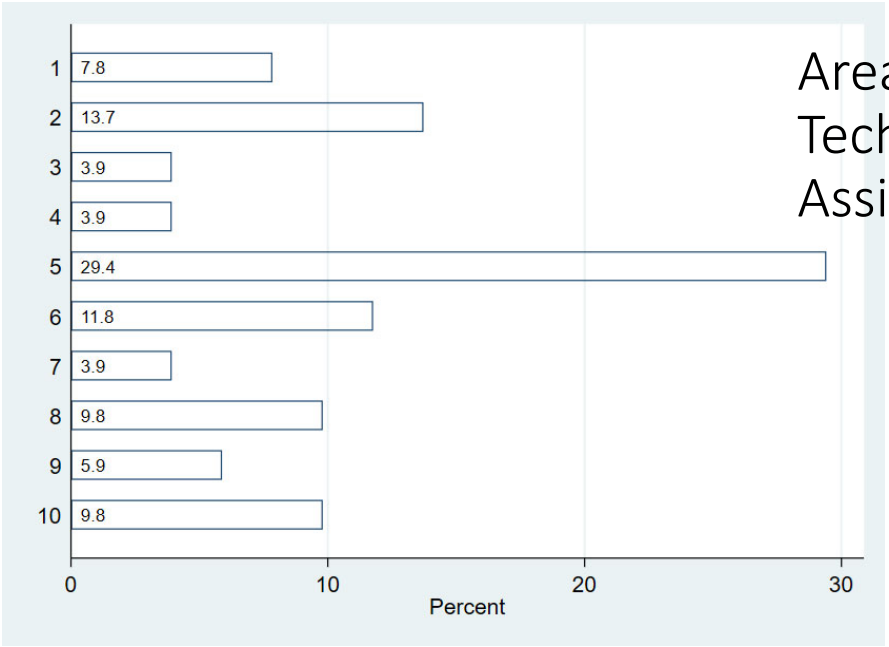
Areas of Technical Assistance

Project planning



Areas of Technical Assistance

Project management



Areas of Technical Assistance

Value of OCCD Meetings

Which of the following meetings have you attended in the past year? ***Please select all that apply.***

	Members
Fall Quarterly Meeting	64.0%
Winter Quarterly Meeting	58.0%
Spring Quarterly Meeting	62.0%
Summer Annual Meeting	34.0%

In which of the following areas do you find significant value in attending these meetings? ***Please select all that apply.***

Learning new information relevant to my job	87.3%
Seeing how other people use their funding to accomplish goals	76.2%
Networking with other professionals in my field	68.3%
Gaining exposure that is valuable to my organization	34.9%

Value of OCCD Meetings

Please share with us how you think quarterly/annual meetings might be improved.

I'm a single-person office and find it difficult to leave office.
Better able to justify to leadership the need to attend. Currently, my position is not so directly related to items often presented so I think/believe it's not so easy to justify the expenditure and time away from the office.
greater diversity, greater participation and attendance, more interactive sessions,
more training and best practice focused
Decrease frequency of general meetings. Look at alternatives for bringing training to communities. Need to train local leaders along with the professionals. The two aspects do not always align.
Shorten to 1 day; do plenary and breakout sessions
I prefer the different tours to see what communities are doing outside of Columbus. It would be a good idea maybe instead of having a meeting in Columbus for a full day maybe use the hotel but then travel a quarter of a state one day to see what different communities are accomplishing. Every Community could participate in whatever area of the state you are visiting each day. This would get the more rural communities involved that do not have as much major development occur and that may only be involved with OCCD due to CHIP or the Allocation Program through the state.
Reorganize the agenda so that there are not big time gaps in the middle of the day for committee meetings and other administration activities.
More hands on work/analysis by individual members dissecting issues..building solutions in real time with guidance per locale..
more case studies of successful projects
I would like to see more sessions based around administering the grants, the types of projects other communities fund. What their CDBG and HOME applications look like, if other communities hold work shops for their grants, if they accept applications year round, or during a limited time... etc. I am interested in the nitty gritty of administering the CDBG and HOME grants, as I have only been in this field and have a lot to learn still. Also, more trainings are appreciated and welcomed.
Continue to offer training along w/the meetings.
I have heard that travel budgets are very rare. Many are not allowed to spend the night. Maybe one day quarterlies would help attendance.
shorten them to one day
More trainings - less banquets and awards especially for summer
If possible, reducing quarterly meeting to 1 day vs. 1 1/2 days. Possibly reducing the number of meetings per year from 4, down to 3. Keeping all meetings centrally located in Columbus. Providing training opportunities at all meetings; adding additional days if necessary in order to accomplish needed training/certifications.
More training prior to the meeting date.
Provide more training on development of affordable housing. How to attain funding? How to combine funding sources? Rules and Regs. of funding? Bring in developers and funders to speak.
There is a national crisis on this topic and OCCD should be more proactive in assisting the development

There is a national crisis on this topic and OCCD should be more proactive in assisting the development
Consolidate the meetings to one full day. Often the sessions end earlier and too much time is left in between for networking. It is difficult to get out of the office for 2 days so we skip attending. Consolidating to 1 day would be a significant improvement.
I am more interested in topics that are more applicaple to implementing programs; more ground level stuff rather than high level discussions on legislation, project development, or agency collaboration. I want to dive into specific policies and procedures (travel, accounting, allowability, reimbursement requests, monitoring, etc).
Specific Training on HUD issues...apparently we are all incorrectly using CDBG funds for Code Enforcement. As the older professionals are leaving, gaps in training remain.
It's getting harder to be out of the office on multiple days. Start meeting at 9:30 am. Too often people are stuck in traffic for the 1st session.
I am satisfied with the meetings.
Our Housing Director has attended these meetings, I have not... sorry to say.
I think they are fine. Content driven. Perhaps a little less organizational business in the middle of the meeting. perhaps better suited to the end of the day. Committee reports,etc.
Less on compliance issues, and more on new initiatives and programs or models. It would be great for travel purpose agendas organized for one day travel without overnight stay. State and Federal Update continued important

Value of OCCD Meetings

How can OCCD make events more valuable to you? ***Please feel free to share any suggestions regarding future topics, formats, locations, speakers, duration, or any other event component that is important to you.***

Mentorship formalized more, hard to meet needs of small cities for TA
how about a brief "Spotlight" session on a member community and the projects in progress or completed. Might be inspiring to see what other kinds of projects can be done.
I believe having a young professional/not that experienced meeting a year would be a good networking opportunity and beneficial for the organization. It seems that a lot of the people involved with OCCD have been there a while and the next generation is not represented well. You could even reach out to Colleges and invite grad students to an annual meeting to lay that foundation for the future.
Social aspect of OCCD is long gone. The days and nights of fun and relationship building are over.
OCCD is very valuable, whether all meetings are attended or not. The networking gained through OCCD and the positive relationships established with HUD COlumbus staff are invaluable. As previously stated, all meetings should be held in Columbus as it is centrally located.
I would prefer less lecture-type, guest speaker sessions and more educational, "connect-the-dots" workshop type sessions. I am more of a small group person. The presenter/participant in the group needs to be friendly, flexible, creative, and open to others' opinions.
Nicer accommodations
I think the need for strategic planning is not clear to the membership and the reasons for the planning need to be discussed and disclosed.
Consolidate into one day so can attend more often. Perhaps shift to 2-3 meetings a year if nor enough variety of new topics or updates available.
I would like to see the meetings shortened to 1 day.
Training that is outside the edge of what's previously been provided. Perhaps, training relevant for lower level employees (not necessarily entry level but more para-professional) for day-to-day activities and encounters on-the-job - customer service/communication/digital technology uses, etc.

Value of OCCD Meetings

Professional Certifications

Please list all professional certifications that you are interested in pursuing below.

Members	Subscribers
Professional Engineer (PE)	ACIP
American Institute of Certified Planners (AICP)	APA
Six Sigma/Lean Six Sigma	Asbestos Inspector, Asbestos Abatement Contractor
LEED AP	CEDC
International Association for Energy Economics (IAEE)	Project Management
Certified Green Professional (CGP)	Strategic Doing
Accredited Land Consultant (ALC)	
Project Management Professional (PMP)	
Certified Emergency Manager (CEM)	
AICP	
The old community development professional certification OCCD used to offer. Leadership training.	
Possibly: AICP , GISP, CPMP	
Any CD certifications that are available.	
AICP	
other two staff would like AICP	
PMP- Project Management Professional	
I have been focused on doing my job the last 21 1/2 years and have not bothered to even look.	
APA	
AICP	
AICP	
Flood Plain Management	
Updates or new NDC certifications	
NDC- Economic Development	
some sort of CDBG certification	
Grant Management	
Would be interested in pursuing various certifications, including the ones listed above, for newer staff, not necessarily myself.	

Professional Certifications

Please list all your professional certifications below.

Members	Subscribers
APA	Ohio Community Development Professional
NDC EDFP, NDC HDFP	Certified HOME Program Specialist - Regulations
NDC Certified Economic Development Finance Professional	Certified HOME Program Specialist - Administration
NDC Certified Housing Development Finance Professional	NDC Economic Development Finance Professsional
Master of Building Rehabilitation Engineering	Economic Development Finance Professional (EDFP)
Master of Business Administration with a Concentration in Management	EDFP, HDFP (NDC)
Bachelor of Urban Planning	BPI Building Analyst, BPI Envelope Professional, BPI Quality Control Inspector, RRP, Lead Risk Assessor, Lead Abatement Contractor, Energy Auditor,
Certificate in Historic Preservation	AICP
Former Licensed Lead Risk Assessor	
Certified Economic Development Professional; - NDC	
Ohio Community Development Professional	
Attorney - State of Ohio	
Certified Public Accountant - State of Ohio	
Ohio Ethics Law, Analysis of Impediments Training; Navigating HUD Exchange; HOME Webinar Series; Learning Systems Administrator, Certified Public Records Training; Affirmatively Furthering Fair Housing; "Final Rule for Housing Counseling Certification for CPD Formula grant Program stakeholders; Lean Ohio Boot Camp - Transforming the Public Sector.	
MPA, CED	
NDC Economic Development Professional Certfication	

one of three staff have AICP, one has HOME certification	
Ohio Building Inspector, Property Maintenance Inspector, Residential Building Official	
Notary	
HOME Investment Partnerships Specialist	
NDC Economic Development Finance Professional	
American Institute of Certified Planners; Economic Development Institute; ICC Building Inspector; ICC Building Official; ICC Building Plans Examiner; Economic Development Finance Professional; Facilities Planning and Management Certification	
NDC- Housing Development Finance Professional Certification	
HUD - HOME Administrator Certification	
B.A. Mathematics	
Middle Childhood Education (Math/Science) Licensure	
Master of Arts for Teaching Mathematics (M.A.T.)	
Title IX 504 Coordinator Certificate	
Bioscience Technology Lab Skills Certificate	
Certified HOME Program Specialist	
Lead Based Paint Renovation, Repair and Painting Program Certificate	
Lead Risk Assessor	
Lead Inspector	
Lead Abatement Contractor	
Notary	

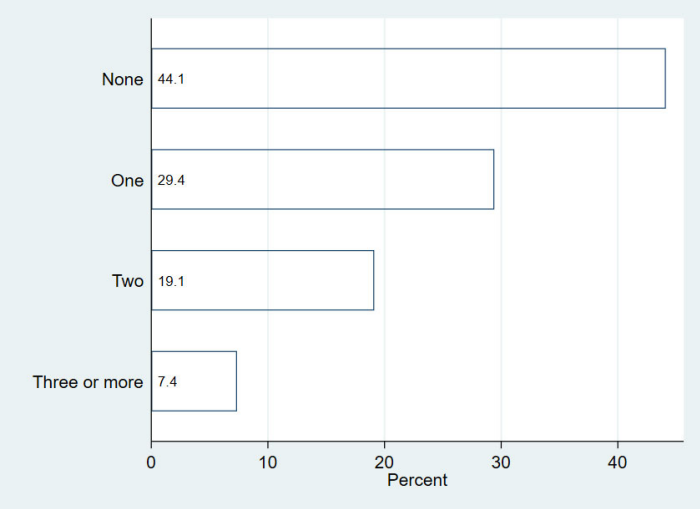
Professional Certifications

If you are interested in OCCD offering continuing education credits, please let us know what courses, workshops, or training would be most valuable to you.

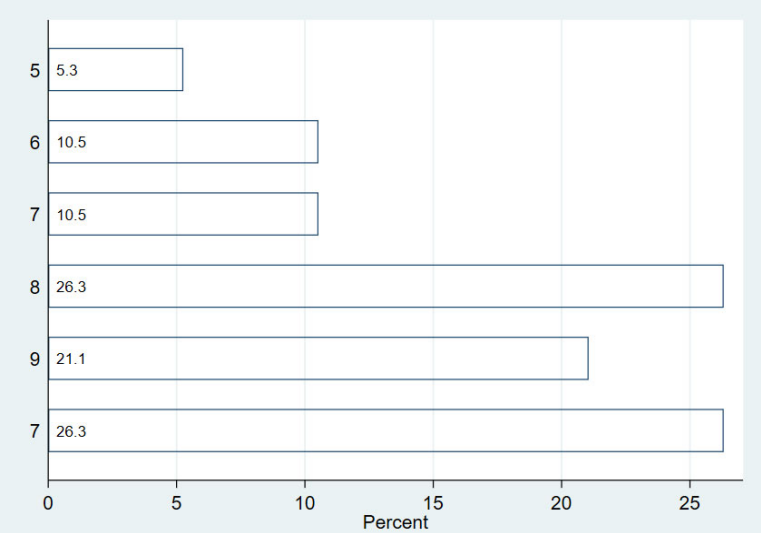
Members	Subscribers
NDC, IEDC, APA	ONES THAT ARE ELIBIBLE FOR AICP CEU'S
Energy/renewable energy courses & cost effective applications for residential, commercial and industrial development	Leadership-Project Management-Talent Development-Communication-Innovation & Change
Auto-CAD and GIS	Food security Governance
Enhanced computing skills - intermediate to advanced level courses	Monitoring and evaluation
Public Development and Finance	policy studies
HOME Programs	
Structured leadership training that identifies professional weaknesses and offers recommendations or specialized training.	
Continuing education for certified public accountant and attorneys.	
Real Estate CÉâ€™s	
financial/public accounting; grantsmanship; project management	
AICP - planning related as well as economic development courses.	
I am not interested in credits; rather, I am interested in beneficial information. I find that the OCCD agendas tend to be full of "fluff".	
NDC trainings on finance or economic development topics.	
All training would be valuable to me since I am new to this field. I am interested in continuing to attend courses, workshops and trainings, as approved by my County.	
IDIS Training	
Contractor Recruitment	
Managing Housing Rehab	
Basically CDBG and possibly intermediate/advanced CDBG training courses	
Building HOME and more advanced HOME training courses	
Bonding and insurance requirements for state and federal construction projects.	
Economic Development Finance, Community Development - Neighborhood Revitalization, Central Business District Revitalization, Housing Solutions - Financing.	

OCCD Trainings

In the past year, have you attended OCCD trainings outside of the quarterly meetings? If so, how many?



On a scale of 1-10, how valuable did you find these trainings?



OCCD Trainings

OCCD Trainings

If you were attending an OCCD training, which of the following would you prefer?

	Members	Subscribers
Single Day Training	62.7%	66.7%
Two Day Training	26.9%	26.7%
Three Day Training	10.4%	6.7%
Training in conjunction with Quarterly Meetings	41.8%	33.3%
Stand - alone Training	47.8%	26.7%

Please share with us how you think OCCD trainings might be improved.

Again, I think my largest hurdle to attending is justification to attend.
more locations within the state
focus on basics and new practitioners,
More offerings at various locations throughout state would perhaps allow more attendance (same training offered several times/different locations)
Take training activities into the â€œfield.â€
Given that many practitioners are retiring or otherwise moving on, we need diverse trainings as well as the basics for newcomers. These need to be given more often with capacity for more attendees. Experienced practitioners need help to bring newcomers up to speed quickly - I am seeing a "brain drain" so to speak.
I would switch the training to a Tuesday, Wednesday, possibly Thursday.
just tacking them on to occd makes them too long- offer more of them via webinar but use part of occd to complete modules in person
more examples to follow months/years later
I appreciate that trainings are attached to the quarterly conferences and would like for them to continue to do so.
Add ED topics
They are pretty good.
Training could be "dumbed down" for those of us that are newer to the field
need more opportunities for training on CDBG/HOME grant and non-grant topics.
I find the trainings to be very helpful in every aspect to utilizing the grants
The Housing Rehab Inspector Training was very valuable to my Inspector. I also appreciated the Determining Income Training.
Training need to be offered based upon knowledge of staffing. Some basic trainings need to be offered, some intermediate trainings, and some advanced trainings. Trainings are needed to cover all staff. And basic trainings need to be offered at least once every year or so as new staff is being hired regularly by programs.
Offer trainings at each meeting.
Provide more in depth training - most times what OCCD has training on is just a broad overview.
Additionally, at the conferences - focus a little less on the in person tours and more on actual training. With today's technology many times the sharing of what others are doing in the field can be done in the form of a presentation - saving the time and resources for more insightful training's taught by better trainers.
I didn't know there were any this year - so more publicity? If I WAS aware, maybe they were not relevant and I just forgot??
If you advertise a working lunch, make it a working lunch.
I am satisfied with the tranings.
One Day agenda for quarterly meetings with new programs, initiatives and models. Keep meetings in central part of State. Keep State and Federal Update sections. Have training on program administration, fair housing, etc, etc. to separate training sessions, or maybe on day before or afterward for those coming into program new.

OCCD Trainings

What topics would you like OCCD trainings to cover?

utility and weatherization activities are most closely related to my current position and could possibly allow me to attend.
Section 3, Environmental Review, Advanced CDBG,
Funding sources, comprehensive planning, introduction to planning tools
both intro and advaced courses dealing with CDBG and HOME
The focus is typically on having a â€œsponsor â€œ explain a successful project or a panel provide insight into a pressing issue. In an environment where so many of the professionals are new to the business, capacity building is needed to provide sustainability into future.
Subrecipient/Developer/Owner/Sponsor Monitoring - CDBG and HOME
Wage Compliance and Federal Labor Standards
Lifecycles of Federal Grants
Other Federal Crosscutting Regs
Eligible but Creative Activities for Impact with Less $
HOME - Updated Training
More Economic Development Training and the different tools that are available would be beneficial especially in smaller communities that may have just one building they would like to redevelop.
Section 3 implementation, Davis Bacon, Strategies to increase MBE/WBE contractor participation, Environmental Review, OHPO Section 106, Best practices for working with sub-recipients of CDBG funds.
What are current funding sources, how to use, how to layer, how to partner more effectively, who are leaders, who to contact for info/resources
pitfalls to avoid
Rehabilitation, Demolition
HOME project development/subsidy layering/cost allocation.
Using CDBG funds for economic development projects and how to administer them.
Housing rehab program administration; how to run program efficiently, completing projects in a timely manner, etc.
I am very new to this field and attended the Spring meeting and all trainings associated with CDBG, Fair Housing, and the Analysis of Impediments that were offered in the Spring of 2019. The trainings were beyond helpful, but I did notice that many introductory topics were skipped over and topics were talked about more in depth. Many of the attendees present, I believe, were not new to the field and were familiar with more of the language and topics being discussed. I, however, was new and was looking for more beginner and background information to help me understand the bare basics and build from there. My colleague attended with me and she was also very new. We met other "newbies" quickly and found many Counties were represented at the workshops, many of which with newly employed staff. I believe there is a need for very basic instructional courses/workshops in addition to the higher level workshops that focused more on updates or recent changes to programs. I have to compliment the state representatives (Ben Kepple and Jared Jodrey, more specifically, who I have worked closely with) who have been VERY helpful and supportive as I call them with basic questions to help me learn and acclimate myself.
TIFS, Enterprise Zones, Historic Preservation

Trainings that benefit rehab inspectors. Some kind of a contractor training to help get contractors interested in the rehab programs.
HUD Funding 101
What counts as program income?
Allowable CDBG Expenses
how to apply for other grants via USDA or NRAC or OPWC since they have large pots of funds for typical community needs like parks and infrastructure. I would also be very interested int learning of non-CDBG and HOME residential rehabilitation funding sources, if any exist.
Contractor Management
Time Management
Contractor Recruitment
Basic and background information on CDBG & HOME funding. Staff needs to understand basics in order to understand how funding sources can and should be utilized; knowledge will grow from there.
Areas of most concern to HUD from existing reports and findings.
HOME & CDBG Regulations
Anything in the development of affordable housing. As I stated in previous comments
NDC and/or CDFA economic development and finance courses offered in Ohio would be great.

OCCD Trainings

Member Funding Sources

Sources of funding used

	Members	Subscribers
CDBG - HUD	70.8%	53.3%
CDBG - State	58.3%	53.3%
CDFI	9.7%	6.7%
CRA	31.9%	26.7%
Economic Development Administration (EDA)	19.4%	
Entertainment Districts	5.6%	20.0%
Federal Historic Tax Credits	20.8%	20.0%
HOME - HUD	54.2%	13.3%
HOME - State	45.8%	33.3%
HTC (7)	8.3%	6.7%
LIHTC (5)	27.8%	13.3%
NMTC (6)	8.3%	13.3%
State Historic Tax Credits (20)	12.5%	33.3%
USDA Rural Development - Community Facilities (15)	16.7%	6.7%
USDA Rural Development - Economic Development (16)	12.5%	
USDA Rural Development - Housing 502 or 504 Programs (10)	11.1%	6.7%
Tax Incentive Programs (11)	37.5%	40.0%
TIF (12)	29.2%	40.0%
Other (please specify:) (8)	15.3%	40.0%

Member Funding Sources

You indicated using CDBG funding. What have been the primary uses of CDBG funding you have received?

	Members	Subscribers
Building Affordable Housing	21.1%	40.0%
Blight Elimination/Demolition	59.2%	60.0%
Code Enforcement	26.8%	
Construction and Improvements of Public Facilities	66.2%	60.0%
Homeownership Assistance	32.4%	40.0%
Infrastructure	64.8%	40.0%
Property Acquisition/Rehabilitation	43.7%	50.0%
Other	22.5%	20.0%

Member Funding Sources

You indicated using HOME funding. What have been the primary uses of HOME funding you have received:

	Members	Subscribers
Acquisition/Rehabilitation/Resale	7.0%	20.0%
Down Payment Assistance	5.3%	20.0%
Homeowner Rehabilitation	40.4%	60.0%
New Construction – for sale	3.5%	
New Construction – rental	14.0%	
Rental Rehabilitation	5.3%	
Tenant-based Rental Assistance	15.8%	
Other	8.8%	

Member Funding Sources

Have you used any other funding sources?
Please elaborate on sources/use of funding.

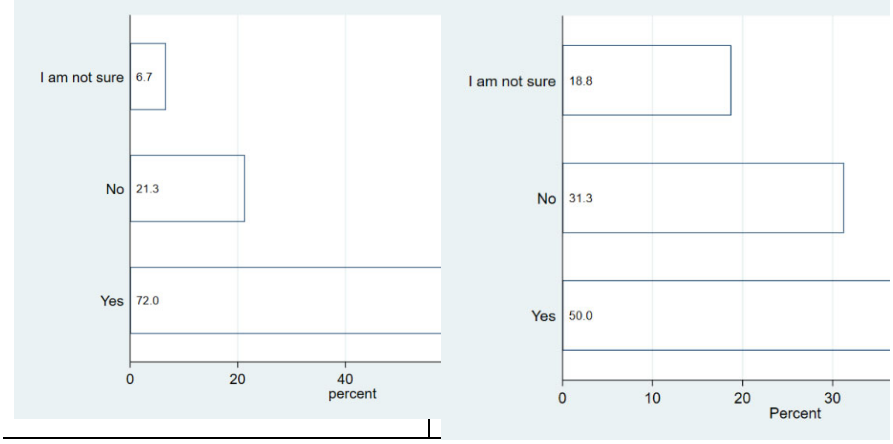
Members	Subscribers
Lead Safe and Healthy Homes funding, County funds for demolition	Neighborhood Stabilization Program (HUD); Consolidated Planning Grant (ODOT)
Ohio Housing Trust Fund	NSP1/2 - Acq-rehab, New construction, demo
ODSA will sometimes provide OHTF funding for CHIP	Permanent Supportive Housing - Rental Assistance
NSP1, NSP2	USDA and EPA Lead grant
UDAG (years ago), Federal Enterprise zones	Funding from City issued bonds
Leverage private sector funding	We are a Community Action Agency ...we use many federal, state and local funding sources...too many to list.
Emergency Solutions Grant; Neighborhood Stabilization Program; Office of Healthy Homes and Lead Hazard Control	Grants from lenders to support homeownership education. United way funding to support financial literacy and capacity programs. Miscellaneous corporate grants for rental counseling.
ODNR	Multiple including JFS, HUD Empowerment, ARC, HHS, CSBG, Aging, ODNR, DOI, etc.
Nexus Gas Line Funds	Trying to use PACE but its project driven and difficult to launch. Also using local non-profit RLFs for business expansion and redevelopment projects
NSP	ODOT-SRTS, TAP, Small Cities, and Safety; OPWC; OWDA; Ohio EPA DEFA; JobsOhio; Clean Ohio Trail Fund; Clean Ohio Redevelopment Fund
We have used HUD Lead Hazard Control Funds and USEPA Brownfield Grant Funds	
Ohio Arts Council, local grants	
Economic Development Administration - for water infrastructure	

Land & Water Conservation Fund - for public park development
MPO administered transportation grants - for roads, rec trails
CHIP
NSP 1,2 & 3
HUD Lead elimination Grants
Green and Healthy Homes grants
LISC / muliple bank s housing repair programs
OHFA 's Neighborhood Initiative Program
CDBG funding for a County Revolving Loan Fund (RLF).
Ohio Housing Trust Fund for home repairs and special population rehabs. Ohio Public Works for infrastructure.
Ohio housing trust fund, for home repair Ohio EMA FEMA for flood mitigation, Nature Works for parks, Federal Home Loan Bank for transitional housing for domestic violence victims.
NIP NSP
Neighborhood Stabilization, Homeless Prevention Rapid Rehousing.
Previous HOME question only allows one selection !
LIHTC, historic tax credits, new market tax credits, private loans
General Fund
CDBG-R - utilized when funding was available in 2008/2009
NSP-1 - utilized the program from 2008-2018
ESG - utilized when our agency was eligible prior to 1995
Rental Rehab - utilized when funding was available prior to 1992
Ohio Developmental Disabilities
Home Weatherization Assistance Program
Community Housing Impact and Preservation Program
Utility Programs
Neighborhood Stabilization Program (NSP) Funds- ARRA funding
Ohio Attorney General's Moving Ohio Forward Demolition Funding
NSP, USDA, EDA
ARC, GOA, USDA-RD

Land Banks

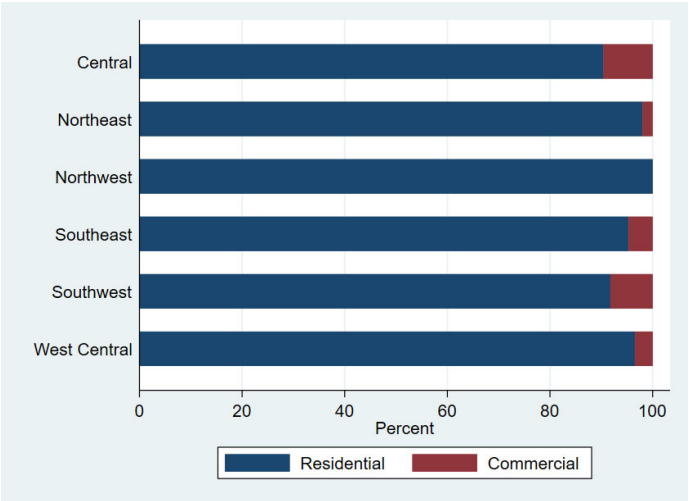
Does your community have a land bank?

Members	Subscribers



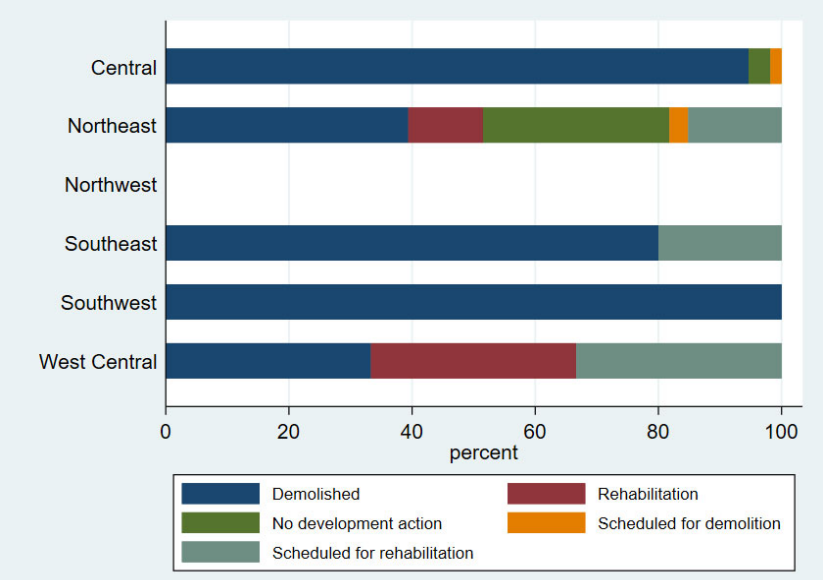
Land Banks

Residenital versus commercial



Land Banks

Commercial fate



Land Banks

What resources or strategies has the land bank used to support rehabilitation activities?

sold for rehab
Deed in escrow, fast track foreclosures, lien removal
NIP and Moving Ohio Forward
Profits from resale of property
they sell properties to investors for purchase/rehab
DTAC funds
The land bank has combined their resources with CDBG and HOME funds to rehabilitate and sell homes to qualified homebuyers.
rehabs are done by private developers or nonprofits. the land bank does not contribute funds to the actual rehab of the structure.
None to date, but the Land Bank is researching programs/policies to start undertaking rehab activities.
It is a small county and the land bank is used to facilitate demolition. They do not rehab any properties.
NIP
Targeted acquisition program
Demolition assistance program
selling to buyers willing to rehab the property. Need to get more creative on rehab though.
We can get you the numbers for the land bank but I donâ€™t have them handy - we have 49 local governments and the City of CIncinnati has 15 CDCâ€™s - the Land Bank works with some of these for property disposition
The land bank sells lots to abutting neighbors.
Mostly Demolition and Clearance to date
Land Bank has not/does not currently operate a rehab program.
JUst beginning that process now since land bank had been busy first using Moving Ohio Forward (MOF) funds then Neighborhood Improvement Program (NIP) funds.
sale with deed held until required rehab complete
City funding and private owner funding
Our CAP agency has used corporate funds to acquire, rehab and resell affordably to low-mod income families. This is the key model being used by our land bank. Two other local organizations have received recovered houses for in the same/similar model. We would like to do more of this work, we have only begun. One complete, one in process.
Donated properties that have been given to the townships in our service aeaa. One has donated several lots to us for new construction.

Land Banks

Please list any additional resources or strategies that can enable the land bank to increase support for rehabilitation activities.

rehab loan funds, homeowner focused low-dollar home mortgages and rehab loans, appraisal gap financing,
Low cost funding for acquisition/rehabilitation.
Additional grant funding for stabilizing low value neighborhoods
State funding for blight elimination.
permanent funding in the state budget, i.e. bonds or general funds
Need to learn best practices and how to prioritize which houses to rehab etc.
Funding
EPA grants help for commercial properties - hazard surveys and remediation
Community Land Trust
Funding needs to be provided for administrative & planning uses in order to undertake a program.
Don't know
Work with agencies for affordable housing/rentals

Land Banks

In your opinion, how much money does the land bank need yearly in order to rehabilitate properties?

This is a total guesstimate $150- $175/sq. ft.
$2-5 million revolving fund to rehab 40 to 100 units annually.
$60,000 per structure
probably +50,000 per unit, 5 units per year = $250,000
500000
As much as possible to build a robust Community Land Trust
Unknown as the Land Bank does not current offer a rehabilition program. Funding needed would be dependent on the type(s) of programs offered and how they are operated.
200000
200
$1 million
It would be nice to have between $200,000-$300,000 in a revolving fund to utilize to complete more rehabs. We could do more if funding were available.
$1 million

A**PPENDIX THREE**

July 23, 2019 OCCD Board of Directors Presentation and Working Session

OCCD
Strategic Planning

John Glazer
Senior Executive in Residence for Strategic Development

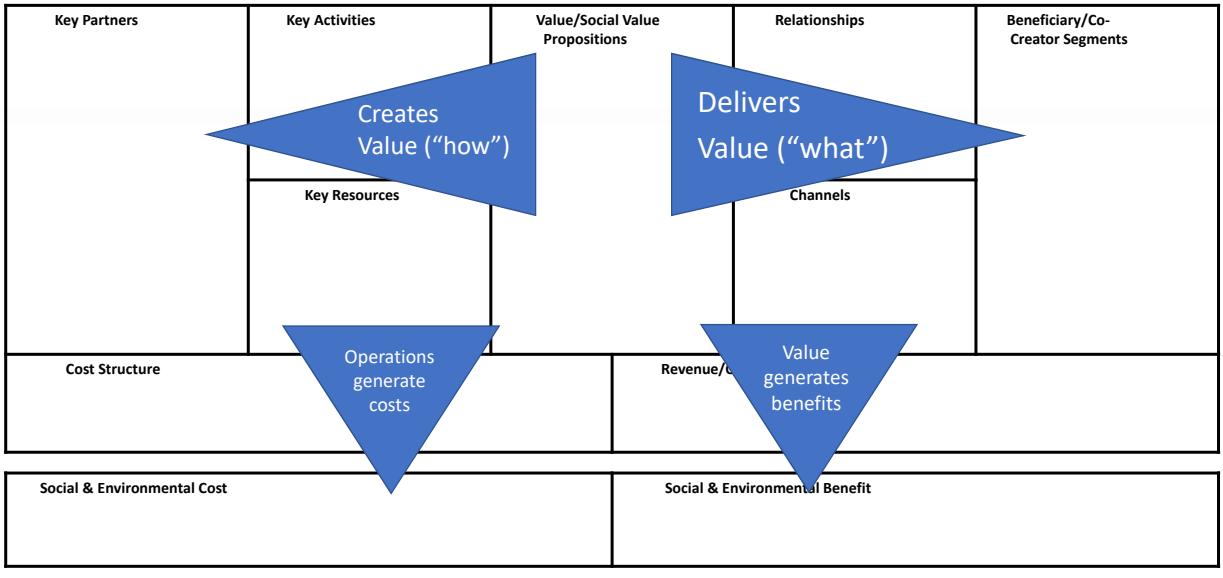
Faith Knutsen
Director of Social Entrepreneurship and Innovation

Voinovich School of Leadership & Public Affairs

Background

- > 10 years venture development in tech and social enterprise sectors at Ohio University
- International, regional and institutional planning expertise
- Personal experience in business and entrepreneurship

Planning tool: Venture Model Canvas



OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

participants: OCCD - Jack Riordan, Debra Mayes, Pat Richards; OU - John Glazer, Faith Knutsen

KEY PARTNERS

Members

Trainers

Community development professionals

Relationship network

Government agency and program officials

Other State Agencies, associations and organizations

ACTIVITIES

Identify and research member funding opportunities
- monitoring changing policies

Training
- program design, funding, and logistics

Membership
- needs assessment
- recruitment, retention and reclamation
- orientation and engagement

State and Federal programs
- monitoring, communication, and member needs assessment

Administration
- Board and organizational support

RESOURCES

Funders

Network of knowledge and experience
- members
- State and Federal officials
- experts
- industry leaders

Personnel
- Staff
- Board members, committees, and working groups
- Emeriti

Other State Agencies, associations and organizations

VALUE PROPOSITION

PROBLEM

Local communities seek to enhance livability in Ohio through the development and preservation of well-planned, suitable, and economically-sound community facilities, housing, and industrial and commercial development. The community development sector is challenged by complex dynamics of funding, administration, and implementation requirements as they seek to maximize local impact.

SOLUTION

OCCD maximizes the impact of State and Federal funding programs related to housing, community and economic development by serving community development practitioners through trainings, meetings and events, networking, and digital communications focused on education and empowerment.

RELATIONSHIP

Sense of belonging and alignment with mission-aligned goals and values

Sense of "the sum being greater than the parts"

Feeling expressed by one voice

Trust and confidence

CHANNELS

Member meetings and annual conference

Scheduled trainings

Digital communications

Networking

BENEFICIARIES

Direct
Practioners who participate in federal and State grant programs relating to housing, community development and economic development across the state of Ohio
Local government, non-profits and consultants

State and Federal Funders

Indirect
Local Communities serving direct beneficiaries (improved housing, neighborhoods, industrial and commercial development, etc.)

FISCAL COST

FISCAL REVENUES

SOCIAL/ENVIRONMENTAL COST

SOCIAL/ENVIRONMENTAL BENEFITS

OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

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OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

participants: OCCD - Jack Riordan, Debra Mayes, Pat Richards; OU - John Glazer, Fa

KEY PARTNERS	ACTIVITIES	VALUE PROPOSITION
Members Trainers Community development professionals Relationship network Government agency and program officials Other State Agencies, associations and organizations	Identify and research member funding opportunities - monitoring changing policies Training - program design, funding, and logistics Membership - needs assessment - recruitment, retention and reclamation - orientation and engagement State and Federal programs - monitoring, communication, and member needs assessment Administration - Board and organizational support	PROBLEM Local communities seek to enhance livability in Ohio through the development ar well-planned, suitable, and economically-sound community facilities, housing, and commercial development. The community development sector is challenged by c of funding, administration, and implementation requirements as they seek to ma impact.
	RESOURCES Funders Network of knowledge and experience - members - State and Federal officials - experts - industry leaders Personnel - Staff - Board members, committees, and working groups - Emeriti Other State Agencies, associations and organizations	SOLUTION OCCD maximizes the impact of State and Federal funding programs related to hou and economic development by serving community development practitioners thr meetings and events, networking, and digital communications focused on educati empowerment.

FISCAL COST

FISCAL REVENUES

SOCIAL/ENVIRONMENTAL COST

SOCIAL/ENVIRONMENTAL BENEFIT

BENEFICIARIES

Direct

Practioners who participate in federal and State grant programs relating to housing, community development and economic development across the state of Ohio

Local government, non-profits and consultants

State and Federal Funders

Indirect

Local Communities serving direct beneficiaries (improved housing, neighborhoods, industrial and commercial development, etc.)

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RESOURCES

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ITY DEVELOPMENT

hards; OU - John Glazer, Faith Knutsen

KEY PARTNERS		RELATIONSHIP	BENEFICIARIES
Members			
Trainers			
Community de		Sense of belonging and alignment with mission-aligned goals and values	Direct Practioners who participate in federal and State grant programs relating to housing, community development and economic development across the state of Ohio
Relationship n	Ohio through the development and preservation of community facilities, housing, and industrial and lopment sector is challenged by complex dynamics requirements as they seek to maximize local	Sense of "the sum being greater than the parts"	Local government, non-profits and consultants
Government a		Feeling expressed by one voice	State and Federal Funders
Other State Ag		Trust and confidence	Indirect Local Communities serving direct beneficiaries (improved housing, neighborhoods, industrial and commercial development, etc.)
zations		**CHANNELS**	
	l funding programs related to housing, community ity development practitioners through trainings, nmunications focused on education and	Member meetings and annual conference Scheduled trainings Digital communications Networking	

FISCAL COST

SCAL REVENUES

SOCIAL/ENVIRONM

CIAL/ENVIRONMENTAL BENEFITS

KEY PARTNERS

Members

Trainers

Community development professionals

Relationship network

Government agency and program officials

Other State Agencies, associations and organization

E OF COMMUNITY DEVELOPMENT

ebra Mayes, Pat Richards; OU - John Glazer, Faith Knutsen

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	Oth			

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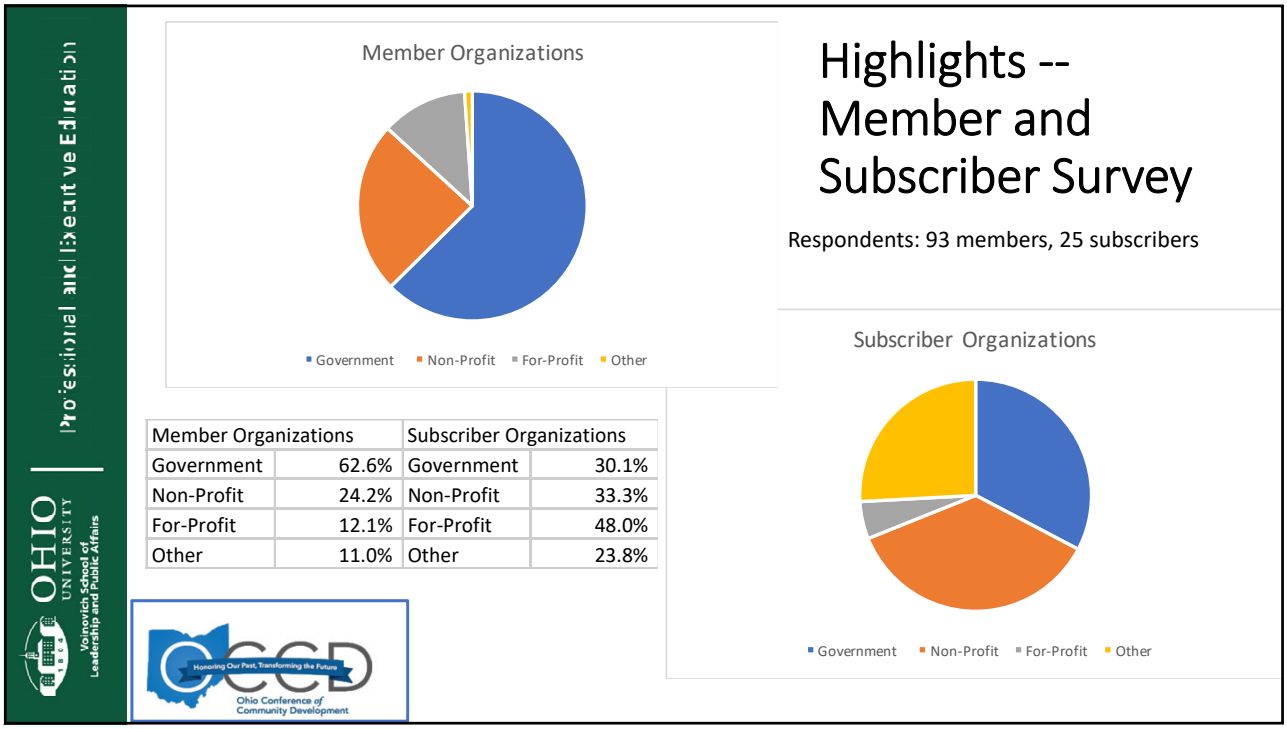

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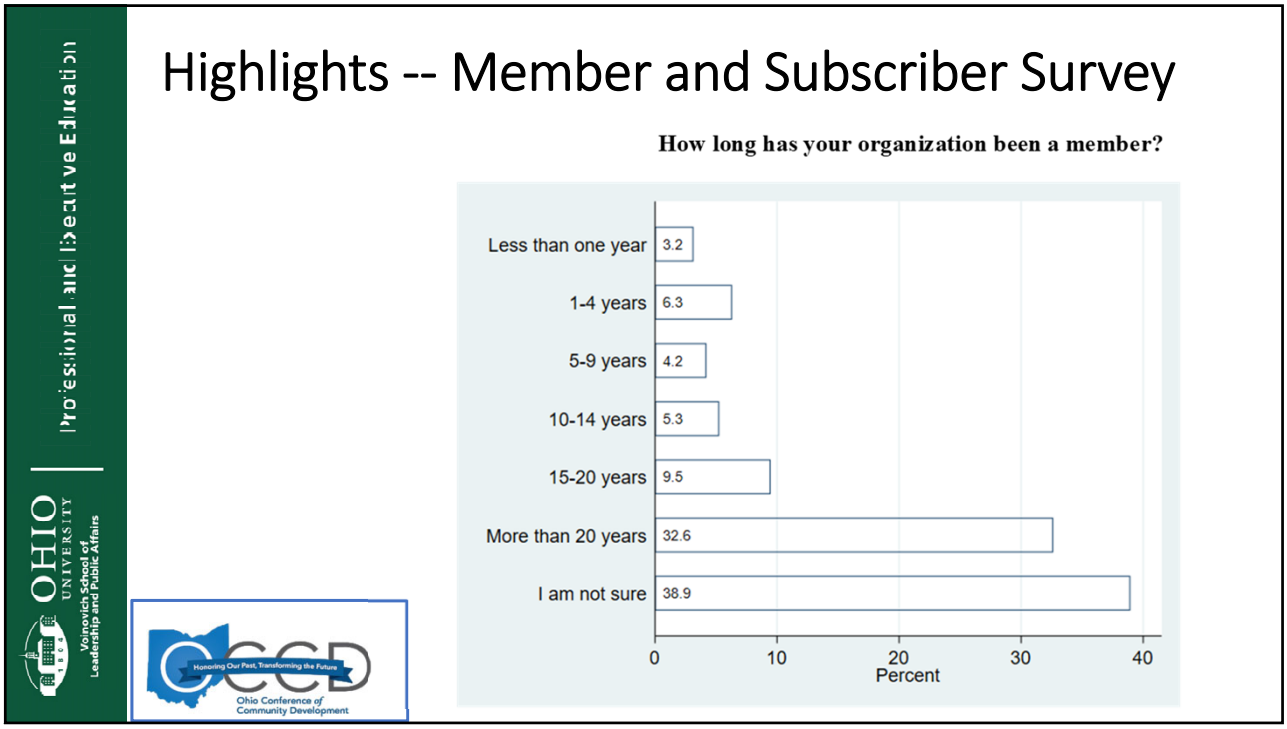

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Member Meetings

- "Quarterly, 2-Day Model unchanged in 20 years"
  - Shorter / More locations / On-line
  - Targeted topics -- relevant to today's member activities
  - Community Development: shared vision, outcomes, success measures

If you were attending an OCCD training, which of the following would you prefer?

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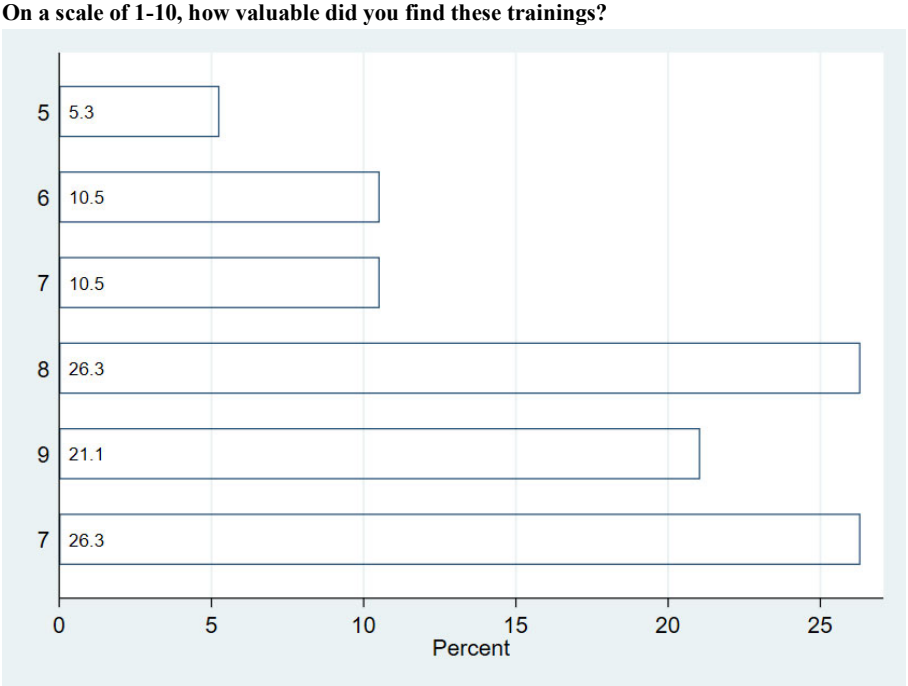
Member Value

High Levels of Satisfaction – Validates Vision, Mission, Values
80% satisfied or very; 16.7% neutral; 3.3 dissatisfied
73.3% likely to recommend; only 8.3% unlikely and 18.3% neutral

- Access to training and professional development key to membership
- Networking – 63% rate it 8 or higher
- Low cost education opportunities – 59% rate 8+
- Specific trainings - 58% rate 8+
- Source of trusted and timely information ("in the loop", "knowledgeable")
- 73% rate trainings 8+

Trainings



Technical Assistance

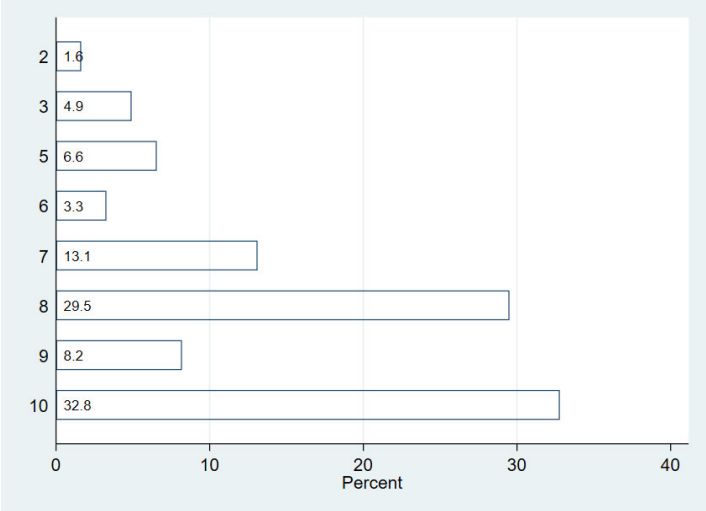
68% rate hands-on TA for specific programs 8+

Do you *agree* or *disagree* with the following statements?

	Agree	Disagree
My organization engages external fee-based technical assistance services.	40.3%	59.7%
OCCD should get more involved in the provision of reduced cost technical assistance services for its members.	81.4%	18.6%
My organization would utilize reduced cost technical assistance services provided by OCCD.	79.3%	20.7%

Technical Assistance

Hands-on assistance/instruction of specific programs or projects in community development, economic development, and/or affordable housing



Partnering

- 67% rate partnering with other associations for certification & credits 8+
- 51% rate partnering for advocacy 8+

Certification and Continuing Education

- Recommend OCCD undertake
- Would attract new and existing members
- Types wanted
  - Lots of suggestions
  - Lots of practitioner goals for certifications

If you are interested in OCCD offering continuing education credits, please let us know what courses, workshops, or training would be most valuable to you.

Members	Subscribers
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Energy/renewable energy courses & cost effective applications for residential, commercial and industrial development	Leadership-Project Management-Talent Development-Communication-Innovation & Change
Auto-CAD and GIS	Food security Governance
Enhanced computing skills - intermediate to advanced level courses	Monitoring and evaluation
Public Development and Finance	policy studies
HOME Programs	
Structured leadership training that identifies professional weaknesses and offers recommendations or specialized training.	
Continuing education for certified public accountant and attorneys.	
Real Estate CE's.	
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Bonding and insurance requirements for state and federal construction projects.	
Economic Development Finance, Community Development - Neighborhood Revitalization, Central Business District Revitalization, Housing Solutions - Financing.	

Advocacy

- Strong desire for effective advocacy – Collective Voice
  - Funding Levels
  - Program Value
  - Policy Goals
- 53% score advocacy 8 or higher out of 10 (25% rate it a 10)
- 55% rate quarterly legislative update 8+

Strategic Plan Framework

STRATEGIC FRAMEWORK: OHIO CONFERENCE OF COMMUNITY DEVELOPMENT

MISSION	OCCD is the State of Ohio's curator and disseminator of knowledge, experience, training, and practical assistance for best practices in field of community and economic development. OCCD is the network hub for agencies, organizations, and professionals involved in community development programs.
VISION	OCCD increases the effectiveness of local governments, non-profits, and private entities working to enhance the livability of Ohio's diverse communities by maximizing the impact of State and Federal funding programs related to housing, community, and economic development, aligning local goals and funder priorities, and improving professional standards among practitioners engaged across all phases of community development.
VALUES	OCCD values: * collaborative, flexible, and responsive bridge-builder and network enabler for its stakeholders in the field of community development. * an environment of respect which asserts the values of dignity, equality and diversity while assisting all of its members in developing their full potential. * highest standard of professionalism and best practices to make Ohio's local communities better places to live, work, and enjoy life. * the needs of its stakeholders and is dedicated to solving problems to enhance their impact.

OBJECTIVES *in words*	**GOALS** *in numbers*	**STRATEGIES** *in words*	**MEASURES** *in numbers*

Professional and Executive Education

OHIO UNIVERSITY Voinovich School of Leadership and Public Affairs

OBJECTIVES, GOALS, STRATEGIES, MEASURES (OGSM)

'What we want to achieve'		*'How we'll achieve it'*	
Objectives	Goals	Strategies	Measures
▪ Breakthrough achievement statement	▪ Stepping- stones to achieving the objective ▪ Financials and Operational Performance Measures	▪ 'How' of achieving objectives – Choices we will make; "Where to play + How to win" ▪ Programs or initiatives required to deliver strategies	▪ Numerical targets of progress toward implementing each strategy.
Words	Numeric/Binary	Words	Numbers

Honoring Our Past, Transforming the Future
OCCD Ohio Conference of Community Development

Professional and Executive Education

OHIO UNIVERSITY Voinovich School of Leadership and Public Affairs

Transitions & Successions

- Turnover & Retirements
  - Losing seasoned members, knowledge and experience
- Gaining young professionals
  - Varied career paths
- External environment
  - Increasingly competitive

Honoring Our Past, Transforming the Future
OCCD Ohio Conference of Community Development

Vision, Mission, Values

Over a half-century after its founding

What does the OCCD mission mean today?

How does OCCD realize its vision
and meet stakeholder needs?

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Professional and Executive Education

OHIO UNIVERSITY Voinovich School of Leadership and Public Affairs

Topics for Discussion

1. Financial
2. Member Services
3. Big Ideas
4. Organizational Structure
5. Partnerships
6. Policy / Advocacy
7. State Roles

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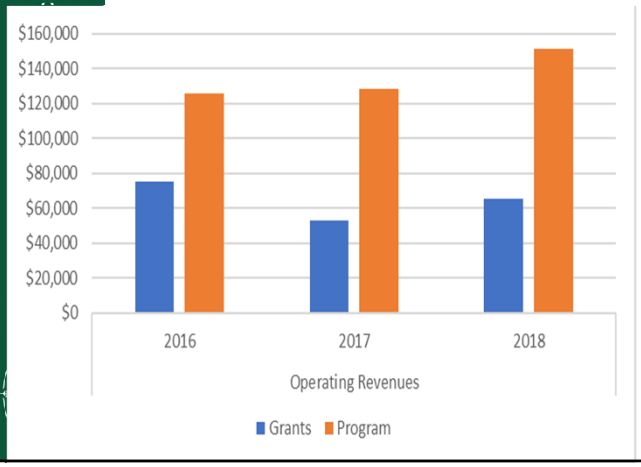
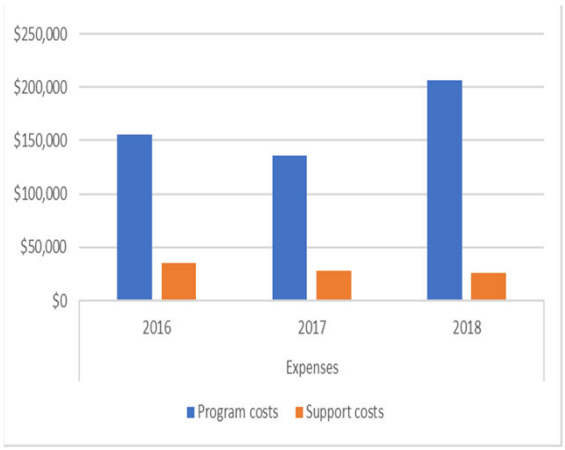
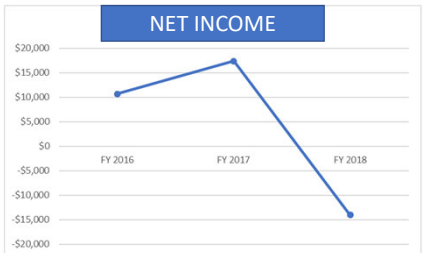
Professional and Executive Education

Financials







Member Services

- How are we doing delivering our value proposition to our members?
- Recruitment, retention, reclaiming – how?
- What are special needs for new members and young professionals?
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- Is there an opportunity for certification and continuing education?
- What are the strategies for the member marketing plan?

Big Ideas

- OCCD as a co-applicant and/or sub-grantee with member program proposals
- OCCD services to include grantwriting, ideation assistance, capital stack structures, project plan execution
- 'Rapid Response Team'
- SCORE Model

Organizational Structure

- Continuity/succession solutions – Board and staff transitions
- Bandwidth solutions
  - Is the committees and working group structure sufficient?
  - How can strategic direction by implemented?
  - What would an ideal staff structure look like?

Partnership

- Partnering:
  - community Foundations
  - institutions of higher education
  - economic development organizations
- How can resources and value creation be enhanced through partnerships?

Professional and Executive Education

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Policy / Advocacy

- DYI or partner?
  - How to win consensus on policy platform statements
  - Can OCCD partner with other advocacy organizations?
- Expanded activities of Legislative Committee?
- Best ways to educate legislators on member-interest policies and programs?

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Professional and Executive Education

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OCCD and the State

- Where are the synergies and shared goals?

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Phase of Transition

- Year One: financial stabilization/diversification
- Year Two and Three: Implementing new strategic initiatives

THANK YOU!

John Glazer and Faith Knutsen
Voinovich School of Leadership & Public Affairs

APPENDIX: SWOT

STRENGTHS / WEAKNESSES

Strengths

- Strong, half-century-experience-based network of knowledge/experience
- Expertise on State and Federal grant programs related to housing, community, and economic development
- Matching member needs to training opportunities
- Forums/events/gathering for networking, education, discussion
- Board and Committee structure (when operating as designed)

Weaknesses

- Dependence on overstretched Board and Committees
- Volunteerism expectations: less available than historically
- Revenue vulnerability
- Lack of infrastructure – no staffing to accomplish new things
- Continuity issues; bandwidth issues

OPPORTUNITIES / THREATS

Opportunities

- New practitioners in need of training
- Diversity of membership – can align products to segments
  - Basic Training
  - Focused Training (e.g., capital stacks; project mgt; leveraging funding sources
- Peer to Peer network/education opportunities
- Technical Assistance programs/services
- Changing environment creating training needs
- Mentoring
- Certification programs, continuing education
- Contributing role in program execution success
- Platform for learning resources, key research distribution, access
- New partnership opportunities with member consultants, higher education, others

Threats

- Continuity and Succession challenges
- Talent turnover (retirements; job change; career ladders) in industry – loss of talent, experience, network connections; new faces or old hands – not many in middle
- Staff retirements and succession needs
- Funding uncertainties
- Resource constraints
- Competitive organizations

APPENDIX FOUR

July 24, 2019 OCCD Membership Meeting Presentation and Strategic Plan Update

OCCD
Strategic Planning

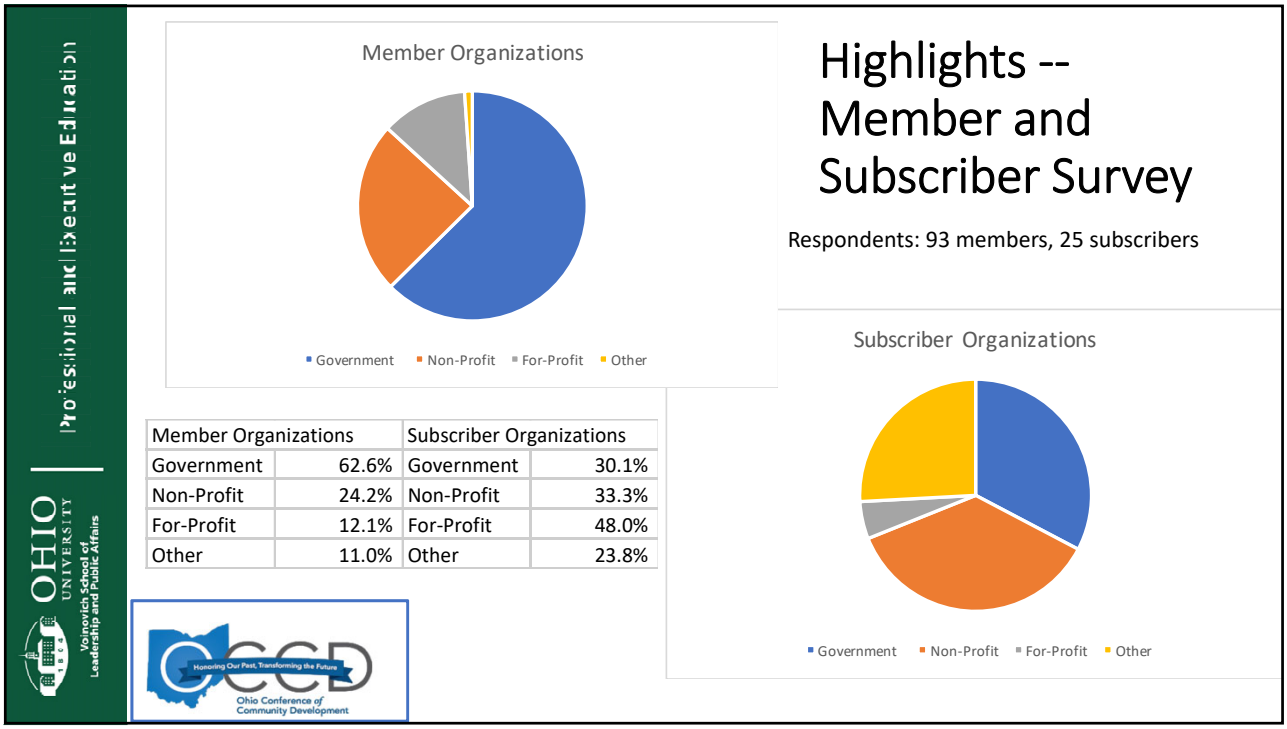
John Glazer
Senior Executive in Residence for Strategic Development

Faith Knutsen
Director of Social Entrepreneurship and Innovation

Voinovich School of Leadership & Public Affairs

Background

- > 10 years venture development in tech and social enterprise sectors at Ohio University
- International, regional and institutional planning expertise
- Personal experience in business and entrepreneurship



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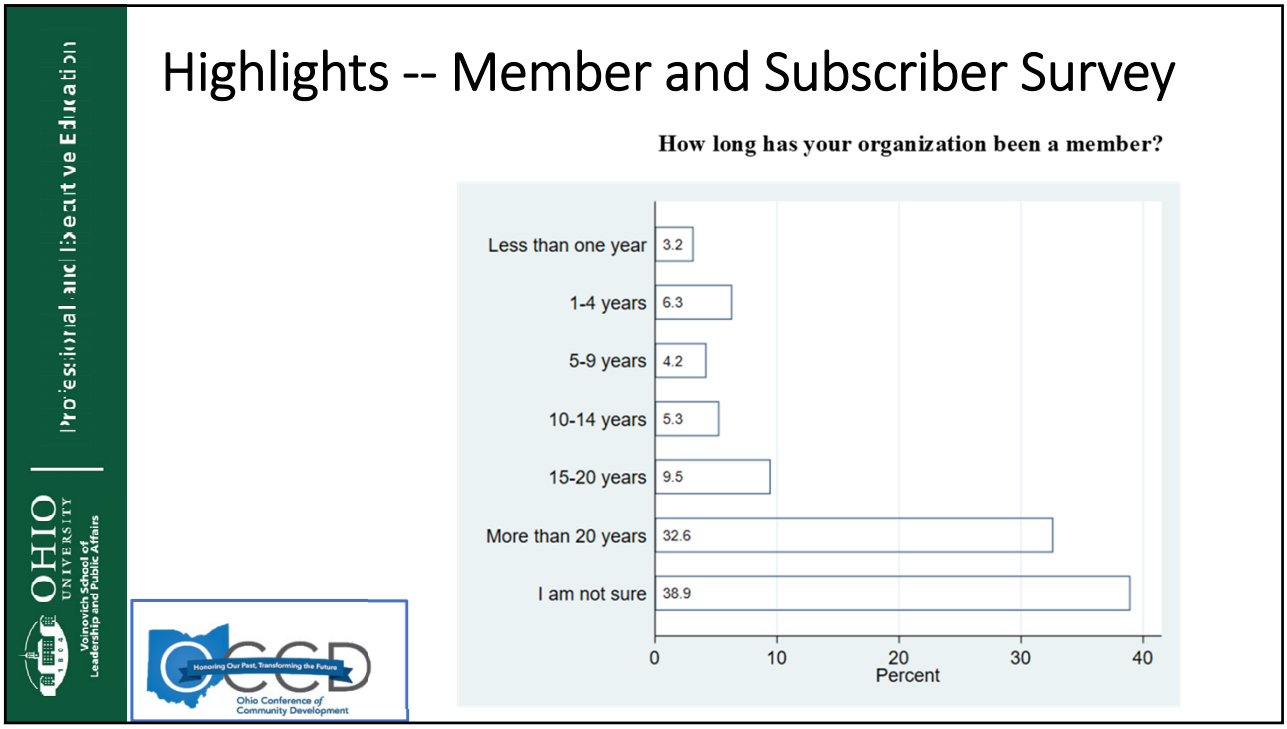

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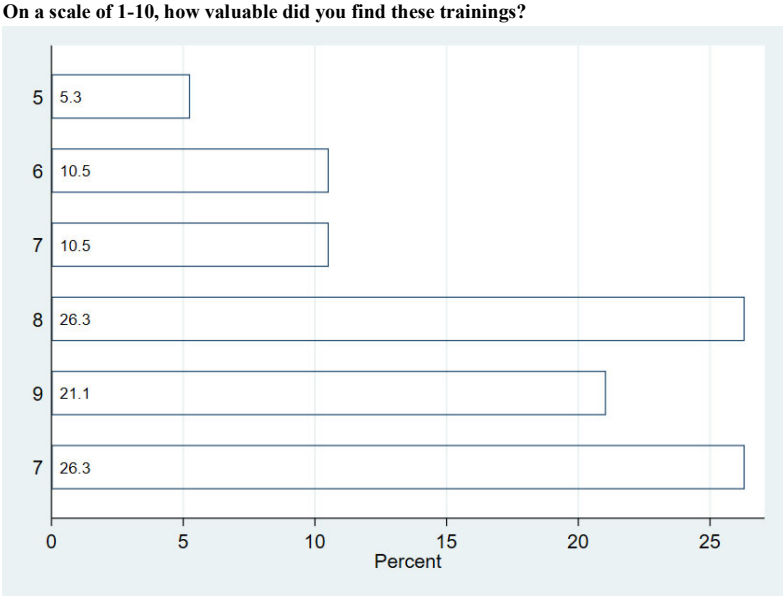
74% rated 8+



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GOALS AND OBJECTIVES

Topics for Discussion

1. Sources of Revenue
2. Member Services
3. Big Ideas
4. Organizational Structure
5. Partnerships
6. Policy / Advocacy
7. State Roles

Starter Brainstorming Highlights

1. New partnerships
2. New funding sources
3. One-on-one technical assistance
4. Member-and-friends membership model
5. Podcasts or other digital outreach
6. New member meeting and training models
7. Continuing education credits/certifications

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Professional and Executive Education

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Professional and Executive Education

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OCCD Honoring Our Past, Transforming the Future Ohio Conference of Community Development

Policy / Advocacy

- DYI or partner?
  - How to win consensus on policy platform statements
  - Can OCCD partner with other advocacy organizations?
- Expanded activities of Legislative Committee?
- Best ways to educate legislators on member-interest policies and programs?

OCCD and the State

- Where are the synergies and shared goals?

Phase of Transition

- Year One: financial stabilization/diversification
- Year Two and Three: Implementing new strategic initiatives

THANK YOU!

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APPENDIX: SWOT

STRENGTHS / WEAKNESSES

Strengths

- Strong, half-century-experience-based network of knowledge/experience
- Expertise on State and Federal grant programs related to housing, community, and economic development
- Matching member needs to training opportunities
- Forums/events/gathering for networking, education, discussion
- Board and Committee structure

Weaknesses

- Dependence on overstretched Board and Committees
- Volunteerism expectations: less available than historically
- Revenue vulnerability
- Lack of infrastructure – no staffing to accomplish new things
- Continuity issues; bandwidth issues

OPPORTUNITIES / THREATS

Opportunities

- New practitioners in need of training
- Diversity of membership – can align products to segments
- Basic Training
- Focused Training (e.g., capital stacks; project mgt; leveraging funding sources
- Peer to Peer network/education opportunities
- Technical Assistance programs/services
- Changing environment creating training needs
- Mentoring
- Certification programs, continuing education
- Contributing role in program execution success
- Platform for learning resources, key research distribution, access
- New partnership opportunities with member consultants, higher ed, others

Threats

- Continuity and Succession challenges
- Talent turnover (retirements; job change; career ladders) in industry – loss of talent, experience, network connections; new faces or old hands – not many in middle
- Staff retirements and succession needs Funding uncertainties [different from 'revenue vulnerability' in 'weaknesses'?]
- Resource constraints Competitive organizations