Ohio Conference of Community Development

Strategic Planning Project

January 2020

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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. The very origin of the OCD organization lies in its ability to respond to such needs.

Nevertheless, today, the overriding strategic imperative for OCCD is to adapt to a different set of fundamental changes. In addition to changes in rules, regulations, and opportunities applying Federal and State programs to local needs (which OCCD handles well), the most central changes challenging OCCD stem from transitions currently taking place both internally and externally.

Internally, OCCD is facing a generational shift 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, refresh its brand, and enhance perceptions of its important 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** – There is a need to streamline traditional delivery methods for professional development trainings, conferences, and networking opportunities to adjust to the more hectic pace of time-and-money constrained member organizations.

   - Members suggest that training presentations be less about sharing or celebrating success stories and more about articulating replicable best practices with a focus on the "how to" to inform local application.
   - Content drawing upon collective knowledge and experience of members to solve practical problems, answering pressing questions, and advancing professionalism of frontline community developers needs to be more accessible and immediate to member needs.

- New professionals want to be more fully engaged, with trainings that leverage digital literacy, learning styles, and communication tools.
- New professionals also suggest that OCCD affiliation offer credentials advancing careers and increasing leadership roles for rising community development professionals.
- OCCD's ability to respond to such member needs would benefit from greater use of technology in its service delivery models, networking opportunities, and professional community development.

3. **Organizational and Staffing Structure** – OCCD's current reliance on an active, committed, volunteer Board has been its hallmark means of ensuring a lean organization focused on serving diverse community development practitioners. 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.   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 in transition and disappearing. OCCD needs to find ways to draw ever more productive activity out of its current Board structure while also considering alternative staffing solutions to sustain momentum, provide for continuity, address members' immediate information and problem-solving needs, deliver stakeholder value, and advance organizational goals in a digital age.

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.   Partnership opportunities might include the following:

- Partnerships related to financial sustainability might entail collaborations on grant applications that can contribute to organizational overhead while creating member value. OCCD is 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. **State Office of Community Development**—The Ohio Department of Development Services' Office of Community Development is an important strategic partner for OCCD. The State recognizes the value OCCD has created historically and continues to do so through its training programs and member outreach. The State also recognizes the challenges of change and transition affecting not only OCCD, but the State as well along with the entire community development sector. The State would highly value an OCCD that is recognized as the first "go-to" resource for community development professionals seeking answers to questions, solutions to problems, and how-to assistance for immediate and emerging needs. The State notes that OCCD has historically served this mission and encourages OCCD to align its capabilities and organizational structure to create and deliver that value in the digital age where practitioners' information needs are immediate and specific. An OCCD that is the primary resource for the practice of community development, encompassing not just how to implement State programs but all the tools of community development, would elevate and expand the community development sector and deliver a strong 'return on investment' to the State.

6. **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 members distinguished between lobbying for particular policy positions and advocating through educational activities, noting 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 members' interest in "elevating" the profession. Members suggested that OCCD's mission include a leadership role defining, articulating, promoting, and defending "Community Development." Members identified this mission as what was needed to "elevate" the profession and suggested that it may differentiate OCCD from other organizations and position OCCD as a thought-leader in the field enabling it to inform and shape public discourse about the impact of community development efforts thereby affecting policy, funding, and appreciation of the profession's value. This would be a brand worth having.

7. **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.

   - Members cited a general lack of awareness about Community Development among the public as well as public officials and policy makers. They reported a sense that

Community Development has been relegated to a not-well-understood status secondary to 'economic development' and a feeling that the contributions of its projects and programs, the values it represents, and the impacts it has on the communities it serves go unrecognized and underappreciated. 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 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.

8. **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.   It is an expression of OCCD's current status quo "Mission / Vision / Values" statement.

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).

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: <u>Collaboration</u>: 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. <u>Economic Opportunity:</u> 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. <u>Innovation:</u> OCCD is committed to finding new and innovative ways to effectively achieve community development goals in response to changing contexts for our work. <u>Inclusion:</u> Community development professionals seek to create inclusive communities where all people are welcome. OCCD seeks a community development field reflective of the people we serve and ensures its service offerings are aligned with the diveriisty of communities served. <u>Performance & Accountability:</u> OCCD promotes the highest standards of professionalism and best practices in community development, including impact measures and return on investment.

OCCD STRATEGIC PLAN MATRIX 2020-2022				
Goals	**Objectives**	**Strategies**	**Deliverables**	**Assignments**
Achieve financial sustainability for the organization.	Increase and diversify revenue sources in 2020.	Review and analyze fee structures for membership, trainings, conferences and make recommendations for changes Analyze opportunities for additional training and capacity building courses for members. Explore revenue opportunities through partnerships and collaborations.		
Identify new technology tools and updates required to deliver value to members.	Develop and maintain a website that provides practitioners at all skill levels with the access to information and training.	Information curated for members to include archived educational materials, training materials, podcasts, etc. Explore opportunities for digital peer-to-peer communications and information exchange.		
Attract and fully engage new and emerging community development and housing professionals in and to Ohio for professional engagement.	Recruit from existing membership a cohort of emerging professionals for the purpose of developing future leadership in the community development field.	Distribute emerging professionals throughout the committee structure. Recruit new community development professional talent. Adapt trainings and communications to the needs and learning styles of new and emerging professionals in the field.		
Maintain OCCD's position as the leading provider of access to training and best practices for community development professionals in Ohio.	Create compelling and sustainable value for both community development professionals and administrators of State and Federal community development programs.	Distinctive training offerings tailored to diversity of Ohio's communities. Explore opportunities for advocacy activities to educate policy makers and eelevate public awareness of the importance and value of community development projects.		
Maintain and advance an effective organizational structure to deliver value added services to members.	Build capacity for continuity of service and development of needed new initiatives and upgrades.	Design Board committee, volunteer structure, and project assignments to address ongoing and new initiatives needed to achieve strategic goals.		
Evaluate future staffing needs to deliver the level of services to members.	Support operatons, capacity development, partnerships, and stakeholder relations.			
Review and evaluate opportunities to partner with non-traditional partners, including universities to determine how to provide access to resources to strengthen their community development activities.	Partnerships that leverage OCCD resources can advance revenue diversification (e.g., grant sub-contracting) and capacity building goals.			

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 enable the OCCD Board to identify strategic goals and objectives and to determine the activities, deliverables, and assignments that will implement their strategic intent. The project did not try to usurp the Board's authority and responsibility to determine its strategic plan and implementation process.   Instead, this project aimed to create conceptual frameworks that capture mission alignment while guiding pragmatic implementation, suggesting   deliverables with both intellectual and practical value and 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, finalizing, communicating, 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
- Faith Knutsen, Director of Social Innovation and Entrepreneurship
- John Glazer, Senior Executive in Residence for Strategic Development

Dr. Jason Jolley oversaw project tasks and phases, providing consultation and guidance. Mr.   John Glazer served as the project's 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 member survey conducted under this project and the structure of the working sessions with staff and Board members, member interviews both early in the process and later towards the end of the project), and interviews with representative of the Community Development Program of Ohio's Development Services Agency.

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, identified issues of major concern, deepened understanding of challenges and opportunities, and set the goals for this strategic planning project.

The OCCD Board's Executive Committee had previously initiated a great deal of effort around strategic planning, and the results of that work became the starting point for the current project. This previous progress toward a strategic plan enabled the current project to focus on the framing of questions, identification of priorities, charting alternatives, and revisiting the organization's vision and mission more important than specific or definitive recommendations. Considerable effort went into gathering Executive Committee 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 information, and a working session to build a Business Model and Strategy Framework reflecting OCCD's existing operations and mission statements. This initial business model and strategy framework reflect, as accurately as possible, the current state of OCCD and was used as a baseline against which to compare the updated and revised Business Model and Strategy Framework resulting from this project. Both the initial '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 related to transitions and successions both internal and external the organization, revisiting and refreshing components of OCCD's mission and vision statements, and a wide-ranging discussion of the organization's financial stability, member services, potential partnerships, advocacy roles, organizational structure and staffing, 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.

State of Ohio Interview:

Deputy Chief, Office of Community Development, Ohio's Development Services Agency

An interview with the Deputy Chief of the State of Ohio's Office of Community Development of Ohio Development Services Agency took place on November 14, 2019. Due to scheduling conflicts, this interview occurred late in the project's process, after

member surveys were completed and Board and Member facilitated co-creation sessions were conducted. Informed by Board and Member inputs, this was an extensive and frank discussion of OCCD's historical and current relationship with the State agency and the strategic themes emerging from the project research to-date.

Board Transition and Report Iteration

A preliminary version of this report was submitted to the OCCD Board on October 15, 2019. During the course of this project, the OCCD Board of Directors and its leadership underwent significant changes. The new Board needed time to review the preliminary report, assess the general direction its analysis suggested, and provide its own input into the shaping of the final project report.   A no-cost extension of the project was executed at the end of October 2019, a no-cost extension of the project was implemented to allow for work to continue until March 1, 2020 to give the new Board time to process and help shape the strategic framework now reflected in this final report. During the time of the extension, additional Board input was obtained by collecting comments on the preliminary report.   This final report incorporates that input.

Strategic Theme Detail

Overriding Challenge: TRANSITIONS & CHANGE

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

   - Members offered specific suggestions to increase OCCD engagement among emerging new professionals in the field of community development, including:

      - Identify a core cohort of career-oriented professionals committed to OCCD vision and recruit them to engage more fully. Identification 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.
      - Recruit emerging professions to engage across all of OCCD's committees, either as participating observers or full voting members.
      - Adopt goals and objectives around succession planning for leadership positions and solicit the perspectives and recommendations of new and emerging community development practitioners in shaping OCCD's approaches to training, communications, digitalization, advocacy and other organizational capacity building activities.

- Continue OCCD's scholarship program and assist with placements.

b. State Changes
- Changes in OCCD's relationship with the State of Ohio stem in part from similar transitions and personnel turnover resulting in shifts away from long-standing relationship structures. There is a strategic need for renewing a shared understanding of OCCD's role in adding value to the State's community development programs. (See Section VI of this report.)
- Additionally, policy, programmatic, and budgetary changes in State operations potentially impact the State's need for training programs and communication channels with community development practitioners.

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. Primary examples are the Ohio CDC Organization (https://www.ohiocdc.org) and the Ohio Economic Development Association (https://ohioeda.com). Other member-based organizations include the American Planning Association Ohio Chapter (http://www.ohioplanning.org/aws/APAOH/pt/sp/home_page) and more broadly Community Development Professionals (http://www.communitydevelopmentprofessionals.com)
- The Economic Development sector has come to dominate public awareness, government policy, and funding. These trends potentially diminish the recognition of the important contributions of the Community Development sector. Members pointed to a need to elevate the perception of Community Development on the part of Federal, State, and Local officials as well as among the general public, and they expressed the hope that OCCD might lead such efforts.

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 limiting factor for new capacity development or initiatives.

Specific ideas for increasing and diversifying revenues:

- Membership Categories and Fees. Members interviewed noted that 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 strengthening OCCD sustainability. All recognized the need to remain competitive

and retain membership while bringing fees more in line with other professional organizations.

- Expand Membership Base.   Both member survey comments and interviews suggested expansion of OCCD' membership base. These suggestions were often in connection to recommendations around increased member service offerings that might appeal to a more diverse member base. Currently, OCCD focuses primarily on a base of members with professional development needs around the federal and state programs OCCD has traditionally been organized to support (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 include wider community and economic development topics and opportunities. With an expanded vision (e.g., to uplift and serve "community development" more broadly defined), new membership categories might include additional nonprofits, philanthropic entities, impact investors, public officials, civic society organizations, economic development entities, etc. Developing strong value propositions for different segments of the community development sector, crafting compelling messages for membership campaigns, 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 related to affordable membership fees apply to fee structures associated with OCCD trainings and events, revisiting existing program fees and benchmarking against comparable training programs are suggestion for financial planning going forward. In addition to current services, new product offerings consistent with an expanded OCCD mission statement may be strategic opportunities to increase and diversify revenues.

- Technical Assistance. Customized, intensive, hands-on, one-on-one technical assistance repeatedly emerged as an in-demand opportunity for OCCD.   The ability to deliver such services is hindered by current organizational capacity and staffing structures. Despite challenges, members 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 the primary area of needed assistance was in identifying funding sources and building integrated capital stacks. Members were less interested in help identifying community development projects, preparing funding applications, or planning/managing project implementation.   Designing financing structures is the key area of need for technical assistance and a potential focused opportunity for OCCD.

- Grant Funding. As a nonprofit organization, OCCD can qualify for grant funding from both governmental and philanthropic sources. A significant portion of current budgeting relies on State grant funded support for training. If OCCD diversified its programmatic base or partnered with other organizations, OCCD 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 or partnering with others may create opportunities for increased financial sustainability.   OCCD has access to sources of data, pilot programs, and community development projects that may be valuable to grant partnerships.

- Sponsorship / Advertising Opportunities. OCCD has previously considered monetizing its member outreach and ability to convene community development professionals through sponsorship and advertising opportunities.

- 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.

Membership & Membership Services

- 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. Campaigns for new members and/or new member services can benefit through leveraging existing member support. 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 both professional development and advancement of the community development sector generally. 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.

  o Members prefer shorter (viz. single day) meetings and trainings to be held at varying locations. Over 62% of survey respondents expressed a preference for single-day training.
  o Members suggested that trainings be available on-line.
  o 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.
  o 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 levels as well as 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 services:

  - Technical Assistance – specific, hands-on, applied learning projects/programs with a particular emphasis on project financing challenges (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 recommended by members.   Some comments noted that the key obstacle to attracting new members is that potential candidates 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 partner relationships.

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.

Several suggested a training session template or standard set of questions that all presentations should be sure to address. This would include an account of the capital stack, how funding was acquired/combined, how the idea/innovation/solution was formed, the partnerships involved, processes needed to implement, practitioner lessons, and how success could be replicated in other contexts. This is especially important for trainings focused on new emerging professionals in the field.

Another suggestion to ensure maximal value from presentations 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.

- Digital services. Members (especially new professionals) have information and training needs that are more immediate than can be satisfied by quarterly meetings and scheduled training sessions.

    o One suggestion to address this need, while also serving to capture/transfer knowledge within the organization, is to build an online, searchable library archive of trainings, problem-solution sets, best practices, etc. These need to be easily identified and found, highly focused, short, and crisply presented.
    o Another suggestion to build the library, regularly disseminate information, engage members, and generate potential revenue (via a subscription model) is to provide weekly 15-20-minute pod casts or TED talks on community development topics that members could access during commutes, downtimes, etc.
    o Digital peer-to-peer interactive platforms for Q&A, references, and chat-type interactions are included in the desire for OCCD to move from an 'analog' to 'digital' service delivery system.

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 are threatened by pending retirements of all current part-time support staff members.

- Member concerns. The number and diversity of initiatives needed to implement a refreshed strategic plan require focused effort, timely implementation, ongoing management, and continuous progress.

    o Members are concerned about capacity of current organizational structure.
    o Members appreciate the limits of financial capacity to solve capacity challenges.
    o Members encourage creative solutions to the need to expand organizational capacity through innovative staffing structures or volunteer systems.

- Functional Areas. Strategic goals and objectives will require staffing and organizational structures to expand current capacity. Current operational structure addresses general needs of administration, training/event planning and coordination, and a development specialist. Other functional areas might include:

    - Membership engagement and expansion
    - Member trainings, programs, services: content and design
    - Diversifying revenues
    - Website development and digital service delivery platforms
    - Branding, marketing, messaging
    - Partnership development
    - Advocacy and educational activities

Partnership with the State Office of Community Development

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 Office of Community Development.

The interview with the Deputy Chief of Ohio Development Services Agency's Office of Community Development affirmed the State's perception of both the historical and current value represented by OCCD. At the same time, this interview echoed the concerns of OCCD membership about adapting to the challenges of changing environments, serving the information needs and learning styles of emerging professionals, expanding engagement with the community development sector, and modernizing service delivery platforms.   The alignment between the State's suggestions/recommendations and those that emerged from OCCD member survey and interviews is striking.

In particular, the State emphasized the following challenges:

- Trainings in recent times are often too broad and nonspecific to deliver practical, take-home value to attendees. The State relates this challenge, in part, to differences not only between legacy and new professionals but also to differences between the two main groups of community development practitioners (large, entitlement communities and smaller, State allocation communities).
- The State emphasized its own changing environment as one in which ODSA funding is increasingly constrained and subject to greater scrutiny and accountability. The Office

of Community Development needs to assess its spending in terms of a 'return on investment' for the State.

The State appreciates the potential of OCCD to generate a valuable ROI for ODSA but suggests that OCCD align modern capabilities with its traditional mission. OCCD's organizational structure and service delivery model has worked effectively in the past but needs to keep pace with changing environments. In particular, a service delivery platform based on quarterly meetings, networking, and intermittent trainings may no longer be sufficient for timely responsiveness to information and learning needs in a digital age and at digital pace.

The Office of Community Development would greatly benefit from OCCD realizing the mission of being the "first" go-to resource for community development professionals seeking answers to questions, solutions to problems, and how-to assistance for immediate and emerging needs. OCCD's primary function needs to be the one-stop (or at least first stop) for information needs and the place where community development professionals go to plan solutions for community challenges.

Herein lies the potential State "ROI" from OCCD's role as an intermediary supporting a high-performing, adaptive, professional community development sector with timely, accessible technical assistance. An OCCD that is the primary resource for the practice of community development, encompassing not just how to implement State programs but all of the tools of community development, would elevate and expand the community development sector and deliver high value to the State.

Staffing solutions and organizational changes may be needed for the capacity to create and deliver this value and perform this function for the community development sector.

The takeaway from the interview with the State is a strong reinforcement of the suggestions and recommendations of OCCD's membership in the research underlying this report. In addition, there is a need for OCCD's strategic plan going forward to not only be responsive to this input but also to communicate, educate, and promote to the State OCCD's value in terms of "return on investment."

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.
- OCCD elevates and expands the community development sector more broadly than State programing to encompass the community development toolkit as a whole.

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 existing 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 about 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 goals and objectives

  - 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.

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.

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.

Appendices:

Initial and Revised Business Models and Strategy Frameworks

OCCD 2019 Member Survey Results

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

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