



Strategic Planning Committee's  
Engagement Workgroup  
***ROUGH, ROUGH DRAFT***  
CHARTERS – ACTION PLANS

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V07-04-2023

# Explaining SMART

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As the sub-workgroups dig into your 3 Initiatives using the Charters in the following slides, align them with SMART.

- **S**pecific
- **M**easurable
- **A**chievable
- **R**elevant (**R**ealistic)
- **T**ime-Bound

## 9 Strategic Issues (12-10-22) Bolded are the focus issues of Engagement Workgroup

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1. Review and gain alignment on its mission / vision – should OTTA grow, maintain or shrink? What are the priorities over the next five years?
2. Create a strategic plan and, moreover, a strategic mindset that honors the past but continually looks to achieve future goals.
3. **Define and communicate a re-established “brand” to promote a better understanding of how it serves and supports the Triangle community.**
4. Review the Board structure and terms of office to provide better continuity and support for Board work.
5. Create a Board / leadership development / succession plan to build its bench strength and avoid leadership / volunteer burn-out and recycling.
6. **OTTA needs to improve and diversify its programming and marketing capacity to increase the participation and membership from a broader range of residents.**
7. OTTA needs to determine the role of paid staff and volunteers in its business model and organization and build a volunteer development program that will ensure that it can build a future corps of volunteers as committed and talented as the current group.
8. OTTA needs to make targeted investments to improve its organizational infrastructure and systems (facilities, policies & procedures, technology, training, management, communication, etc.) to assure the organization operates efficiently and effectively and can support future growth.
9. OTTA needs to reframe and rebuild its role as a responsible and effective steward of the Triangle's “living environment” and **expand civic engagement through information, education and collaboration.**

# Engagement Workgroup

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## Goals

1. Define engagement. Establish baseline numbers for targeting goal of doubling engagement over 3 years. *Specific date TBD.*
2. Define and communicate a re-established “brand” to promote a better understanding of how it serves and supports the Triangle community. Create Marketing plan.
3. Improve and diversify programming and marketing capacity to increase the participation and membership from a broader range of residents. Expand civic engagement through information, education and collaboration.

# SMART Goal 1 Engagement Sub-workgroup Jacob and Elaine

## PROBLEM STATEMENT

In an effort to explore potential increased capacity for the organization's growth, the OTTA needs to:

**Develop and implement a plan to expand and diversify programs and services that will attract a broad range of stakeholders (SMART Goal Statement #1).**

## PROPOSAL / APPROACH

After conducting a first-time survey of 4000++ Old Town neighbors (using the USPS households addresses) and doing a SWOT Analysis, the OTTA updated/modified its Mission, created a Vision Statement and identified its Core Values. From there, the Strategic Planning Committee (SPC) created workgroups focusing on 3 organizational areas and recruited additional volunteers to explore capacity and growth potentials.

## CORE TEAM

**OTTA Board Committee:** Strategic Planning Committee

- **SPC Leads:** Brad Neuman, Chairperson, SPC; John Engeman, Consultant/Facilitator
- **Workgroup Lead:** Dorothy DeCarlo

**Sub-Workgroup Team:**

- **Double Engagement**
  - Elaine Frei
  - Jacob Ringer
- **Brand Management**
  - Dorothy DeCarlo
  - Sandy Bredine
  - Eury Chrones
  - Vi Daley
- **Deliver Value**
  - Laura Becker
  - Carly Jenkins
  - Marya Lucas
  - Sherry Smith

**Engagement Workgroup Team:**

- Dorothy DeCarlo, Lead
- Sanford Bredine
- Eury Chrones
- Vi Daley
- Jacob Ringer
- Carly Jenkins (Communications)
- Elaine Frei (Membership)
- Marya Lucas (Events)

## OBJECTIVE(S)

- Become more relevant to more people
- Create a sense of community and belonging
- To develop long range plans that will enable OTTA to grow-with-purpose over the next 3-5 years, including 5-7 initiatives for sustainable growth
- Prioritize the 5-7 initiatives and develop short-term Action Plans for the top 3 prioritized initiatives

## SUCCESS CRITERIA

*To ensure we are successful, we will measure these things at intervals.*

- ✓ **Define and establish baseline numbers for membership and events.**
- **Double Engagement over 3 years. (2023 is BASE YEAR)**

## DELIVERABLES

*Given the proposal, what we will deliver...*

- Deliverables
- Dates

# Numbers

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- **OTTA email addresses:** **6614**
- **Subscribe:** 4715
- **Unsubscribed:** 1032
  
- **Active Memberships** (not people): 556
- **Voting members:** 447
  
- **Volunteers:** 1180 (including art fair)
  
- **Event attendees:** **321** (not including art fair)  
(does not include art students or most artists)

Jacob Ringer & Elaine Frei

# SMART Goal 1 Engagement Worksheet

Ideas + Descriptions	Resources Required, Timeline, Measures, Participants
1. Define baseline numbers	Jacob and Elaine
2. Establish baseline number for “doubling engagement”	Jacob and Elaine lead, whole committee decides. (7/11).
3.	

# SMART Goal 2 Engagement

Sub-workgroup: Dee, Sandy Eury

## PROBLEM STATEMENT

In an effort to explore potential increased capacity for the organization's growth, the OTTA needs to:

**Define and communicate a member value proposition to increase membership from a broader range of stakeholders (SMART Goal Statement #2).**

## PROPOSAL / APPROACH

After conducting a first-time survey of 4000++ Old Town neighbors (using the USPS households addresses) and doing a SWOT Analysis, the OTTA updated/modified its Mission, created a Vision Statement and identified its Core Values. From there, the Strategic Planning Committee (SPC) created workgroups focusing on 3 organizational areas and recruited additional volunteers to explore capacity and growth potentials.

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• **Brand Management**

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• Deliver Value

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- Carly Jenkins (Communications)
- Elaine Frei (Membership)
- Marya Lucas (Events)

## OBJECTIVE(S)

- Become more relevant to more people
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- Prioritize the 5-7 initiatives and develop short-term Action Plans for the top 3 prioritized initiatives

## SUCCESS CRITERIA

*To ensure we are successful, we will measure these things at intervals.*

- ✓ **Define community**
- ✓ **Reach out to community/more inclusive**
- **Develop new brand**
- **Create marketing plan**

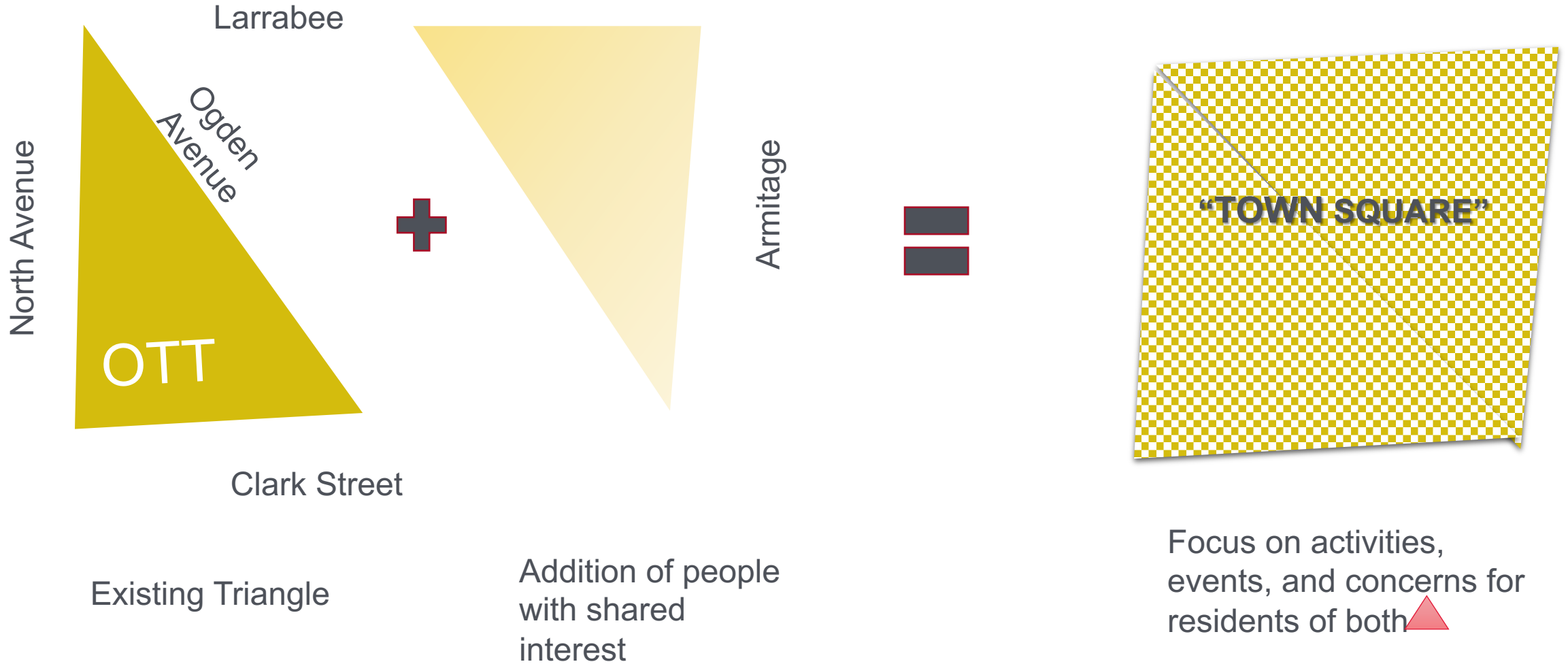
## DELIVERABLES

*Given the proposal, what we will deliver...*

- Deliverables
- Dates



# Redefining Community



**TOWN SQUARE IS THE INTERNAL MARKETING AREA.**

It allows us to reach out to more of the community and be more inclusive\*

# SMART Goal 2 Engagement Worksheet

Ideas + Descriptions	Resources Required, Timeline, Measures, Participants
1. <b>Inclusiveness</b> – redefining community	Extend reach to include all residents in “Town Square”
2. <b>Outreach</b> - Aldermen newsletters, property mgmt. co., email tree, Town Square	Communications and membership committees
3. <b>Outreach</b> - Updated brochure	Communications and membership committees
4. Two levels of membership	Defined by engagement committee (7/11)
5. Develop new brand	Dorothy leads, engagement and communications committee (2024)
6. Marketing plan	Engagement and communications committees (2024)

# SMART Goal 3 Engagement

Sub-workgroup: Marya, Sherry, Laura

## PROBLEM STATEMENT

In an effort to explore potential increased capacity for the organization's growth, the OTTA needs to:

**Define and communicate a re-established brand to promote better understanding of how OTTA serves and supports The Triangle community (SMART Goal Statement #3).**

## PROPOSAL / APPROACH

After conducting a first-time survey of 4000++ Old Town neighbors (using the USPS households addresses) and doing a SWOT Analysis, the OTTA updated/modified its Mission, created a Vision Statement and identified its Core Values. From there, the Strategic Planning Committee (SPC) created workgroups focusing on 3 organizational areas and recruited additional volunteers to explore capacity and growth potentials.

## OBJECTIVE(S)

- Become more relevant to more people
- Create a sense of community and belonging
- To develop long range plans that will enable OTTA to grow-with-purpose over the next 3-5 years, including 5-7 initiatives for sustainable growth
- Prioritize the 5-7 initiatives and develop short-term Action Plans for the top 3 prioritized initiatives

## SUCCESS CRITERIA

***To ensure we are successful, we will measure these things at intervals.***

Demonstrated value, cultural shift and vibrancy (of community center) as measured through **event attendance** (ex. capacity, diversity, new/repeat); **post event attendee surveys; periodic member surveys; diversity of events and activities.**

## DELIVERABLES

***Given the proposal, what we will deliver...***

- Multi-year **calendar of diverse and engaging events, enhanced presence of calendar, membership driven events; idea "box", pre and post event recaps, easy access to events, activities and membership through QR codes**
- **Redesigned OTTA pamphlet**
- **Dedicated support** for events, activities and communication
- **Refreshed membership levels** aligned with strategic goals and new brand; enhanced membership presence on webpage highlighting value

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- Elaine Frei (Membership)
- Marya Lucas (Events)

# SMART Goal 3 Engagement Worksheet

Ideas + Descriptions	Resources Required, Timeline, Measures, Participants
1. Redesigned OTTA pamphlet	
2. Dedicated support for events, activities and communication	
3. Multi-year calendar (~2 year) of diverse events designed to increase participation and membership from a broader range of residents; supporting belonging, value, relevancy and vibrancy. Broader events planning group, locations and ideas “box” to enhance diversity of events. Offer large events and newer smaller programming (ex. Monthly summer concert, speaker series, etc). Encourage new ideas.	
4. Membership driven events (ex. member-only events, member early sign-up, member discounts, etc) to drive memberships/value	
5. Enhanced presence of events calendar: posted outside the center, posted online in easy to find “Events” place on webpage	
6. Pre and post event recaps to support knowledge transfer, assessment (vibrancy, value, membership growth) and best practice identification	
7. Easy access to events, activities and membership information and sign-up through QR codes	
8. Refreshed membership levels aligned with strategic goals (increasing membership, attracting more diverse audience) and new brand; enhanced membership presence on webpage highlighting value.	

# NEXT STEPS

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## ❖ Engagement Workgroup Meeting Schedule

- Thursday, March 6
- Thursday, March 23
- Wednesday, April 26 (4pm)

❖ Submit draft for 6/28 meeting

❖ Submit draft by 7/5 meeting.

❖ Engagement Workgroup Plan submitted for July 11<sup>th</sup> OTTA Board Meeting