

Brick Capital Community Development Corporation



Strategic Planning Workshop June 8-9, 2012

Facilitated by greenschemes™
www.greenschemesnc.com



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Insert Introduction

Brick Capital CDC Design Conference
 Demonstration Consensus Workshop
 May 16th, 2012

Focus Question: What are the greatest challenges that BC CDC faces in the next 3 years?

A. Putting a Face on BC CDC	B. Maintaining Experienced Staff and Leadership	C. Financial Sustainability	D. Maintaining Relevancy	E. Stay Awake – Pay Attention
<ul style="list-style-type: none"> • Community and electorate must believe in what we do • Visibility, location, receive credit • Community awareness increased 	<ul style="list-style-type: none"> • Increase staff • Maintaining experienced staff and leadership • Succession plan for staff and board • Board composition 	<ul style="list-style-type: none"> • Funding, increase revenue • Continued funding, sustaining projects • Program financing, funding • Capital campaign 	<ul style="list-style-type: none"> • Economy, funds to purchase housing • Community demographics (community needs) • New direction (solar farm) 	<ul style="list-style-type: none"> • Responsive to the primary funders and lenders • Political awareness and involvement on behalf of communities in need

Report prepared by greenschemes, 5/29/2012

Focus Question for Strategic Planning Workshop (June 8-9, 2012)

What does BC CDC need to do to survive, grow and succeed over the next 3 to 5 years?

BC CDC Strategic Planning
June 8 and 9, 2012
Vision Elements

Focus Question: What do we see in place in 5 years as a result of our actions?

Green Visible Office	Expanded Well-trained Staff	Sustainable Fundraising Relationships	Quality of Life Initiatives	Diverse Housing Types	Partnership Opportunities	Far-reaching Image of BC CDC
<p>New office building</p> <p>New office</p> <p>Build new BC CDC office</p>	<p>Provide counseling and financial opportunities for new homeowners</p> <p>Add a deputy director</p> <p>Additional trained staff: foreclosures and homeownership</p> <p>Staff succession plan</p> <p>2 training events per year per employee</p>	<p>Franchise for revenue</p> <p>Own the Wicker School</p> <p>Better fundraising plan -- \$10k/event</p> <p>Strong volunteer base in place</p> <p>Improved relationship with all funding agencies, especially NC Initiatives and Housing Finance</p> <p>Collaboration & partnership with CDCs in Lee, Moore, Harnett and Chatham counties</p>	<p>Develop youth center in the BC CDC redevelopment neighborhood</p> <p>Green industry park in walking distance to our neighborhood</p> <p>Recreation area at WBW auditorium</p> <p>Develop business suites at 40 S. Makepeace St.</p> <p>Investing in new small businesses for revenue</p> <p>More services in target area: park, library, grocery or corner store</p> <p>Small business growth corner of Wicker and Vance Sts.—locally owned co-op (food, crafts, housing, etc.)</p> <p>Franchise for job creation</p> <p>Solar farm project</p>	<p>Thriving housing market</p> <p>Housing development: market rate and elderly on WBW 5 acres</p> <p>Student housing</p> <p>Supportive housing in Moore, Chatham and Harnett Counties</p> <p>Take lead on homeless shelter and day facility (partner with city and others)</p> <p>Houses and shops on Washington St. property</p> <p>Build 24 affordable housing units @ 3rd and 7th</p> <p>Build more homes</p> <p>BC CDC subdivision</p>	<p>Sidewalks for access</p> <p>Open Church St. to Catharge St. walkway</p> <p>Public transportation</p> <p>Enforced housing regulations</p> <p>Clean-up blighted areas (parks)</p>	<p>Every staff & board member think and talk the talk !!</p> <p>Media and publicity</p> <p>Radio testimonies</p> <p>Weekly ads in local newspapers</p> <p>Monthly newsletter</p> <p>Project signs</p> <p>New BC CDC sign</p>

Expanded Well-trained Staff

Grounding the Vision

Brick Capital CDC's staff is a well-trained group of people who have incorporated the mission of the organization. They work together for one common goal that is to carry out the purpose and responsibilities of the agency. Because their work is essential to the future of the organization, the staff must have the newest, most innovative training and knowledge of the current events of the industry and the state, local and national economy.

Unless there is a sharp well trained, well oiled, well disciplined and thoroughly competent staff in internal and external communication skills, BCCDC will not reach its vision of a sustainable future.

1. BCCDC needs intern from UNC School of School of Government or the like to shadow Executive Director
2. BCCDC needs to provide counseling training to HC

Sustainable Fundraising Opportunities

Grounding the Vision

1. Partner development is necessary to implement strategies
2. A strong financial plan is the foundation of the organization
3. A specific goal to address is the need to own WB Wicker

Income stream with every partner without financial planning can not survive or thrive. WB Wicker ownership is a must – all of our time and effort is quite an accomplishment to own.

For Brick Capital CDC to continue providing quality services to the 6+ surrounding communities, the organization must develop a fundraising strategy encompassing many directives. Said relationships with partners such as funding agencies, local governments, community groups, and lending institutions are all necessary components in this plan. Every project must entail a revenue stream for Brick Capital, not just provide a benefit to the partner. In addition, having access to a strong volunteer base will assist BCCDC in its efforts. Developing and maintaining a strong financial base is crucial for BCCDC to thrive.

Quality of Life Initiatives

Grounding the Vision

1. Future investments in our community
2. Bring in more income, jobs, staff, notably to BCCDC
3. Recreation for youth
4. Business – self employee stores
5. Solar Farm
6. Improve quality of life in the future of our community
7. Investment in the future of the community by bringing recreation, small business and opportunities for the Quality of Life to our community.

Diverse Housing Types

Grounding the Vision

1. Single family housing
2. Specialty housing
3. Thriving housing market

BCCDC will provide affordable housing for low income families and the elderly, as well as other specialty groups such as supportive housing and student housing. The specialty housing will better meet the needs of Sanford's diverse population for the future. In addition, Brick Capital will take the lead on developing a homeless shelter/day facility in partnership with the city and other organizations.

Enhance the Beauty and Safety of Sanford

Grounding the Vision

1. Safe and affordable housing
2. Access of enjoyment of homes and recreation

To be able to clean up and provide a better living environment we need a partnership with other organizations because where BCCDC lacks in resources we can connect to an organization that can provide the resources and BCCDC still gets our name out there. It is essential because it will help us gain exposure as well as enhance Sanford and built better relationships. This ties to getting BCCDC's image out and to link with other organizations that provide services that BCCDC cannot.

In general, the overall vision is to increase the exposure of BCCDC and to enhance Sanford.

BCCDC Visibility and Image

Grounding the Vision

1. Using local media to put a face on BCCDC
2. We want to be here in 5 years – sustainability of the organization
3. All of these are needed to make the BCCDC visible to our community and partners
4. Testimonials from current BCCDC homeowners and businesses which have benefited from our services by way of local radio, local cable, word of mouth, billboards, and Facebook.
5. Whenever/wherever a project is being done by BCCDC post a project sign at the location; a sign or marquee at the office site.
6. A digital marquee could feature some of our projects and/or upcoming events/fundraisers.
7. Monthly newsletter obsolete
8. Weekly ads – too expensive and obsolete
9. Staff and Board take advantage of every opportunity to let the community know/become aware of the services we have to offer – media, word of mouth, and public speaking.

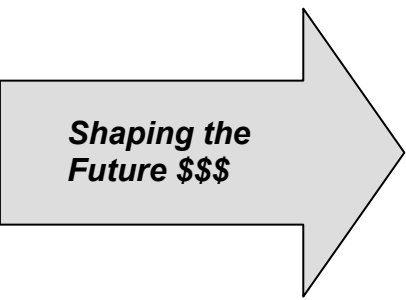
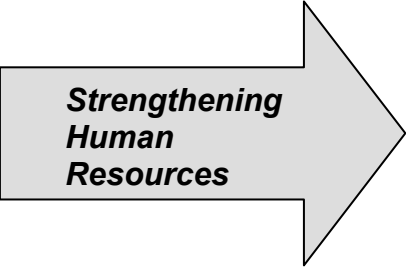

Each of these components adds to reaching our public and improving the image of BCCDC by means of a variety of mediums; Sanford social, cable TV, radio, Facebook, website, media testimonials, staff and board participation

BC CDC Strategic Planning
June 8 and 9, 2012
Contradiction Elements

Focus Question: What is blocking us from moving toward our vision?

Unbalanced Communication Systems	Untilled Revenue Sources	Bewildering Advocacy Challenge	Misconception of BC CDC's Abilities	Undirected Volunteer Program	Inadequate Public Image
<p>Limited communication between support staff and board members leads to negative outcomes</p> <p>Time to build relationships</p> <p>Too many things started to focus on</p> <p>Feeling unprepared for the tasks at hand</p> <p>Knowledge base does not meet the need for thinking "out of the box"</p> <p>Delegate project to the staff</p> <p>No cross training of staff</p> <p>Because of small staff, employees are doing double-duty, more than their job description entails</p>	<p>Untilled "other" grant sources</p> <p>Small office blocks opportunities for revenue sharing</p> <p>Limited grant writing</p> <p>No funding to hire staff</p> <p>Lost funding from NC Initiative</p> <p>Trickle down effect – no organization can get enough money to make a difference</p>	<p>Difficulty in initiating cultural change</p> <p>Facing the scary giants</p> <p>Stock market decline</p> <p>Narrow-minded politicians</p> <p>Housing market decline</p>	<p>Ways to involve more volunteers / people</p> <p>Limited fundraising participation among board and volunteers</p> <p>Uninvolved board committees</p> <p>Igniting excitement in work plan</p>	<p>Nobody asks for volunteers</p> <p>No volunteer staffing plan</p> <p>Need volunteer coordinator</p> <p>Volunteers require training</p>	<p>City and county boards don't know what we do</p> <p>BC CDC – stymied public image</p>

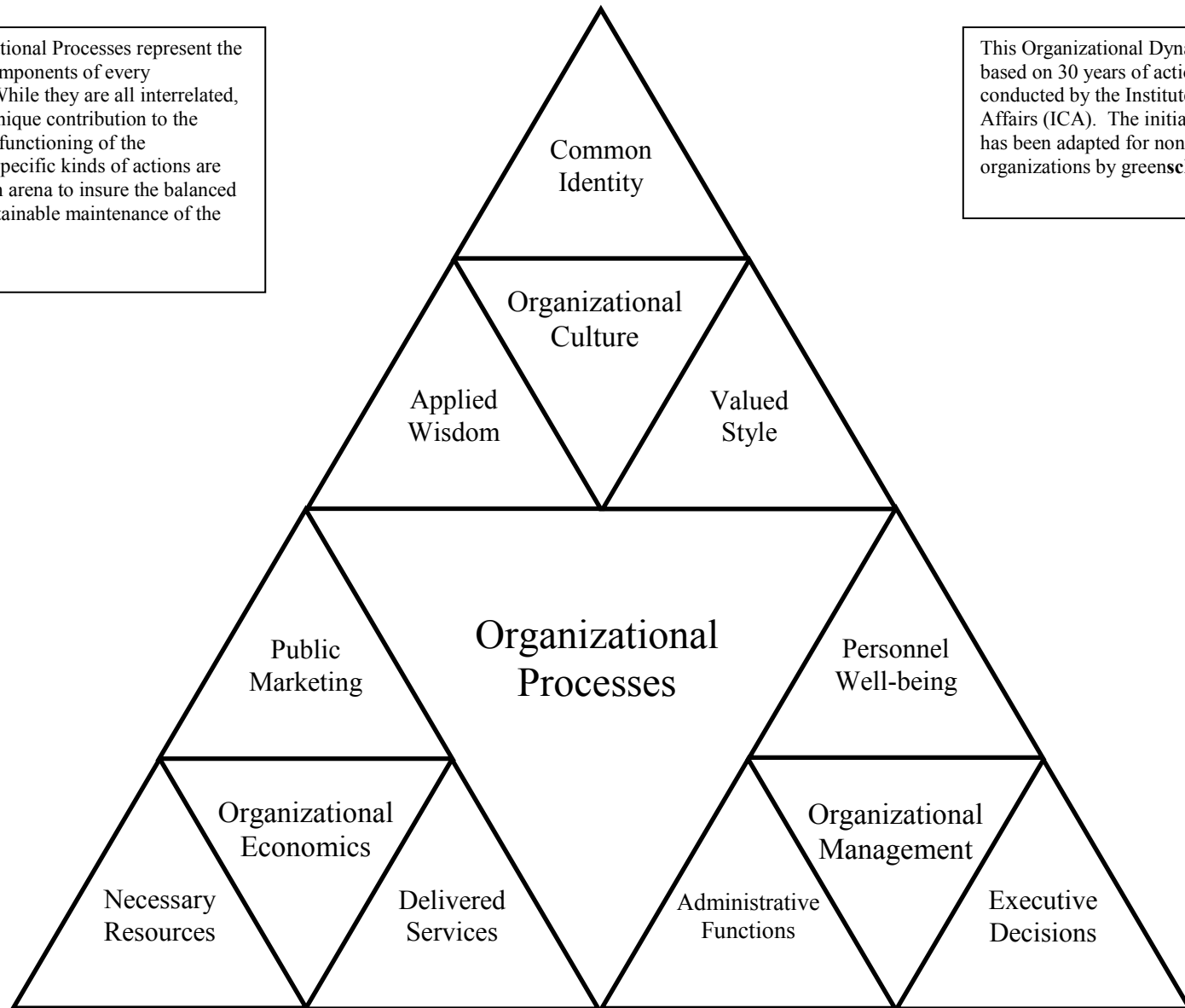
Strategic Directions

	Training in Grant Writing	Fundraising	
	<ul style="list-style-type: none"> • Attend (all staff) CCCC “free” granting writing course • Train staff to find and share grant opportunities • Search for grants to hire more staff with the use of university students and other assistance • Cross train staff • Supply cross training in different area of BCCDC 	<ul style="list-style-type: none"> • Solicit alumni for money to purchase DWB Wicker • Review old projects to project income to fund RCCDC base • Plan and contact new sources for purchase of Wicker “Rosenwald” • Activate fundraising committee • Create board permanent fundraising committee • OWN and WBW 	 <p>Shaping the Future \$\$\$</p>
Staff Retention	Volunteerism Utilization	New Staff	
<ul style="list-style-type: none"> • Set staff priorities for time rather than get thrown into frustration over uncompleted • Establish an incentive program for staff to keep them motivated such as a 3-day trip, tickets, etc. 	<ul style="list-style-type: none"> • Recruit Volunteers <ul style="list-style-type: none"> ❖ Media ❖ Community involved ❖ Partnerships • Visit Enrichment Center’s volunteer coordinator 	<ul style="list-style-type: none"> • Hire a Deputy Director • Hire one new staff • Hire/appoint Volunteer Coordinator • Hire a Deputy Director • Delegate responsibilities 	 <p>Strengthening Human Resources</p>
New Projects	Building Relationships	Communication	
<ul style="list-style-type: none"> • Open an adult day care • Organize a reading room • Open small parks in BCC housing area • Open a daycare in the BCC housing area that offers 2nd/3rd shift care/wc of college interns • Build a new office and do more “thinking out of the box” 	<ul style="list-style-type: none"> • Presentation to city and county officials to keep us relevant • Create BOD committee to continually relate to others in community, i.e., pol, agencies, serv • Build relationships with others: city, county, CDC’s in NC • Partnership with others to make 1 or 2 goals happen 	<ul style="list-style-type: none"> • Have open-ended staff meeting to discuss staff training wants • Hold a brief staff meeting weekly and periodic round table with Dir. Of Comm. staff and board • Educate BOD and staff on related issues. Knowledge is Power • Board and staff meet more often to communicate • Staff presentations to BOD re activities and duties (and ideas) • Put communication system in place for BCCDC BOD, staff and community • Increase face-to-face meetings/BOD through scheduled communication meetings. 	 <p>Systematizing the promotion of the whole organization</p>

Dynamics of Sustainable Organizations

These Organizational Processes represent the fundamental components of every organization. While they are all interrelated, each makes a unique contribution to the overall healthy functioning of the organization. Specific kinds of actions are required in each arena to insure the balanced growth and sustainable maintenance of the organization.

This Organizational Dynamics chart is based on 30 years of action research conducted by the Institute of Cultural Affairs (ICA). The initial research has been adapted for non-profit organizations by greenschemes™.



Business Plan Culture Team

Steps for project common identity

1. Listing accomplishments and letting the community know that we are here to stay
2. Inform the community of different projects that we are involved in
3. Connect with CCCC personal finance instructor
4. TV and radio
5. BCCDC account for Facebook

Options for staff and board training

1. Volunteers 3 hours per day
2. Provide training for volunteers about BCCDC and phone training
3. Grant writing course (July 14th)
4. Volunteer in-take
5. Any and all training with the initiative at North Carolina Association of CDC's

Ways to enliven staff work environment and board gatherings

1. Provide gift certificates and prizes
2. Once-a-month gathering
3. Rotating Fridays to close early
4. Twice a year have board and state meet, and a graduation party
5. Theater tickets

Business Plan Economics Team

The major financial requirements for the next 3 years

Special Projects:

- 3-year budget – short-term; Richard and Connie. Come back to Bill and Kate for future plan and staff

Staff Expenses

- Volunteer to assist with operations, planning and fundraising

Potential revenue sources

Types of individual donors:

- Wicker alumni

Government agencies:

- Need to define project for assistance

Foundational supporters:

- Grants from private foundation-operations and WBW purchase

Service revenue:

- Fees and management

Potential funding campaigns and initiatives

- WBW

Business Plan Management Team

Key board decisions that will be required over the next 12 months:

1. Hire one new staff member
2. More board meetings and get new board members on board that have specific skills
3. Strategy to pay off Wicker
4. Identify what skill set is needed for hiring a new staff member
5. Beef up board committees with non-board members
6. Succession plan

Types of staff growth over the next 5 years:

1. At least two more staff members (recruit 2-3 project leaders)
2. Hire a “shadow” for Kate
3. Media and marketing skills (volunteer or not)

Steps for retaining and expanding staff, board members and volunteers:

1. Board member recruitment event (volunteer or new board member)
2. Get a menu of volunteer jobs available to match volunteer with task at hand
3. Speaker’s bureau: give out information on what we do (tools: PowerPoint presentations, brochures, etc.)



Turning Green Dreams into Green Schemes

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