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***OTSEGO MAIN STREET MMS
STRATEGIC PLANNING SERVICE
REPORT SUMMARY AND
RECOMMENDATIONS***

Otsego Main Street

MMS Strategic Planning Service

Report and Recommendations

The following summary and recommendations reflect the results of a three-hour strategic planning process that was designed to help the board and staff achieve clarity of vision and design a roadmap to guide the organization's future direction.

A strategic plan typically answers for the organization:

- Where are we now?
- Where are we going?
- How will we get there?
- How will we know?
- How will we measure and report success?

The process designed for Otsego Main Street (OMS) was guided by the MMS Resource Team Visit activities and report, as well as the recent Fund Development service. The RTV report recommended that OMS adopt a “Family Friendly” strategy as their primary organizing framework. Riverfront Development has been adopted as a longer-term strategy. Overarching organizational recommendations included:

- Clear roles and responsibilities, outcomes, and feedback loops: Staff stepping up in the realm of economic development and design. When people don't know what is expected of them, they step back, which has created a void in the community. Clear expectation of who does what reinforces ownership but action by all parties. We can be strategic by aligning those roles around transformation strategies. When roles are established, then regular feedback loop will keep everyone focused on their progress in those roles and its relation to the strategies.
- Ownership over direction of organization and tools to evaluate programming that support it. Otsego Main Street is moving from Catalyst phase to Growth phase of their program that means that the programming needs to support strategic direction to leverage the participation generated during the catalyst phase. This only works when there is strong leadership in place on the board of directors that has ownership over the strategies and is willing to evaluate programming against these strategies. This could include thoughtful review of work plans against. Tools should be put in place before the project to evaluate if a project is effective, to know when it is working, when it isn't, and when it should be cut. This information can also be used to celebrate the organization's value to the community.
- Strategic use of organization committee and programming to support the overall organization and organization's strategy. Pivot the organization committee or organization programming to support the strategy and programming and committees.

The purpose of the Strategic Planning service provided to Otsego Main Street (OMS) on January 24, 2017 was to identify a desired future state and define a path forward to support the development of a “family-friendly strategy”, and whole organization thinking.

Given the time constraints of the planning session, your consultant chose to direct the energy of the board and staff toward the following agenda:

- ▶ Desired Future State
- ▶ Four Point Objectives
- ▶ Goals and Outcomes
- ▶ Supporting and Monitoring

The concept of using strategic planning to transform the organization from its current reality to a desired future state was reviewed. By keeping a clear view of the current reality and a well-defined and articulated future state before us, we are able to create tension between the two. Tension, by its nature, seeks resolution. If we maintain a clear view for the future, the most natural resolution of this tension is for reality to move closer to that committed vision. The ultimate results may be different from (or less than) the original intent. But, extraordinary results can still happen. We learn that “It’s not what the vision is; it’s what the vision does.”

During the Fund Development service, board/staff members were asked to consider what the future of Downtown Otsego might look like, based on its definition of “family-friendly”. The results of that exercise are:

- Maintain/support existing business and services mix
- Add unique retail options, specifically:
 - Outdoor outfitter or other sports/active-lifestyle-oriented shop
 - Geared toward millennials
 - Attractive to families with children
- Add kid-friendly, interactive sculpture/attraction(s) to Art Garden
- Offer a variety of “lifestyle” classes, drawing from local talent
- Add an “all-in-one” snack foods shop; one that includes ice cream, hot dogs, popcorn, etc. (rather than one shop offering each of these)
- More dinnertime dining

Based on a review of the RTV family-friendly synopsis, and the results listed above, the group was presented with a draft “future state”, which was refined as follows:

Desired Future State

“Downtown Otsego is a vibrant and charming district with activities and businesses for all ages.”

This statement articulates where OMS seeks to be in the next 3-5 years. This vision will be used as a touchstone for setting goals, and as a filter through which to guide decision-making.

Four Point Objectives

Your consultant originally intended for this exercise to define what it is the OMS seeks to accomplish through each of its four point committees, and what role each might play in reaching the desired future state. While these objectives were ultimately accomplished, the process might be refined to focus separately on “accomplishments” and “roles”.

In response to the guiding question: “*What role might this committee play in reaching the desired future state?*”, the following describes the role of each committee, based on the dialogue and discussion among board/staff members:

THE ROLE OF DESIGN:

To design and guide the physical environment of Downtown Otsego.

THE ROLE OF ECONOMIC VITALITY:

To drive the overall business environment of Downtown Otsego.

THE ROLE OF PROMOTIONS:

To design, guide and monitor the promotional activities of Otsego Main Street.

THE ROLE OF ORGANIZATION:

To support and acquire resources for Otsego Main Street.

To define the broad and continuous objectives of each committee toward achieving the desired future state, the group also responded to the question, “*Overall, what might this committee seek to accomplish?*” The responses have been distilled into the following committee objectives:

DESIGN OBJECTIVE:

Create a safe, charming and beautiful downtown area with abundant amenities.

ECONOMIC VITALITY OBJECTIVE:

Maintain/support existing business and services mix while actively recruiting targeted businesses.

PROMOTIONS OBJECTIVE:

Refine the promotions activities framework to ensure success and desired impact.

ORGANIZATION OBJECTIVE:

Expand capacity to acquire necessary resources; both human and financial.

Defining Goals

To help define specific, measurable and actionable goals, the group was then asked to reflect on the following guiding questions:

- *What specifically, do you want to achieve?*
- *What dial do you want to move?*
- *How will the goal serve to achieve the desired future state?*

The compilation of the desired future state, committee objectives and draft goals and strategies follow, and are also attached in a map format.

OMS Desired Future State:

Downtown Otsego is a vibrant and charming district with activities and businesses for all ages.

Economic Vitality

Objective: Maintain/support existing business and services mix while actively recruiting targeted businesses.

Goal: Successfully recruit one targeted business.

Strategy: Create living property inventory.

Strategy: Match business type with vacant storefronts, (group complementary businesses.)

Organization

Objective: Expand capacity to acquire necessary resources; both human and financial.

Goal: Expand volunteer base to meet organizational needs.

Strategy: Create volunteer recruitment plan.

Goal: Raise \$30,000.00 from new sources.

Strategy: Create Fund Development Committee.

Promotions

Objective: Refine the promotions activities framework to ensure success and desired impact.

Goal: Develop design and evaluation criteria for events; e.g. targeted age group(s), volunteer participation, event attendance, business receipts, branding opportunities

Strategy: Create diverse sub-committees for events

Design Committee

Objective: Create a safe, charming and beautiful downtown with abundant amenities.

Goal: Add amenities; sound system, public bathrooms and water stations, heated sidewalks.

Strategic Plan Recommended Next Steps:

Whole board:

Review and reflect on the proposed goals. Have a conversation about your desired outcomes, asking:

- *If we achieve the goal, what do we expect to happen? What will be different? The same?*
- *What will success look like?*
- *How will the outcome contribute to the desired future state?*

Once the goals have been approved by the board, proceed with the steps recommended in the RTV report:

- Facilitate work planning sessions with all committees to identify existing or potential projects that can be executed to support transformation strategy.
- Have committees draft projects
- Board reviews all proposed work plans and evaluates based on return on investment or objective, alignment with transformation strategy, and volunteer and staff support. All work plans should be approved or sent back for modifications.
- Board and Organization Committee should sit down and begin to draft budget and fundraising strategy in support of work plans and their expenses. Final budget can be approved by board of directors and submitted to City Council for review and approval.

- ▶ Once budget is approved committees can commence work in the identified projects with projects that are identified mid-year being work planned, reviewed and approved by the board prior to investment of staff or money.
- ▶ Quarterly and annual evaluate the performance of programming and finances as it relates to the transformation strategies, at the board and committee level to determine impact of organization.

Finally, ensure that you are monitoring and evaluating your progress by attending to your data needs during the work planning process:

- ▶ Determine what data
 - ▶ During planning phase; what do we need to know?
- ▶ Agree on documentation method(s)
 - ▶ Must be observable, measurable and accessible
- ▶ Assign data collection
 - ▶ Who will collect the data? Provide tools and training
- ▶ Share and reflect on the data

Suggestions from the RTV Report:

The following tools can be used to track your success in implementing the Family Friendly strategy and in measuring its impact on the downtown as a whole:

- ▶ For downtown events, track economic impact of event attendees by surveying a random sample of event visitors and determining if their customer profiles (e.g., age, income, zip code, whether they came with children). Also ask if they visited downtown Otsego businesses and how much they spent.
- ▶ Survey businesses, particularly after events, to ask about economic impact on a percentage-sales basis and to solicit their feedback for future planning.
- ▶ Count and monitor the downtown housing inventory, including units added, sizes, and price points.
- ▶ Track improvements in store hours (e.g., businesses open late, businesses open regular hours, etc.)