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# North Carolina Community Development Association



## **Draft Strategic Plan Fiscal Years 2012-2013**

**Adopted by Board of Directors on May 16, 2012**

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## *Preface*

The North Carolina Community Development Association (**NCCDA**) was formed in 1979 to provide a unified voice for community development officials across North Carolina. The founding purpose of the organization was to:

- Provide a vehicle for making recommendations to federal and state agency partners involved in policy or programs in all areas of community development;
- Provide a forum for the exchange of information and experience among agencies concerned with all areas of community development;
- Cooperate and coordinate with other professional associations involved with community development; and
- Examine, evaluate and recommend alternatives to existing and proposed legislation, which directly or indirectly affect local community development activities.

**NCCDA** started life as an affiliate of the North Carolina League of Municipalities and remained an affiliate until 2009 when the organization decided to become a private nonprofit. Today, **NCCDA** is governed by a seventeen member volunteer Board of Directors. The Executive Leadership of the organization (*President, Vice-President and Secretary/Treasurer*) is elected by the membership every two years with the remaining board members appointed by the Board's President.

The organization's general membership is comprised of two groups – Active and Affiliate. Active members are made up of municipal, county, regional agencies, and nonprofit entities. Affiliate members include private consultants, private professionals and commercial firms.

For over three decades, **NCCDA** has provided information, training, advocacy and networking opportunities for hundreds of community and economic development practitioners in North Carolina.

## I. Introduction

The North Carolina Community Development Association (NCCDA) is a nonprofit organization providing information, training, advocacy and networking opportunities to community and economic development practitioners across North Carolina. The membership includes public, nonprofit and private organizations and individuals engaged in community and economic development work.

The **FY2012-2013 Strategic Plan** provides a road map for the organization’s work over the next 18 months. This plan shows how NCCDA’s Board intends to serve its membership, manage resources, improve internal processes and enhance the organization’s capabilities.

### A. Plan Purpose

The Strategic Plan sets forth **NCCDA’s vision, mission and values** to lead, direct and guide the organization; presents a **Situation Analysis** that shows the organization’s current conditions and provides a context for the future; establishes long term **Goals**; provides **Strategy** and **Strategic Objectives** to direct the organization’s work; and creates an **Action Plan** for accomplishing the **NCCDA’s** FY2012-2013 goals and objectives.

## B. Vision, Mission, Values & Guiding Principles

NCCDA has established a *vision* for the future, a *mission* to focus its work, and *values and guiding principles* to govern the organization’s actions.

**Vision:** *“Serve as the premier professional development organization for community and economic development to improve the quality of life in North Carolina.”*

**Mission:** *“Provide information, training, advocacy and connecting opportunities for community and economic development practitioners in North Carolina.”*

### Values & Guiding Principles:

Values	Guiding Principles
<b>Membership</b>	<i>Our primary aim is to meet the needs of our membership.</i>
<b>Education</b>	<i>Provide diverse professional development opportunities for our members.</i>
<b>Advocacy</b>	<i>Affect positive change by promoting the most effective and efficient use of available funding in North Carolina.</i>
<b>Commitment</b>	<i>We keep our promises to our members and each other.</i>
<b>Economic Justice</b>	<i>Bring economic opportunities to all North Carolinians.</i>

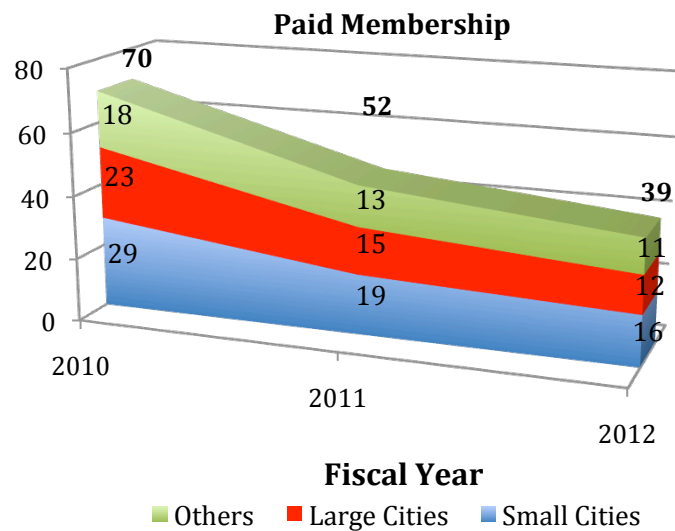
## II. Situation Analysis

This section summarizes **NCCDA's** current conditions and conducts an assessment of the organization's operating environment. Included are a review of the organization's performance drivers and an assessment of **NCCDA's** internal strengths and weaknesses; and external opportunities and threats.

### A. Performance Drivers

**NCCDA** focuses on three top organization performance drivers, which affect the health and overall well being of the organization. Those key drivers are:

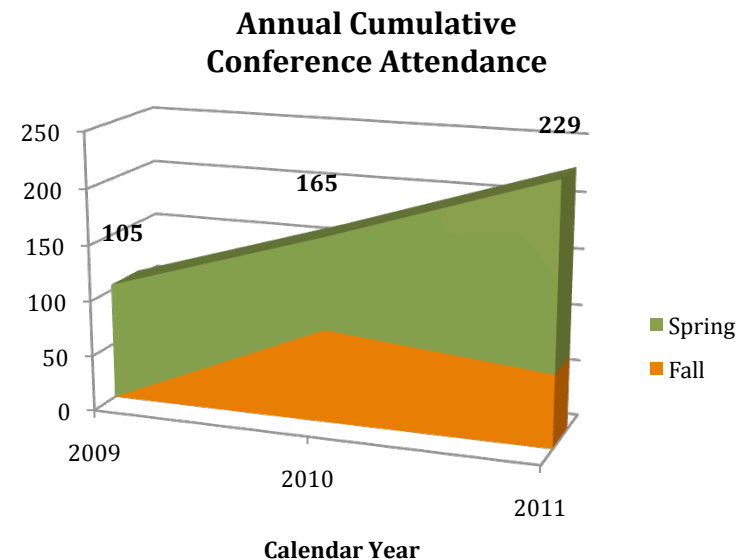
#### 1. Membership Growth



**NCCDA's** membership is based on organization or entity participation instead of individual membership. Overall, membership is down from previous years.

The membership declined from 70 to 39 organizations (44 percent decrease) between fiscal year 2010 to 2012. *Note that FY2012 reflect year to date figures as of November 2011.*

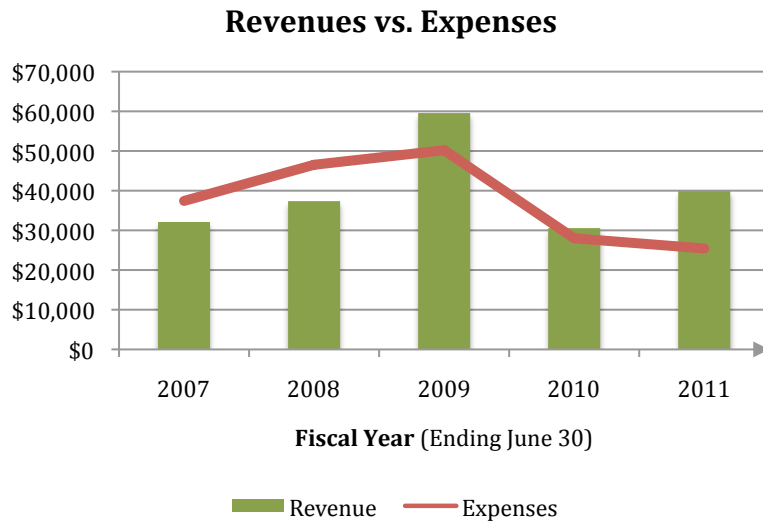
#### 2. Conference Attendance



Overall, conference attendance is up for the organization. Paid conference attendance increased from 105 to 229

(118 percent increase) between 2009 and 2011. There was no Fall Conference in 2009

### 3. Revenues and Expenses



Since fiscal year 2007, the revenues of NCCDA have fluctuated from year to year. In some years, expenses (red line) exceeded revenues (green bars). The good news is since fiscal year 2009 revenues have exceeded expenses.

## B. SWOT Analysis

In December 2011, NCCDA's Board conducted a SWOT (Strengths, Weakness, Opportunity and Threat) Analysis to assess the organization's internal and external challenges and opportunities in order to better address

the organization's mission. Below are the top findings from the SWOT Analysis.

### Internal Strengths

- Good at putting on conferences
- Cordial (to one another)
- Share Information
- Longevity (Since 1979)
- Creative membership
- Committed Volunteers
- Passionate About Work
- Profitable
- Professional Management

### Internal Weaknesses

- Lack of resource commitment for message and work
- Website/Newsletter
- Lack of Membership
- Not demonstrated added value
- Focus too much on CDBG

### External Opportunities

- Work with UNC School of Government
- Potential for AICP Credits (at conferences)
- Continue work with various Federal, State and Regional Council and Partnerships
- Current (economic) crisis is an opportunity for collaboration
- Work on Regionalism

### External Threats

- Funding Cuts impact
- Lack of new people coming into the profession
- Lack of a broader definition of community development
- Competition for resources (among agencies)
- Elected Officials not valuing the work

Based on the key issues from the SWOT Analysis, NCCDA identified some general themes as input to the plan development. Key themes were the importance of growing the membership base, improving communication with the membership to better understand their needs as well as to disseminate important information, maintaining a solid financial base, improving internal processes to better facilitate the operations of the organization and developing the Board and Staff to better implement the mission.

### III. Goals

Based upon an understanding of the organization's vision, mission and values, performance drivers, and an assessment of the organization's strengths, weaknesses, opportunities and threats, NCCDA's Board developed the following goals for FY2012 and FY2013:

- 1. Increase membership of NCCDA in order to expand the capacity of North Carolina communities to undertake community and economic development.**
- 2. Increase revenues to sustain and enhance NCCDA.**

- 3. Enhance the internal capacity of NCCDA to achieve the mission.**
- 4. Improve Board and Staff capabilities to represent and manage the increased responsibility of operating a premier community and economic development organization.**

These goals served as the driving force to formulate a strategy and plan to achieve NCCDA's mission.

### IV. Strategy & Strategic Objectives

Beginning with the organizational goals, NCCDA developed a strategy and formulated strategic objectives to accomplish the organization's mission over the next 18 months. The strategy and strategic objectives, which are illustrated in the *Strategy Map on page 6*, shows how NCCDA plans to take a balanced approach to achieve its mission.

The Balanced Scorecard (Robert Kaplan and David Norton) approach focuses on Customer, Financial, Internal Process and Learning & Growth Perspectives as keys to an organization's success. By focusing on the various perspectives, organizations are better equipped to address all aspects of organization growth and development.



NCCDA customized the four perspectives for the organization by renaming them to *Serve the Membership*, *Manage Financial Resources*, *Improve Internal Processes* and *Develop the Board and Staff*.

Twelve (12) strategic objectives were identified for the four NCCDA perspectives as follows:

**Serve the Membership**

1. Membership Recruitment
2. Host Conferences
3. Consistent Communications

**Manage Financial Resources**

4. Enhance Revenues
5. Institute Audit

**Improve Internal Processes**

6. Improve Marketing
7. Review Internal Policies
8. Improve Internal Communications
9. Improve Budget Process
10. Staff Evaluation Process

**Develop Board & Staff**

11. Use Temporary Staff
12. Provide Board Training

The *Strategy Map* also shows linkages between the strategic objectives, which mutually reinforce each other. In order for

NCCDA to be successful, the organization must execute around the strategic objectives to accomplish the plan.

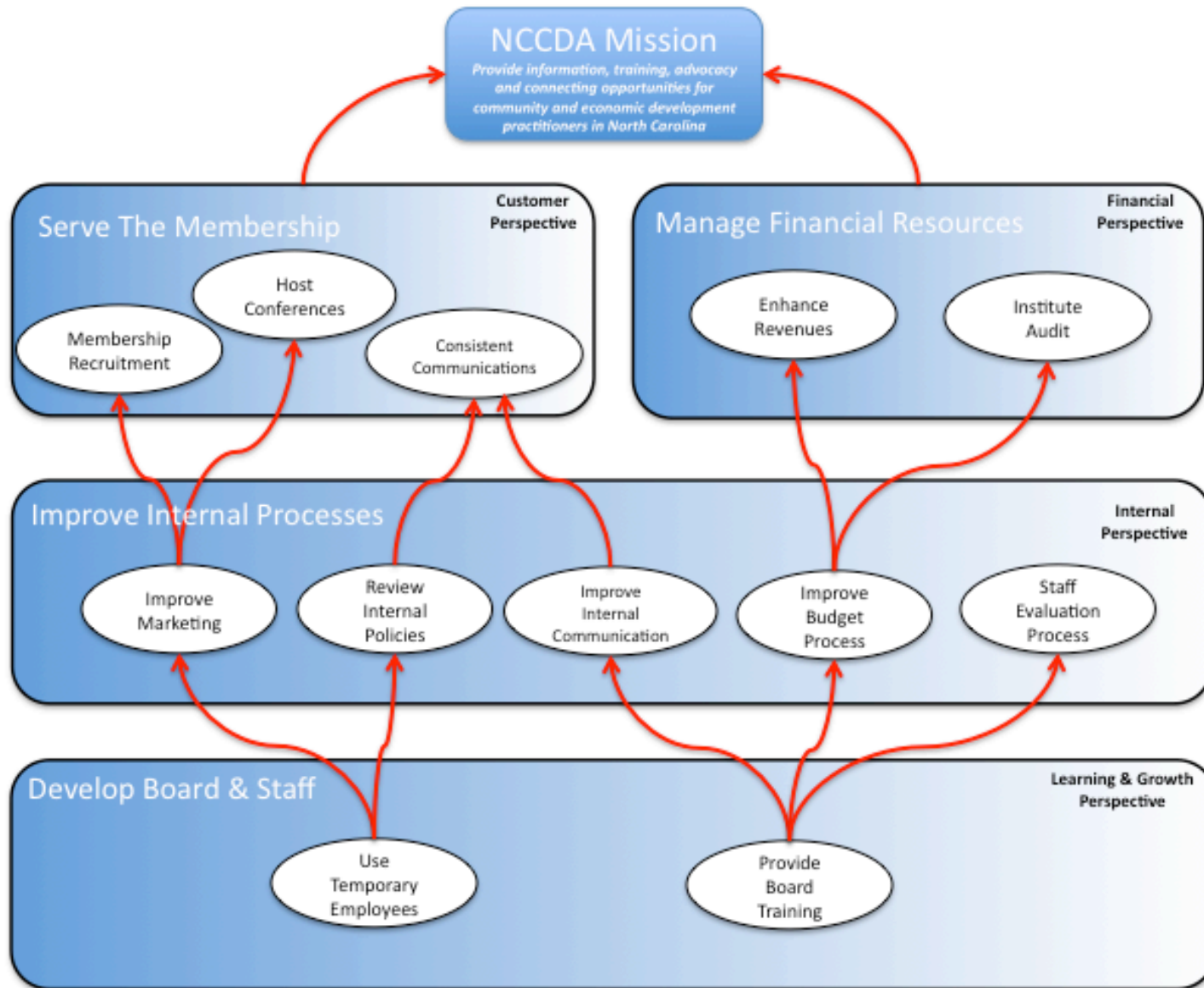
## V. Action Plan

The **FY 2012-2013 Action Plan**, which is shown in the matrix on page 7, shows the activities and initiatives that NCCDA will engage in to achieve the plan. The Action Plan translates the Strategic Objectives into 18 specific measures with accompanying targets for Fiscal Years 2012 and 2013. The Action Plan presents the measures and targets within the Balanced Scorecard framework.

The Action Plan also identifies specific accountabilities for achieving the strategic objectives and related measures. The Board of Directors, Board Committees and Staff jointly share responsibility for achieving the plan.

The achievement of the Action Plan will be an assessment of NCCDA's overall performance. Successful implementation of the plan will further the mission of the organization.

### FY2012-FY2013 NCCDA Strategy Map



FY2012 – FY2013 NCCDA Action Plan Matrix					
Strategic Objectives		Measures	FY2012* Targets	FY2013* Targets	Accountability
Serve The Membership	C1) Membership Recruitment	1. Total Number of NCCDA Members	75	150	Membership Committee
		2. Survey Membership - Response Rate	75%	---	Membership Committee
	C2) Host Conferences	3. Total Attendance at Conferences	200	200	Training Committee
		4. Percent of Conference Sponsorship	25% of Budget	25% of Budget	Training Committee
	C2) Consistent Communications	5. Complete Website, Blog, Newsletter	100%	---	Marketing Committee
Manage Financial Resources	F1) Enhance Revenues	6. Increase Revenue	\$39,000	\$44,000	NCCDA Board
	F2) Institute Audit	7. Establish Finance Committee	100%	---	NCCDA Board
		8. Create External Audit Process	---	100% (September 30, 2013)	NCCDA Board
Improve Internal Processes	I1) Marketing Process	9. Develop Membership Communication	Completed	---	Marketing Committee
		10. Update Communication Materials	100%	---	Marketing Committee
	I2) Internal Policies	11. Approve Updated/Revised Policies	100% (May 16, 2012)	---	Bylaws/Rules Committee
	I3) Improve Internal Communications	12. Provide Social Networking and Internal Communications on Website	100%	---	Marketing Committee
		13. Feedback to Marketing/Web Committee	Complete	---	Marketing Committee
	I4) Improve Budget Process	14. Committee Budgets Due	100% (April 1, 2012)	100% (April 1, 2013)	Committee Chairs
	I5) Staff Evaluations	15. Complete Manager Evaluation	100% (April 30, 2012)	100% (April 30, 2012)	Board Executive Committee
Develop Board & Staff	R1) Use Temporary Staff	16. Develop Job Description	---	100%	Board Executive Committee
		17. Recruit/Hire Individuals	---	100%	Board Executive Committee
	R2) Train Board & Staff	18. Conduct Board Training	---	100% (January 13, 2013)	Board Executive Committee

## VI. Budget Plan

NCCDA’s budget for FY2012 is \$39,000. The Board is projecting revenues of \$39,000 from membership dues, conference fees and miscellaneous income. Projected expenses include conference, operations, insurance, professional services and other expenses. A summary of the FY2012 budget is below.

FY2012 NCCDA Budget		
Budget Category	Budget	%
<b>Revenues</b>		
Investment Income	75	---
Membership Dues	4,500	12%
Conference / Training	34,425	88%
<b>Total</b>	<b>\$ 39,000</b>	<b>100%</b>
<b>Expenses</b>		
Board Expenses	1,100	3%
Bank Charges	300	1%
Conferences/Training	24,600	63%
Operating Expenses	4,450	11%
Insurance	1,200	3%
Professional Services	7,200	18%
Miscellaneous Expenses	150	---
<b>Total</b>	<b>\$ 39,000</b>	<b>100%</b>

The FY2013 Budget Plan will be developed in the Spring of 2012.

## VII. Conclusion

The **FY2012-FY2013 Strategic Plan** describes a future vision of **NCCDA** being the “*premier professional development organization for community and economic development in North Carolina*”. The organization’s mission is to provide “*information, training, advocacy and connecting opportunities*” to professionals in the field. The foundation of **NCCDA** is the values and guiding principles that govern the organization – *membership, education, advocacy, commitment and economic justice*.

**NCCDA** has developed goals for *Membership, Financials, Process Improvements and Board and Staff Capabilities* for the next 18 months considering current conditions and an assessment of the environment in which the organization does business.

**NCCDA** has developed a strategy for accomplishing the organization’s goals, identified 12 Strategic Objectives and 18 measures of success to serve as a road map for achievement. The Action Plan identifies specific targets for both fiscal years and designated accountabilities.

The success of this plan will depend upon the collaboration of the Board, Staff and Membership of **NCCDA**. Only through working together, this Strategic Plan can achieve success.

VII. Appendix

**FY2012 – FY2013  
Board of Directors**

*Executive Officers*

**President** - Dan Kornelis, Forsyth County  
**Vice President** - Teresa Johnson, City of Lumberton  
**Secretary/Treasurer** – John Connell, Land of Sky COG  
**Immediate Past President** - Lori Jones, Pitt County

*Committees/Members*

**Advocacy**

Michael Blair, City of Greensboro  
Karen Kiehna, Land of Sky COG

**Communications & Marketing**

Tara Fikes, Orange County  
Teresa Spires, Isothermal Planning & Development

**Historian**

Julie Reid, Kerr Tar COG

**Meetings & Training**

Karen Kennedy, City of Stanford  
Stanley Watkins, City Strata Consulting

**Membership & Nominating**

Alicia Broadway, Benchmark CMR, Inc.  
Tim Emmert, Moore County

**Rules & Bylaws**

Patt Crissman, The Wooten Company  
Jeff Staudinger, City of Asheville

**At-Large**

Victor Sharpe, City of Fayetteville  
Vacant Position