

Ocean Pines Strategic Planning Advisory Committee 2021 Annual Report

October 30, 2022

Section I. COMMITTEE MEMBERS AND STATUS OF TERMS.

<u>Name</u>	<u>Date appointed</u>	<u>On Term</u>	<u>Comments</u>
McGorry, Bernie	Oct 2022	2	Chair
Johnson, Helen	March 2020	1	
Colt-Ferguson, Rebecca	Sept 2020	1	
Keesling, Rob	Sept 2020	1	
Cropper-Rines, Jennifer	March 2020	1	
Blakeslee, Wesley	March 2021	1	
Miller, Gary	June 2021	1	
Frank Brown	Feb 2022	1	

We currently have one opening on the committee. Ideally would want someone with strategic planning experience.

Section II. SUMMARY OF MAJOR ACTIVITIES DURING REPORTING PERIOD.

1. Conducted deeper dive on survey results and shared with BOD (Jan)
2. Finalized Situation Analysis (Feb)
3. Conducted a virtual town hall on survey results & communicated results via OP website and newsletters (March)
4. Shared Situation Analysis including Conclusions and implications with BOD (March)

5. Held strategic planning work session #1 with BOD and received approval of situation analysis (March)
6. Developed recommended long-term goals and a revised vision and mission statement (April/May)
7. Held strategic planning work session #2 with BOD and received approval for long-term goals and revised mission and vision (June)
8. Collaborated with Budget Committee on future budgeting process once Strategic Plan is approved (July)
9. Worked with OPA General Manager and Executive Office Manager on template for long term action plans (August)
10. Provided general and specific feedback to OPA GM and Exec. Office Manager on Initial Draft of Strategic Plan (Sept.)
11. Received final draft of Strategic Plan from OPA GM and Exec. Office Manager (October)

Section III. PROBLEMS ENCOUNTERED AND ASSISTANCE REQUIRED.

1. No major problems or assistance required and we appreciated the Board of Director support for our work.
2. We were thrilled that the OPA GM embraced the strategic planning process and developed both overall and individual dept. long term action plans that aligned to our situation analysis conclusions/implications and goals.
3. The Committee was also pleased that OPA has embraced Customer Satisfaction surveys for key areas within Ocean Pines.

Section IV. REQUEST FOR ITEMS TO BE CONSIDERED FOR INCLUSION IN THE NEXT OPA BUDGET. CHAIRPERSONS SHOULD CONSIDER IMPACTS ON THEIR COMMITTEES RELATING TO THE OPA COMPREHENSIVE PLAN.

1. The Committee recommends that OPA embraces the final OP Strategic Plan which is targeted for completion by December 2022. **Future budgets for all departments and committees should align with the strategic plan priorities identified in the plan.**
2. With expanded use of Survey Monkey for Customer Satisfaction Surveys, Ocean Pines should consider evaluating a more extensive license for Survey Monkey (currently approximately \$1,500 annually) and/or consider other alternatives.
3. The OP Marketing budget should include plans to communicate and implement the 6 Core Values (\$2,500-\$5,000).

Section V. RECOMMENDATIONS FOR BOARD ACTION. (Number and underline each heading. Each recommendation should be a single, numbered statement and be supported by the information contained in other sections of this report.)

1. That the Board of Directors embrace the strategic plan including the 6 core values which is targeted for December completion.
2. We recommend that there be a strategic plan onboarding session for new board members.
3. Support for another annual property owner survey in 2023 and continuation of the customer satisfaction surveys (costs included under Section IV-2)

Attachments: (Chairpersons may attach supporting documents, studies, and other materials as deemed appropriate.)

1. Ocean Pines Survey Detailed Report by Demographics 2/7/22.
2. Ocean Pines Survey Results Town Hall 2/28/22.
3. Board of Directors Work Session 3/29/22.
4. Board of Directors Work Session 6/16/22.
5. Final approved revised vision, mission and long-term goals 7/3/22.