

# Strategic Plan Progress Report

Fiscal Year 2015



July 2015

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## **Introduction**

This report provides the one-year status review of actions taken to achieve Columbia Association's (CA) Strategic Plan's goals and objectives. It encompasses an overview and highlights of what CA has done as it works toward achieving its vision of "Making Columbia the community of choice — today and for generations to come."

Columbia Association's Strategic Plan provides the guiding framework for the organization. CA's current Strategic Plan was developed in 2013 and 2014 and became effective May 1, 2014, as approved by the Board of Directors. The strategic planning process included a review of trends and driving forces, as well as self-examination. CA also engaged an extensive group of different stakeholders and organizations that interact with or are impacted by CA. This helped CA develop a framework of goals and objectives to achieve its desired future.

## **Moving the Needle - Recent Progress/Activities**

Columbia Association's Strategic Plan identifies five high-level goals to guide the organization.

1. Deliver programs and services that meet stakeholders' expectations and enhance the quality of life in Columbia
2. Maintain and enhance Columbia's facilities, open spaces, connectivity and environmental stewardship
3. Develop and communicate a shared community vision for Columbia and advance the vision through advocacy, partnerships and alignment of CA programs and services
4. Strengthen communication and community engagement in CA
5. Demonstrate the practices of a high-performing and responsive organization

This progress report summarizes the actions and activities that were initiated from May 1, 2014 through April 30, 2015 and is organized by goal. Additional detail is provided in the appendix.

## **We're Serving**

"Deliver programs and services that meet stakeholders' expectations and enhance the quality of life in Columbia"

### **Overview**

CA's mission is "Working every day in hundreds of ways to make Columbia an even better place to live, work and play." CA offers a wide array of programs, events, activities and services putting that mission into action. Some of the most notable programs and services include before and after school care, summer camps, a Lakefront Summer Festival featuring free concerts and

movies, an archive with a collection that includes materials from the planning and development of Columbia, a volunteer center and a sister cities program. At its sport and fitness facilities, CA offers hundreds of indoor and outdoor fitness classes and programs. Highlights of recent projects that demonstrate how we are adapting to the changing needs of Columbia to better serve our community are provided below.

### Highlights

**Haven on the Lake.** CA is well-known for its fitness and recreation facilities. Many community members use our health clubs and other sport and fitness programming and facilities to improve their health and well-being. To further reinforce and expand our presence in the health and fitness arena as Downtown Columbia redevelops, CA built the Mind Body wellness retreat called Haven on the Lake in the former Rouse Company Building. At Haven on the Lake, CA is providing a variety of wellness and complementary holistic health services and programs to the community for the first time in a single facility, such as aqua yoga, acupuncture, crystal salt therapy, hot yoga, naturopathic medicine and more.

**Revamp of CA's Tennis Program.** Overall, CA's tennis program continued to grow and thrive. CA, in consultation with our advisory committee, revamped our tennis program this past year to better serve tennis players of all ages. CA made these changes based on best practices and the needs of the community. CA has provided expanded youth and adult tennis instruction and programming, both of which have resulted in increased participation. The new junior development program features a rally-and-play approach to learning using the appropriate balls, racquets and court sizes with defined and clear competencies. This has been complemented by a new junior competition program that teaches how to be more effective in match play situations. As a result, youth participation grew by more than 40 percent over the previous year's youth involvement. The new adult instruction and drill programs also resulted in an increase in participation of 35 percent over the previous year. In addition, new programming included Cardio Tennis, which combines tennis skills and cardiovascular fitness drills. CA also introduced both indoor and outdoor Pickleball in response to community requests. Pickleball can be played on a tennis court, but uses paddles and special balls that are similar to but smaller than wiffle balls. With the defined court area being smaller and the net lower than tennis, the game is accessible to players of varying ages and abilities.

**DogPark.** In response to resident requests, CA opened the Columbia DogPark this past year. This long-imagined and planned project meets the need for an off-leash, enclosed play space for dogs. A recent CA survey found that 30 percent of Columbia resident households have dogs

and this park is another way that CA has enhanced its offerings in response to community needs. The park has been well attended and is an attractive amenity for the community.

**Customer Service.** Columbia Association is a major provider of community services in the Columbia community. Therefore, there is a focus throughout the organization to ensure that residents, members, guests and others have a positive experience when they interact with CA. This year CA sought to enhance CA staff customer service capacity and skills by investing in staff attendance at high-quality customer service training programs. As a result, CA team members understand and can apply best practices as they interact and serve community members. CA also launched an online membership program in FY15, providing enhanced service by allowing the people CA serves to purchase memberships digitally for the first time. CA also changed the name of the former Membership Service Center (MSC) to Customer and Member Service Center (CMSC) to make evident the focus on residents rather than members. Additional training in SNG has expanded the abilities of the CMSC to better serve customers. This training is being extended to the front line staff at facilities as well.

## **We're Greening**

“Maintain and enhance Columbia’s facilities, open spaces, connectivity and environmental stewardship”

### **Overview**

CA owns and maintains more than 3,600 acres of open space as a permanent asset for residents. This open space and its tight weave through Columbia’s residential and commercial areas is a defining feature of Columbia. Amenities include lakes, parks, tot lots, basketball and tennis courts, landscaped features and 94 miles of paved pathways. Columbia Association also operates and maintains three fitness clubs, a roller rink, an ice rink, a horse center, two golf clubs, three tennis clubs, 23 outdoor swimming pools, five indoor pools and a hot water therapy pool, Haven on the Lake Mind Body wellness retreat, a DogPark and a combination SportsPark and SkatePark. Through funding allocated in capital and operating budgets, CA maintains and reinvests in all of these facilities.

CA is committed to environmental sustainability. Major sustainability initiatives include watershed management and energy management. CA is actively working to restore Columbia’s watersheds through public education and projects to reduce water runoff and restore our streams. In addition, CA is also is working to reduce energy consumption and our greenhouse gas emissions.

## Highlights

**Energy Management.** CA has made significant progress in improving the environmental sustainability of its operations over the past year. Efforts included numerous upgrades throughout CA's building portfolio to reduce lighting loads and improve the efficiency of air conditioning and water heating equipment. CA is also preparing to implement an innovative combined heat and power (CHP) project at the Supreme Sports Club that will be one of the first such installations in Howard County. In addition to these conservation measures, CA has also established itself as a leader in renewable energy.

Based on extensive efforts undertaken this past year, a two-megawatt solar installation at Nixon Farm is expected to be operational this summer and will provide 25 percent of CA's power. CA has augmented this solar project with the purchase of wind-based renewable energy certificates for the balance of our electricity usage. As a result, CA's power consumption is now 100 percent offset with renewable sources and our carbon footprint will be reduced by nearly 50 percent beginning this year.

CA also received national recognition through an ENERGY STAR Partner of the Year Award from the U.S. Environmental Protection Agency for community initiatives related to energy conservation. CA has linked its internal energy management efforts with an innovative community engagement campaign to promote energy efficiency and sustainability throughout Columbia.

**Connecting Columbia.** CA completed the Lake Kittamaqundi pathway loop this year. The project included the installation of CA's first 10-foot wide pathway – the new standard for CA's highly used pathways, enhanced landscaping, as well as 200 feet of boardwalk over environmentally-sensitive lands at the north end of the lake. Pedestrian use of the pathway has increased by more than 240 percent as compared to before the loop was completed.

Additionally, CA installed two pathway signage projects to enhance the ease of use by pathway users. One signage route helps people to navigate from Lake Elkhorn to the Stevens Forest Neighborhood Center, while the other directs users from Lake Elkhorn to Route 108 via the Jackson Pond pathway. CA had previously installed pathway signage from Wilde Lake to and around Lake Kittamaqundi.

CA also partners with the county where possible to improve mobility and connectivity for people who walk and bicycle. CA partnered with Howard County this year on two feasibility studies: the Downtown to Patuxent Branch Trail Extension and the Bike Share feasibility studies. Each study concluded that the projects were feasible. The county has subsequently been awarded grant

funds for design of the first phase of the Patuxent Branch Trail extension from Downtown Columbia to Stevens Forest Road. In addition, CA continued to work with Howard County on implementation of recommendations in CA's Active Transportation Action Agenda related to intersection improvements. This has resulted in several improved CA pathway/county road intersection improvements.

CA also initiated an annual count program of walkers, cyclists and others who use CA pathways. The information gives CA a better understanding of pathway users and usage. The pathway counts provide CA with a better understanding of pathway users and usage, as well as the impact of pathway investments have on pathway usage.

**Hobbit's Glen Golf Clubhouse.** CA constructed a new clubhouse and turnhouse at Hobbit's Glen Golf Club, including a new pro shop, men's and women's locker rooms, underground cart storage and new spaces for CoHo Grill that include indoor and outdoor dining and seating areas and a golfer's lounge. This is an important project, as it replaced one of Columbia Association's oldest facilities.

**Accessibility Plan.** CA completed a multi-year effort to analyze all CA facilities for conformance to new American Disability Act guidelines and subsequently developed the Columbia Association Accessibility Report and Plan. The plan includes a set of implementation recommendations and timeline for ADA improvements –improvements at several facilities have already been put in place.

## **We're Columbia**

"Develop and communicate a shared community vision for Columbia, and advance the vision through advocacy, partnerships, and alignment of CA programs and services."

### **Overview**

Columbia Association is the organization that has the largest role in ensuring that the shared community vision for Columbia remains well understood. To do this, CA is the steward of Columbia's history through the Columbia Archives. The Archives collects and preserves the history of Columbia through its conservation of historic materials, as well as its educational programming. Through the Archives' various programs, CA promotes the community's understanding of the history of Columbia and its founding values.

### **Highlights**

**Guiding Principles.** CA established Principles for the 21st Century Planned Community of Columbia to guide the continued evolution and growth of Columbia as a planned community of

choice in the 21st Century. These principles are organized in five categories and focus on the characteristics that make Columbia distinctive: community facilities and services; diversity; land use and design; neighborhoods and destinations, and stewardship and are to be used to guide those involved in shaping the future of Columbia. For instance, they are being used by CA managers who have the responsibility for planning, facilities and natural resources, finance, communications/advocacy or other CA functions related to decisions and investments impacting the Columbia community. They also will be referenced as CA coordinates and partners with Howard County government in reviewing and updating the New Town zoning regulations and other initiatives.

**Partnerships and Advocacy.** CA has more than 35 partnerships with other community organizations and entities. Partnerships are collaborative efforts CA undertakes with other organizations that support CA's strategic mission: "Working every day in hundreds of ways to make Columbia an even better place to live, work and play." These partnerships are characterized by mutual cooperation and responsibility: CA management and staff also serve on various boards and committees. For instance, CA President Milton Matthews serves on the boards of the Howard County Economic Development Authority; the Inner Arbor Trust; the Downtown Partnership; and the Downtown Arts and Culture Commission.

This past year, CA completed the "Columbia Market Study," which was undertaken at CA's suggestion and done in partnership with Howard County. This data-rich report identifies market conditions and future potential opportunities for Columbia's village centers and their relationship to other commercial areas in Columbia. Howard County has used its findings as it plans for the redevelopment of Long Reach Village Center.

**Transportation.** CA has also advocated for expanded transportation options in Columbia including enhancements to transit, sidewalks, pathways and improved intersections for those who walk and bicycle. CA management served on the BikeHoward advisory committee and is serving on the WalkHoward advisory group. CA also partnered with The Horizon Foundation to bring Complete Streets expert Mark Fenton to Columbia. Fenton is a national expert in public health, transportation and planning, whose stimulating presentation addressed how the physical design of communities can help promote healthy lifestyles.

**50<sup>th</sup> Birthday Celebration.** Columbia was founded in 1967 and its 50th birthday will officially occur in 2017. In 2012, the CA Board approved creation of a separate 501(c)(3) organization to facilitate and run the 50th birthday celebration. This past year, the IRS application for this new non-profit was filed for tax-exempt status and granted for the Columbia 50<sup>th</sup> Birthday Celebration

Inc. CA is providing some funding for this organization, which is also seeking grants and funding from other Columbia-based organizations. The organization has begun planning for the activities and programs that will be part of the celebration.

## We're Engaging

“Strengthen communication and community engagement in CA.”

### Overview

Columbia Association informs residents, members and the general public about our programs, events, activities and opportunities through myriad channels, including ColumbiaAssociation.org, print, digital, and broadcast media and a presence at CA community events. The Customer and Member Service Team in conjunction with the Maggie J. Brown Welcome Center are available six days a week to greet residents and assist them with information and services they seek. In addition, CA seeks input and ideas from the community to help us understand what changes or enhancements are desired. The avenues for civic engagement include Resident Speakout at the public Board of Directors meetings, surveys and social media. In addition, CA has the Community Solutions Program that provides a customer service platform for residents to offer feedback and ask questions about CA's programs, services and initiatives. The Community Solutions Program provides the ability to contact CA 24/7 by phone or email with inquiries and gain responses quickly. Individuals have the ability to contact CA 24/7 via phone at 410-715-3109 or visit the Community Solutions Program website at <http://solutions.ColumbiaAssociation.org> and complete the electronic “Solutions Form.”

### Highlights

**Enhanced Communications.** This past year, CA implemented many initiatives to improve and enhance our communications. Initiatives included:

- Opt-in form posted on CA's website so users can select types of information they wish to receive from CA.
- New monthly eNewsletter, which is sent to all email addresses in CA's database.
- Enhanced services to non-English speaking residents.
- Interim changes to CA's website to enhance usability and add content.
- Introduced themed issues of the *CA Monthly* to provide more information and depth about CA programs and services.
- Developed weekly video segments with CA's president on programs and events and posted them on the CA website.

- Launched Columbia Matters Radio, a new radio show in partnership with Howard Community College
- Enhanced the links, details and contact information for each village community association on CA's website.

**Columbia Speaks. CA Listens.** In October 2014, CA hosted *Columbia Speaks. CA Listens.*, an interactive forum where residents and community stakeholders provided their ideas and comments on CA's programs and services, governance structure and communications and community engagement efforts. Approximately 100 people participated and sat at tables and engaged in small group discussions guided by facilitators from Howard Community College's Mediation and Conflict Resolution Center. Note takers at each table documented these discussions. CA received more than 1,100 comments and ideas, which were documented in the summary report with responses to all the questions. Participants evaluated the meeting and liked the interactive format and approach that was specifically designed to reinforce the sense of community and engage with other residents about Columbia.

## **We're High Performing**

"Demonstrate the practices of a high-performing and responsive organization."

### **Overview**

When CA managers talk about their employees, they often refer to them as team members. The meaning refers not to members of a sports team but rather team members working together to achieve CA's mission "every day in hundreds of ways to make Columbia an even better place to live, work and play." As team members focus on service to the community, they play an important part in enhancing the quality of life in Columbia. CA needs to continue to manage its financial assets, provide team member training and make investments in technology that result in a high-performing and responsive organization.

### **Highlights**

**Favorable Rating.** Moody's Investors Service assigned Columbia Association an issuer rating of Aa1, the highest CA has received from the agency. This high rating from Moody's will allow Columbia Association to issue debt at lower interest rates and with more favorable terms, which will lower CA's costs when borrowing. The very favorable rating for a non-stock, nonprofit corporation such as CA is a credit to CA's strong fiscal management. Obligations rated "Aa" are judged to be of high quality and are subject to very low credit risk, according to Moody's. An "Aa1" rating is the best rating for that category, bettered only by "Aaa" ratings.

**Organizational Structure.** Milton W. Matthews, CA's President and CEO, implemented a comprehensive and streamlined organizational structure for Columbia Association in early 2015. This new structure more clearly identifies to residents and other stakeholders CA's core functional areas and assigns the appropriate senior staff to lead each.

**New Headquarters.** After 50 years as renters, CA negotiated a lease for CA's new headquarters facility with an option to purchase at the same total rent expense as CA is currently paying, but for more space. The new location is in Owen Brown on Hillside Court and provides modern office space, an updated boardroom and new space for the Columbia Archives. The new headquarters building enhances CA's long-term financial sustainability because of the favorable lease and CA's option to purchase the building in future years.

**Training.** CA instituted a Learning Management System (LMS) for online training for all CA team members, including courses on ethics and ADA to have better trained team members. The LMS allows for all employees to receive consistent, universal training content to meet compliance requirements. It also provides online learning opportunities to all team members in topics that can benefit them for job skill improvement, remedial knowledge or to enhance their learning in a general sense. Some training opportunities, for the first time, are available to employees at their convenience and are not tied to an in-class learning schedule. The LMS has social functionality to allow CA to share information for to all team members in one place; assign follow-up and general interest learning; create work spaces for work teams to use to discuss projects, assign tasks, share information and ask questions; ask questions of internal experts; form discussion groups and survey employees. LMS provides a single location for training records for all team members and allows easy access to the records for managers. This is particularly important for compliance with regularly agencies for safety-related training records. LMS also provides online learning opportunities to all team members on topics that can benefit them for job skill improvement, remedial knowledge or to enhance their learning in a general sense.

**Information Technology.** CA also made significant advances in information technology by signing an agreement with Howard County Government providing for six CA facilities to use the Inter-County Broadband Network (ICBN) to create faster online speed and lower costs. The ICBN powers internet services at CA headquarters and its maintenance facility, as well as Columbia Athletic Club, Columbia Gym, Haven on the Lake and Supreme Sports Club.

**Certification.** While many team members at CA have professional certifications and credentials, there are two large groups that have truly excelled. In 2014, CA's Aquatics Department received the Silver International Aquatic Safety Award for consistently exceeding the criteria for aquatic safety certification this year. Also, all 20 schools in the School Aged Services (SAS) program achieved a Level One credentialing in the new Maryland State Department of Education's quality rating system, EXCELS. This demonstrates the program's commitment to continuous quality improvement.