



## **Columbia Association Strategic Planning Phase 2 Report**

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### **Introduction**

A wide range of data, information, and perspectives was gathered to prepare for strategy sessions. This information is intended to inform CA Board members and senior leadership team members in preparation for the March 9<sup>th</sup> and March 30<sup>th</sup> strategic planning sessions. The goals of those sessions include identifying key strategy issues, determining goals, and setting a future strategic direction for CA for the next five years and beyond.

The following sources were identified for information gathering via interviews lasting 45 to 75 minutes: CA Board members, CA senior staff, stakeholder groups including Community members, Commercial Property owners.

Two-hour focus group style meetings were conducted with Village Board Chairs and CA Advisory Committee Chairs. Information from all interviews and focus groups is reported in the words of the authors, and categorized by stakeholder groups.

Surveys were completed by CA members, CA non-members, and CA staff. The authors determined survey questions with input by CA staff. Summary results of the survey data are reported in the survey section and detail results by question are included in a separate document. Similarly, summary results from interviews and focus groups topics were categorized, compiled, and will be included in a separate document.



Lastly, an overview of regional demographic trends and national trends in demographics, planned communities is included to provide perspective on key comparisons.

This report is organized into an executive summary with summaries from each data or information source category.

## Executive Summary

Board members and senior leadership team members strongly desire a strategic plan that has a clear and definable mission, a compelling vision with an emotional connection, is focused on select strategic issues impacting Columbia, and includes specific goals and measures. It should consider Columbia in context with Howard County and the Central Maryland region as forces affecting those regions also affect and influence Columbia.

Among all stakeholders, the qualities that have made Columbia stand out as a community of choice are important to incorporate as the community continues to grow. These include diversity and inclusion, community cohesion, i.e. Columbia's small town feel (cohesion & open space) and city characteristics (diversity of people, variety of amenities, a downtown, availability of arts and culture). The amenities, village centers, and downtown are part of what has made Columbia unique. While not under CA's authority, infrastructure, schools, planning and zoning, and development impact Columbia's quality of life. Many stakeholders value an increased advocacy role for CA to maintain Columbia's quality of life. All stakeholders also recognize that the one distinction Columbia has that virtually no other community or small city can claim is the quality and amount of its open spaces.

Survey responses support the issues and perspectives of the stakeholders.

Growth challenges community cohesion. One key to maintaining a small-town feel and vibrant community is the quality of relationships among citizens and stakeholders. For those reasons, CA's relationship with stakeholder groups is a vital strategic issue. Stakeholders believe they are essential to community cohesion and vibrancy.

Organizational priorities commonly identified include:

- Clearly establish the CA identity
- Continually work on building trust with open, frequent, two-way communication
- Build community and engagement with CA among diverse people – age, race, ethnicity, demographics, and socio-economic factors
- Preserve, maintain, and engage people with Columbia's open spaces
- Engage the business community as a voice at the table
- Manage value of assets and amenities as they age
- Improve citizen involvement
- Be bold in standing up for a future based on Columbia's values



- Be an agile organization strategically, operationally, in governance, and not risk averse, conflict avoiding, or using fear based decision-making.

A common denominator among all individuals and groups queried was their appreciation for being included in CA's strategic plan process. Going back to them for their perspectives as we develop mission, vision, and goals is a part of this process and will help establish the stakeholder relationship they desire.

## **Board Member Perspectives**

Nine interviews with Board members were conducted in which they were asked what they would like to see in the next strategic plan, and their views on organizational priorities for CA, what works well regarding governance, and what can be improved.

Measurable goals, a clear mission, and a compelling vision were the most frequently cited desired strategic plan characteristics. Most Board members want to be more strategic, addressing high impact issues with greater focus by tackling a select number of significant issues, crafting specific objectives and using these as guidelines for decision-making. Several observed the necessity of establishing priorities in the plan.

What should the organizational priorities be? The most commonly cited priorities among the Board are:

- Guiding development through CA influence (advocacy)
- Strengthening relationships with villages
- Establishing a clear CA identity
- Addressing sense of community or community cohesion
- Better communication of who CA is and what CA does

Most Board members believe the Board fulfills its Board functions as designed and generally reaches the right decisions. Deep knowledge about CA and Columbia were cited by most as contributing to what works well regarding the Board.

The top category identified for improvement is how the Board works, which includes the ability to work constructively through conflict while not avoiding it, and maintaining civility and respect for each other and staff members. Further actions to support these improvements include building trust with each other and staff, defining the role of the Board, and practicing open and transparent communication among Board members and staff. Many cited the Board retreat in November as a good start toward this end.



## Senior Leadership Team Perspectives

Interviews were conducted with eight senior leadership team members in which they were asked what they would like to see in the next strategic plan, and their views on organizational priorities for CA, what works well regarding Board-staff relations, and what can be improved.

Other communities have copied the characteristics that used to make Columbia distinctive. How Columbia grows in this ever-evolving marketplace will determine its success. Diversity, inclusion, health club amenities and programs, and neighborhood centers have become benchmarks for communities of choice rather than the distinctive attributes they once were. Staff reported a need to select goals that stretch CA as a community-wide organization, represent rigorous thinking, and help Columbia mesh with Howard County and Maryland as regional growth continues. The mission and vision should have more clarity and have an emotional impact to help bind CA's many stakeholders and distinguish CA's identity. Staff members deem specificity, measures, and linkage with key performance indicators as essential.

Organizational priorities should include:

- Building community and engagement with CA among diverse people – age, race, ethnicity, demographics, and socio-economic factors
- Preserving, maintaining, and engaging people with Columbia's open spaces
- Engage commercial players as a voice at the table
- Help housing stock and village centers remain current
- Manage value of assets and amenities as they age
- Advocate for improved roads and infrastructure as planning occurs
- Embed technology in all appropriate aspects, for example, how fitness incorporates social media platforms now

Senior leadership team members believe CA staff fulfills its operation functions as designed, are highly knowledgeable and professional, trustworthy and care deeply about the success of CA and Columbia.

To some, Board-staff relations are better now compared to many years ago. Still, it was widely recognized that further efforts to build trust, respect and civility, role clarity, and focus would improve Board-staff relations. Many staff members believe the Board generally reaches the right decisions even if it's an arduous path, at times. A productive Board-staff relationship was mentioned as a top issue in CA's ability to attract and retain top talent.



## Stakeholders

### Village Board Chairs

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When discussing recommended strategic issues and organizational priorities, the 10 Village Board chairs focused on the impact of change occurring in Columbia, Howard County, and Maryland. How the villages and CA manage change for those who've been in Columbia for 50 years and those who will be in Columbia in 50 years is central to the strategic issues and CA priorities. At the same time, there's a significant fear of losing Columbia's uniqueness.

To them, how Columbia manages future change, such as climate, growth and development, diversity and inclusion (e.g. age, race, ethnicity, economic) will determine whether or not it remains a community of choice. To that end, the group expressed a desire to have a strong and meaningful relationship with CA, especially with the Board. They believe two-way flow of information can be improved and want to be included in information regarding what's upcoming (as it affects the villages) regarding Board decisions, planning, and actions regarding CA.

They would like to play more of a partnership role in how villages evolve. There was acknowledgement that development is often met with resistance and that with a meaningful relationship with CA, much of that resistance can be mitigated.

Organizational priorities should include:

- Building trust, involvement, and communication between villages and CA
- Include villages as stakeholders
- CA identity – what it does and who it is

### Advisory Committee Chairs

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Strategic issues and CA priorities discussed by chairs of eight advisory committees centered on recognition that at each stage of growth, a community encounters certain necessary changes. In order to keep the cohesion of the community, communication needs to change commensurately – via mediums, frequency, and two-way in order to maintain a sense of community.

To the advisory chairs, villages want to be unique and guidelines seem to vary from village to village. Ideally, there would be a level of consistency regarding guidelines among villages while retaining their uniqueness. Affordable housing is seen as a driver for economic diversity and in too short supply. There is a significant fear that people are increasingly priced out of Columbia.

Organizational priorities include:

- Improve citizen involvement.
- Be bold in standing up for a future based on our values.



- CA needs to be an agile organization – not risk averse, conflict avoiding, or fear-based.
- Establish a meaningful relationship with advisory boards. Show an openness to committee ideas and be supportive of the reasons the committees were created. Not all ideas are good ideas, but being more open to committee ideas will help committees engage.

## **Community Stakeholders**

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Fourteen interviews with stakeholders included commercial developers, community members, members of the business community, Howard County administration, former members of the Howard County Council, and members of the health and wellness community. There was a commonly expressed concern for how Columbia will change as the area and market evolves and a belief that CA should play a central role in helping move Columbia forward.

The areas of Gateway Business Park and Gateway Overlook were often cited as areas that will experience significant change during the next 20 years and where CA can be an important influencer in their development and redevelopment so they incorporate the values and characteristics central to Columbia.

Likewise, redevelopment of village centers in keeping with values and characteristics central to Columbia and market forces is an essential part of growing and evolving with the region. Many residents oppose multi-family housing, yet it can help Columbia's values of affordability and diversity. It is also in congruent with today's market forces, and a future trend among planned communities nationally.

To be effective, community stakeholders believe CA needs to be an agile organization strategically, operationally, and in governance.

### Organizational priorities

- Partner with stakeholders on a regular and meaningful basis.
- Include the voice of business and consider business as a partner
- Community visioning - Columbia needs a vision and CA should be instrumental in such a process.
- Relationship with villages



## CA Survey Results Data Summary

As part of the strategic planning process, GRIFF Strategic Leadership conducted surveys to gather perspectives regarding CA mission, values, governance, operations, and strategic direction. Three groups were surveyed: CA employees–Team Members, CA members, and non-members.

The response rate for each group was relatively high, yet respondents did not necessarily answer each question in the survey. The total survey response rate for each group is noted along with the average response rate per question. The survey period began January 3, 2019 and concluded January 18, 2019.

A separate report provides details of the survey results from each group, highlights key patterns, and points out implications for the strategic planning process. Supporting data is included in a separate appendix.

### Highlights From the Team Member Survey

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*(Total # of responses: 203 / Average # of responses per question: 170)*

**Delivering Values** CA's strength lies in its inclusiveness and diversity. Using that strength, employees see a need to expand the membership base, extending offers to underserved groups and attract people to CA. CA's inclusive culture primarily supports racial and ethnic diversity while economic diversity is lacking.

**Meeting Member Needs** Team members recognize that they have made strides in improving customer service and community outreach. Team members also recognize that there is room for improvement, and they are looking to management to increase customer/staff face time.

**Employee Engagement** Employee engagement is high; with team members citing all team member meetings and better communication between the leadership and employees as positive changes. Team members would value more training opportunities. Part-time team members appreciate changes to benefits and believe more can be done.

**Looking Ahead** CA should target 5 distinct areas:

1. Listen to members
2. Provide better customer service
3. Increase marketing to build awareness of CA services to members
4. Continue to build communication among employees
5. Improve the website and program registration software.



## Highlights From the Non-member Survey

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*(Total # of responses: 450 / Average # of responses per question: 288)*

**Relationship With CA** 60% of respondents say the cost of membership is too high. The same percentage are past members. 10% report using a competitor. More than one-third says the mission and vision resonate with them “very much.”

**Vision Achievement** Almost 30% of respondents feel CA has achieved its vision through its focus on community, offering community events, and contributing to Columbia in a way that make it a great place to live. Another 30% say CA achieved its vision through its open/green space.

**Future Membership** Just under 50% of respondents say they would join CA if they could afford it. 10% of respondents report that they do not live in Columbia.

**Ways To Improve** According to 30% of respondents, CA should invest time and energy into developing a better pricing model and membership structure. More than 20% say planning issues, such as transportation, walkability, and over-development need to be addressed.

## Highlights From the Member Survey

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*(Total # of responses: 1969 / Average # of responses per question: 1087 for open-ended questions / 1307 for multiple choice)*

**Connection** The majority of respondents feel a connection to CA through its mission. 75% say the mission resonates with them somewhat or very much. When asked in what ways has this vision been achieved, respondents offered multiple reasons.

**Strengths & Weaknesses** Responses show 3 clear preferences regarding CA's strengths:

1. Facility convenience
2. Range of programs offered
3. Facility quality

Respondents show no clear preferences regarding CA's weaknesses.

**Governance** The majority of members who responded to this question say the CA Board is somewhat or not at all able to communicate its decisions and initiatives, work with transparency, and be responsive to members.

**Next Steps** Nearly 30% of respondents identify planning issues as the priority to achieve CA's mission; citing the need to curb over-development, revitalize village centers, and encourage affordable housing. Planning is followed by affordable member options, programming, facility quality, and community engagement.

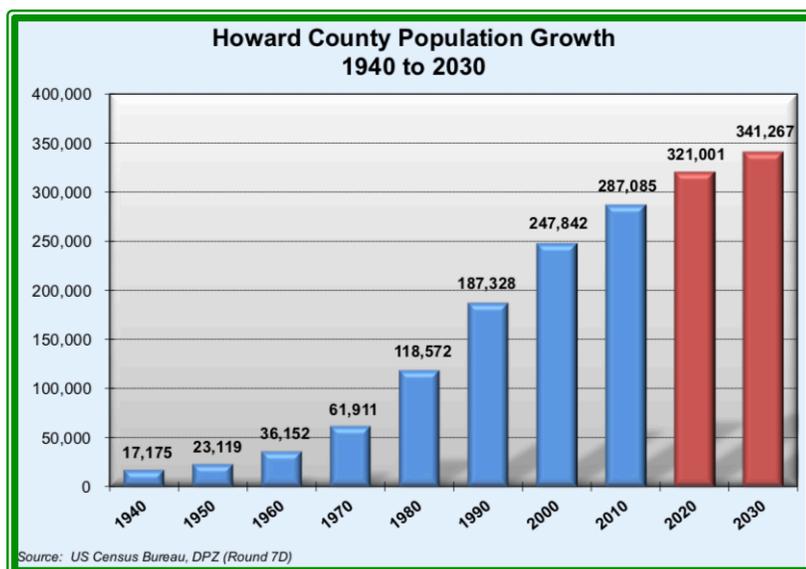


## Regional Demographics

Columbia	2010 Census		2000 Census		'00-'10 Change		2015 Estimate	
Source	US Census		US Census		US Census		ACS 5-year	
	Counts	%	Counts	%	Counts	%	Counts	%
<b>Total population</b>	99,615	100%	93,863	100%	5,752	6.13%	103,439	100%
<b>American Indian &amp; Alaskan native alone</b>	393	.39%	231	.25%	162	70.13%		
<b>Asian alone</b>	11,390	11.43%	6,974	7.43%	4,416	63.43%	13,019	12.6%
<b>Black or African American alone</b>	25,231	25.33%	20,578	21.92%	4,653	22.61%	26,564	25.7%
<b>Hispanic or Latino</b>	7,884	7.91%	3,888	4.14%	3,996	102.78%	8,841	8.55%
<b>Two+ races</b>	4,424	4.44%	2,643	2.82%	1,781	67.39%	3,643	3.52%
<b>Pop. by age</b>								
<b>Persons 0-4</b>	6,364	6.39%	6,715	7.15%	-351	-5.23%	6,661	
<b>Persons 5-17</b>	17,538	17.61%	18,088	19.27%	-550	-3.04%	16,764	
<b>Persons 18-64</b>	64,915	65.17%	62,330	66.41%	2,585	4.14%	66,210	
<b>Persons 65+</b>	10,798	10.84%	6,730	7.17%	4,068	60.45%	13,804	

### Columbia

**Median Household Income**  
**\$ 103,707**  
**Persons in poverty, percent**  
**7.4 %**  
**Educational Attainment: Percent high school graduate or higher**  
**95.7 %**  
**Persons without health insurance, percent**  
**4.7 %**  
**Median Housing Value**  
**\$ 367,600**  
**Total Housing Units**  
**42,193**  
**Number of Companies**  
**10,644**  
**Male Median Income**  
**\$ 65,267**  
**Female Median Income**  
**\$ 42,134**  
**Veterans**  
**6,383**  
**Percent of households with a broadband Internet subscription**  
**92.8 %**  
*Source: 2013-2017 American Community Survey 5-Year Estimates*





## National Demographic Trends

The year 2030 marks an important demographic turning point in U.S. history according to the U.S. Census Bureau's [2017 National Population Projections](#). By 2030, all baby boomers will be older than age 65. This will expand the size of the older population so that 1 in every 5 residents will be retirement age.

“The aging of baby boomers means that within just a couple decades, older people are projected to outnumber children for the first time in U.S. history,” said Jonathan Vespa, a demographer with the U.S. Census Bureau. “By 2035, there will be 78.0 million people 65 years and older compared to 76.7 million (previously 76.4 million) under the age of 18.”

The 2030s are projected to be a transformative decade for the U.S. population. The population is expected to grow at a slower pace, age considerably and become more racially and ethnically diverse. Net international migration is projected to overtake natural increase in 2030 as the primary driver of population growth in the United States, another demographic first for the United States.

The non-Hispanic White-alone population is projected to shrink over the coming decades, from 199 million in 2020 to 179 million in 2060 — even as the U.S. population continues to grow. Their decline is driven by falling birth rates and a rising number of deaths over time among non-Hispanic Whites as that population ages. In comparison, the White-alone population, regardless of Hispanic origin, is projected to grow from about 253 million to 275 million over the same period.

By 2020, less than half the children in the United States will be non-Hispanic white. That number rises to about 72 percent when children, regardless of Hispanic origin, are included.<sup>1</sup>

## Planned Community Trends

According to planning experts at the Urban Land Institute, the future of planned communities in the next 10 years will be driven by two very clear themes:

1. Attracting and accommodating millennials and baby boomers to the same neighborhoods,
2. Offering a ‘sense of place.’

### Broad Demographics

In ULI conferences over the last two years, speakers highlighted the importance in building communities that accommodate multiple generations together within one neighborhood. Future developers will focus more on the single millennial and the empty-nester baby boomers than the traditional buyer -- the young family. These groups will live in the same

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<sup>1</sup> “Older People Projected to Outnumber Children For the First Time in US History.” March 13, 2018. U.S. Census Bureau. <https://www.census.gov/newsroom/press-releases/2018/cb18-41-population-projections.html>



community and expect neighborhoods to cater to each. This dynamic requires developers to offer a wider range of **housing**, from affordable rentals to luxury single-family homes.<sup>2</sup> For example, apartment complexes and single-family homes are close enough to share amenities, but residents have access to child-free swimming pools. “The goal of many of these people is to never leave the community,” said Jody Kahn, SVP of research for John Burns Real Estate Consulting.

At the ULI fall meeting in Los Angeles in 2017, panelists said that data trends are showing a greater market for a population looking to rent, not own their homes. This means that single-family rentals are a product type that are needed in planned communities.<sup>3</sup> “Tom Woliver of [Hillwood Communities](#), a Dallas-based developer of master-planned communities, highlighted a project by [BB Living](#) in Arizona that offers three- and four-bedroom rental homes in a master-planned community. Woliver said that 30 percent of the community’s renters end up buying into the community.”

The 55-plus community and millennials also share an active life-style that demands access to health and wellness opportunities as well as green space. Planned communities must be foot-friendly and focus on indoor-outdoor living. Millennials care about sustainability and want to live in an area that celebrates the environment. Several new planned communities in Texas and California market every home as Zero Energy Ready meaning they are capable of offsetting all or most of their annual energy consumption. Other developments offer underground geothermal for all heating and cooling, or solar panels for lease or purchase.<sup>4</sup>

Today’s seniors are working longer, staying active, and waiting to make their senior housing decisions. They also want to live among the other generations. According to ULI’s Emerging Trends 2018 report, baby boomers are waiting until the age of 80 to make the move to senior housing.<sup>5</sup>

#### A ‘Sense of Place’

Equally important to having a variety of housing options and amenities is the need to create a sense of community within neighborhoods. While this is a new theme for regions across the US, it is, obviously, a standard for Columbia. What is critically important for CA to recognize is the need to stay relevant to multiple generations and pay careful attention to what the data is saying.

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<sup>2</sup> O’Malley, Sharon. “Developing the Future.” Professional Builder Magazine. January 5, 2018. <https://www.probuilder.com/developing-future-master-planned-communities>

<sup>3</sup> Harper, Jeremy. “Coming to Master-Planned Communities.” Urban Land Magazine. October 26, 2017. <https://urbanland.uli.org/industry-sectors/residential/coming-master-planned-communities-data-driven-marketing-renters-flying-uber-rides/>

<sup>4</sup> O’Malley, Sharon.

<sup>5</sup> “Defying Expectations for Master Planned Communities,” Spring Issue 2018. Urban Land Magazine, p. 84.



Real estate experts are struggling to understand millennials. The market experts assumed millennials would move to urban centers and be in the market to buy at this point in their lives. However, according to census data they have stayed in the suburbs where their parents are, and are looking to rent. Real estate experts also expected them to be attracted to the flashy, gadget-driven living experience but market figures suggest they value organic, unplanned, authentic and experience-based community amenities.

Here are three examples of communities providing this type of experience<sup>6</sup>:

- Daybreak near Salt Lake City: Community invited a few food trucks to set up on an empty lot once a week. Soon the number of food trucks doubled, and community members built a simple stage and invited local bands to play. The spontaneous community night soon outgrew its space and moved the event to a park.
- Harvest Community north of Dallas and Fort Worth: The community features a wide variety of typical amenities, but the biggest surprise was The Barn – the least expensive and most popular. The Barn is a large, open-air pavilion/barn, featuring unprogrammed space, picnic tables, giant Jenga, chess, corn hole, and Connect 4, and has a basketball court for pick-up games. Residents began using the space organically even before furniture was installed.
- Lakewood Ranch in Sarasota: In their new town center, they incorporated corn hole, a beer garden, and sand volleyball courts to cater to their younger residents. This decision was data-driven – a key resource for the community to meet changing needs of newer residents.

Millennials are looking beyond traditional amenities, wanting their neighborhoods to meet their lifestyle needs. Consultants believe this will include the need for incubator space and pop-up retail stores to attract future residents who want to start local businesses. A 2017 Gallup survey estimated that 43% of employed Americans spend some portion of their workweek working from home.<sup>7</sup>

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<sup>6</sup> Seabaugh, Kate. "Give Us Music, Fresh Food, Wine, and Cornhole," May 1, 2018. <https://www.realestateconsulting.com/give-us-music-fresh-food-wine-cornhole>

<sup>7</sup> Harper, Jeremy.