

VHA Strategic Plan Status - October 20th Workshop

Major Topics for Priority Setting 2023

Marketing & Communications Strategy

1. Strategy Leadership and Overall Program
2. Informational Documents
3. Promotion Plan and Activities
4. VHA New Residents' Night
5. The VHA Voice
6. The Daily Sun
7. VHA Website and Back Office
8. Neighborhood Reps Mktg & Com Responsibilities
9. Internal Communications

Membership and Volunteer Recruitment Strategy

1. Strategy Leadership and Overall Program
2. Business Case including Incentives
3. VHA a "Villages Lifestyle Club" - "Members Only" Events / Meetings
4. Specific Recruiting of Volunteers (Leaders)

Community Foundation Committee

1. Community Organizations to Support - Donations
2. Committee Membership
3. Publicity

Mission/Vision - Focus ALL Residents - Far South, Next Generation, Established Areas

1. Identify Residents' Needs and Define & Implement Initiatives

Information Systems & Technology

1. Back Office - Features, Procedures, Role, Training
2. Future Needs & Development Process
3. Leadership and Supporting Team

VHA Marketing & Communications Strategy Initiatives / Recommendations

SLIDES & HANDOUTS

Date 10/15/22

OBJECTIVE /GOAL:

- Establish the VHA prominence as the most widely publicly recognized Champion of Residents Advocacy in The Villages.
- Establish overall cohesive strategy and processes to promote programs, determine most appropriate public relations and advertising in the various targeted media outlets and resident platforms.
- Create VHA Strategic Director position (unpaid or paid) to develop and oversee the VHA Marketing and Communications Strategy. If no one readily identifiable, look into a consulting engagement with Marketing/Communications specialist.

STATUS OF INITIATIVES & RECOMMENDATIONS

STRATEGY LEADERSHIP & OVERALL PROGRAM

- Instead of hiring VHA Strategic Director, enter into a consulting engagement with Marketing/Communications specialist. **ACTV high priority - VHA Exec VP, Peter Russell and small committee negotiating with Tangent media and Daily Sun as consultants instead of hiring Director to look at key needs of this strategy**
- Create a Permanent Marketing and Communications Program and Team - Analyze needs, define and implement solutions including internal communications. **ACTV High priority– See above comment**

INFORMATIONAL DOCUMENTS

- Update Key informational documents about the VHA:
 - History of VHA document needs to be updated from 2015 to present. **ACTV - Sandy Mott working on this but need to determine estimated completion date.**
 - Fast Facts Reference Guide (FFRG) including promotional “Elevator speech” needs to be updated. **ACTV - Currently updating FFRG for review and make available to Officers; ACTV - elevator speech being reworked. Feedback being send to Joan Sullivan with Peter Moeller co-ordinating.**

PROMOTION PLAN and ACTIVITIES

- VHA Individuals need to be identified and provided accurate information to promote the VHA in various settings. **ACTV – Increased VP training to recruit NRs and provide promotional material for NRs to distribute in neighborhoods and at programs.**
- Some ideas to enable promotion:
 - VHA needs to have a sufficient number of photographers and reporters, perhaps one per area, who function in as many areas as possible for reporting our activities. **PLAN – Currently Mark Palmer is only photographer, need additional photographers and need reporters! An idea for NRs responsibilities**
 - VHA should continue to participate in parades and promotional events where we can put out tables of literature, etc., whenever possible, anything to get out brand noticed. A large foam core board with our logo on it placed in a prominent place at eye level at all events would help people recognize our brand. **NEW – Pres/EVP/VPs – designate who attends business openings for photo on website/Voice**
 - VHA should “honk our horn” as often as possible. Promote where and when we have given scholarships, money, any stories of us doing good things must be reported. **ACTV - Foundation Committee goal for donation photos; Had articles in Daily Sun several times this year**
 - VHA needs to start capturing all news worthy events, workshops, any contact. Find out where they heard about us, using reporters and metrics. **ACTV - Area VPs need to develop approach for each of their areas.**

- **Proactive Personal Marketing - PLAN** - Consider other proactive regular approaches to welcome new residents and introduce them to new resident night. For example, while driving through a VHA Leader's Village, he stopped and introduced himself to people unloading a PODS container assuming they were new residents. They are long term renters who are considering buying 6 months from now. He doubts they'd ever hear about VHA or attend events if he hadn't drove by and saw them unloading their shipping container. In addition to using new homeowners' info to just send invite to new resident night, how can we use other info (such as long-term renters info if available) to market to new members?

- **VHA NEW RESIDENT NIGHT**

The first impression residents have of The VHA is New Resident Night. As such, more should and can make it a good impression by revamping the evening and making it more interesting and relevant.

- Make sure we know and communicate well WHO WE ARE and what we do for the community. **ACTV** - How we meet and greet New Residents is vital. A welcoming face and hospitality, would be good to do. It is key that we do not assume the people in the room know who we are. We have to be very specific about our hosting, benefits, and goals. Merchant to Members program should also be highlighted at New Resident Night, perhaps using a merchant to promote the program.
- Focus on recruitment that night **ACTV**
- Have a great info packet that is concise and not overly technical/wordy. **ACTV?**

- **THE VHA VOICE:**

- **CPLT** - Many improvements made
- **NEW** - Leveraging Printed VHA Voice, Daily Sun and WebSite to increase readership as well as manage expenses.

- **THE DAILY SUN**

- **ACTV** - Continue to look at improving coverage

- **VHA WEBSITE and BACK OFFICE**

- **ACTV** - What will motivate members to use the website?
- **ACTV** - Find ways to target new residents
- **ACTV** - Have links to helpful resources, informational services, activities
- **ACTV** - Completion of Back Office Functionality including Document Repository

- **NEIGHBORHOOD REPRESENTATIVES - MKTG & COM RESPONSIBILITIES:**

- Neighborhood Representatives needed to promote the VHA while also providing knowledge of District government through: Handouts about CDDs obtained from Customer Service, encouraging CDD Orientation and Resident Academy. This added responsibility may give Neighborhood Representatives more purpose showing the VHA as supportive and informative to residents. **ACTV** – These responsibilities part of VP training of Reps **PLAN** - Add "Facebook VHA Updates" to duties for neighborhood reps for their individual village Facebook pages

- **INTERNAL COMMUNICATIONS**

- **ACTV** - More options for tailored Email communications for example VPs to specific District or All Members, VPs to Reps, Reps to Members/Residents
- **ACTV** - Need more Training of "Back Office" system for those who need it.
- **ACTV** - Need to continually improve internal communications and make better use of features we have to facilitate that. Keeping our own people informed is critical for the smooth operation of the VHA.

VHA Membership / Volunteer Recruitment Strategy Initiatives /Recommendations

SLIDES & HANDOUTS

Date 10/15/22

OBJECTIVE /GOAL:

- Create a Permanent Membership Program with a Strategy Leader and cross-functional leaders of The VHA
- Understand the needs of our residents especially the “Next Generation” Villagers (particularly in the “Far South”) Revised to ALL Residents focused each demographics group’s unique needs.
- Build and promote a business case for joining the VHA including WIIFM - “What’s In It For Me” and implement those benefits.
- Increase membership to over 20,000 members by end of 2023.

STATUS OF INITIATIVES & RECOMMENDATIONS

STRATEGY LEADERSHIP and OVERALL PROGRAM

- Identify individual to be overall Executive Strategy Leader for Membership Recruitment **ACTV - No specific direction to identify individual – VHA Exec VP Peter Russell volunteered to work with a committee approach moving VHA into future**
- Create a Permanent Membership Program and Leadership Team with three distinct objectives. **PLAN no activity on over-arching program and Strategy Leader but also ACTV - some initiatives being pursued**
 - A. Recruiting---Which refers to the overall process of attracting individuals from our community to become involved and members in the VHA.
 - B. Retention---Which refers to, in this case, the process of finding out what means would work best to get members in good standing to continue to be members.
 - C. Metrics---Which refers to quantifiable measures to assess our membership success. This would include leaders at all levels, VHA Executive Committee, Area Leadership and Reps.
 - Create membership goal for 2023 and monitor progress towards it **PLAN but no formal goals set “Like the idea of having a membership goal/objective. Consider having both a new member goal and a renewed membership goal.”**

BUSINESS CASE INCLUDING INCENTIVES

- Understand the needs of our residents especially the “Next Generation” Villagers (particularly in the “Far South”) **ACTV – VP Far South arranging 10 programs a year to educate new residents**
- Build and promote a business case for joining the VHA including WIIFM - “What’s In It For Me.” Promote who we are, accomplishments, charitable donations we make, annual appeal letter. **PLAN**
- **NEW Need to Evaluate** Would be very beneficial to provide more of an incentive to join The VHA. For instance, provide a service like a free oil change, one free session with an attorney when you join to discuss a specific topic such as estate planning etc.
- Provide Membership “Recruiters” with necessary information and training to build confidence to approach potential members. **PLAN Training VPs to educate and direct NRs**

VHA A “VILLAGES LIFESTYLE CLUB” - “MEMBER ONLY” EVENTS/MEETINGS

- Make the VHA more like a Villages Lifestyle Club with mostly “Membership Only” events & programs. **Many current programs educating all residents. Only few Members Only events - need more.**
 - A. Have regular monthly meetings with Reps there to “work the room.” **monthly DEL – ACTV - quarterly is fine as long as regular/frequent email updates/contact to avoid meeting overload.**
 - B. Have Social Events with snacks and speakers, meet & greets for new and potential members. **ACTV - some social events occurring. More planned. Bingo almost monthly. BYO works best to avoid overload work for volunteers.**
 - C. Have grassroots meetings in rec centers to get to know neighborhood Reps. Eventually, Lunch & Learns led by membership. This proved successful at Fenney. **ACTV - Small group**

with north NR and VP north met with neighbors. This is being encouraged in the north for other NRs to promote the VHA with VP attending “coffee time.”

- D. Provide speakers to clubs, highlighting programs such as Helping Hands. **PLAN?**
- Focus on Member Only Events **NEW Need to Evaluate**
 - To get a decent size audience at members-only events, emphasize that the members will be getting information first, best, from the horse's mouth, etc. that non-members won't have access to.
 - Get special speakers for members-only events from inside The Villages and outside on a **monthly** basis.
 - To get a decent size audience at members-only events, emphasize that the members will be getting information first, best, from the horse's mouth, etc. that non-members won't have access to.
 - **All VHA volunteers** should be encouraged to attend all members-only meetings to make sure we have a decent size audience; if the audience is sparse, it makes our event look unimportant. In addition, it's important that our volunteers be
 - Joining the VHA should be like joining an exclusive club ... If only we could give people a reason why
- Increase educational and social programs with perks for members with a current membership card:
 - Cost reduction for social events **PLAN**
 - **PLAN** Wonder why we do not have a recruitment table at Bingo with it well-staffed and announced prior to play. Perhaps we could offer another free board, 25% off admission, a free last game sheet or something similar to encourage becoming a member.

SPECIFIC RECRUITING VOLUNTEERS & LEADERS

- Considerations for RECRUITMENT OF VHA LEADERS, i.e. NRs, Asst. VPs, Committee Chairs, etc. – This area is weak in part due to initial plan not including, or considering, the concept of “emotional intelligence”. **NEW Need to Evaluate**
 - Some personalities are perceived as rude and/or demanding
 - Creating “busy work” is off putting
 - Competition with the POA is not received well. Not outwardly competing with the POA will serve the VHA better. We can do this by staying in our non-profit lane and serving the people in the way we have been with education.
 - Gossip and reputation should be carefully controlled particularly when focused on an individual. The good of the whole needs to come first. Put on a happy face and use self-control.
 - Set up table for recruitment of leadership positions at our General Meetings by creating signage, sign-up sheets, and personally manning the table. This is an excellent place for us to be visible and active.
- RECRUIT NEIGHBORHOOD REPRESENTATIVES **ACTV High priority**
 - Define and increase Neighborhood Representatives responsibilities **ACTV High Priority Add recruiting/retention to main duties for VPs/Neighborhood reps PLAN** One new idea is add “Facebook VHA Updates” to duties for neighborhood reps for their individual village Facebook pages
 - **NEW Need to Evaluate** Identify and display where we have reps and where we need reps. A chart should be made and displayed at our leadership meetings to “fill in the blanks”.
 - **NEW Need to Evaluate** Suggestion that rather than using the title “Neighborhood Representatives” we rename them “Village or Villa Ambassadors”.
 - **NEW Need to Evaluate** Point of clarification: why do we treat villas, that are within a village, as separate? Possibly we only need a rep for each Villages and Villas would be included; a villa resident could be the rep for the entire village.
- Volunteers are donating time that is worth thousands of dollars. They need to be appreciated, respected, not overburdened because we want something for nothing. Also, if we need to pay for some services we should. **PLAN**

To Establish the VHA Community Foundation (CF) Committee Strategy

SLIDES & HANDOUTS

Date 10/15/22

OBJECTIVE /GOAL

- To meet the VHA Mission of providing philanthropic support to The Villages residents.
- To establish the VHA Community Foundation Committee as a committee which provides financial and organizational support for program and service activities to address the needs and concerns of the resident of The Villages for “aging in place”. U.S. Centers for Disease Control (CDC) defines “aging in place” as the “ability to live in one’s home and community safely, independently and comfortably regardless of age, income or ability level.” NOTE: one particular comment from the workshop cautioned that total focus on supporting aging in place has a limited appeal considering the younger age of the “next generation” of Villages residents.

STATUS OF INITIATIVES & RECOMMENDATIONS

COMMUNITY ORGANIZATIONS TO SUPPORT - DONATIONS

- The Objectives and Goals as stated in the November 2021 Workshop are being met. **ACTV** Financial resources are being distributed. Community organizations supported include the One Moment Cafe, the Girl Scouts Alumnae Silver Trefoil Group of The Villages, and Shared Harvest Gardens.

COMMITTEE MEMBERSHIP

- At present, there are three (3) VHA Foundation Committee members. Additional members are being actively recruited. **ACTV**

PUBLICITY

- The VHA Foundation Committee Chair is reporting at the monthly VHA Advisory Committee meetings. **ACTV**
- Focus moving forward includes increased publicity. Articles and photos have appeared in The Villages Daily Sun and The VHA Voice **ACTV**

VHA Vision, Mission & Values Strategy
Focus Far South & Next Generation Resident's Needs
NEW - FOCUS 2023 SHOULD BE ON ALL RESIDENTS

SLIDES & HANDOUTS

Date 10/15/22

OBJECTIVES

- VHA needs to modify its strategy and guiding principles in light of the changing demographics of The Villages especially in the Far South expansion.
- VHA needs to realize the “Next Generation” might not have the same retirement goals.
- For ALL Residents the VHA needs to continue to analyze “The Dream” yearly North to Far South to make sure still applicable or requiring modification.

STATUS OF INITIATIVES & RECOMMENDATIONS

IDENTIFY RESIDENTS' NEEDS AND DEFINE & IMPLEMENT INITIATIVES

NEW - 2023 Strategy Should be to Focus on ALL Residents

- Upon further reflection we should define the various key segments of our membership base and make sure we don't just focus on the needs of the Far South/Next Generation members but also current members.
- How have their needs changed now that they have been here longer and are perhaps older?
- What do we need to do to make sure we're addressing their needs which may have changed over the years?
- Our programs should be designed to address needs of the different members.

VHA Information Systems & Technology Strategy

SLIDES & HANDOUTS

Date 10/15/22

OBJECTIVE /GOAL:

- The Web/Cloud-based VHA Business Systems implemented in 2021 and modified in 2022 will have matured and will provide a competitive advantage for the VHA
- The Customer facing Web Page and Social Media are “Best in Class” for volunteer organization and driving value-oriented communications with our Members / Residents every day.
- The integrated back office provides VHA Leadership personnel with the information, processes, policies, procedures and efficiencies for seamless access whenever and however they need it.
- VHA Operations have been streamlined and cost of operations reduced. VHA Operations

STATUS OF INITIATIVES & RECOMMENDATIONS

BACK OFFICE - FEATURES, PROCEDURES, ROLES, TRAINING

- Completion of Phase 2 (Back Office) needs to be verified. This includes the following:
 - Data has been successfully loaded from former system as well as new required data. **ACTV - There were questions as to what membership information has been uploaded AND more importantly, is it accurate? Need to Verify.**
 - Document repository e.g. Policies and Procedures Manual implemented and populated. **ACTV It appears most documents are being populated and now it's a matter of end users knowing how to download and print what is needed. Need to confirm all active Policies & Procedures loaded.**
 - Roles defined, individuals assigned to fill them and trained to support ongoing administration and operation of the Back Office. **CPLT - Web site content editor role and responsible individual assigned. ACTV - Don't know who is assigned to other roles**
 - Access control defined and individual assigned and trained to administer. Including management of passwords. **ACTV - Unsure if all previous various VHA emails have been merged into one general “admin” email. It was understood from the November meeting that there were a lot of different admin emails out there that were not being checked. Not sure who is administering - need to confirm**
 - Procedures established for operation of Website and Back Office. **ACTV - Need to confirm**
 - VHA Leadership personnel trained on accessing and use of new business system (Website and Back Office). **ACTV - Need to confirm completion.**
 - **ACTV Website & Back Office - Word Press is one of the most commonly used website back offices. Therefore, many people already have experience with it. This will serve the VHA well for future generations of VPs and Board members**

FUTURE NEEDS & DEVELOPMENT PROCESS

- Define Future needs many of which will be identified by the other Strategic Plan Priority Initiatives. Based on results of other Strategy areas (e.g. Marketing & Communications, Membership/Volunteer Recruitment, etc.) there will probably be additional requirements that will need to be added/changed to our VHA Business System. Some might be able to be implemented within the new system. Others might require modification to our business system. They will have to be evaluated, cost estimated, approved and funded.
 - **PLAN** There is always room for improvement especially as technology advances and the needs of the VHA increase.
 - **NEW** - Need some type of formal process for IT updates/changes. As new needs arise or issues identified with certain parts of our IT/business systems we should have a process to identify updates/changes needed. We would track the upgrades/changes via a parking lot and prioritize the needs. We could then get cost estimates from Tangent or other Developer and decide which ones to fund. We then would systematically update the IT system on a scheduled basis (i.e. website updates twice a year, etc).
- **NEW** - Consider having a specific budget line for IT support/updates.

LEADERSHIP and SUPPORTING TEAM

- There appears to be a need for a leader to provide overall oversight and coordination of our Information Systems & Technology Strategy and Operations. **PLAN - seems general agreement with the need.**