

Strategic Priority Team Recommendations



February 6, 2024

Agenda

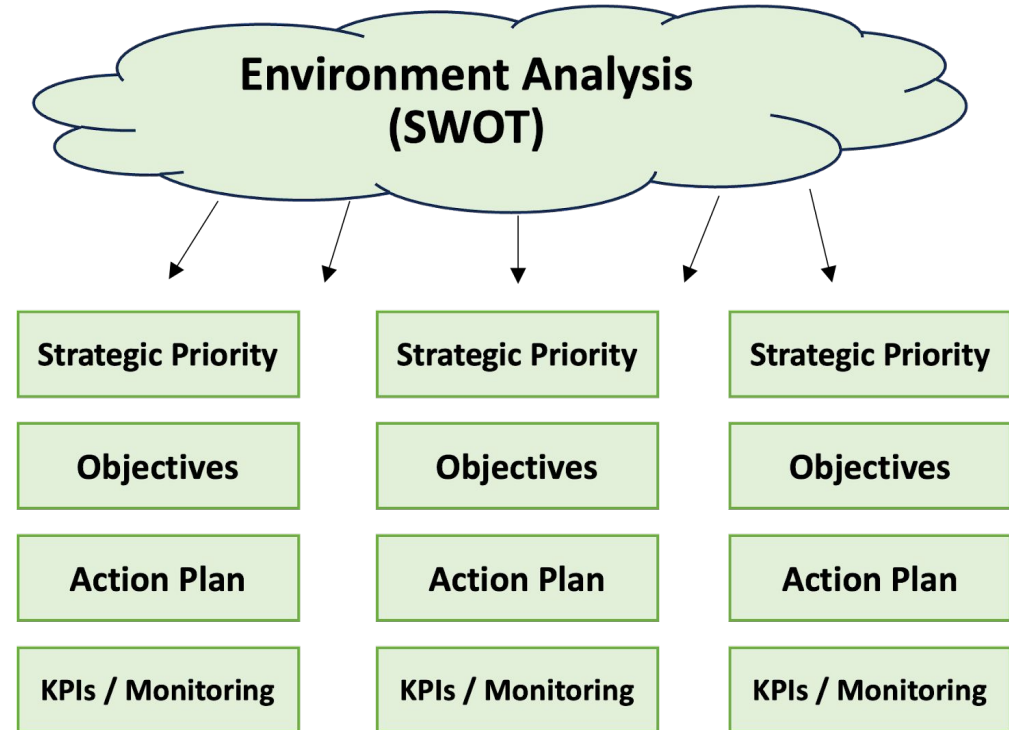
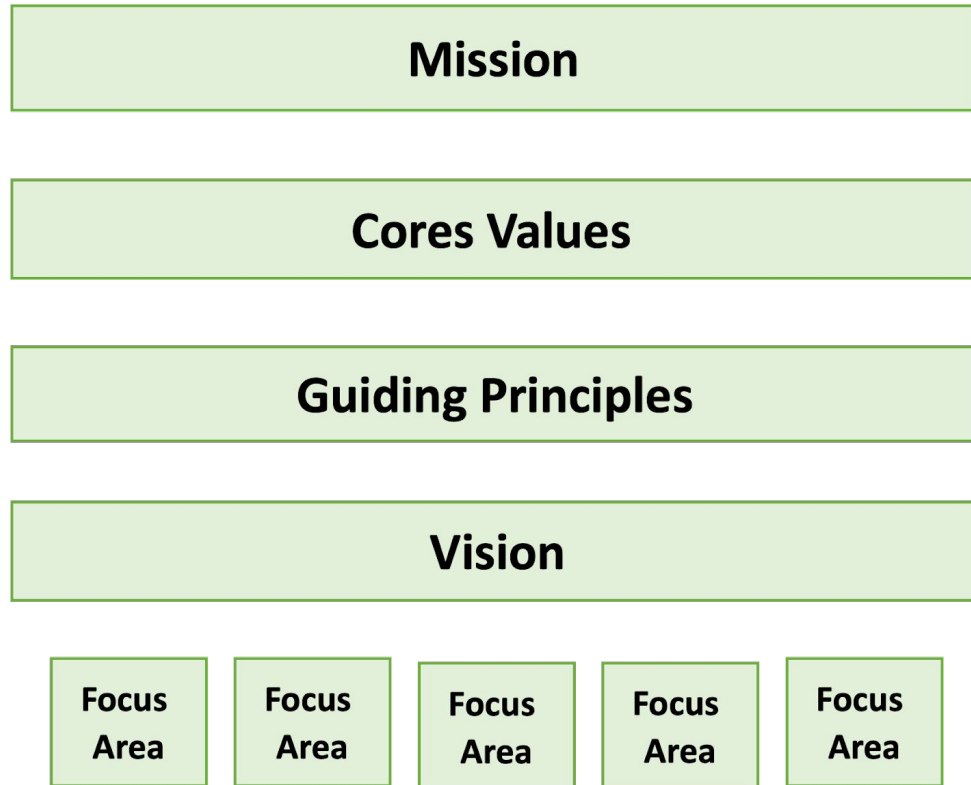


- Brief Strategic Plan Review
- Strategic Priority Team Presentations
 - Create a socially strong community that promotes the health and well-being of OV Residents – **Phyllis Pierce**
 - Develop strong relationships with local and state government – **Bob Sabo**
 - Safeguard the dependency OV has on the Blackhawk Country Club – **Bruce Blanchard**
 - Strengthen Financial Reserves; identify and take advantage of opportunities to control costs – **Dan Kanner**
 - Develop a Compliance Program that addresses the need for enforcement of Declaration, By-laws and Rules and Regulations – **Carole Plotnick**
 - Strengthen resident and employee partnership – **Sara Newell**
 - Establish practices and adopt technologies for environmental sustainability – **Linda Fuchs**
 - Maintain and improve Ononoque Village infrastructure and appearance - **John Weidner**
 - Implement and maintain a Strategic Marketing and Communications Plan – **John Carpenter**
- Next steps
- Close

Strategic Plan Foundation



Strategic Planning Process



Strategic Plan Foundation



Mission

“Our mission is to provide an outstanding resident and employee experience while protecting and enhancing the OV brand, being fiscally responsible and ensuring a stable and safe environment.”

Vision

“Our vision is to become the finest 55+ condominium association in Connecticut where residents and employees work cooperatively and employ best practices to sustain an economically, environmentally and socially strong community.”

Core Values

*“In fulfilling our mission and achieving our vision we value **civility, quality, transparency, resident and employee satisfaction, security, adherence to process, sustainability, the OV image, fairness and ethical principles** in all our actions.”*

Strategic Priority Team

Create a socially strong community that promotes the health and well-being of OV Residents.



SPT Members:

Jill Bachman

Becky Botkin

Diane Fero

Phyllis Pierce

Myrna Mills Albino (Coach)

February 6, 2024

Why is it a Strategic Priority?



- Loneliness is a public health crisis.

Why is it a Strategic Priority?

- 50% increased risk of developing dementia for older adults.
- 32% increased risk of stroke
- 29% increased risk of heart disease.



Recommendation

- Take concrete steps to improve social connectiveness and mitigate the physical health consequences of loneliness and isolation.



Most Vulnerable at Oronoque Village



- New residents.
- Those who live alone.
- Those who are homebound.

Recommendation



- Ad hoc OV Health and Wellness Committee.
- Outdoor Facilities Reserve to fund facilities that promote outdoor social gathering and health and wellness activities.

Recommendation



- Welcome new residents with welcome packs, monthly orientations and socials so they can meet one another as well as others in the community.
- Encourage our residents to reach out to newcomers directly.
- Improve the experience of those who attend events alone.

Resources

- Local – Baldwin Center
- State - CHOICES
- Federal - National Family Caregivers Support program





Recommendation

- Arrange speakers from these local and state agencies to come and explain their services and how they benefit our residents.
- Have a ‘reference librarian’/volunteer create an online reference library that has contact information for resources both in the Village as well as resources outside of the village.
- Use our existing technology, including the TV station, to livestream meetings.
- Email discussion forums to relay important and relevant information.



Thank You

ANY QUESTIONS?




Strategic Planning Team

Relationships with State/Local Governments Recommendations

February 6, 2024

Deb Gunzelman
Bob Sabo
Sabine Curry – Facilitator



Introduction

Oronoque Village exists in an ecosystem of public, not for profit and other external organizations. All have the potential to benefit our residents. The purpose of the External Resources Planning group is to suggest ways these resources can be engaged with our community.

Our recommendations are focused on four specific areas as described below.





1. Inventory a list of external organizations that can offer services to both our residents and OVCA/OVTD.

These services can include medical, health, social services, financial assistance, and other services.

Once identified, an **OVCA committee or designated representative** would confirm services, reach out to the organization for more information and confirm what they could provide.

This information would be communicated through a dedicated tab on the OV website. Periodic articles highlighting specific services could appear in the Villager.

In some cases, events with a specific organization could be scheduled onsite. For example, the Stratford Health department offers periodic vaccination clinics, health screening clinics and other educational sessions for residents.



2. Examine security and police presence for the Village

The recent Town Hall meetings raised security issues and the role of the Stratford Police Department (SPD) in the village. We should also review the role of other emergency services such as Stratford EMS and Fire.

Create a safety and security audit of the village under the auspices of OVCA and OVTD. This should include lighting, traffic and pedestrian safety, wayfinding, and overall resident security.

Examine the current relationship with Stratford Police.

Meet with Stratford PD, EMS and Fire to discuss security and safety issues.



3. Establish a regular communication cadence with Town of Stratford, State of CT and federal representatives.

Oronoque Village is impacted by the decisions of our appointed and elected officials. Also, our 900+ households can leverage their voting support with elected officials aligned with our best interests. We recommend establishing a communication channel with representatives at each level.

We also recommend a regular cadence of meetings with Town and State officials. This would be similar to the recent meeting with Mayor Hoydick and her staff.

This should be a **joint effort between OVTD and OVCA**. A specific designee should be named to coordinate this effort.



4. Develop an Alternative Funding Committee.

Multiple organizations at various levels offer funding to recognized “municipal” entities like OVTD. We recommend that an effort be made to Research, evaluate and process municipal, state and federal funding opportunities through grants, awards, and working stipends.

The committee would interface with OVCA and OVTD to determine the placement and execution of funds by the respective groups. The OV Alternative Funding committee would operate as an entity of the federal government's System for Award Management (SAM).



Thank you

We appreciate the efforts of OVCA and OVTD to involve residents in the Strategic Planning Process

We look forward to working together.



Thank You

ANY QUESTIONS?

Safeguard OV'S Dependency on Blackhawk Country Club



February 6, 2024

Safeguard OV'S Dependency on Blackhawk Country Club Team Members

Bruce Blanchard	Carole Guglielmino
Marilyn Coffey	Joe Myers
Norm Dube	Sue Sapia
Phil Flaker	Fred Strassburger
Bob Grosso	

Objectives

- Determine methods to generate a positive relationship between Oronoque Village residents and Blackhawk Country Club Ownership and members.
- Foster programs that enhance cooperation with regard to boundaries, membership and restaurant usage.
- Accomplish the creation and implementation of events and programs to enhance the relationship and solidify the Country Club for the future benefit of both Communities.

Strategy – Country Club

- The overall ownership and management of Black Country Club (BHCC) is financially strong with competent management, foresight in planning and communicative in dialogue with OV. As a community, we need to view BHCC as a roof-mate and the value it represents to our Condo and village as a whole.
- Alliance is making BHCC a top-rated private golf club via substantial improvements in its first two years of ownership. There is now an opportunity to improve its relationship with OV re: generate more active OV golf participation with the Club. There are two opportunities we can leverage.

Strategy – Country Club

- Restart the OV resident/guest tournament which was discontinued after three years. It was very successful in the past. A date has been set for July 15, 2024 and a committee has been formed to run the tournament.
- To consider availability of beginner and/or private golf lessons specific to OV. This could include the BHHC staff plus Jordan Lintz, a former LPGA player who currently runs clinics at the club.

Strategy - Restaurant

The following are opportunities for improvement.

- Enhance the ability to hear better which is structurally being done during the month on January, 2024.
- To consider catering for OV events held in our two Clubhouses.
- To explore a discount for special OV events held at the restaurant.
- Publicize the use of the credit card with the discount that is available in the restaurant.
- For now, we will not explore the use of the covenant that primarily dictates the use of advertising.



Thank You

ANY QUESTIONS?

Strategic Priority Team

Strengthen Financial Reserves

February 6, 2024



Team Members

Mike Anderson

Bob Davie

Dan Kanner

John Weidner

Tom Becker/Ken Colman (Coaches)



Why is it a Strategic Priority?

- Overall, while the magnitude of the \$3 million shortfall is in question, we all agree that a deficit certainly exists and will only grow as our 52 year old village ages.
- Over the last six years our average yearly capital reserve contribution from both CA and TD is only \$425K, while the Becht study calls for an average yearly reserve contribution of \$1.3 million over the next six years using the more modest 2.5% reserve balance methodology.



Recommendation

- 1) Using OVTD to issue low interest municipal bonds---while contemplated recently in the road paving program, the closing costs to proceeds was deemed prohibitive; maybe not so for a much larger bonding that would also finish the outstanding road issues?
- 2) Investigation of state and federal grants for senior condo associations
- 3) Utilization of the pending community contribution fee special reserve
- 4) Traditional bank financing similar to the 2015 renovation loan
- 5) Across the board increase in our facilities usage fees



Recommendation

- The Becht study, using an item-by-item individual component analysis, came up with a present required capital reserve balance of almost \$4.1 million. When compared to the June 30, 2023 combined OVCA and OVTD reserves of some \$1.1 million, a \$3 million deficit results.
- In reviewing the deficit by component, three items alone comprise almost 70% of the total, namely roof replacement (\$823K), roads and parking lots (\$229K), and outside concrete stairs and railing (\$1 million).



Recommendation

- Some of the committee members feel that the roads are currently being ably addressed by the OVTD Road Committee, which is seeking funding to complete the south side paving goals.
- Some members questioned the magnitude of the outside stairways and rails calculation, especially in view of the ongoing repair effort taken by our Maintenance team to mitigate any possible insurance claims.



Thank You

ANY QUESTIONS?

Strategic Priority Team

Compliance

February 6, 2024



SPT Members:

Dina Glantz

Carole Plotnick

Lee Schlafer (Coach)

Strategic Recognition

- Rules and regulations require consistent enforcement to maintain the appeal and attractiveness of Oronoque Village as this community of seniors becomes more senior.



Recommendation

- The committee suggests a review of the existing rules to verify their necessity and relevance to achieve the goals of the community.
 - While most rules were created for valid reasons, it would be worthwhile to confirm that they continue to have merit and that no revisions are needed to make a rule more relevant and applicable.





Recommendation

- Upon completion of the review process, an on-going quarterly program to communicate rules to residents should be established.
 - Rules that are the most applicable by season should be messaged to residents via the Villager and the OV website.
 - The messaging should explain what the rule requires and why the rule was created.
 - The messaging should be a permanent feature of our communication tools to help residents be informed about a topic they may not otherwise view as important.

Conclusion

- There can be no expectation of adherence to the rules without enforcement.
 - If a professional approach to enforcement of rules is not undertaken, there will likely be a deterioration in adherence to rules as new residents move in and observe rule violations with no consequences.
 - The time and talents of the Executive Director and Maintenance Director are not best spent dealing with day-to-day compliance matters.
 - Delegation of this task should be given to a staff member who can develop a process and maintain the objectivity and professionalism needed to deal with sensitive issues.



Recommendation

- The focus group recommends that:
 - A designated staff individual be assigned the responsibility of rules enforcement.
 - A job description be created that details the responsibility of rules enforcement.
 - The job description be shared with residents so they understand how compliance and enforcement will function in the community.





Thank You

ANY QUESTIONS?

Strategic Priority Team: Employee Experience



February 6, 2024

SPT Members:

Sara Newell, Team Captain

Dave Bingham

Linda Satlin

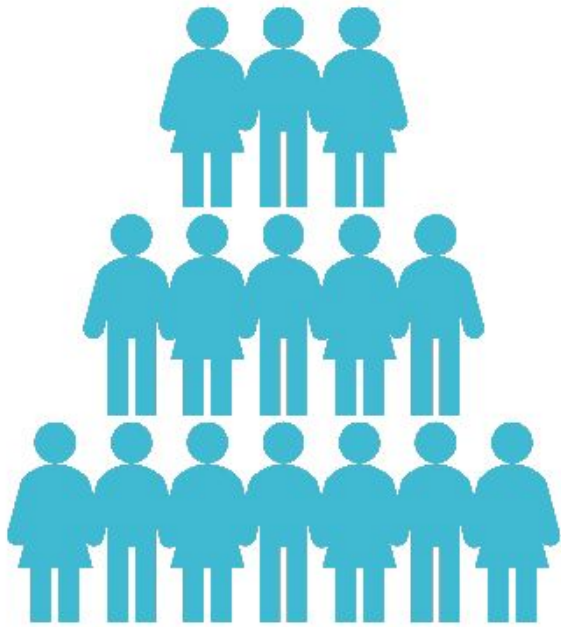
Kathy Grogan

Maureen Gordon

Maggie Dunigan

Norm Dube

Mark Rhatigan, ED, Coach



Employees are essential to the success of the Oronoque Village Strategic Foundation.

Because of our strong belief in this fundamental principle, the team felt it was imperative to re-state the Mission, Vision, and Core Values to include the Employees.



The maintenance of the idyllic setting and smooth day to day operations of Oronoque Village, the consistent increase of property values, and the ability of Oronoque Village to attract new Unit Owners is a direct result of the efforts of our employees.

When a person becomes a Unit owner, in Oronoque Village, they become an employer. As an employer, we have the obligation to ensure that our employees feel valued and understand that they are critical to the success of our community.

MISSION

□ Our mission is to provide an outstanding and rewarding homeowner experience. Oronoque Village values *both its residents and employees* and strives to promote the beauty and desirability of our community.



VISION

- Our vision is to become the finest 55+ condominium community in Connecticut where residents, employees, and elected leaders work collaboratively and employ best practices to sustain an economically, environmentally and socially strong community.



CORE VALUES

- In fulfilling our mission and achieving our vision, we value civility, equality, transparency, *resident and employee satisfaction*, security, adherence to process, sustainability, the OV image, fairness and ethical principles in all our actions.

A large, 3D question mark graphic is positioned on the right side of the slide. It is rendered in a light grey color with a subtle red shadow, giving it a three-dimensional appearance. The background is a solid dark red color.

Thank You

ANY QUESTIONS?

Strategic Priority Team

ENVIRONMENTAL SUSTAINABILITY

February 6, 2024



SPT Members:

Deborah Grossman, Lighting

Fred Strassburger, Air Quality

Minna Barrett, Integrated Pest
Management

Nick Harding, Alternative
Energy

Linda Fuchs, Coach



Why is it a Strategic Priority?

- Oronoque Village is over 300 acres of property that include both commercial buildings and a large amount of landscaping. The Environmental Sustainability Team recommends having an assessment and long term plan for maintaining and improving our landscape and community buildings.
- The team winnowed down a large number of ideas to four that have potential for immediate improvement.
Those areas of concern are...



Recommendation

- Outdoor lighting to be more effective and reduce use of energy
- Indoor Air Quality to ensure residents are safe from hazardous toxins
- Alternative energy to reduce dependence on oil products
- Integrated Pest management to ensure our landscape is pesticide free



Recommendation

- Create a Standing Committee of resident volunteers and a representative from the maintenance department to develop an assessment of the Environmental Sustainability Team’s ideas.
- Develop a long term plan (5 to 10 years) of replacement of fixtures, plantings and mechanicals and implement the necessary “Best Practice” solutions for the highest quality environment available to Oronoque Residents.



Recommendation

- Research using area experts to understand, evaluate and implement “best practices” that work for the Oronoque Village Environment.
- Continue to explore other opportunities for environmental sustainability such as battery-operated vehicles and tools, replacement of grass with sustainable ground cover and leaf recycling for the replacement of topsoil.



Thank You

ANY QUESTIONS?



OV Strategic Plan Infrastructure & Appearance

Our Team Purpose:

To identify issues and concerns regarding Oronoque Village's Infrastructure and Appearance, and to create a plan that protects a homeowner's individual property value and the overall value of Oronoque Village.

February 6, 2024

Team Assumptions & Acknowledgements

- OV is an active 55+ residential community. It was not founded to provide senior services, however, it values providing a safe and socially active environment for all residents.
- Long-term planning requires micro review and macro planning vs. short-term band-aids.
- Infrastructure and appearance items constitute a significant portion of the OVCA and OVTD budgets.
- We need the prudent building of reserves, and prudent allocations to accomplish our goals.
- Not all OV residents are interested, informed, or engaged in participating in planning and in operating activities, including the budget process. Many are not interested or are unable to care for their surrounding areas, while unsightly, untended foundation shrubs, for example, directly impact appearance and value.
- Too much is left to the homeowner to typically address via a work order i.e., dead or threatening trees, sidewalk replacement, siding replacement, grass seeding, etc.
- A good strategic plan should reduce the need for residents to request work orders.

A Microcosm Approach

- We believe the most comprehensive way to review and ultimately budget for the overall infrastructure and appearance needs of the Village is to assess each, individual unit as an individual microcosm.
- This means: from roof to siding to painting to sidewalks to trees to grass etc., what does the unit and its surrounding area/landscaping need to have done?
- This means: the entire strategic planning and budgeting process for both Infrastructure and Appearance must start at zero and build from there.

PHASE ONE – ASSESS

1. **ASSESS THE CONDITION** of each unit's "skin," and interior (build on OVMD's 14 Points per Resale Docs), and surrounding landscape, recognizing that every item has a finite life
2. **COMPILE DATA** on each individual unit's current condition (siding, decks, windows, roofs, walkways, etc.) as well as the surrounding landscaping (trees, foundation plantings, grass, etc.) **TO BE ENTERED INTO AN OVERALL DATABASE**, able to be sorted by individual items (i.e. walkways, decks, trees, etc.)
3. From the database **PRIORITIZE** the items/tasks for **SCHEDULING** purposes (walkways needing repair and when, shrubs needing to be removed for appearances' sake, etc.)
4. **INVITE and ASSESS QUOTES** as needed

PHASE TWO – ACT

5. **ACT** with
the **input** of the **OVCA** and the **OVTD Treasurers**
and a team of **qualified and experienced residents**
and/or **outside advisors**

6. **DETERMINE** the **BEST FUNDING/BUDGET PROCESSES**
to **BUILD RESERVES** and to **ALLOCATE MONIES**
per a **SCHEDULE** based on **need and cost** to complete the goal (**CYCLE** or specific task)

7. **IMPLEMENT**: **initiate, implement, oversee** the work

8. **HOLD CONTRACTORS, SERVICE PROVIDERS, STAFF ACCOUNTABLE** for the work **AND** the
accomplishment of the goal

9. **HOLD RESIDENTS ACCOUNTABLE**: **ENFORCE CODES/GUIDELINES** and **CONSEQUENCES**

Leadership and Commitment

To accomplish our goals will require leadership, commitment, communication and cooperation by

- OVCA and OVTD Officers
- District Representatives
- OVTD Representatives
- Committees
- VOLUNTEERS
- The Executive Director
- The Maintenance Director
- Residents and Neighbors working together
- The Staff

Note: There are current and former committees and studies with valuable resources which should be invited and engaged and work together to reach our common goals.

Examples: The Maintenance Committee; the Architectural Committee; the Preventative Maintenance (PMP) Committee; the Roof Study; the Road Study/Committee; the recent Reserve Study... And our many other talented residents who make Oronoque Village a community we call home.



Thank You

ANY QUESTIONS?

Marketing & Communications Strategy Team

Tom Fuchs - Coach

Strategic Planning Foundation

Marketing & Communications Team
Strategic Planning Foundation



The Communications Strategy Team

- Tom Fuchs (Coach)
- Joe Mackenna
- Edie Briner
- John Carpenter
- Kate Coburn

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Summary

The team has formulated the following
Objectives and Strategies for
OV Marketing and Communications

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Summary

Overall Objective:

Elevate **public awareness** of Oronoque Village being one of the finest 55+ condominium associations in CT.

- End benefit – raise our property values.
- Focus areas –
 - 1) Existing public perceptions of OV;
 - 2) What makes OV one of the finest associations;
 - 3) Best methods to raise OV awareness;
 - 4) Existing Village attributes and new strategic team initiatives that could improve the OV perception/product

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Summary

1) Existing Public Perceptions

Feedback, initially from real estate agents and the community, indicates further work is needed to determine positioning of the OV brand/messaging. This information base can drive the positioning of the OV brand and messaging.

Strategy

Conduct three ***focus groups*** to identify perceptions of OV:

- 1) Former/current town officials and local businesses.
- 2) Local real estate agents.
- 3) Current residents (recent buyers) - why they purchased in OV.

Why? The results provide a foundation of information for the next set of decisions.

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2) What Makes OV One of the Finest

Contrast OV with the competition (other 55+ communities in CT) and the “product” (the attributes of OV, and the OV public image).

Strategies

- A) Conduct in-depth analysis of other 55+ communities in CT.
- B) Gain agreement on key criteria for comparisons i.e. average home price, geographic location, exclusively 55+ or mixed ages, available amenities and number offered, physical appearance of the community, the size (number of units), stage of development (resales only?) and home style (condos only or mix of units including single homes)?
- C) Review new initiatives from other strategic planning teams (i.e. initiatives to become more environmentally friendly, etc.), and any improvements in internal communications. Incorporate improvements into messaging as applicable.

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3) Ways to Raise Awareness of OV Strategies

A. Create **new or existing resident events** providing the basis for public relations campaigns (publicity) which demonstrate that OV is a good neighbor:

- Alzheimer's walk
- Dog parade (STARS)
- Toy Drive (Sterling House)
- School student mentoring (Stratford Volunteers Corp)
- Clothing drives (Vietnam Vets, Salvation Army)
- Furniture (Habitat for Humanity) – OV May cleanup

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3) Ways to Raise Awareness of OV Strategies (cont.)

- B. Explore costs of advertising (*identify audience, scope, & purpose*).
- C. Explore feasibility of **social media** efforts to build awareness.
- D. Develop marketing materials (info sheets?) for real estate agents to achieve consistent, repetitive Village messaging.
- E. Explore market appeal of a buyer's choice of buying remodeled units or updating original ones to the buyer's taste & budget.

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4) Prioritization of Strategic Initiatives / “Product” Improvements

Pursue “product” (OV perceived value) initiatives making the Village more socially strong (via improved internal communications).

Strategies

- A. Incorporate into outbound messaging **Village enhancements** identified and implemented by other strategic teams which improve the “Product” (the Village itself).
- B. Identify methods of **recruiting** more Village **volunteers** to develop a talent resource/data base,
- C. Explore resident willingness to **participate** in **Town elected** and volunteer positions.

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“Product” Improvement Strategy Suggestion

Develop Line of OV Merchandise

- Build awareness of OV.
- Enhance a sense of community.
- Strengthen our communication mission of awareness.



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4) Prioritization of Strategic Initiatives/“Product” Improvements

D. Enhance **internal communications**:

- **Reach residents** who do not use current OV communications channels (and their caregivers as necessary).
- Provide more **informational sessions** for residents on relevant topics
- **Communicate** Stratford’s senior services, OV emergency plan.

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Summary & Way Forward

Actions for Better External and Internal Communication

- Information gathering & analysis (focus groups, strategies, priorities)
- Augment public awareness initiatives; explore new comm channels
- Exploit opportunities for better OV awareness and positive perception
- Recruit more volunteers through awareness & information
- Enhanced external communication is our goal, but improved internal communication is the means to the end
- Looking to the OV Communications standing committee for leadership

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Thank You

ANY QUESTIONS?