

Mt. Lebanon Partnership

Strategic Planning Assessment



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Introduction

The Board of Directors for the Mt. Lebanon Partnership is undertaking an organizational assessment with the intent to create an action plan based upon strategic priorities. This document provides an organizational scan, summary of activities, and recommendations for next steps.

The Strategic Assessment offers an objective review of the Partnership and is a step towards defining and refining the Board's goals and action steps necessary to implement those goals. The priorities and recommendations are not definitive but rather a work in progress and it is up to the Board to continue the effort.

Organizational Scan

Formed in 1991 as a Community Development Corporation, the Partnership's bylaws (Article 1, Section 1. 2015) provide the following Mission and Vision statements:

Mission Statement:

"The mission of the Mt. Lebanon Partnership is to create a vibrant community in Mt. Lebanon by promoting economic growth and preventing or correcting deterioration through the implementation of economic restructuring, design, promotions and organizational plans developed by the Mt. Lebanon Partnership Board of Directors on behalf of the business owners, property owners, residents and volunteers within Mt. Lebanon commercial districts.

It is the intention of the Mt. Lebanon Partnership to correct and prevent deterioration in the commercial districts, to encourage historical preservation where possible, to create and implement development plans in the districts, to promote the economic growth of the districts, and to encourage the expansion of commercial enterprises in Mt. Lebanon."

Vision Statement:

"The Mt. Lebanon Partnership makes Mt. Lebanon the Main Street of the South Hills, a true destination where businesses and community come together."

Finances:

This effort did not include a review of the Partnership's Budget and therefore a detailed analysis is not included in this report. The Partnership Board Retreat revealed that the organization does have fiscal reserves however, it is not clear if a capital budget exists. Based upon available information, it appears that the Partnership's primary source of funding is revenue generated through various events. Additionally, the Municipality of Mt. Lebanon provides support for contract staff positions and a fiscal donation.

Committees:

There are two Standing Committees with governance authority as follows:

1. Executive committee – Governance
2. Nominating committee – Board Membership

Several committees serve in an advisory role but it is unknown if they were established in accordance with the Partnership's Bylaws. These committees do not follow a formal strategic plan/action plan but provide regular updates at Board meetings (the Board conducts 10 meetings per year).

1. Marketing & Branding
2. Events

3. Design

Geographic Focus Area

The Bylaws state that the Partnership will serve all business districts within Mt. Lebanon. However, Board Members acknowledge that the Partnership's geographic focus (in order of priority) are as follows:

1. Uptown Mt. Lebanon/Washington Road
2. Beverly Road
3. Other minor districts such as Castle Shannon and Cochran

Board Engagement Summary

The Board of Directors for the Mt. Lebanon Partnership identified the need to examine organizational needs and strategic priorities. Activities undertaken during the initial assessment included an online survey conducted in March and a board retreat held on March 26, 2017.

Survey Summary

Fifteen people associated with the Board and/or Committee chairs responded to an online survey designed to identify the perceptions of Board member regarding engagement with the Partnership, alignment and support of the mission of the Partnership, productivity of the organization, and satisfaction with the activities of the Partnership.

The survey revealed that the Board supports the organizational mission of the Partnership and members work cooperatively to achieve the mission. The Board believes the committee structure supports the mission but there is not clear guidance on the operations or activities of the committees. Additionally, there is concern regarding the lack of defined metrics and protocols to share information regarding activities and results of the committees. Finally, a lack of protocols contributes to a feeling that the time and talents of Board members and volunteers are not used to the highest and best potential. For instance, most agree that not all of the board members engage actively, meetings are not as productive as they could be and internal procedures and guidelines are not clearly articulated.

Retreat Summary

On March 26, a planning retreat held at the Mt. Lebanon municipal building challenged the Board of Directors to discuss how the organization should evolve over the next 3-5 years. Eleven members of the Board of Directors attended the four-hour session to discuss a variety of topics including where the Board should focus its efforts, committee functions, priority actions, and organizational needs.

Partnership Goals

During the Board Retreat, the members shared the reason they were involved and their understanding of the purpose of the Partnership. The majority of Board members agreed that the Partnership supports the vibrancy of all business districts within Mt. Lebanon with the priority being the Uptown area followed by the Beverly Road business district.

Two issues of contention became evident at the outset of the retreat:

1. Does the Partnership exist to bring outsiders into the community or is it to serve Mt. Lebanon residents and businesses as well to create a destination?

2. Is it necessary to brand the Partnership to create an identity separate from the municipality and/or other entities serving Mt. Lebanon?

Following a facilitated discussion, the Board identified several areas where the Partnership serves a valuable role, all of which align with the Goals outlined in the By-laws, and are as follows:

1. Be a catalyst for positive change
2. Assume responsibilities for tasks outside municipal realm
3. Support physical improvements to business district and create a destination
4. Continue to organize and support activities that attract people to Mt. Lebanon
5. Build the Mt. Lebanon brand
6. Support vibrant business districts with a healthy mix of retail, service, and office space

Draft Priorities

Throughout the Board Retreat, the members discussed strategic priorities and organizational goals as shown below. These topics are not final or inclusive. Rather, the Board should continue to identify, define, and prioritize its priorities.

1. Transportation
 - a. Portal
 - b. Parse Way
 - c. T-Stop/Clock Tower
 - d. Traffic
 - e. Parking
2. Marketing
 - a. Brand Development
 - b. Website
 - c. Social Media
3. Placemaking & Design
 - a. Appearance of business districts
 - b. Signs
 - c. Building Facades
 - d. Streetscape
 - e. Municipal regulations – ensure that local ordinances and guidance tools are updated and reflect Partnership guidelines/goals
 - f. Planters
4. Business Support & Relationships
 - a. Membership
 - b. Business Development = Attract, retain, and establish the Partnership as a valued resource
 - i. Occupancy Study & Assessment
5. Events
 - a. Artist Market
 - b. First Fridays
 - c. Block Party (formally Ultra Party)
 - d. Farmers Market and Second Saturday s
 - e. Plein Air Paint-outs
6. Initiatives
 - a. Arts Initiative
 - b. Accessible Lebo

Recommendations

The following recommendations provide a suggested list of action items for consideration. The recommendations are goal-oriented and action based. Some activities will require support from the municipality or professional facilitator to complete but the first step should begin with the Board to review, revise if needed, and prioritize.

Goal: Strengthen Organizational Capacity

1. Formalize Board Development Process
 - a. Define Board Roles
 - b. Develop onboarding packet and orientation process for Board and Committee members
2. Ensure fiscal sustainability
 - a. Develop a Capital Program tied strategic priorities with allocations to committees as appropriate
3. Demonstrate accountability
 - a. Define measures of success for each strategic priority beyond attendance and profit
 - b. Have committees prepare goals & performance metrics
 - c. Provide regular updates on activities at Board meetings
4. Develop a 3-5 Year Action plan
 - a. The Action Plan is a high-level document that specifies the Strategic Priorities of the Partnership and outlines how it will achieve the priorities
 - b. The Plan should formally document which Committees are recognized by the Partnership
 - c. The Plan should be specific enough to include committee action items such as a summary of their goals for the next 3-5 years or specific efforts they will undertake to support the strategic priorities

Goal: Determine Strategic Priorities

1. Form an ad-hoc committee or working group to identify and clarify strategic priorities
2. Include a discussion of organizational priorities as an agenda item at Board meetings

Goal: Heighten the awareness of the Mt. Lebanon Partnership as a valued resource to the community, businesses, and municipality

1. Support data gathering activities to determine health and composition of the business districts
2. Continue to advance placemaking goals through updates to land use regulations and guidelines
3. Main Street or “main street” – continue dialogue regarding the Main Street Program as a resource for the business community and the Partnership

Goal: Create a strong and effective support base

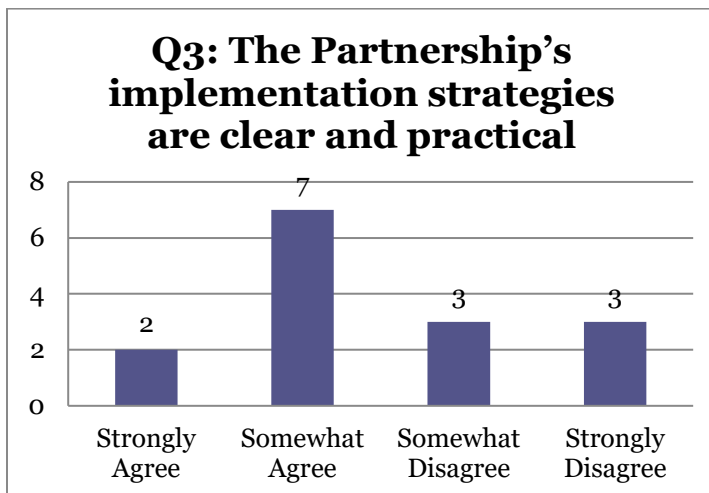
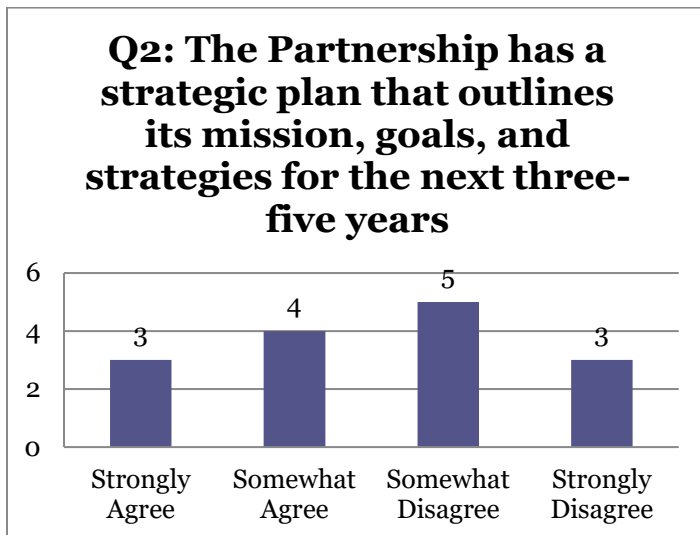
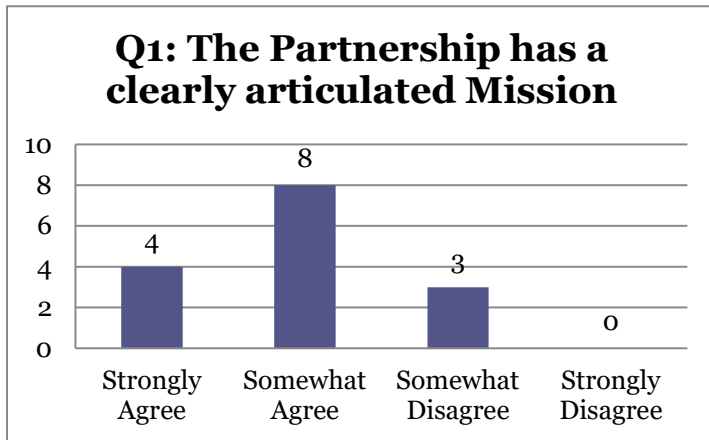
1. Establish a process to engage and recognize volunteers
2. Complete an assessment of Board and volunteer expertise and interests
3. Implement a volunteer plan to capitalize upon identified resources

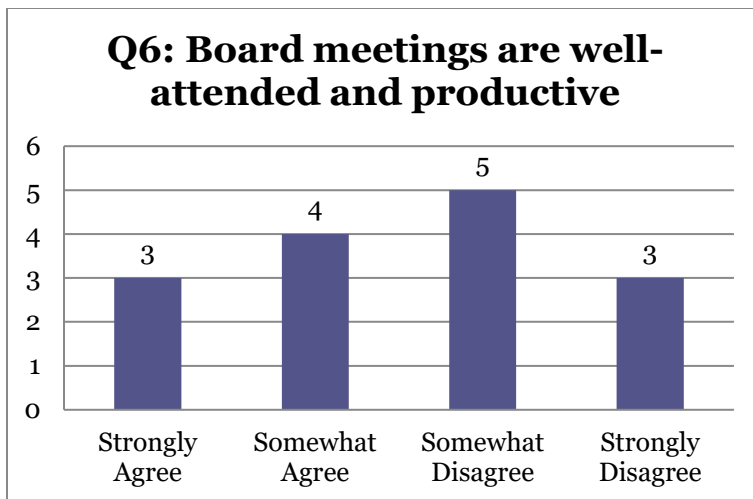
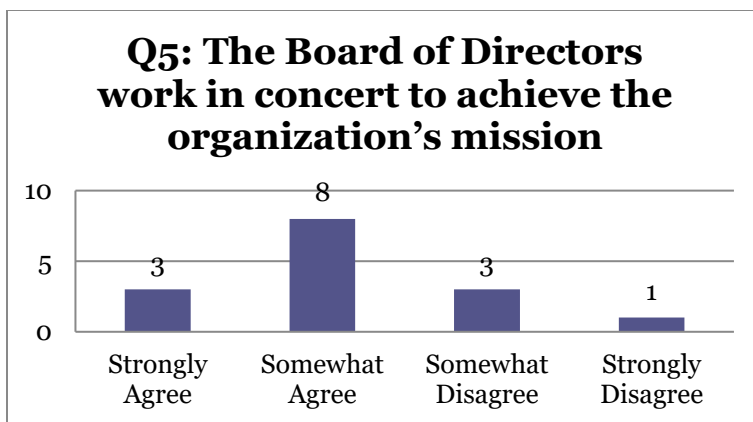
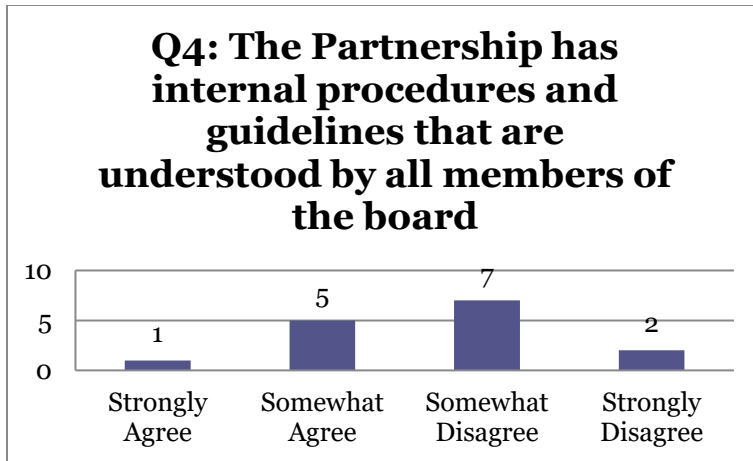
Goal: Strengthen the Municipal Relationship

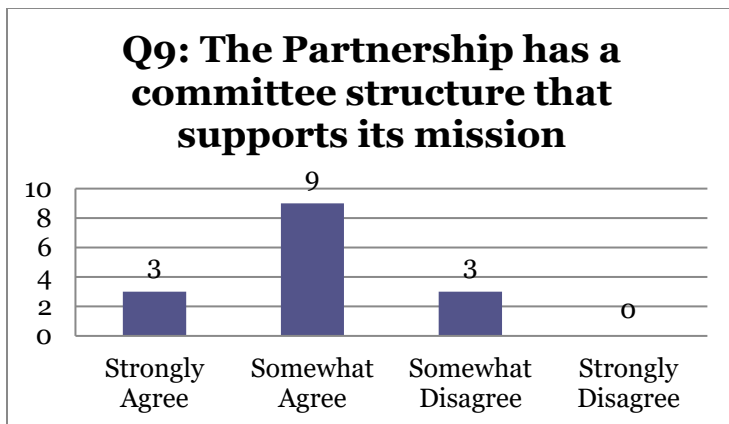
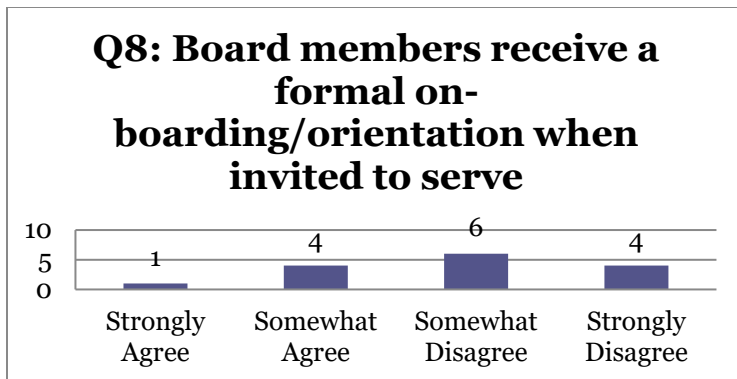
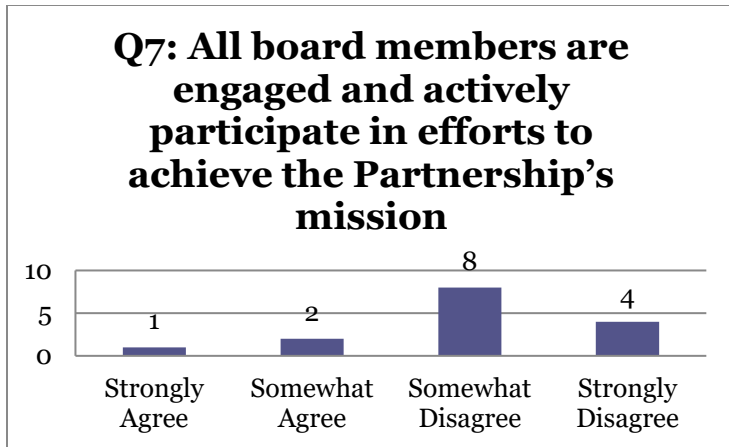
1. Share strategic priorities
2. Establish shared vision
3. Formalize support of contract staff

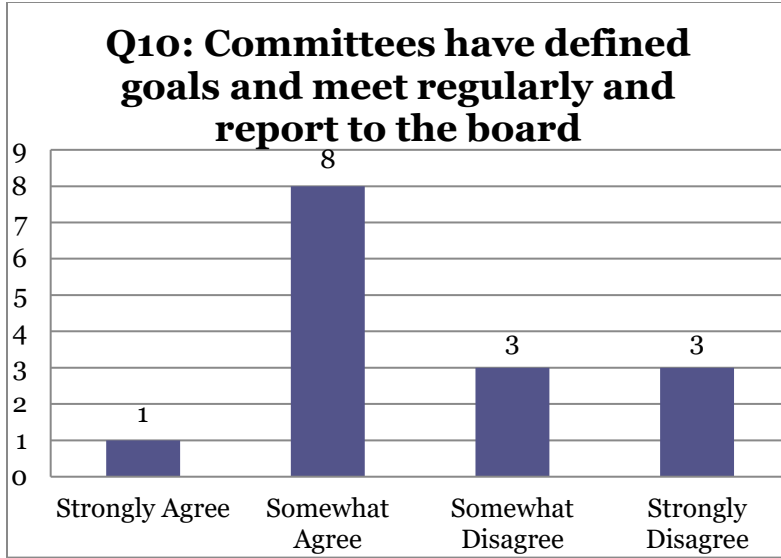
Appendices

Survey Responses









Board Retreat Notes

Passions/Reasons for serving on Board

- Business owner (repeated several times)
- Alternative to “big box” retail (repeated twice)
- Community needs to learn about what the Partnership is/does (repeated twice)
- Need to show exciting things are happening here
- Must maintain and edge & progressive attitude
- Business and home are both here
- Want to make Uptown the Main Street of the South Hills
- We’re very good at events
- I’m a resident and love the accessibility services offered in Uptown
- Lots of pride in what the Partnership has done for events and business (repeated twice)
- Family oriented businesses, both in terms of service AND in ownership (repeated three times)
- Board’s action oriented
- Have been able to get the organization fiscally OK in the past 10 years
- Uptown is an attraction/amenity for residents and others in the area/region (repeated several times)
- Helps bring people into town from other areas
- Partnership gives an opportunity to get involved in my community
- Community and CBD combined make Mt Lebo an exceptional place to live
- Want to help community and economic development opportunities (repeated twice)
- Opportunity to take the next steps forward in the business districts
- Creation of activity/vitality for community
- Successful older and historic business districts help create economically successful and vibrant communities

Where—physically—does Partnership see itself being active

- Uptown (Washington Road) & Beverly Road and *maybe* Castle Shannon Blvd.
- All commercial areas—Uptown, Beverly, Castle Shannon, Galleria, Cochran Road
- By-laws allow broader approach than just commercial districts
- All commercial districts but primarily Uptown (repeated three times)
- Past practice has been to focus on Uptown
- Lots of conversation at this point in re Beverly Road, Castle Shannon Blvd and a little additional talk in re Cochran Road and Galleria.

Where is the organization weak/where are we struggling?

- We’re good at events but we need to be willing to change how we approach them
- Event attendance seems to be declining; events may be stale
- It’s a real challenge to keep events fresh (this was met with consensus agreement)
- Event contractor has difficulty knowing/understanding to whom they report/consult/communicate before/during events
- Changing demographics and ability to stay on-point for events is very tough
- Maintain capacity to keep events going is tough

- (General consensus) Board needs to take next steps as an organization to get a handle on priorities.
- Social media is event specific, but no more than that
- We have money in the bank, why aren't we spending it on the community?
- Partnership does not have an organizational sustainability plan
- No plan to spend all the money; it's a lot but not much in the grand scheme & Board needs a strategic plan/business plan to spend funds appropriately without going broke
- Why do we do events at all?
- Events are to focus on business; part of business development and marketing
- Should ensure events are part of a larger opportunity/strategy for business development/retention etc.
- Need events to help pay for the Partnership's ability to operate
- We killed off Ultra Party and it was doing fine
- Ultra Party was not killed off; it was replaced by Block Party-Ultra Party did not start as Partnership initiative; First Fridays was
- First Fridays have turned a small profit
- Partnership has no identity (emphatically)
- Have to focus on identity
- It doesn't matter if people know about the partnership at all as long as work gets done
- Identity is important for community to know who/what the Partnership is in re funding and recognition to develop sponsorships
- Not necessary for identity/brand outside of work done to bring people into commercial districts
- Would need identity for "members"
- Identity also important for other organizations/entities to make connections with community and commercial opportunities (more or less)
- Vision statement/mission statement are good, but no path on how to address them

What do we do as an organization? Who are we serving?

Committees:

- ❖ Design
- ❖ Marketing
- ❖ Events
- ❖ Artists Market
- ❖ Planters—should this be in design?
- None of the above are in the By-laws

Capacity—as a volunteer organization do we ask ourselves to do too much?

- We have no metrics to measure success
 - ❖ Should measure # of event attendees
 - ❖ Should measure/monitor profit margins for events
 - ❖ No metric to understand how many events we should have
 - ❖ We should develop a report documenting metrics
- Previous iterations of Board/Partnership essentially used 2 metrics
 - ❖ Don't lose money
 - ❖ Do we have the (human) capacity to manage each event

- Why not just use those two as metrics now? Don't lose money, have capacity and bring people into town are sufficient goals
- Don't do events just for event's sake. Events intended to bring people in and familiarize them with Uptown—especially Uptown businesses
- Who do we want to be when we grow up?
 - Previous iterations/last 10 years Board & organization has been a toddler/adolescent. Now time to figure out who we want to be as an adult.
 - We shouldn't limit ourselves to simple ability to make profit on events
 - Bringing people to business districts
 - Should provide a service
 - Does community like the event?
- Businesses
- Residents
 - ❖ These could/are often the same
- People who aren't from here
- Business districts are an asset to the community
 - ❖ Business Districts have been documented as an asset/reason for living in MTL through several different planning processes—it's not a guess.
- Partnership has historically been about serving both the businesses and residents
- Necessary to have vital business districts for all levels of community/economic development; real estate values, vitality, community/cultural development
- Overall value of MTL is built by building value of business districts

Board—do we have the right people? Is participation adequate?

- We need someone experienced/professional in fund-raising/development
- Historically been reluctant to utilize Board resources in fundraising—not using Board adequately to reach out and solicit funding
- We're awfully white
- It's hard to see where we lack without a Board strategic plan that tells us what our short- and long term goals are
- We need to know our own priorities before we know what kinds of expertise we're lacking/should have on the Board
- We don't have our own paid staff; a problem because (municipal staff) doesn't work for us specifically
- But what would we tell a paid staff what they should be doing?
- Without a plan in place that defines our goals and steps to reach those goals, how would we write the job description?
- We already are asking contractor & (municipal staff) to do an awful lot; we could burn through a great deal of money paying someone to do...we don't know what exactly
- Current situation is that we don't need additional funding & if we do we don't know what it would be for
- We DO have arts initiative and accessibility initiative as Board goals
- Those are ad hoc initiatives; they weren't planned in advance
- How does the Board identify its priorities?

Staffing-is it necessary? Do we have “staff?” What is the Municipality’s role in staffing?

- Is it necessary to have staff? (consensus is yes, but current situation in re staffing very difficult)
- Municipality will not share specific information in re business district manager’s responsibilities towards Partnership; this is a serious problem
- Municipal staff support exists because Municipality sees value in Partnership
- Municipality provides \$10-15K every year to Partnership in addition to staff support
- Municipality asks/has asked Partnership to do things it wants done but can’t necessarily do itself
- Draft MOU in re business district manager’s role for Partnership vague and inadequate
- Partnership should propose its own MOU in re business district manager’s role to Municipality and start from there, since they will not provide specificity for the position
- Must have more clarity in re business district manager’s role
- Consensus that incumbent business districts manager good at the job
- Concern that business districts manager picks and chooses when work will & will not be done for Partnership
- Concern business district manager only concerned about Main Street designation and Uptown and not other business districts/projects/initiatives
- Partnership needs specificity about role of Municipal staff
- In lieu of articulation of Partnership goals, lack of specificity in Municipal role may be inevitable
- Business district manager arbitrary about when support will be available outside of Uptown
- Business district manager wary of discussion in re potential hiring of Executive Director for Partnership.
- If we hire an executive director, what would their role be? What will we ask them to do?
- Business district manager has own vision for Uptown, how does that compare with Board’s vision?
- What is the Board’s vision for Uptown? How will it attain that vision?
- Municipality should approach Board and pitch projects that have come out of municipal planning projects-e.g. Comprehensive Plan and Uptown Strategic Plan; Board could then choose or not to participate

What’s next?

- Ensure no vacancies in Uptown
- Uptown business district recognized as “best in class” throughout region
- Ensure business community recognizes value of Partnership
 - ❖ Recently, business owners have suggested business membership to Partnership would be successful-this is not something that was possible in the past.
 - ❖ This creates an opportunity and shows recognition of value of Partnership
- Work for recruitment/creation of new businesses and maintenance/retention of existing businesses in all business districts
- Have more Mt. Lebanon residents engaged in Uptown activities and businesses
- Promotion of Uptown to larger (regional) audience

- Create a membership component to Partnership
- Partnership needs specific brand/established recognition
- Need definition of role in re Municipality
- Need definition of role of Municipal staff support to Partnership
- Create a destination through business districts
- Need to create/maintain an “experience” for local and out-of-town visitors
- Mt. Lebanon should be a commercial destination

What’s the role of the Board in what’s next?

- Build Mt Lebanon business’s brands
- Be the catalyst for business development/branding of business districts
- Make Mt Lebanon a destination
- Develop Mt Lebanon as a destination—placemaking
- HOW will we be a catalyst? What does that look like?
- We should “shoot the moon,” be bold
- Fully utilize/better engage immense potential of volunteer pool in Mt Lebanon
- Ensure there are legal tools in place to protect vibrancy
 - ❖ Design guidance
 - ❖ Updated sign ordinance & guidelines
 - ❖ Zoning to manage types of use
- Implementing good design principles is a way to capitalize on our existing resources
- Ensure business development/recruitment/maintenance
- How do we do that? No plan in place to guide Board on that and other issues
- Use our unique elements to enhance Mt Lebanon
 - ❖ T-line
 - ❖ History
 - ❖ Businesses
 - ❖ Parse Way
- Some reticence in re Parse Way vision
- Must address business composition on street-level to maintain vibrancy
- Board must be catalyst for business development, vibrancy and “design”
- Is Main Street our approach?
 - ❖ Main Street™ is specific designation that applies to Uptown; national program
 - ❖ main street approach is a philosophy of economic development in older CBDs that follow four principles: Organization, promotion, economic vitality (economic restructuring) and design
- Uptown’s designation as a Main Street™ provides specific opportunities but is only a subset of larger Partnership goals and strategies
- main street approach is best philosophy for all business districts in Mt Lebanon, even if they don’t have specific Main Street designation
- Board needs to retain and recruit businesses to Uptown and all business districts

Change—what do we need?

- Must develop organizational/Board strategic plan/business plan
 - Plan should include strategies for long-term organizational sustainability
- Ask Municipality what do they want Partnership to do/be?

- NO—don't need or want to be what Municipality wants; partnership yes, but not as a function of
- Define partnership with Municipality
- Municipality did not drive creation of the organization
- Must develop strategic priorities

Priorities

- Branding
 - ❖ Including website & social media plan
- Marketing plan
- Artists market
- Membership
- Business recruitment and retention
- Streetscape design
- Construction/rehabilitation design/façade program
- Address zoning issues
- Events
- Create metric to analyze success
- Define what success means
- Tool to address building condition
- Signage design/upkeep
- Create gateways
 - ❖ T-station
 - ❖ Parse way
 - ❖ Clocktower Plaza
 - ❖ Vehicular entries into business districts, especially Uptown
- Art initiative
- Define Art Initiative
- Accessibility initiative
- Get municipal relationship right
- Facilitate communication issues between municipality and businesses (roadwork, utility work etc.)
- Create/enhance experience of visiting Mt Lebanon
 - ❖ Art
 - ❖ Design
 - ❖ Healthy business mix
 - ❖ Public infrastructure/streetscape
- Public infrastructure priority should include traffic/vehicular transportation issues
- Addressing/advocating public policies that enhance Partnership mission
- Must develop organizational strategic plan/business plan to figure out ways all these priorities can be addressed and/or whether they should be addressed