



# ROSLINDALE VILLAGE MAIN STREET

**2017 - 2022 Strategic Plan**

**Prepared by Strategy Matters, LLC.**

**JUNE 2017**

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# INTRODUCTION

## Roslindale Village Main Street

The mission of Roslindale Village Main Street (RVMS) is to promote Roslindale Village as an appealing destination and the dynamic center of our community. As an independent non-profit 501(c)(3) organization, we bring together local volunteers, businesses and public agencies to strengthen the Village's economic vitality, physical appearance and unique local character.

RVMS follows the operating principles of the National Main Street Center. The Main Street Approach advocates a return to community self-reliance, local empowerment, and the rebuilding of traditional commercial districts based on their unique assets: distinctive architecture, a pedestrian-friendly environment, personal service, local ownership, and a sense of community. Harnessing the efforts of local volunteers builds long-term success by fostering community involvement and commitment to a shared vision for the neighborhood.

## 2017 - 2022 Strategic Planning

Founded in 1985, RVMS is one of the first urban Main Street programs in the nation. Its inception marked the beginning of a period of growth and revitalization in the neighborhood that has continued today, with Roslindale recently being named one of Boston Magazine's Best Places to Live, and the organization garnering recognition on local and national fronts.

In February 2017, with a committed Board of Directors, a highly-skilled new Executive Director and a strong track record of successful projects, the organization embarked on a strategic planning process with Strategy Matters, LLC, a Boston-based consulting company. The strategic planning process posed the initial question of: *How can RVMS best allocate and align its significant resources (member and staff attention, time, participation, commitment and organizational funding) to further fulfill its mission and deliver on the promise of Roslindale Village?*

RVMS's Strategic Planning Committee, an ad-hoc committee of the Board of Directors, consists of

Elizabeth Sherva, Chair, Strategic  
Planning Committee

Anthony Giordano, President, RVMS  
Board of Directors

Deb DeBenedictis

Liz Graham-Meredith

Daniel Johnson

Chris Kollett

Alia Hamada Forrest, Executive Director, RVMS

# METHODOLOGY

## A Three Phase Process



## Phase I: Understanding the Current Situation

*In this phase, we conducted research and analysis, and engaged with the RVMS stakeholder community to develop a shared understanding and detailed answer to the question, "Where are we today?"*

### Stakeholder Engagement And Internal Data Gathering

Beginning in March 2017, Strategy Matters worked with the Strategic Planning Committee (SPC) to identify key stakeholders, design a plan for engaging these individuals, and collect data and information from the organization. SML consultants conducted interviews, administered online surveys, and attended community events to engage with community members and make observations (Appendix A: Stakeholder Engagement Overview). Questions addressed in these activities included:

- What is RVMS doing well? What could the organization be doing better?
- How do community members perceive RVMS?
- What kind of work should RVMS focus on now and in the future?
- Which aspects of RVMS's work are most important?
- What are community members' observing in their neighborhood, or in surrounding neighborhoods?

Survey questions also included information regarding stakeholders' basic demographics, which allowed our team to compare the characteristics of survey-takers with those of the neighborhood as a whole. The surveys garnered a total of 131 validated responses, most of which were from residents. Survey takers also identified as RVMS supporters, volunteers, business owners, board members, and staff. The SM team also conducted 25 interviews with board members, business owners, residents, and community partners. It is important to note that RVMS stakeholders almost always fall into more than one of the categories listed here.

## PESTLE Analysis

In addition to extensive internal research, Strategy Matters consultants completed research to gain an understanding of various external factors that have an impact on RVMS. This analysis examines the Political, Economic, Social, Technological, Legal, and Environmental trends and projections that are likely to influence (or be influenced by) RVMS's activities. The complete results of this research can be found within the Phase 1 Report (Appendix B)

## Phase II: Creating a Shared Understanding and Looking Ahead

*In this phase, we developed a shared understanding of RVMS's assets and liabilities, including within the context of pursuing organizational goals. We also identified opportunities for RVMS to accelerate and capitalize on, resulting in the creation of three possible future scenarios for RVMS.*

Roslindale Village Main Street's mission statement is "to promote Roslindale Village as an appealing destination and the dynamic center of our community." At the time of Strategy Matters' research, RVMS organized its work and activities by following the Four Point Approach set by the National Main Streets organization.



These four points guide the committee structure and many of the activities of the organization. The standing committees for RVMS at the time of this report are

- **Design Committee**
- **Economic Development Committee**
- **Marketing Committee**
- **Farmers Market Committee**

In addition, the organization has two ad-hoc groups, the Strategic Planning Committee and the Substation Task Force. The latter is devoted to the revitalization of a long-vacant building that was once part of the infrastructure of Boston's trolley car system.

### SWOT Analysis

The Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis synthesizes the most salient data gathered from the internal and external research activities. The analysis confirmed some of the often-cited but undocumented aspects of organizational culture, as well as common perceptions and experiences of RVMS's stakeholders. In the case of RVMS, gaps in data were just as revealing as the data

itself, notably the discrepancies between survey-taker demographics and those of Roslindale as a whole.

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>● Communications (in particular, the newsletter and Facebook engagement)</li> <li>● Tenure of the organization and of individual board members and volunteers</li> <li>● Strong roots in the community with a track record of success, resulting in good credibility</li> <li>● Genuine excitement for Roslindale</li> </ul>	<ul style="list-style-type: none"> <li>● Outreach and engagement with non-White residents, and some commercial landlords and business owners</li> <li>● Lack of clear fundraising/development strategy</li> <li>● Internal processes, specifically decision making</li> <li>● Communications with respect to establishing a shared understanding of organizational identity, mission, vision</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>● The community looks to RVMS as community resource and convener - if RVMS wants to take on this role the community would likely support</li> <li>● The City of Boston is experiencing similar racial and socioeconomic disconnects - RVMS can take a citywide lead</li> <li>● Partnership with the City on their Open Space and Recreation commitment to work with neighborhoods on wellness and community-building initiatives</li> <li>● Residents are looking for RVMS to take on a wide variety of roles now and in the future - RVMS has a broad menu of strategic growth opportunities that would likely be supported by at least some of the community</li> </ul>	<ul style="list-style-type: none"> <li>● The community looks to RVMS as a community resource and convener - this is not the organization's current mission</li> <li>● Ongoing development in neighborhood with no group taking the lead on convening the community</li> <li>● Increases in residential and commercial rent and property costs</li> <li>● Increasing use of online shopping may threaten local businesses</li> <li>● Residents are looking for RVMS to take on a wide variety of roles now and in the future - without careful marketing and branding, organizational mission and impact of activities are likely to be diluted</li> </ul>

## Recommendations and Strategic Directions

As a result of Phase 1, Strategy Matters presented RVMS with three potential strategic directions/scenarios. These options were crafted with the organization's current mission and vision for the neighborhood in mind, as well as the results of Phase 1 data gathering, specifically

- RVMS's current portfolio of supports and activities
- Stakeholder perceptions of the organization's current role
- Current and projected neighborhood trends and needs
- Traditional Main Streets model and activities

Each of the presented scenarios would serve to refocus the activities of the organization by creating a more concrete understanding of the role that RVMS plays in the community. These scenarios are:

**Traditional Main Streets** in which RVMS would refocus its work around the parameters and guidelines set by Main Street America, with a focus on serving the business community of Roslindale Village through training and technical assistance.

**Collective Impact for Creative Placemaking in the Village** in which RVMS would catalyze and support activity in Roslindale Village, creating a unique space for community conversation, and amplifying the positive aspects of the Village as the heart of the neighborhood.

**Convener for Collective Impact in Roslindale** in which RVMS would convene, connect, and catalyze community planning for neighborhood development through engagement with all of Roslindale's stakeholders.

[A complete description of each scenario can be found in Appendix C: Retreat Report]

## Phase III: Charting the Path Forward

*In this phase, Strategy Matters worked with the board to begin a roadmap for RVMS's organizational identity and role in the community.*

Roslindale Village Main Street's annual retreat took place on June 11, 2017. During this time, Strategy Matters worked with the Board and the Executive Director on

- Creating a shared vision for Roslindale
- Understanding the three possible scenarios, including implications for the organization and the community
- Coming to agreement on a scenario/strategy and sketching out leading and lagging indicators of success

Complete notes from each activity during the retreat can be found in Appendix XX

### Consensus on a Vision

Using a [consensus-building activity](#), Strategy Matters support retreat attendees in reaching a shared vision for Roslindale. The discussion during, and results of this activity served to ground the work of the retreat, the primary aim of which is answering the question, "How can RVMS best serve the neighborhood?" In order to best answer this question, it is necessary for the group to have a shared and coherent vision of where the neighborhood could go in the coming years. The results of this activity included indicators falling into five broad categories:

Smart growth	A vibrant neighborhood
Neighborhood identity	Effective advocacy
Rozzie Access	

### Scenario Consideration

To explore the three possible scenarios, retreat attendees worked in pairs and then as a group to predict how each strategy might contribute to, or pose a risk to, the concepts laid out in the shared vision. The results of this conversation helped to identify a strategic direction for the organization as well as a loose map of possible metrics of success.

## Strategic Direction

As one of the country's first urban Main Streets programs (and Boston's first), RVMS has a longstanding commitment to the values set forth in this model. It is clear the the neighborhood benefits from the traditional Main Street activities in which RVMS organizes. However, RVMS has also stepped up the plate to support its neighborhood in ways that go above and beyond the expectations of the basis of its founding goals - and it is clear that stakeholders at every level expect and appreciate these offerings. RVMS also has a strong base of supporters, a committed board and staff, and a strong understanding of organizational and neighborhood strengths and needs.

Based on Strategy Matters' research and engagement with the board, RVMS can best serve its neighborhood through a strategy that encompasses the activities and values of the traditional Main Streets model, while at the same time establishing a role for RVMS within a collective impact strategy for creative placemaking in the village.

# STRATEGIC PLAN

## Strategic Vision

An inclusive, vibrant Roslindale Village with a thriving local economy, arts, and culture, that meets the needs of residents and draws people to the neighborhood.

## Strategic Mission

To catalyze and support activity in Roslindale Village which amplifies the positive aspects of the Village as the heart of the neighborhood.

## Values Embodied in this Plan

- *Support for local economy*
- *Community self-reliance*
- *Vibrancy*
- *Connection*

## Goals, Objectives, and Activities

RVMS's strategic goals are grounded in a commitment to maintain the organization's current position as a traditional Main Streets' organization while also leveraging its unique and emerging role in Roslindale as a community convener and catalyst for smart growth. Using the language of collective impact theory, the Board embraces the opportunity to be a catalyst, convener and "backbone organization" to support coordination and communication across the many businesses, residents and organizations all working toward aligned goals.

The implication of this strategic decision is that RVMS' goals and objectives include both results-oriented and process-oriented work to ensure that the highest levels of engagement are informing the selection and execution of projects.

It is important to note that this reflects a shift from past practice at RVMS, which has a long history of using strategic planning to identify and plan for managing large scale community projects. In this iteration, RVMS outlines an ongoing role as community convener which will still lead to the embrace of large projects in the near future, but with ongoing participation and engagement of Roslindale stakeholders beyond those currently serving on the Board and its committees. This plan has ambitious projects embedded in long-term activities that build sustainable, meaningful, and inclusive partnerships.

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**1. Catalyze and sustain a village economy that is vibrant, appealing, and accessible to neighborhood residents and visitors.**

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<b>Objective A:</b>	Keeping/Growing a Vibrant Village Economy
<b>Key performance indicators:</b>	Commercial vacancy rate under 5% <sup>1</sup> Diverse mix of businesses in Village <sup>2</sup>

**Strategy:**

*Increase RVMS engagement with all Village businesses and focus on outreach to support new businesses which improve the overall mix.*

**Activities**

**Now:**

1. Develop a set of data points that business owners already collect or could easily collect which will shed light on the connection between RVMS events and their revenues<sup>3</sup>.
2. Implement an updated Business Ambassador (or similar) program to support this work. Implementation should include:
  - a. Identifying how such a group can support/supplement the already-existing responsibilities of the ED; identify responsibilities of RVMS staff vs Ambassadors; determine what, if any, responsibilities lie with board members.
  - b. Create protocol for ambassadors (training needed, frequency of check-ins, accountability to Board/staff.)

**Weekly (Ongoing):**

1. RVMS ED and/or Business Ambassadors<sup>4</sup> check in with businesses; aiming to check in with each business monthly.

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<sup>1</sup> To be approved by the board.

<sup>2</sup> As indicated by stakeholders in Goal 2 data gathering, and supported by eventual Roslindale Village Market Profile report.

<sup>3</sup> [Measuring](#) economic impact of arts and culture

<sup>4</sup> Typically, though not necessarily, in person. ED does walkabouts, Board members and ED may sometimes prefer phone, text or email. The check in is a simple temperature taking to offer an early indicator of distress and enable action when necessary.

**Monthly:**

1. Following identification of data points that business owners can easily collect and share with RVMS<sup>5</sup>, monthly reporting on the link between RVMS programming/events and business success.
2. At Board meetings, review data on number of businesses at each point in the [Business Engagement Continuum](#) and leverage Board resources and networks to move businesses along to deeper point.
3. Continuously update RVMS’s internal list of businesses that have expressed interest in the Village, and contact potential business renters when a match may be made between vacant property and business needs/interests.

**Quarterly:**

1. Update the Dashboard of indicators<sup>6</sup> for Village Economic Vitality (*we can create this if it doesn’t exist*) and share with community via social/traditional media and public meetings.

**Annually:**

1. Publish annual report showing trends in economic vitality of Village year over year, focusing on vacancy rates and business mix.

**By Early 2019**

1. Prospect and secure funding for outside support in completing a Roslindale Village Market Profile report. This study should update findings from the [2014 report](#) and may be supplemented with ongoing community data gathering indicated in Goal 2.

<b>Objective B:</b>	Ensuring Strong Visual Appeal of the Village
<b>Key performance indicators:</b>	High percentage of well maintained and clean buildings/exteriors

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<sup>5</sup> Possibilities include new customers or sales on Farmers Market days, foot traffic during events or after technical assistance. RVMS should work with businesses to determine feasible data collection and reporting.

<sup>6</sup> Indicators can include visitors to events, revenues at Farmers Market, and foot traffic measurements over time utilizing [Google’s Popular Times](#) tools and [Facebook Business analytics](#)

**Strategy:** *Develop and deepen relationships with commercial landlords renting to Village businesses and the business owners themselves, through identifying ways they can invest, and supporting those investments.*

### **Activities**

#### **Weekly:**

1. Maintain/update an internal commercial landlord directory that details name, contact information, contact history, and other pertinent details.

#### **Monthly:**

1. Following development of an RVMS protocol for addressing issues with landlords of commercial properties that are vacant and/or in need of upkeep, on a monthly basis, develop specific strategies aligned with protocol to address problems.
2. During business engagement (see above, Objective A), identify areas of potential improvement for businesses. Enlist appropriate committee to follow up with business with technical assistance, connection with resource, or other appropriate support.

#### **Quarterly**

1. In the RVMS newsletter or Blog, spotlight businesses or landlords who have made improvements, been innovative, or in some other way have contributed to the visual appeal of the neighborhood.

#### **By End of 2018**

1. Review and rate pop-up successes and develop a local best practices manual to help replicate success. Capture lessons learned, directory of who to talk to, receptive landlords (and why), city restrictions/regulations, and outcomes (even anecdotal).
2. Identify additional potential outlets for bringing attention to specific local businesses and/or landlords.

#### **Early - Mid 2019**

1. Convene a committee (potentially an ad hoc board committee or sub-group of the Economic Development Committee) to explore the development of a revolving loan fund for businesses or landlords seeking to make improvements on their properties. Initial agenda items:
  - a. Current known best practices in this area.

- b. Fiscal and legal processes and policies required to initiate and manage such a fund.
  - c. Using insight from business and landlord data gathering, develop guidelines on types of projects this fund will support.
  - d. Application and approval processes and terms of loans.
2. Identify source(s) of funding for loans.
  3. Pilot initiative - start small, track process, and continuously review pluses and deltas to ensure smart scaling-up.

<b>Objective C:</b>	Ensure Easy Access to Village for All
<b>Key performance indicators:</b>	Resident satisfaction Local utilization of Village businesses Improved public transit options

**Strategy:** Focus on improving wayfinding<sup>7, 8</sup> to and around the Village in order to drive traffic to the area.

### Activities

#### Now-June 2018:

1. Convene and meet with the Roslintrail Development Committee<sup>9</sup> including identifying current committee roles/representation and reaching out to partners/participants representing businesses, residents, other community organizations. Early agenda items:
  - a. Initial draft list of landmarks, destinations, resources, routes, and other items to be included in wayfinding campaign.
  - b. Identify funding source(s) and write proposal for wayfinding project. Funding should cover design, production, installation.
2. Meet with local officials to identify ways to capitalize on the City's commitment to transit and travel expressed in the Go Boston 2030 plan.
3. Develop action plan in conjunction with the recommendations of the local officials. Potential action plan items include

<sup>7</sup> What is Wayfinding? "Wayfinding refers to information systems that guide people through a physical environment and enhance their understanding and experience of the space." --[SEGD.org](http://SEGD.org)

<sup>8</sup> A Main Street and Wayfinding [Case Study](#)

<sup>9</sup> The initial vision of the Roslintrail is a community-wide campaign encompassing signage, landmarks, and other visual signals that encourage and assist residents and visitors in getting to and around the Village on foot, bicycle, car, public transportation. Helping people get to and around the Village is a strategy for supporting local businesses and organizations. (Please note: This is a long term goal - so the activities reflect planning for it rather than finishing/maintaining it.)

- a. Strengths and needs in the areas of pedestrian, bicycle, public transportation, and car routes ways of getting places.
- b. Compelling information for wayfinding signs (ie, what will drive people to the Village?)

**Monthly:**

1. Gather data on local utilization of businesses and identify potential wayfinding solutions
  - a. Using community engagement processes indicated in Goal 2/Objective A to better understand where and why community members are shopping.
  - b. Using findings in above activities (3a) to guide conversations on modes of transit.
2. Meet with Board and/or businesses to share data on utilization rates and data on resident satisfaction with both businesses offerings and wayfinding (*this could be a standing item on Board agendas, with invitations to residents/businesses to join for this part of the conversation*).

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**2. Sustain and grow all that makes Roslindale unique.**

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<b>Objective A:</b>	Sustain what works today
<b>Key performance indicators:</b>	Continued socioeconomic and racial/ethnic diversity among businesses and residents; RVMS Board reflects the full diversity of the community.

**Strategy:** *Act as neighborhood convener, organizing and amplifying resident voices in all areas where changes are affecting Roslindale’s affordability and inclusivity (e.g. housing, development).*

**Activities**

**Now:**

1. Formalize volunteer recruitment<sup>10</sup>: identify opportunities for volunteers who want ongoing vs one-time engagement and for those whose availability may not reflect typical 9-5 working hours; skills necessary for jobs; anticipated time commitments.
2. Finalize [Community Inclusiveness Checkback](#) (or similar) tool to ensure broad community participation, and to minimize unintended impact on various stakeholder groups. Utilize this tool in all event and project planning.
3. Create outreach/collateral to support recruitment in line with the clarified opportunities.
4. Determine protocol for incorporating information gathering into events (either during or post)
5. Gather data from residents and businesses to better understand and articulate what makes Roslindale unique<sup>11</sup>.
6. Determine protocol for information gathering on annual basis (annual survey, community engagement opportunities as with the Community Center)

#### Ongoing:

1. Use convening (in Objective A) and community engagement as foundational activities for identifying future volunteers and board members.
2. Recruit new volunteers and potential Board members to join RVMS's work; constantly expanding network of businesses, property owners, residents and Board members.
3. As board seats turnover, establish dedicated seats for represented racial demographics (African American and Latino, each ~25% of population) (*Note: this likely requires a change in by-laws*).
4. Use baseline initial findings (after 1 year) to determine RVMS's role in convening the community around particular issues.
5. As RVMS strengthens understanding of these neighborhood characteristics and needs, use this to inform programming.

#### Quarterly:

1. Convene business owners, property owners, and residents around neighborhood issues like development, open space, transportation planning OR integrate neighborhood input gathering into other events, e.g. Farmer's Market. Ensure that a cross section of residents participate.

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<sup>10</sup> Here's a simple and [useful guide](#) to better volunteer recruitment:

<sup>11</sup> Data gathering may include questions that provide insight on retail leakage, in service to Goal 1.

<b>Objective B:</b>	Grow what makes Roslindale unique
<b>Key performance indicators:</b>	Increased foot traffic in the Village day and night Percentage of individuals reporting “Arts and Culture” as favorite thing about Roslindale <sup>12</sup>

**Strategy:** *Explore and establish potential cultural anchors for the neighborhood (landmark cultural draws) and invest in ongoing cultural activities, day and night, ultimately establishing Adams Park and nearby landmark buildings as a cultural district for the neighborhood.*

### Activities

#### Now - Early 2018

1. Determine partnership opportunities with already existing anchor spaces. Do this by determining
  - a. Mission alignment with potential partners.
  - b. What are the anticipated pros and cons of the partnership. Include the Community Inclusiveness Checkback Tool.
  - c. Does the potential partner have an interest in partnering with RVMS.

#### Potential Partnerships

- Roslindale Arts Alliance to create a shared agenda around community performing and visual arts.
- Friends of Roslindale Branch Library<sup>13 14</sup>, to include advocacy for library renovations to include capacity for performing/visual arts space, as well as initial thoughts on programming for space.
- Roslindale Community Center and Roslindale House, to explore utilization of space, whether there are arts/cultural gaps that the Center is well positioned to meet.
- Historic Boston Incorporated and Peregrine Group, to ensure alignment as work progresses on the Substation Redevelopment project.
- Social Security Building, capitalizing on the General Services Administration’s Urban Development and Good Neighbor Program<sup>15</sup>.

<sup>12</sup> Or, a similar TBD metric based on RVMS’s community engagement procedures moving forward.

<sup>13</sup> Resource: The [Project for Public Spaces](#) offers strategies on rethinking the role of libraries in communities, many of which align with Main Streets goals and values.

<sup>14</sup> The Friends of the Roslindale Library state that there is a [need for advocacy](#) for the Roslindale branch to maintain its position in the queue of capital projects, and they are looking for partners for education and outreach.

<sup>15</sup> Boston is a participating city in the GSA’s [Good Neighbor Program](#).

- Roslindale Congregational Church, to support and expand existing cultural opportunities for community members.

### Mid 2018

1. Convene: Confirm partnerships, including shared agendas, organizational roles, and synchronicities.
2. Campaign: create materials that compel businesses, residents, and the city, strengthened by data from community engagement survey.
3. Meet with Roslindale representatives and District 5 City Councilor t to ensure buy-in.

### Late 2018

1. Begin action planning for shared cultural corridor project.

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## **3. Invest in long term sustainability and organizational strength**

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<b>Objective A:</b>	Ensure RVMS' organizational sustainability
<b>Key performance indicators:</b>	Annual income exceeds expenses by at least 10% <sup>16</sup> Operating funding is ⅓ grants, ⅓ contracts and ⅓ donations or earned income. <sup>17</sup>

**Strategy:** *Develop a strong operating budget through an income diversification strategy that broadens the individual donor base, establishes creative options for corporate sponsorship, and includes grant funding.*

### Activities

#### Now:

1. Identify: are there ongoing aspects of the RVMS menu of activities and planning that are conducive to sponsorship style funding? Figure out the cost of these activities, and outreach to potential sponsors whose interests may align.

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<sup>16</sup> Or another metric to be approved by the board.

<sup>17</sup> Or another ratio to be approved by the board.

2. Explore low cost “supporter swag” or other ways to incentive supporters.
3. Determine and operationalize the roles of board members, committees, and RVMS staff in fundraising.

**Ongoing:**

1. Identify and submit proposals for grant opportunities that support the work and/or projects of RVMS.
2. Broadening donor base: track donors and identify those who give year after year and those who do not.
3. Outreach directly to those who have stopped giving.
4. Within Annual Report, offer a transparent report on how donations were spent and contributed to the success of programming and impact of operations.

<b>Objective B:</b>	Invest in RVMS’ Organizational Strength.
<b>Key performance indicators:</b>	RVMS activities and events align with organizational mission. RVMS events draw participants representative of Roslindale demographics

**Strategy:** *Sharpen and amplify RVMS messaging on what we do, why we do it, and why it matters for residents, businesses, and the City.*

**Activities**

**Now:**

1. Conduct beta testing for RVMS Decisionmaking Framework for Community Event - Marketing Committee’s criteria - use it, assess usefulness and consider where RVMS priorities (established in goals 1 and 2) fit into criteria
2. Finalize above Framework to determine RVMS’s role in community programming and events, ultimately ensuring that events that RVMS plans or supports contribute directly to the goals in this plan, or the overall organizational mission<sup>18</sup>.
3. Check this Framework against already existing RVMS events

**Monthly:**

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<sup>18</sup> This criteria will be used to help communicate what RVMS does and does not do, and will ensure that our limited resources and capacity are directly contributing to the goals of the organization.

1. Create and maintain a matrix tracking criteria and activities and support throughout the course of the year to help ensure identified organizational priorities are being addressed or supported.

**Annually:**

1. Assess the diversity of RVMS's activities and efforts and determine course corrections for the following year. Determine: a) are there organizational priorities not receiving enough attention? b) do our activities/efforts indicate a need to shift focus?

## Other Tools and Frameworks for Consideration in Implementation

- [Authentic Demand](#) blends leadership opportunities for residents, strong social networks, community organizing efforts, and civic participation.
  - Key concepts include the neighborhood messenger(s), programming developed with (not for) residents, recruitment and retention of participants, community hiring.
- Tool: [Asking Powerful Questions](#), a starting point to consider the “right” questions for RVMS staff and board members to use when engaging with community members.
- Tool: [Criteria for Setting Priorities](#) to evaluate current and future event alignment with overall RVMS mission and strategy.
- Guide: An [overview of signage for wayfinding](#) and important components of the planning process.
- Tool: Community Toolbox [Guide to Creating and Maintaining Partnerships](#) provides details steps for forming smart partnerships around shared goals, including mechanisms to ensure equitable division of labor and resource contributions.

# APPENDICES

## Appendix A: Stakeholder Engagement Overview

### Interviews

#### Board Members

Adam Shutes	Anthony Giordano	Chris Kollett
Daniel Johnson	Deb Debenedictis	Erin Doherty
Hilary Sullivan	Liz Graham-Meredith	Liz Sherva
Mandana Moshtaghi	Nina Parlour	Robert Orthman
Terry Fitzgerald		

#### Other Internal Stakeholders

Adam Rogoff	Alia Hamada Forrest	Denge Agola
Laura Gang	Richard Chalfin	Sue Forti

#### Community Partners

Abby Furey, City of Boston	Alison Perlman, City of Boston	Ann Seigel, Roslindale Community Center
Elizabeth Swanson, Business Owner	John Malley, Roslindale Business Group	Michelle Wu, Boston City Council

## Appendix B: Phase 1 Report

See attached. An electronic version of the report is also available [here](#).

## Appendix C: Retreat Report

# Roslindale Village Main Street Strategic Planning Retreat Report

## THE RETREAT

**Date:** June 11, 2017

**Location:** Northeastern Crossing, Boston, MA

### Attendees:

Aila Hamada Forrest	Anthony Giordano	Chris Kollett
Daniel Johnson	Deborah Debenedictis	Elizabeth Sherva
Erin Doherty	Hilary Sullivan	Liz Graham-Meredith
Mandana Moshtaghi	Nina Pralour	Robert Orthman
Silvana Ragusa		Terry Fitzgerald

### Agenda:

12:00	Welcome and Introductions
12:15	Review Objectives and Agenda
12:20	Strategic Planning Process
12:30	Phase 1 Findings
1:00	Vision for Roslindale
2:00	Three Possible Futures
2:45	Exploring Goals and Objectives
3:30	Closing

## RETREAT GOALS

### Rational Goals:

1. Review findings from Phase I report, agree or modify SWOT analysis
2. Articulate our shared goals for the future of Roslindale (whole neighborhood, not just Village). Identify areas where we have consensus as a group of civic leaders.
3. Review three roles that RVMS could play in building that future, and using SWOT analysis, select one that is the best fit.
4. Set goals within that strategy for RVMS to pursue over the coming five years
5. Identify what success will look like (scoreboard) and what will help us know we're on track (dashboard)
6. Clarify territories where we are, and where we are not, neutral.
7. Where we are not neutral, clearly state our POV.

### Experiential Goals:

1. Participants leave feeling committed to this plan and confident that it is moving RVMS (and in turn that RVMS is moving Roslindale) in the right direction
2. Participants have had the opportunity to build the strength and resilience of their team
3. Participants feel like their contributions were invited and put to highest and best use in service to RVMS and Roslindale
4. Participants leave inspired for future engagement and action.



## OVERVIEW OF PHASE ONE FINDINGS

The Strategy Matters team presented findings from Phase 1 of the Strategic Planning process. This phase entails gathering data in order to create a shared understanding of RVMS's current reality.

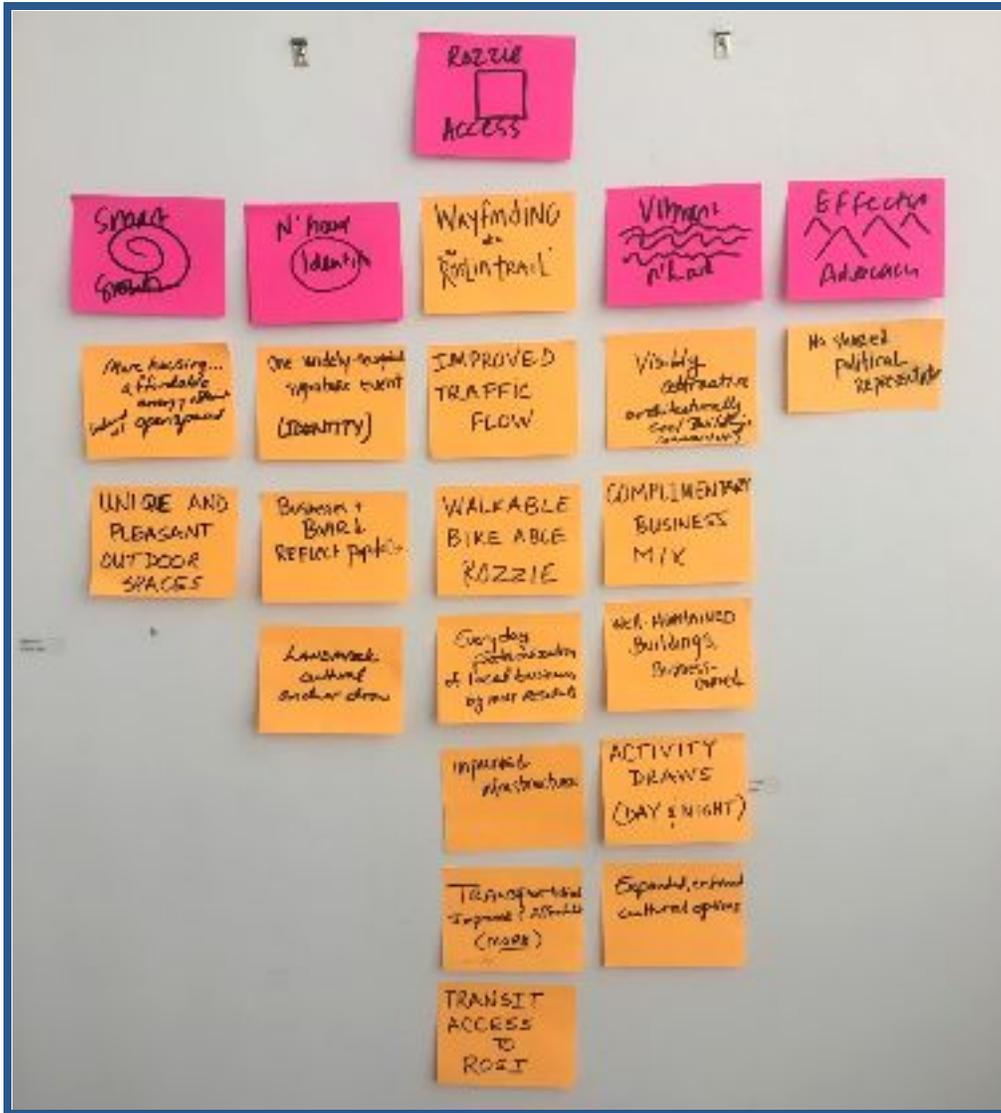
Ultimately, the Phase 1 report helps to create a SWOT (Strengths, Weaknesses, Opportunities, Threats) Analysis. The broad themes of RVMS's SWOT are as follows:

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>● Communications (in particular, the newsletter and Facebook engagement)</li> <li>● Tenure of the organization and of individual board members and volunteers</li> <li>● Strong roots in the community with a track record of success, resulting in good credibility</li> <li>● Genuine excitement for Roslindale</li> </ul>	<ul style="list-style-type: none"> <li>● Outreach and engagement with non-White residents, and some commercial landlords and business owners</li> <li>● Internal processes (decision making and fundraising strategy)</li> <li>● Communications with respect to establishing a shared understanding of organizational identity, mission, vision</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>● The community looks to RVMS as community resource and convener - if RVMS wants to take on this role the community would likely support</li> <li>● The City of Boston is experiencing similar racial and socioeconomic disconnects - RVMS can take a citywide lead</li> <li>● Partnership with the City on their Open Space and Recreation commitment to work with neighborhoods on wellness and community-building initiatives</li> <li>● Residents are looking for RVMS to take on a wide variety of roles now and in the future - RVMS has a broad menu of strategic growth opportunities that would likely be supported by at least some of the community</li> </ul>	<ul style="list-style-type: none"> <li>● The community looks to RVMS as community (resident) resource and convener - this is not the organization's current mission</li> <li>● Ongoing development in neighborhood with no organization taking the lead on convening the community</li> <li>● Increasing use of online shopping may threaten local businesses</li> <li>● Residents are looking for RVMS to take on a wide variety of roles now and in the future - without careful marketing and branding, organizational mission and impact of activities are likely to be diluted</li> </ul>

## A VISION FOR ROSLINDALE

In order to begin to answer the question of how RVMS can best serve the neighborhood, retreat attendees participated in a Consensus Workshop to begin to map out a shared, coherent vision for the direction of the neighborhood in coming years. Through a series of steps that include both individual and group brainstorming, and consensus-building in small and large groups, the group identified five key components for a shared vision of Roslindale's future:

- Smart Growth
- Neighborhood Identity
- Rozzie Access
- Vibrant Neighborhood
- Effective Advocacy



## THREE POSSIBLE FUTURES

The group then explored, in-depth, three potential future scenarios for RVMS. Each scenario offered a different mission and set of values for the organization, and as such presented unique pros and cons.

Values	Traditional Main Streets	Collective Impact for Creative Placemaking in Village	Convener for Collective Impact in Roslindale
Our statement of what is most important to us, and, by exclusion, what is not. They allow us to see the boundaries for our work. They	Support for Local Economy, Community Self Reliance	Vibrancy Connection	Inclusiveness, Consensus Building, Facilitating Collaborative Action

help us to see which issues are clearly ones for us to address, and which are not.			
<b>Vision</b>			
The more perfect world we hope to create. It helps to identify allies, and non-allies. We want to work with organizations that share our vision.	A thriving local economy where residents can walk, live, work, shop safely and easily.	An inclusive, vibrant Roslindale Village, where small independent businesses thrive, and arts/culture draw people into the village	A diverse and inclusive Roslindale, with strong resident leadership over local development and change.
<b>Mission</b>			
Our reason for existing and working. It defines and clarifies our role in creating the world we want.	To promote Roslindale Village as an appealing destination and the dynamic center of our community.	To catalyze and support activity in Roslindale Village which amplifies the positive aspects of the Village as the heart of the neighborhood	To convene, connect and catalyze community planning for neighborhood development. To engage all Roslindale stakeholders in helping to build our future, weaving new connections among neighbors.
<b>Unique Value Proposition</b>			
Our statement explaining why we, specifically (and no one else), is best suited to fulfill the role prescribed by the mission we've embraced.	RVMS is Boston's first Main Street district, and has pioneered many of the successful programs and initiatives in operation across the City today. We are for property owners, business owners and residents who want to build community here, and who engage, through RVMS, in the organizing work necessary to keep Roslindale Village growing and thriving.	Our central role in the community creates a unique space for community conversation, creating shared vision and catalyzing new projects and programs.	RVMS is for all who live, work and play in Roslindale Village and who want to invest in its vibrancy. We are well positioned to support consensus building and collaborative action as we have deep roots, a strong commitment to inclusion and a diverse membership. Our central, and neutral, role in the community creates a unique space for community conversation, creating shared vision and catalyzing collective action.
<b>Goals</b>			
The high-level things we want to accomplish, internally and externally.  It focuses resources and enables	To be a leader in national and local main streets movements  Support RVMS small	To make RV more accessible to all  To improve our streetscapes in ways that	Convene and facilitate community conversations about change and planning  To facilitate inclusive, fair

team members to make decisions in alignment with each other and with organizational commitments. It clarifies and helps to resolve resource conflicts.	businesses through training, technical assistance  No commercial vacancies	encourage outdoor uses and foot traffic  To create community events and spaces which bring people together  Promoting and preserving Roslindale's unique culture	and consensus driven community processes about development issues
<b>Objectives</b>			
What we count to know how well or badly we're doing or have done.	<ul style="list-style-type: none"> <li>• Bounty bucks</li> <li>• # biz receiving TA</li> <li>• Foot traffic</li> <li>• Vacancy rates</li> </ul>	<ul style="list-style-type: none"> <li>• Visits to farmers' mkts</li> <li>• Attendees at events</li> <li>• Foot traffic</li> </ul>	<ul style="list-style-type: none"> <li>• Participation reflecting community composition overall.</li> <li>• Resident members/donors</li> </ul>
<b>Activities</b>			
What staff, board, volunteers do on a day to day basis that keeps the organization on track to complete objectives and goals.	Offer workshops for business owners, connect them to resources	Plan events and public space improvements	Convene meetings and organize for turnout.

Board members paired up to explore each of these scenarios, determined a list of pros and cons for each one, and came back together in the larger group to determine master lists of the benefits and drawbacks of each possible scenario. Through this exercise, the group determined that a hybrid strategy of the traditional main street model combined with collective impact for creative placemaking activities was the ideal framework with which to continue the work of the organization.

Benefits	Risks
Traditional Main Street	
<ul style="list-style-type: none"> <li>• Less work for staff and board, easy to manage; Presents staff with boundaries</li> <li>• Role definition is clear; Following proven model; clear mission</li> <li>• Lower risk for RVMS</li> </ul>	<ul style="list-style-type: none"> <li>• More work for staff</li> <li>• Repeat RVMS already doing; retreating current operations</li> <li>• Not responsive enough</li> <li>• Hard to get more fund</li> </ul>

<ul style="list-style-type: none"> <li>• Ensure stable funding</li> <li>• Focus on work on an achievable scale</li> <li>• Clearly align with national main streets mission</li> </ul>	<ul style="list-style-type: none"> <li>• Does not help achieve all goals; already exceed this role</li> <li>• Stifles creativity; diminished impact</li> <li>• Changing consumer landscape</li> <li>• Untapped potential local population</li> <li>• Lack of flexibility in improving neighborhood</li> </ul>
Collective Impact for Creative Placemaking	
<ul style="list-style-type: none"> <li>• More exciting: more exercises, greater staff creativity and neighborhood engagement</li> <li>• More donation, additional stream of funding</li> <li>• Has perception of inclusive operations</li> <li>• Staff and resources can be managed, can also partner with other NPOs</li> <li>• Create sense of belonging</li> <li>• Bring more foot traffic</li> <li>• More opportunity to make visible changes to the community</li> <li>• More proactive approach, makes RVMS special</li> </ul>	<ul style="list-style-type: none"> <li>• Placemaking does not attract diverse patrons</li> <li>• Business may lack of support</li> <li>• Event focused; lack of public clarification on mission</li> <li>• Ambiguous metrics, need more reasoning</li> <li>• Can lose opportunities if another organization takes the role</li> <li>• Required too much resources for event planning including time, staff etc</li> <li>• Dependent on secondary effect to support economy</li> </ul>
Roslindale Convenor	
<ul style="list-style-type: none"> <li>• Help with diverse engagement of resident and business awareness</li> <li>• Increase social impact to drive advocate with city government</li> <li>• Achieve goals more quickly</li> <li>• Amassing people</li> <li>• Providing more business support</li> <li>• Deeper connections with community</li> <li>• Improve to implement the vision laid out</li> </ul>	<ul style="list-style-type: none"> <li>• Requires too many resources and skills</li> <li>• Could have negative impacts on city affiliation and support received</li> <li>• May not align with mission</li> <li>• May has political risks</li> <li>• Blur main street business support role, maybe more resident focused</li> <li>• Cross the line with the city may create lack of funding</li> <li>• Potential loss of directional control</li> </ul>

## INDICATORS AND INITIAL THOUGHTS ON GOALS

With a strategy in mind, the group got to work considering what a hybrid Main Street/Creative Placemaking strategy might look like.

### Successful Creative Placemaking looks like...

- Businesses supporting RVMS
- Businesses feel RVMS is helping

- Strong fundraising plan
- RVMS more proactive re setting direction or setting agenda for the organization and the village
- We would see more shoppers in businesses making purchases
- Increase in sales on the opening day of FM - how do we capture?
- Higher business occupancy
- Owner investment in buildings

And, to further solidify these ideas, the group then brainstormed initial indicators of success, and had the opportunity to identify those that they thought would be most meaningful for the vision, strategy, and goals mapped out during the day's activities.

Indicator	Votes
Make fundraising plan, broaden the donor base from individuals, corporate...	12
Sharpen/amplify message, clarify what we do	9
Provide more incentives for landlord	5
Generate impact to business and residents including investing in measuring trainings; create impact feedback loop	5
Change traffic pattern for business distinct	5
Use criterias for new activities	5
1-1 business engagement	4
Collaborate with nonprofits to leverage relationships; Work with support aligned interests	3
Focus on staff retention	3
Better volunteer management; provide short-term volunteer opportunities	2
Engage with large local employers to promote village visits	1
Encourage relationships before other groups	1
Diversify the board	0

## Closing Thoughts

The day culminated with board members having the opportunity to provide initial thoughts on the work of the day, and consider the work ahead. Themes in the go-around included:

- A hope for development of tangible tools and action items to address the tactical items discussed (3)
- Continuing respectful internal discussions

- Need to be active in upcoming local elections
- The day was useful to help a somewhat new board get to know each other and each other's vision for Ros (2)
- Impressed with level of consensus in group (4)
- Anxious about lack of broader representation in process thus far, and concern about moving to far forward without that (2)
- Looking forward to the work ahead, and energized by the day (4)

## Appendix D: Neighborhood Demographic Overview

Source: U.S. Census Bureau,  
2011-2015 American Community Survey 5-Year Estimates

Subject	Zip Code 02131	
	Estimate	Percent
<b>SEX AND AGE</b>		
Total population	31,890	31,890
Male	14,711	46.1%
Female	17,179	53.9%
Under 5 years	2,494	7.8%
5 to 9 years	1,802	5.7%
10 to 14 years	1,540	4.8%
15 to 19 years	1,503	4.7%
20 to 24 years	1,851	5.8%
25 to 34 years	5,423	17.0%
35 to 44 years	5,335	16.7%
45 to 54 years	4,407	13.8%
55 to 59 years	1,899	6.0%
60 to 64 years	2,004	6.3%
65 to 74 years	1,983	6.2%
75 to 84 years	1,074	3.4%
85 years and over	575	1.8%
Median age (years)	37.3	
18 years and over	25,095	78.7%
21 years and over	24,191	75.9%
62 years and over	4,728	14.8%
65 years and over	3,632	11.4%

Zip Code 02131		
Subject	Estimate	Percent
<b>RACE</b>		
Total population	31,890	31,890
One race	30,756	96.4%
Two or more races	1,134	3.6%
One race	30,756	96.4%
White	19,093	59.9%
Black or African American	8,474	26.6%
American Indian and Alaska Native	220	0.7%
Cherokee tribal grouping	0	0.0%
Chippewa tribal grouping	0	0.0%
Navajo tribal grouping	12	0.0%
Sioux tribal grouping	0	0.0%
Asian	638	2.0%
Asian Indian	126	0.4%
Chinese	376	1.2%
Filipino	64	0.2%
Japanese	0	0.0%
Korean	46	0.1%
Vietnamese	14	0.0%
Other Asian	12	0.0%
Native Hawaiian and Other Pacific Islander	0	0.0%
Native Hawaiian	0	0.0%
Guamanian or Chamorro	0	0.0%
Samoan	0	0.0%
Other Pacific Islander	0	0.0%
Some other race	2,331	7.3%
Two or more races	1,134	3.6%
White and Black or African American	245	0.8%
White and American Indian and Alaska Native	13	0.0%
White and Asian	157	0.5%
Black or African American and American Indian and Alaska Native	78	0.2%

Zip Code 02131		
Subject	Estimate	Percent
<b>Race alone or in combination with one or more other races</b>		
Total population	31,890	31,890
White	19,975	62.6%
Black or African American	9,082	28.5%
American Indian and Alaska Native	527	1.7%
Asian	1,006	3.2%
Native Hawaiian and Other Pacific Islander	32	0.1%
Some other race	2,695	8.5%
<b>HISPANIC OR LATINO AND RACE</b>		
Total population	31,890	31,890
Hispanic or Latino (of any race)	7,690	24.1%
Mexican	155	0.5%
Puerto Rican	2,785	8.7%
Cuban	106	0.3%
Other Hispanic or Latino	4,644	14.6%
Not Hispanic or Latino	24,200	75.9%
White alone	15,519	48.7%
Black or African American alone	6,942	21.8%
American Indian and Alaska Native alone	121	0.4%
Asian alone	638	2.0%
Native Hawaiian and Other Pacific Islander alone	0	0.0%
Some other race alone	242	0.8%
Two or more races	738	2.3%
Two races including Some other race	117	0.4%
Two races excluding Some other race, and Three or more races	621	1.9%
<b>CITIZEN, VOTING AGE POPULATION</b>		
Citizen, 18 and over population	21,882	21,882
Male	9,841	45.0%
Female	12,041	55.0%

### Other Demographic Information Sources:

- [Boston in Context 2017](#)
- [Boston Neighborhood Business Patterns 2016](#)
- [Commuter Flows: Employment and Residence Patterns in Greater Boston](#)

# STRATEGY MATTERS, LLC

Strategy Matters, LLC is a consulting group that works with organizations to develop creative solutions to complex problems. Expert at working across issue areas, our consultants support businesses, nonprofits, government agencies, collaboratives, and public-private partnerships to address organizational and societal challenges.

Using custom-designed approaches and instruments, we work collaboratively with organizations to build teams and their capacity, expand resources and reach, and sharpen strategy. Leveraging insight derived from years of cross-sector experience, we bring new ideas, energy, and approaches to the obstacles and opportunities critical to an organization's necessary breakthroughs in the areas of stability, expansion, and future success.

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