



2017 Strategic Plan

(September 2016 - December 2017)

Affirmed by the Board 9/21/16

<i>We will Focus on these Core Areas</i>		
INSPIRING COHOUSING FORMATION	NURTURING COHOUSING COMMUNITIES	ADVANCING POLICY AND ADVOCACY
<u>Goal 1:</u> Inspire the growth of cohousing as an innovative response to social and environmental challenges	<u>Goal 2:</u> Nurture Cohousing Communities and Help Them Thrive	<u>Goal 3:</u> Foster a Cohousing-Friendly Social, Political and Economic Environment
<i>We will increase foundation effectiveness and efficiency through</i>		
QUALITY SERVICES	QUALITY GOVERNANCE	
<u>Goal 4:</u> Provide Quality Services as a Connector and Clearinghouse to Grow Cohousing	<u>Goal 5:</u> Develop a Board that can be responsive to a growing organization and its strategic focus	
<i>We will sustain and propagate the mission through</i>		
ENGAGEMENT	PUBLIC EDUCATION	SUSTAINABLE FINANCIAL MODEL
<u>Goal 6:</u> Expand engagement of volunteers, cohousing communities and partner organizations	<u>Goal 7:</u> Raise National Awareness about Cohousing and Increase the Public's Appreciation of its Benefits	<u>Goal 8:</u> Create a financial model to sustain the organization and meet strategic goals

CORE FOCUS

**GOAL 1: INSPIRE THE GROWTH OF COHOUSING
AS AN INNOVATIVE RESPONSE TO SOCIAL AND ENVIRONMENTAL CHALLENGES**

2017 Deliverables	Responsible	Progress	Challenge
Produce 2+ resources per month for finding and creating cohousing	Staff		
Enhance “What is Cohousing?” with 2 or more new resources	Staff		
Establish an Aging in Cohousing initiative: form a committee and create vision and goals prior to 2017 Conference	Aging in Cohousing Committee; Board		
Create promotional pieces that advocate for senior-friendly cohousing communities; enhance the Aging in Cohousing webpage and resources	Aging in Cohousing Committee; Board		
2017 National Conference offers senior and senior-friendly cohousing sessions	Aging in Cohousing Committee; Board		
2017 National Conference offers cohousing basics, including financing/affordability, and more than cohousing opportunities	Staff; 2017 Conference Resource Team		
2017 National Conference spurs the growth of cohousing in Nashville and Tennessee through promotion, support to forming groups	Staff; Board		
Establish a “more than cohousing” initiative to support the creation of (1) cohousing or cohousing-like models with an additional social-economic mission and (2) cohousing-like models that	More Than Cohousing Committee; Staff		

encourage human interaction			
Offer a “more than cohousing” session(s) at the 2017 National Conference	2017 National Conference Resource Team; Staff		
Establish a “Young Families in Cohousing” initiative: encouraging families to live in cohousing; and supporting intergenerational communities in attracting families	Young Families in Cohousing Committee; staff		

Activities:

- **Expand forming groups access to knowledge, skills, and professionals**
 - Provide abundant learning and networking opportunities at National and Regional Cohousing Conferences.
 - Provide enhanced Coho/US resources for finding and creating cohousing; updating useful documents, and enhancing search and organizational capabilities
 - Respond to or refer inquiries from individuals and groups seeking to create cohousing
- **Develop and promote strategies to broaden access to financing and affordability**
 - Secure FNMA + FHA-HUD support for cohousing
 - Establish Coho/US identified financing resources
 - Promote lending to cohousing program with NCB and Self Help Credit Union
 - Explore crowd funding opportunity through National Condo Advisors
 - In partnership with PFAC, create affordable cohousing opportunities
 - Offer “financing and affordability” session(s) at national and regional conferences
- **Increase the pool of cohousing professionals and enhance connection for forming communities**
 - Support *500 Communities* training program through promotion and collaborative opportunities, including a gathering at the 2017 National Conference
 - Promote cohousing professional advertising packages
 - Seek cohousing professional blogs
 - Cultivate cohousing professionals to present at events and conferences
- **Enhance “what is cohousing” resources on the Coho/US website**
 - Enhance Coho/US “what is cohousing” resources
 - Seek out and highlight 2-3 promotional videos
 - Capitalize on community initiatives to profile cohousing
 - Revisit Cohousing Brochure + Slideshow
- **Support the creation of cohousing-like communities**

- Establish a “more than cohousing” initiative to support the creation of cohousing or cohousing-like models with an additional social-economic mission
- Consider a “cohousing-like” initiative to support the creation of cohousing-like models that encourage human interaction, but may not have cohousing type self governance and/or design participation
- Offer “more than cohousing” session(s) at national and regional conferences
- Explore opportunities for creating links and support networks to grow cohousing-like communities, and providing resources
- **Cohousing definition**
 - Revisit “What is Cohousing” definition created fall 2015 to revise or affirm
 - Consider trends that might affect the “evolving definition of cohousing”
- **Promote senior and senior-friendly cohousing**
 - Establish Aging in Cohousing (AIC) Committee; recruit additional committee members as needed
 - Finalize AIC Initiative vision and goals prior to 2017 National Conference
 - Committee to meet face to face at 2017 National Conference
 - Enhance and oversee the Aging in Cohousing webpage material/resources
 - Offer senior and senior-friendly cohousing sessions at national and regional conferences
- **Establish a “young families in cohousing” initiative:** encouraging families to live in cohousing; and supporting intergenerational communities in attracting families

CORE FOCUS

GOAL 2: NURTURE COHOUSING COMMUNITIES AND HELP THEM THRIVE

2017 Deliverables	Responsible	Progress	Challenges
Review and explore a re-design of Cohousing Now! eNews to enhance engagement and deliver resources	Staff		
Secure two or more online blogs from communities per month	Staff; Board		
Promote “tune up” programs and create connections to group process facilitators	Staff; Board		
Establish a “living in community” initiative, with initial focus on budget & finance (costs of living in coho); and 20 year retooling after founders and developers long gone	Staff; Board		

As part of Living in Community initiative, review and enhance the Cohousing Policy Database	Board; Staff		
Partner with a local community or organization to co-produce a regional conference	Conference Committee; staff		
Provide a 2016 Retreat “Dealing with Diverse Personalities”	Staff; select Board		
Design program sessions at the 2017 National Conference that enhance our vibrant communities	Staff; 2017 Conference Resource Team		
Design program sessions at the 2017 National Conference that “build resilient, sustainable communities” and capitalize on outcomes to support resiliency practices	Staff; 2017 Conference Resource Team		

Activities

- **Strengthen connections** between established cohousing communities and Coho/US
 - Enhance and distribute monthly *Cohousing Now!* eNews to subscribers
 - Cultivate connections between board members and community contacts; consider geographical criteria when recruiting
 - Partner with local communities to produce Regional Conferences
 - Improve the utility of our Community Reps data
 - Seek out and capitalize on opportunities to connect with communities, e.g., conference registrations, coho-l postings, inquiries
- **Identify needs of established communities** through conference feedback and other survey mechanisms and explore approaches for meeting needs
 - Compile and consider 2017 national conference survey results
 - Outreach to cohousing communities by board members representing regions
- **Enhance exchange of ideas and best practices** through increased online blogs
- Design program sessions at the **National Conference** that enhance our vibrant communities
- Support and promote “tune up” programs for existing communities
- Explore approaches to supporting efforts to **increase sustainable practices**
- **Establish a “living in community” initiative**
 - Getting a more systematic understanding of how communities address money with initial efforts of researching community budget and financing, including annual fees and surrounding issues
 - Defining (and sustaining) cohousing without linking it to an arduous design/development process: retooling practices for communities to maintain

vibrancy after 20 years, when many or most founders are long gone

- Enhance living in community resources, including the Policy Database

CORE FOCUS

GOAL 3: FOSTER A COHOUSING-FRIENDLY SOCIAL, POLITICAL and ECONOMIC ENVIRONMENT

2017 Deliverables	Responsible	Progress	Challenges
Collaborate with CRN/Cohousing Research Network in supporting research lead by University of Vermont	Research Committee; Staff		
Offer a full day CRN intensive at the 2017 National Conference	Staff; CRN		
Identify research specifications that could support cohousing growth such as financing metrics	Research Committee; Staff		
Increase access to financing: <ul style="list-style-type: none"> • Secure FNMA + FHA-HUD support for cohousing • Facilitate a success in NCB funding of a cohousing project • Develop Coho/US identified financing resources • Create “affordability” tagged resources 	Cohousing Financing Working Group; Staff		
Present at four or more events or conferences to educate the public on cohousing	Staff; Board		
Offer a public presentation at the 2017 National Cohousing Conference	Staff; 2017 Conf Resource Team		
Offer a “financing and affordability” session at the 2017 National Conference	Staff; Cohousing Finance Work Group		
Deliver a 2017 National Cohousing Open House Day	Staff; Public Education Committee		

Capitalize on the 2017 National Conference in creating partnerships with affiliated organizations, e.g., TWIG, Urban Land Institute, Civic Design Center, Lipscomb University's Institute on Sustainability	Staff; 2017 Conference Resource Team		
Create and promote material and resources on cohousing as a sustainable option for aging in place in community; outline economics of aging in cohousing	Aging in Cohousing Committee; Staff		

Activities:

Educate policy makers, the broader public and other key players about cohousing and its potential to contribute to the public policy agenda in areas such as: energy/resource conservation, sustainable development, limiting sprawl, building strong and resilient communities, healthy families, supporting environments for seniors, and increased citizen engagement.

- **Develop and promote strategies to broaden access to financing and affordability**
 - Secure FNMA + FHA-HUD support for cohousing
 - Promote lending to cohousing programs with NCB and Self Help Credit Union
 - Explore with NCB the creation of a deposit/investment program within NCB that could be used to reduce the lending rate on the traditional loan program for cohousing.
 - Explore crowd funding opportunities through National Condo Advisors' affiliated mortgage company.
 - In collaboration with PFAC, NCB and other potential partners, explore opportunities for programs that support creative financing and affordable models for cohousing development.
- **Enhance resources for affordable cohousing options**
 - Develop Coho/US identified financing resources for cohousing
 - Expand and promote resources on Coho/US website that are tagged "affordability"
 - Explore partnering with PFAC in producing a regionally-based cohousing conference focused on affordability
 - Offer "financing and affordability" session(s) at national and regional conferences
- **Promote quality research on cohousing** and its impacts on residents, local environments and local communities that contribute to growing cohousing
 - Strengthen collaborative partnership with CRN (Cohousing Research Network)
 - Support MOU with CRN supports mutual goals; identifies research specifications that could support cohousing growth; support CRN in seeking financing and grants to fund research, and collaborating with an academic institution.

- Create research-focused intensives and/or sessions at national and regional conferences in collaboration with CRN
- **Educate the broader public** about the benefits of cohousing, from resource conservation and sustainability to resilient communities and healthy families
 - Seek out and present on cohousing at regional and national events and conferences (presentations by Coho/US staff, volunteers, and cohousing professionals)
 - Organize and support an annual Cohousing Open House Day
- **Advocate for Aging in Cohousing (Internal & External Services)**
 - Promote cohousing as a sustainable option for Aging in Place in Community - socially, economically and environmentally.
 - Outline the economics of Aging in Cohousing vs other options
 - Advocate for services/benefits in Caregiving & End-of-life Issues in Cohousing
 - Support CRN research on Senior Cohousing

ORGANIZATIONAL DEVELOPMENT

GOAL 4: PROVIDE QUALITY SERVICES AS A CONNECTOR AND CLEARINGHOUSE

2017 Deliverables	Responsible	Progress	Challenges
Produce a plan and budget for delivering the 2017 National Cohousing Conference	Staff; Board		
Search for a 2019 National Cohousing Conference site and assemble considerations	Staff		
Increase organizational capacity in social media; conference planning; website resources through onboarding of Outreach Associate contract staff	Staff		
Vet Cohousing Map and Metrics, and enhance the accuracy and numbers of profiles on the Cohousing Directory	Staff		
Create 1-2 website resources monthly	Staff		
Expand and enhance the Cohousing Professionals webpage and increase listings	Staff; Board		
Produce a regional-conference model event, conference or retreat in fall	Staff; Conference Committee		

2017 and/or spring 2018			
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Activities:

- Produce a **National Cohousing Conference** on a biennially (2 year) basis that provides opportunities for learning, networking, inspiration and connecting with professionals
 - Consider location and advance planning for 2019 national conference
 - Determine staffing and management resources for 2017
- Produce 1-2 per year **Regional Cohousing Conferences** in partnership with local groups, cohousing communities and/or cohousing professionals
 - Proactively encourage cohousing groups, communities, and/or regions to submit proposals for conferences in places or about topics that Coho/US would like to target;
 - Maintain and consider enhancing RFP process to determine partnerships;
- Consider co-production of Conferences with National and/or Regional draw that focus on Aging in Cohousing; Affordable and Creative Financing to Support Cohousing Development; More than Cohousing; and/or Resilient and Sustainable Models
- Ensure staffing structure is meeting the goals of the association
- Expand **volunteer capacity** through cultivation and coordination
- Disseminate quality information and enhance connections
 - Assess website content and consider expanded categories, enhanced search and organizational capabilities
 - Refine cohousing metrics and cohousing map
 - Expand Cohousing Directory postings and profiles through collaboration with FIC
 - Increase listings on the Cohousing Professionals webpage and enhance connections

QUALITY GOVERNANCE

GOAL 5: DEVELOP A BOARD THAT CAN BE RESPONSIVE TO A GROWING ORGANIZATION AND ITS STRATEGIC FOCUS

2017 Deliverables	Responsible	Progress	Challenges
Produce a 2017 Strategic Plan; identify and affirm priority initiatives	Board; Staff		
Have a face to face Board meeting in 2017 at the National Conference	Board		
Revisit priority criteria (skills, demographics, geography, cohousing status) for board members, and establish a recruiting plan	Board; Staff		
Capitalize on the 2017 National Conference in recruiting board	Board; Staff		

leadership			
Deliver an annual State of Cohousing in the U.S. spring 2017	Staff		

- Commit to priority initiatives in 2017:
 - Cohousing Finance Work Group
 - Research Initiative
 - 2017 National Cohousing Conference - May 18-21, 2017
 - Regional Cohousing Conference Opportunities
 - Cohousing Open House Day - April 29, 2017
 - Technology for the future growth of cohousing
 - Living in Cohousing
 - Aging in Cohousing
 - More Than Cohousing - supporting cohousing-like communities with socio-economic missions
 - Young Families in Cohousing
 - Public Education to raise awareness and visibility
- Identify priority criteria (skills, demographics, geography, cohousing type) for board members, and establish a recruiting plan to meet needs
- Strengthen board effectiveness
 - Set a face to face meeting each year
 - Identify board member champions for initiatives
 - Promote board leadership development
- Build the credibility of Coho/US by reporting to the cohousing world our activities, achievements and ongoing challenges
- Consider the relevancy and future of Coho/US through a strategic plan process

SUSTAINING AND EXPANDING our AGENDA

GOAL 6: EXPAND AND ENHANCE ENGAGEMENT of VOLUNTEERS, COHOUSING COMMUNITIES AND ALIGNED ORGANIZATIONS

2017 Deliverables	Responsible	Progress	Challenges
Increase Facebook likes from 3,000 to 4,000 and increase Twitter presence	Staff		
Create a succession plan for coho-l	Staff; Board		
Increase subscriptions to <i>Cohousing Now</i> monthly eNews to 10,000	Staff		

Establish collaborative partnerships with SAGE Cohousing International and Aging Better Together (Blanchard & Zabaldo)	Aging in Cohousing committee; Staff		
Within “more than cohousing” initiative, create a partnership with Memel.Global for our mutual benefit	More Than Cohousing committee; Staff		
Provide offerings at the 2017 National Conference in collaboration with our partners (PFAC, CRN, FIC, 500 Communities, Memel.Global)	Staff; Board		
Provide offerings at the 2017 National Conference that support our new initiatives of Living in Community; Aging in Cohousing; Young Families in Cohousing	Staff; Board Committees		
Visit cohousing communities, board members, and cohousing professionals via travel to 3-4 locations	Staff		
Capitalize on 2017 National Conference in recruiting volunteers to staff the conference, and engage as advocates in promoting our agenda	Staff; Board		
Create and implement a marketing promotional plan for the 2017 Conference that attracts 500 participants			
Capitalize on the 2017 National Cohousing Open House Day to create regional collaborations and engagement of communities			
Vet and enhance our database of cohousing community reps	Staff; Board		

Activities

- Enhance communication tools
 - Expand and sustain a Facebook/social media presence that supports our agenda of growth and engagement
 - Formalize a succession plan for cohousing-l email discussion list serve in

- collaboration with Fred Olson
 - Expand utility of contact management system
 - Increase bloggers, blog postings and promotions
 - Enhance effectiveness of *Cohousing Now* monthly eNews
 - Increase the awareness of the Coho/US website through earned media, blogs, cross promotion of social media and aligned organizations
- Strengthen partnerships with affiliated organizations
 - Cohousing Research Network
 - Sage Cohousing International
 - Aging Better Together
 - Partnerships for Affordable Cohousing
 - Fellowship for Intentional Communities
 - 500 Communities
 - National Cooperative Bank
 - Self Help Credit Union
- Strengthen engagement of cohousing communities
 - Provide a board liaison to each geographical area to ensure the Coho/US is connected and responsive to needs and experiences;
 - Seek partnerships of local cohousing communities in delivering Regional Conferences;
 - Assess and enhance effectiveness of *Community Connections* occasional eNews
- Capitalize on National Cohousing Open House Day to strengthen engagement
 - Proactively seek collaborative media and visibility opportunities
 - Invest in encouraging collaboration of communities within regions
 - Identify and cultivate community reps identified through the promotional process
- Broaden and deepen participation in Coho/US events
 - Create and implement a marketing and promotional plan for national and regional conferences
 - Connect with those who have expressed interest, e.g., via a conference survey, and engage as appropriate
- Invest in travel for the Executive Director to visit existing and forming cohousing communities to (1) engage groups and communities with Coho/US; (2) capitalize on opportunities to provide public presentations, hosted by local groups; (3) cultivate individuals to encourage Coho/US support; (4) recruit prospective board leadership; and (5) meet individuals connected with our strategic partners or others who could be influential in our movement. Potential sites include:
 - New England (Aug 2016)
 - Wilmington NC (Oct 2016; hosted by UNC-Wilmington)
 - Phoenix (Oct 2016)
 - Asheville (winter 2017)
 - Sacramento/Bay Area
 - Seattle and Portland
 - Boulder/Denver
 - Yellow Spring, Ohio (Antioch College)

SUSTAINING AND EXPANDING our AGENDA

GOAL 7: INCREASE AWARENESS AND APPRECIATION of COHOUSING BENEFITS THROUGH PUBLIC EDUCATION

2017 Deliverables	Responsible	Progress	Challenges
Create and implement a marketing plan for the 2017 National Open House Day that yields an increase in public attendance and community participation from 2016 levels.	Staff; Board		
Increase number of earned media to two per week	Staff		
Provide “what is cohousing?” type presentations at 4-5 events	Staff; Board; leaders		
Educate the public on the benefits of aging in community: two or more earned media; quarterly Coho/US blogs and social media; two or more speaking engagements.	Aging in Cohousing Committee; Staff		
Deliver a tour of Germantown Commons in connection with 2017 National Conference	Staff		
Capitalize on a 2 nd annual National Cohousing Open House Day April 29, 2017 to educate the public through earned media and collaborative events	Staff; Board		
Capitalize on the 2017 National Conference to educate the public via public presentation(s), earned media, social media reach	Staff; 2017 Conference Resource Team		

Activities:

Increase the public’s understanding and appreciation of cohousing benefits: quality of life, lighter ecological footprint, and caring and resilient communities

- Establish and organize events targeting the public

- Organize and promote an annual Cohousing Open House Day event to welcome the public to visit cohousing communities
- Provide tours of local cohousing communities at regional and national conferences, including bus tours and on-your-own tours
- Consider add-on events that could attract the public to cohousing, and cultivate support for Coho/US, e.g., keynote or field trip prior to Open House Day
- Public Presentations
 - Support presentations to local, state and federal stakeholders, gatekeeper groups, and general public interest groups by staff and volunteer leaders
 - Create opportunities for a cohousing presentation to a general regional audience in connection with national and regional conferences
 - Consider partnering with local community group to host a national event that draws a wide public audience
- Seek Earned media and Visibility Opportunities
- Enhance Social Media to attract a wide public audience and a younger generation
 - Assess and refresh Facebook approach in coordination with web and email communications
 - Assess twitter approach; consider establishing a 2nd Coho/US org focused twitter account
- Promote senior and senior-friendly cohousing:
 - Seek out opportunities to educate the public on the benefits of aging in community such as earned media, inclusion in area agency on aging events, and producing senior cohousing focused blogs, social media and other Coho/US communications
 - Reach out to n4a, AARP, LeadingAge and other age focused organizations to promote participation in the 2017 National Conference
- Seek opportunities to engage and educate developers, to increase the pool, and spur cohousing development

SUSTAINING AND EXPANDING our AGENDA

**GOAL 8: CREATE A FINANCIAL MODEL to SUSTAIN THE ORGANIZATION
and MEET STRATEGIC GOALS**

2017 Deliverables	Responsible	Progress	Challenges
Create a 2017 plan and budget that achieves sustainable finances to meet our association goals	Staff; Board		
Achieve a 2017 National Conference net profit of 35% or greater.	Staff; Board		

Identify and consider an additional revenue stream to enhance finances	Staff; Board		
Increase number of communities and amount of contributing support from 2015 levels	Staff; Board		
Increase number of individuals contributing support, and the total dollar amount from 2015 levels	Staff; Board		
Create an attractive solicitation and pursue funding for 2017 conference scholarships	Staff; Board		
Achieve 100% board participation in fundraising	Board		
Secure or increase advertising revenue from 2015 levels	Staff		
Secure or increase number of professionals advertising, and the total dollar amount from 2015 levels	Staff		
Secure or increase number and total dollar amount of 2017 conference sponsorships from 2015 levels	Staff; Board; 2017 Conference Resource Team		
Secure funding from Univ of Vermont research project to partially compensate Coho/US support	Cohousing Research Network; staff		

Activities:

Goal 8: Ensure financial support to sustain the organization and meet strategic goals

- Refine our business model through an annual budget and planning process to achieve sustainable finances
- Examine and expand our revenue stream generated from:
 - National and Regional Conference Sponsorships
 - Conference and event registration fees
 - Cohousing Community Support
 - Advertising from Cohousing Professionals, Communities, and Individuals selling homes
 - Individual Donations

- Develop and implement annual fundraising strategies to secure
 - private funding from individuals
 - support from cohousing communities
 - sponsorships for conferences
 - advertising from cohousing professionals and businesses
 - 100% board member giving
 - Scholarship funds to support low income conference attendance
- Expand advertising revenue opportunities
 - Solicit and expanding pool of cohousing professionals and businesses providing cohousing services
 - Reassess and consider enhancements of website and print ad features
 - Pro-actively solicit homes for sale service through community communications and coho-l list serve
- Explore other revenue streams to support Coho/US
 - Collaborative funding model with Memel.Global
 - Grant-funded specific projects