Ohio Township Association Strategic Priorities 2022-2025



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Strategic planning facilitation provided by David Civittolo and Becky Nesbitt, Ohio State University Extension, Community Development. Who We Are

The Ohio Township Association (OTA) is a statewide organization dedicated to promoting and preserving township government through educational forums, publications, and lobbying. OTA is organized in 87 of Ohio's 88 counties and has more than 5,200 active members, made up of trustees and fiscal officers from Ohio's 1,308 townships, in addition to more than 4,000 associate members.

Purpose

One of the OTA's primary purposes is to secure - from the Ohio General Assembly - legislation which will enable township government to function more efficiently and to resist any effort that deprives townships of any rights, duties, or privileges which they now possess.

Board of Directors

Timothy Lynch, Trustee, Seneca County - Liberty Township, President Ed Huff, Jr., Trustee, Darke County - Brown Township, 1st VP

Scott Fabian, Trustee, Jefferson County - Steubenville Township, 2nd Vice President Ron Miller, Trustee, Crawford, County - Holmes Township, Secretary-Treasurer

Bob Entenmann, Trustee, Richland County - Washington Township

Dan Frederick, Trustee, Erie County - Milan Township

Joshua Gerth, Trustee, Hamilton County - Anderson Township

Ed Good, Trustee, Belmont County - Mead Township

Barbara Greuey, Fiscal Officer, Morgan County - Malta Township Ellen Homan, Fiscal Officer, Mercer County - Washington Township Larry Johns, Fiscal Officer, Auglaize County - Moulton Township Calvin Mangun, Trustee, Carroll County - Augusta Township Scott Miller, Trustee, Greene County - Xenia Township

Sandra Reichley, Fiscal Officer, Hocking County - Washington Township

Gary Salmon, Trustee, Butler County - Oxford Township

Tom Shay, Fiscal Officer, Trumbull County - Braceville Township Robert Trowbridge, Trustee, Fulton County - York Township Mark Van Buren, Trustee, Licking County - Harrison Township Cole Webb, Trustee, Lawrence County - Union Township Steven Woolf, Trustee, Montgomery County - Clay Township

Staff

Heidi Fought, Executive Director

Kelli Bailey, Office and Membership Coordinator

Carolyn Brown, Accounts Manager

Nicole Ganim, Director of Communications

Shae Haas, Public Relations and Events Coordinator Michael Zaky, Director of Education and Events

Contact Us

Ohio Township Association 6500 Taylor Road, Suite A Blacklick, OH 43004 (614) 863-0045

www.ohiotownships.org

Strategic Priorities 2022-2025

Township Government Advocacy and Promotion

Bringing awareness and support to the township form of government

Goal: Conduct in-district meetings between legislators and township officials.

Goal: Create tools to educate about township government.

Enhanced Member Enrichment

Strengthening the skills and knowledge of township officials to better serve their constituents

Goal: Create a new member training program.

Goal: Establish a mentorship program.

Organizational Sustainability

Creating a strong, sustainable organization to empower Ohio's Townships

Goal: Ensure a stable financial foundation to maintain and enhance services.

Goal: Create a service corporation to provide revenue to OTA for programming.

Goal: Utilize different types of media to improve messaging to all members.

Township Government Advocacy and Promotion

Goal: Conduct in-district meetings between legislators and township officials.

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Propose idea at County Officers meeting	Heidi	They like it/ Approved	June 2023	
Inform CTA Executive Committee (CE) person of program proposal	Kelli and new person	They like it/ Approved	July 2023	
Connect CTA CE and State legislator staffer	New person	Relationship built	July 2023	
Make a one pager for meeting talking points	Nicole and new person	One pager is used in meetings	July 2023	
Follow-up w/ CTA CE on meeting plans	New person	Confirm meetings scheduled	Aug 2023	
Get feedback from CTAs about meetings	Heidi and new person	Meetings held; Meetings scheduled again	June 2024	

Township Government Advocacy and Promotion

Goal: Create tools to educate about township government.

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Evaluate current tools used by OTA	Staff	List created	Sept 2022	
Enhance Twp 101 page on OTA website w/ updated info	Shae	Website content enhanced	Oct 2022	
Research having an OTA booth at the State Fair 2024	Michael	Research completed and shared w/ staff	Apr 2023	
Revamp current OTA video using modern methods	Nicole and Michael	Completed video	July 2023	
Revamp Twp 101 PowerPoint for townships to use	Michael, new person and Heidi	Updated version ready to use	July 2023	
Create poster for use in Government classes in schools and universities	Nicole and Shae	Poster created and printed	Aug 2023	
Research partnering w/ restaurant(s) for Township Day fundraiser	Michael	Research completed and shared w/ staff	Aug 2023	
Partner w/ other local government groups/libraries on education of local government	Heidi	Meeting held	Sept 2023	
Create Township Day flair (pins, pens, cards, flags, etc.)	Michael, Nicole, and Shae	Items purchased	Oct 2023	
Create distribution plan	Team	Final Plan	Oct 2023	
Share w/ board	Heidi and Michael	Approved	Nov 2023	
Implement distribution plan	Team and Board	People receive and use	Feb 2024	

Enhanced Member Enrichment

Goal: Create a new member training program.

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Research other new member programs.	Michael	Sample programs/curriculum; best practices, etc.	Summer 2022	
Share with OTA team and decide what to present to the board.	Michael	List of info to present to the board	Summer 2022	
Develop outline and timeline for the program.	Michael	Outline and timeline	Summer 2022	
Present the info to the board.	Michael	Materials presented and board informed	Fall 2022	
Solicit speakers and formulate materials to accompany the program.	Michael	List of speakers and generated materials	Summer 2023	
Finalize and rollout the program.	Michael	Materials packaged and sent to members; training available online; on magazine (Jan/Feb issue). Presented as option for new members.	November 2023	
Evaluate the program's effectiveness.	Michael	Polls and analytics gathered and shared with OTA team.	Spring 2024	

Enhanced Member Enrichment

Goal: Establish a mentorship program

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Research other mentorship programs	Shae	Samples	Oct 2022	
Share w/ OTA team to decide what to share w/ board	Shae	Potential structure	Oct 2022	
Solicit/recruit potential mentors	Kelli and Michael	List of names	WC 2023	
Focus group of potential mentors/mentees	Nicole and Kelli	Have event; Get feedback and direction	WC 2023	
Develop program structure based on focus group	Team	Program	TBD	
Share w/ board for approval	Heidi and Shae	Approval	TBD	
Fine tune program and roll out	Team	Final Program; Actual participation	TBD	
Follow-up w/ mentors/mentees for effectiveness	Kelli and Nicole	Feedback and suggestions for program improvements	TBD	

Organizational Sustainability

Goal: Ensure a stable financial foundation to maintain and enhance services

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Research new ways to fund operations	Michael	New funding options	July 2022	
Evaluate current funding streams and their sustainability	Staff	List of current funding	July 2022	
Research how other associations are funded	Heidi	Funding options	Aug 2022	
Poll membership on needs and future programs	Shae and Nicole	Results- ideas from members	Fall 2022	
Review all research	Staff	Develop plan	Spring 2023	
Develop 5-year budget projection based on revenue options	Heidi and Carolyn	Budget created	May 2023	
Share w/ board	Heidi	Approved	June 2023	
Share the funding plan w/ members	Nicole, Shae and Michael	Member buy-in	TBD (based on plan)	
Implement and execute new funding options	Staff	\$\$\$\$\$\$\$\$\$	TBD (based on plan)	

Organizational Sustainability

Goal: Create a service corporation to provide revenue to OTA for programming.

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Research entities that have service corporations	Heidi	List created	March 2023	
Speak w/ attorney about legal obligations/set up	Heidi	Direction provided	March 2023	
Board presentation on service corporations	Heidi	Knowledge and understanding	April 2024	
Draft service corporation creation documents	Heidi	Completed draft	May 2024	
Present draft to board	Heidi	Approval given to create	June 2024	
Finalize service corporation creation and management	Heidi	Final plan created	July 2024	
Get legal and accounting firms arranged for service corporations	Heidi	Set-up completed	Sept 2024	
Explore additional programs to offer members	Heidi	List of new offerings	Ongoing	

Organizational Sustainability

Goal: Utilize different types of media to improve messaging to all members.

Actions to achieve the goal	Who is responsible?	Measure of success	Anticipated date	Completion date
Evaluate holes in current messaging plan	Nicole	Holes found	July 2022	
Research other possible communication methods not currently being used by the OTA	Nicole	Develop plan	July 2022	
Create accounts on all social media platforms	Shae	Followers	July 2022	
Work w/ AMS on integrating forums on website	Shae and Michael	Options	Aug 2022	
Develop video messaging plan	Nicole and Heidi	Plan created	Fall 2022	
Create toolkit to help townships w/ communications	Nicole and Shae	Toolkit	Oct 2022	
Share communication upgrades w/ members	Staff	Members engaged	TBD	
Periodically review what is being utilized	Staff	Improved social media presence	TBD	

Appendix

Web-based Survey Summary Data March 2022

What do you think the Ohio Township Association does well? What are you most proud of?

Communication with and among membership, townships, county organizations

- I am most proud of the communication to the membership and the education opportunities
- The way most of the board interacts with county associations and supports county associations with attendance at their meetings
- Communication and follow up with membership
- Gives township official's the opportunity to gather and share ideas, provides communications to its members in several methods
- Offers a wide range of services and information
- The wealth of Information available to Ohio townships
- OTA Convention! OTA Magazine! Communications!
- Board representation at county banquets is well received and appreciated. Scholarship program is noteworthy. County Officers Assoc. meeting is excellent gathering and very informative. Proud of family atmosphere which seams board together at end of business day
- Communicate with members and provide the necessary tools to be good if not excellent public servants (to those who choose to)
- I am most proud of the reputation the State Association has at the General Assembly and with other associations/organizations

Educational programs/opportunities and assistance for members (includes Winter Conference)

- Assistance and information afforded to members
- Trainings, winter conference, publications
- How the OTA promotes itself and how it educates the membership
- The OTA provides relevant information to the membership in a timely fashion to assist in implementing new laws/programs or support/oppose legislation
- We offer educational material, keep them informed with any changes in government.
- Presents excellent conference at reasonable prices in good location

Promoting and advocating for townships with the State Legislature

- The association represents the townships well at the State legislature
- Works to promote Townships causes and concerns to the State Legislature
- Legislature Reviews and advocacy for townships
- Keeping up on House and Senate bills that will affect townships
- Effective legislative advocacy on behalf of townships. Proud of the many successful results

Focus on addressing member needs and concerns

- I think the OTA does a great job of really being member oriented. Almost everything we do is in response to questions/concerns from members. Our focus is truly to serve our members and their townships to the best of our ability
- The association does a great job on delivering townships with all the information necessary to complete day-to-day activity. I am most proud of the relationships I have built since my employment with the association
- Serving its members. The level of respect we get from state and national elected officials
- Member Services

Staff

- Excellent office staff professionalism! Ohio Townships educational material!
- Staff provides information in a timely way. Most proud of excellent leadership of the OTA Board and Staff
- The volume and quality of information coming out of the Association, given the small staff and financial constraints
- How such a small staff works together so efficient such as putting the winter conference

When OTA members think about this organization, what do you think comes to mind?

- Depends, some more involved members think of the benefits, others just think of it as an organization to pay dues
- Conference, assistance with clarification legislation and revised code
- Representation of township government as it pertains to legislation
- Winter conference, magazine, Heidi Fought and staff
- Educational opportunities, information resource
- OTARMA. Often members confuse OTA with OTARMA and vice versa
- Standing the Townships ground with the state
- Members view OTA as a vital resource for their roles in the township
- I do not think townships realize all that OTA has to offer
- The beneficial information they receive about grants and funding
- I believe a minority of our members actually know what the association offers and might only think that all we provide is a publication and a conference. CTA officials know what we do but this information may not be shared with folks that they sign up as members
- Support for township government and the continued efforts at the statehouse with Marisa Myers and the lobbyist group making sure that legislation favorable to townships is passed
- Sharing of township knowledge and resources including classes and vendors at conference and BWC discounts and OTARMA. All members can locate answers online or talk on phone to OTA staff with any problem. Legislative representation protects them. County banquets allow faces to be placed with names and discussions to follow
- I think most feel like they will get a quick response to their needs, such as questions about the ARP money
- Information and problem solving
- Statehouse updates, informative Magazine, telephone questions/answers provided OTA staff
- To experienced and engaged members they are extremely pleased with what we have to offer at a very reasonable price. To those who do not engage I believe they think our services are not necessary or important. Many of them think the Winter Conference is nothing more than a cost to them and a big party vs an exceptional education/networking opportunity
- I think many members associate the OTA with our conference. They generally view the OTA as a source of information for townships. However, there are many that also don't understand the OTA's role or the services provided.

In what ways do you think the OTA organization can improve?

Education, logistics, and access

- I think more online education and training, and the conference will have to have online opportunities because Trustees are not the same trustees as the past, the same for fiscal officers
- Hold some educational classes in the evenings not everyone has time to stop in the middle of the day to set at a computer
- Reliable broadband is a challenge for many of our membership, Keep access to information simple

- Conference use the vendor floor to high-light up and coming services, equipment, etc. that the
 elected officials may not be aware of or been exposed to before. Continue to enhance the on-line
 library of knowledge of Township issues, problems, and concerns. I'm not a blogger (willing to
 learn) but have key knowledge topics, with key folks write and encourage dialog about known
 issues or problems and up and coming items.
- I think the organization can help lead its members to moving their townships to more modern and efficient ways
- Keep Technological up to date and encourage townships to catch up concerning technology!
- Provide case studies of what is working well in other Townships
- Even though we have all this new technology, there is still several members that are still old school, and we should not forget them as we move forward
- Communicating with less "Tech Savvy" persons

Programs

- Offering a Legal Program and Offering Human Resource Program
- More programs that specifically help townships grant writing, legal, HR, website hosting/design, RFP postings on OTA site, House/Senate member virtual chats, and new member training
- Uniformity. All counties, staff, and leadership need to be on the same page when it comes to what
 it is we offer

Organizational promotion and actions

- We need to reach out to township officials about what the OTA has to offer. Unfortunately, some township officials do not put effort into learning about the OTA
- I think the OTA can improve by making our website more streamlined and encouraging members to use the new Resource Center more
- Getting officers and directors to all co organizations once a year to listen to the membership. Current travel is often to just directors co functions with several board members at one meeting. State should be split up and county organizations could simply contact OTA and directors could easily be assigned meetings close to home. This would also save thousands of dollars for the OTA membership. There are co banquets that cost the OTA thousands to attend. I understand officers spreading out across the state, but directors could be better assigned to cover the statewide meetings In my opinion there is no need for over two directors at any one meeting. Often directors are all together at a couple tables not even spread thru the crowd listening
- continued to improve the web site adding more resources making the membership process easier
 to work with not that I have worked with it but have heard comments from various county
 membership coordinators.
- Host one or two other meetings/conferences
- Have OTA (Staff, Board, and/or Volunteers) travel around State to deliver messages. Have four to six conferences locally across state during spring, summer or fall offering less travel for Trustees and Fiscal Officers and allowing them to meeting surrounding OTA members. Classes could be presented by State Auditor, Treasurer, Attorney General, UAN, Ethics, etc. to keep costs down and could be one day (or more). Directors are very much appreciated at County Banquets as it shows they are interested in that county. County Assoc needs to be aware of OTARMA and BWC discount benefits for belonging and that they can purchase recordings at township expense for them to get Fiscal Integrity credits for taking classes. OTA could provide new Fiscal Officers with a list of experienced Fiscal Officers from across the state that are willing to help them. If possible, more interaction between OTA and UAN would be helpful
- Members like to see more representation at County association events
- Continue developing and expanding OTA website and on-line activity
- Make sure newly elected (and in some cases long serving office holders) understand our history, purpose, and effectiveness. Which staff already does extremely well

• I think the OTA could improve on the sustainability of growth and a more strategic direction. For too long, the Association has increased capacity with little to no additional resources. While the OTA puts out highly quality products with what we have, each individual project could be better. We could have a more robust lobbying effort, better events, more individualized communications, and services - but often it just comes down to getting it done rather than making it the absolute best it can be. Services have been added over the years, yes - but I question if we have been thinking about what is really needed, why we are doing things the way we are, what is the best and most efficient ways to do things, and, more generally, a strategic path forward. The change that does happen is slow and not cohesive

When you think about the next 3-4 years, what threats, challenges, or obstacles should the organization be prepared to address to effectively serve the membership?

State Legislature

- Dealing with the State legislature will always be a challenge, but I think we must be more technical savvy to provide the services to the membership
- Change in legislators and their attitude toward township government
- Legislature support of townships

Financial/Organizational Sustainability

- The rising employee cost in wages and benefits, and remain financially stable
- Funding cuts to the townships, Rep. Brinkman introduced HCR No. 41 to repeal the state income tax within a decade will kill the LGF
- Changes in technology vs aging members, Prices for all services increasing all the time w/out realizing the increase in costs to members- ex. pricing of the conference registrations and optional events, pricing of the associate membership, etc.
- Struggles with Transition from the "Old way" to the "new Way" of communication and the lack of experience of new elected Officials
- Inability as an organization to be proactive and always reactive; always being 10-20 years behind other organizations/associations in implementing programs/technology; lack of funding to meet the needs of the membership and challenges facing townships in the 21st century
- I believe the largest challenge the organization faces is an aging membership. There need to be ways reach out to younger generations and get them active and involved
- One challenge could be encouraging our members to interact more with advancing technology and online systems
- Alternative funding for the OTA. Way too reliant on insurance and workers comp programs that is now a monopoly
- Gas Tax Losses! Inflation! Potential Losses on Investments!
- Being able to keep staff, working with large age range of membership and their tech. abilities and what technology is offered in their area ie internet, cell service, being able to keep dues and winter conference at reasonable pricing
- Trustees and fiscal officers are changing, we to kept reminding trustees and fiscal officers of their duties
- We need to think about other ways of getting our material out to our members
- Revenue reductions may be more of a risk for townships. Other government entities may want to
 consume townships for their revenues. Fiscal Officers and Trustees are seeing increased work levels
 and paperwork being pushed at them and it is becoming more difficult to find qualified people to
 even run for office. Qualifications should be updated for Fiscal Officers so that candidates know
 what they are getting in to. There should be mandatory classes for Trustees (such as budget, ethics,
 public
- Keeping our voices heard at the state house; the loss of support from county associations

- Closing the gap in working with Township size largest to smallest
- Main threat is maintaining current member services if something happens to OTA funding provided by insurance programs
- Mob rule, non-township wedge issues making its way into our circle. We are nonpartisan for a reason. Taking positions on partisan issues can/will be detrimental
- Funding, lack of or unsustainability of growth, and lack of innovation. The OTA has modernized quite a bit over the last two years, which was driven in part by the pandemic. The general aversion to change, whether it's keeping pace with the cost of doing business, technological advances, new services, etc., keeps the Association operating in the past. There will always be a balance between meeting the members where they are and keeping up with the world. The Association needs to take an active role in addressing these gaps and planning for the future.

Societal Challenges

- Lack of leadership at the county level; lack of interest in public service; fear of change; After Covid not sure. How and in what way Russia and Ukraine may change or stress the US and our local
 governments Cost of goods, fuel, energy, personnel. What the mix is likely to bring, maybe wideopen, but Townships historically adapt
- The elimination of townships, reduced funding for townships
- God forbid there is another variant that keeps our members from conducting their business. If there is, as an association we need to be prepared
- Government Control affecting Agriculture! Continued EPA Control on Rural Land Use!
- ABC Annexation, Budgets, Consolidation, Collaboration
- Stopping annexation from Townships

In your opinion, what are the most important functions of the OTA? Why is the organization important to its members?

Maintaining the township-based government model (lobbying and advocacy)

- Number one is to keep townships a form of government, this is done through lobbying and creating tools for townships to use
- keeping township government viable and active
- Education, Preserving townships, Information source to members
- Lobbying at the state house and educating our membership
- Serve as a Leader and Resource Center for advance and protecting Township Government
- Preserve and protect township government in Ohio. We provide the voice of townships at the General Assembly and educational tools/legislative reports to OTA members
- I think one of the most important functions of the OTA is the lobbying that is done on behalf of the townships. Another important function is the educational opportunities and information provided about available grants and funding
- Lobbying and Education. Without the many different methods of offering these functions (webinars, conference, publications, testimonials, etc...), I am not sure who would step in to protect townships
- Representing the membership on a state and national level on legislative and funding
- Providing information to the members to promote and protect township government and way of life
- Other than Casino Night...OTA's most important function is to be a VOICE

Communication/Information/Education for members and townships

• Communication to the members from both board members and executive director and attendance at their association meeting when invited

- Be the communicators and facilitators in all realms. We have a broad range of members with different backgrounds, abilities, ages, township make-ups (small to mega), budgets, employee base. Find ways to reach as much of the spectrum as possible and engage them!
- The organization is a safety net for its members. If they do not know something pertaining to any part of their township, they know they can call the OTA for a trustworthy and reliable answer.
- To assist townships in their day-to-day operations
- Keeping them informed of township issues. Training material
- Providing training information about lawmakers helping townships and having face to face
 meetings right now forget about virtual meetings the reason why is not every person has internet
 service in state of Ohio maybe sometime in future townships
- Legislative representation at state and federal levels. Offering most current, accurate knowledge to
 members so that they may do their jobs to the best of their ability both by phone and conference
 and at county association events such as banquets. Bringing unity to the OTA membership. Focus
 on positivity of members to counterbalance news about bad representation
- Keeping our voice heard at state house and supporting our members needs as they arise
- Legislation, communicating with members the importance of assisting with that legislation, and continue encouraging members their value of involvement
- Keeping members first education at conference
- The ability to represent a diverse organization that all members support. An active true collective voice is the only way for any organization to survive and thrive
- Advocacy and education. The OTA is a well-respected voice at the General Assembly and, given townships' reliance on the Ohio Revised Code, the absence of our voice would be immediately detrimental to township government. Additionally, the OTA provides education and resources to the members that they often can't get anywhere else