

Okaloosa Citizens Alliance Inc.

Strategic Plan
2007 - 2009

Outline

- Mission of the Organization
- Core Organization Values
- Officers and Directors
- Strategies
- Action Plans

Mission Statement

“The Okaloosa Citizens Alliance, Inc. is a non-profit and non-partisan group of diverse citizens who promote maximum efficiency and effectiveness of government. We will inform citizens on issues relating to taxes, spending and all government operations.”

Core Organization Values

Integrity

Respect

Teamwork

Service

Officers & Directors

- **B. Kabe Woods – Director & President**
 - President of K LW Properties LLC, a Private Investment Company and real estate brokerage. Member of the Ft. Walton Beach Vision Plan Stewardship Committee.
- **Doug Harvell – Director & Vice-President**
 - Retired Architectural Engineer and Regional Administrator for the U.S. General Services Administration.
- **Barbara Strewler – Director & Sec./Treas.**
 - Owner of a concierge business in Destin, a licensed Realtor and a Certified Case Manager.

Officers & Directors

- **Chuck Bolton – Director**
 - Owner of Capital Management Concepts, a financial services firm that specializes in estate planning, investment and insurance planning and retirement planning.
- **Russell Christesen – Director**
 - Former CEO & Chairman of Ebasco Inc. an international engineering, construction and consulting firm. Current member Citizens Advisory Committee for the Okaloosa-Walton Transportation Planning Org., Director of Destin Water Users Inc. and Director Institute of Senior Professionals at OWC.
- **Glenda Glover – Director**
 - Former Mayor of Ft. Walton Beach, Broker/Owner of Wayne Patton Realty and member of the Ft. Walton Beach Municipal Planning Board.

Officers & Directors

- **Wayne Harris – Director**
 - Executive Director of the Crestview Area Chamber of Commerce
- **Charles J. Morris – Director**
 - Retired as Provost & Professor of Psychology at Denison University after over 30 years of University level experience. He has a Ph.D. in Psychology from the University of Missouri.
- **Wilkes C. Robinson – Director**
 - Senior Federal Judge handling adjudication of cases against the Federal government.

Strategies

- Improve citizens' understanding of, and engagement in, government taxing, spending, budget and operations processes.
- Create and maintain a Board of Directors of at least 12 members that is broadly diverse, has credibility in the community and is “in it” for the long haul.
- Recruit and retain a Member base sufficient to achieve our Mission and goals.
- Implement operational processes and tools to support the Mission.

Improve Citizens' understanding of, and engagement in, government taxing, spending, budget and operations processes.

- Analyze individual entity budgets and processes to identify areas for improvement.
- Research, document and communicate the voting records of elected officials.
- Communicate research findings to as many citizens as possible using white papers, report cards, presentations and media programs.
- Gather input from citizens and establish a “two way” communication process.

Improve Citizens' understanding of, and engagement in, government taxing, spending, budget and operations processes.

- Participate in relevant budget sessions to clarify issues, improve communication and suggest areas of concern and improvement.
- Meet one-on-one with elected officials to discuss issues and create better alignment.
- Sponsor forums for various officials and citizens to create mutual understanding of tax and budget issues.
- Meet regularly with community opinion makers to discuss our ongoing work. (radio, TV, newspapers, etc.)

Create and maintain a Board of Directors of at least 12 members that is broadly diverse, has credibility in the community and is “in it” for the long haul.

- Identify important areas of expertise for the Board to function and actively recruit persons who possess those skills to the Board.
- Actively recruit individuals for the Board and general membership who are interested in pursuing our mission, for the purpose of sustaining our efforts over time.
- Develop the Board’s understanding of key issues through presentations by more knowledgeable persons.
- Share and coordinate with other taxpayer organizations on issues affecting Okaloosa citizens.

Recruit and retain a Member base sufficient to achieve our Mission and goals.

- Engage Members in committees and activities that support the Mission.
- Develop recruitment tools.
- Publish and distribute regular Newsletter to Members and other stakeholders.
- Publish “Special Bulletins” e-mail, mailers and newspaper ads.
- Maintain an up-to-date WEB site.
- Hold regular meetings of the Membership to keep them abreast of activities and issues.

Establish operational processes and tools to support the Mission.

- Recruit WEB Masters to support our WEB Site “oca1787.org”.
- Put Membership software tool in place.
- Put in place:
 - ✓ Checking account
 - ✓ Establish 501(c)(3) Status
 - ✓ P.O. Box
 - Logo & signage standard
 - Tax reporting processes