



Urban League of
Greater Cleveland

*Empowering Communities.
Changing Lives.*

TWO YEAR STRATEGIC PLAN
SEPTEMBER 1, 2018

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Letter from the Board Chair

Dear Friend of the Urban League of Greater Cleveland:

On Thursday, December 7, 2017, Marsha A. Mockabee, President and CEO of the Urban League of Greater Cleveland, delivered a pivotal address at the City Club of Cleveland as the League marked the 100th anniversary of its founding on that date, and at that venue. After reviewing historic milestones and the various challenges that were overcome in the past century, Marsha issued a call to action for all in attendance, and to those who would read her words in the future.

Comparing the actions of one person to sending forth a tiny ripple of hope which eventually builds to a powerful current, Ms. Mockabee invited her audience to start their own “ripple effect” by sharing their ideas and energies with the League. One extremely important part of that process is the document you now hold in your hands, a Two Year Strategic Plan for the Urban League of Greater Cleveland. This plan is the first step on our journey into the next century of delivering hope to those who have been left behind in their quest to build a better life for themselves and their families.

While the words of our Mission Statement have been slightly adjusted in recognition of updated societal needs, the need for our mission has not changed:

The Urban League of Greater Cleveland is a community based organization whose mission is to enable African Americans and other Minorities to develop and realize their potential through education, research, advocacy and provision of services. The Urban League’s work is focused in the following areas: Economic Empowerment, Education & Youth, Workforce Development, and is undergirded by Civil Rights & Racial Justice.

In order for this mission to become a reality, our aspirational vision is for funders, civic/corporate leaders and the broad community to recognize the Urban League of Greater Cleveland as the preeminent empowerment organization in Greater Cleveland for African Americans and other Minorities. This will be evidenced by providing services to an ever increasing number of individuals annually, increased funding levels, board representation, increased staffing capacity and the organization’s ability to serve as thought leader, convener, facilitator and advocate on major issues facing constituents.

We recognize a responsibility to work with and for both African Americans and all other Minorities as they seek true equality.

Our “work product” remains education, research, advocacy and provision of services in the areas of Economic Empowerment, Education & Youth and Workforce Development.

Finally, as Senator Robert F. Kennedy stated in a 1966 University of Cape Town address, because of the continuing need to ‘stand up for an ideal’ and to ‘strike out against injustice’, our mission is undergirded by Civil Rights & Racial Justice.

The Goals, Objectives and Strategies that form this Strategic Plan were developed with this mission as their foundation. Because the challenges we face in today’s world are ever changing, this plan should not be considered static, but rather dynamic as we constantly update it to keep pace with the times. Therefore, we invite you to stay engaged with us to improve what we present here to ensure we stay on point.

For those of you who participated in some way in the creation of this first iteration, on behalf of the board of directors and staff, we extend our humble and heartfelt thanks for your input. If you did not have the opportunity to contribute your thoughts and ideas, please do not hesitate to contact us so that we might have the benefit of your thinking.

Yours in Service,



James R. Myers
Chairman, Board of Trustees

Introduction

One of the earliest supporters in our efforts to build capacity for the Urban League of Greater Cleveland was the Cleveland Foundation which awarded the League a sizable grant to accomplish several objectives, one of which was executing a strategic planning process.

In the following pages, you will see the initial results of that process. We relied heavily on feedback received from our stakeholders, past and current clients, staff, board members, community leaders from all fields and others. The responses, views and opinions were honest, and we needed to hear them as a board of directors and staff responsible for meeting the needs of potentially thousands of individuals over the foreseeable future.

Since this is the first strategic planning for the League in a number of years, we intentionally adopted a shorter, two year time frame and a simpler process in order to build a foundation for a more complex process with a longer time frame as our next step. In addition, we realized at the outset that there were rudimentary issues to be addressed as we moved through the early stages of capacity building. This approach was vindicated by the responses we received in the survey and interview phase, most of which dealt with the most basic issues.

This is a living, breathing document. It is both aspirational in nature and a blueprint—a guide for planning and directing the activities of the Urban League of Greater Cleveland by those entrusted with governance and administrative responsibilities for the organization.

We encourage you to fully review our Two Year Strategic Plan. As our five board committees (governance, financial support and sustainability, public awareness, partnerships and alliances, and programming) move to operationalize the plan in the coming months, we welcome your thoughts and suggestions. Please direct your feedback to info@ulcleveland.org. You may also request a person to person response to your feedback in your email. We really want to hear from you!

Planning Methodology

Formation and Work of Strategic Planning Committee: Five board members (see names highlighted with asterisks on Board of Directors list in Appendix) were appointed to form the Strategic Planning Committee. Trustee Lee Chilcote agreed to chair the committee. In addition, Steven Minter, Senior Board Advisor, was also asked to serve. Several meetings were held during which the work plan was created including the choice of the S.W.O.T. analysis model for this planning phase. Five focus areas for inquiry were selected; the planning schedule was determined; the survey instrument and community leader interview questions were developed; and the strategic planning board retreat agenda was finalized.

Focus Areas: The five focus areas for inquiry were determined to be: governance (related to the board of directors and executive staff, their roles and responsibilities), financial support and sustainability (matters related to fundraising and financial stability), public awareness (how much do people know and understand about the organization), partnerships and alliances (how well does the organization employ collaborative models) and programming (how much do individuals know about the organization's programs, how effective are they, and do they match the needs of constituents).

Survey Instrument and Execution: The survey instrument was developed over several meetings of the Strategic Planning Committee. Survey Monkey was selected as the vendor for executing the survey.

Community Leader Selection: Urban League executive staff submitted names of community leaders to the consultant and Strategic Planning Committee for conducting one-on-one telephone interviews.

Retreat Planning: The Strategic Planning Board retreat was Saturday, April 14, 2018 from 8:30 a.m. to 4:00 p.m., a date and time when the majority of board members could attend. Survey and community leader interview results, along with the retreat agenda, were sent to the board in advance for their review. Supplementary materials related to the League's existing programming activities were distributed at the retreat.

Retreat: The day began with a visioning exercise, allowing board members to freely express what noteworthy successes might be achieved by the League two years hence. The purpose of the retreat was to garner the best thinking of the board of directors regarding medium range (2-3 years) planning goals, objectives and strategies for the League in light of the feedback received through the research phase, and based on their experience both as board members and their individual areas of expertise.

Each of the five focus areas was discussed in smaller work groups (with a chair and a recorder) or, in the case of programming, the entire body. Recommendations were then presented to the full board and consensus was reached. Specific tactics and timelines were left for further development by staff and various board committees and will be the subject of subsequent reports.

Finally, the League's existing Mission Statement was reviewed and updated, and an aspirational Vision Statement was added based on the overall strategic direction set by the board. The schedule for the plan's completion and formal adoption by the board of directors was presented by the consultant at the conclusion of the day.



Rationale

The Urban League of Greater Cleveland has basked in the afterglow of its centennial celebration during 2017. It is an accepted fact that the League played a critical role in both the survival and advancement of African Americans and other Minorities for the past 100 years in Cleveland. Feedback received in the research confirmed this. The League's programming has been cutting edge throughout its history, and its leadership has been applauded for leading the organization through good times and bad.

However, those who shared their thoughts, without exception, recognize that it is now time to write a new chapter and to raise the bar. As one respondent put it: "They need to kick it into a new gear." It is with this counsel in mind that the board drew the following themes from the research:

Governance: While the board of directors has been substantially reconstituted over the last 12-24 months, there is still a need for greater diversification on the board to ensure that all of the voices in the Greater Cleveland community are represented, particularly with regard to age, race, educational level and economic status. The board, particularly its leadership, has to be meaningfully engaged with all of the League's activities and be more visible in the community. It must set the standard for meaningful individual financial support of the organization, thus encouraging the expansion of the League's base of individual donors. Finally, the Directors must see to it that an orderly transition occurs when there are vacancies in either board seats or Executive staff positions.

Financial Support and Sustainability: There is a critical need to diversify the sources of funding for the Urban League of Greater Cleveland, particularly for its core operations, without which auxiliary programs could not exist. The pattern of almost total dependence on program grants creates an atmosphere where the Executive staff spends an inordinate amount of time "chasing" grants and too little time engaged in meaningful program planning and evaluation. As noted under "Governance," the number of individual donations, in amounts both large and small, must be substantially increased. While it may be too early to think about establishing an endowment (a worthy long-range goal), the board can work toward establishing designated reserves to have in place when emergencies arise which could threaten the League's viability.

Public Awareness: It is clear that understanding and knowledge of the League's activities and mission range from murky at best to nonexistent. While respondents were generally supportive of the League's purposes as they understood them, that understanding lacked clarity. Therefore, it is incumbent upon the League to do a better job of communicating with both existing and potential stakeholders. This is particularly important when it involves engaging individuals 40 years of age and younger who were severely underrepresented in our respondent sample.

Partnerships and Alliances: The need for greater collaboration between the League and external entities (nonprofit, public sector, private sector and individuals) was a constant refrain. While the staff have reached out to others in the past to engage in projects with the League, the general impression is that more can be done in this area. The board recognizes that funders in particular are interested in the extent of collaboration occurring in proposals they receive, both from a concern for allocation of scarce resources, as well as enhancing the quality of program planning. Therefore, this is an area which will receive significant attention early in the process of developing implementable tactics.

Programming: The board recognized that there was a significant connection in the minds of respondents between the League and its work in the areas of Economic Development, Workforce Development and Youth Programming and Education. This was due in large part to the inclusion of current or former clients in the respondent pool. The League is committed to continuing its work in these three areas and is looking toward expansion through collaborative partnerships. One of the issues raised by many had to do with the League's proper role when it comes to advocacy, particularly given the challenges facing the African American and Minority communities in the current political climate. This will bear further examination and resolution by the board. Two issues that call for immediate attention is ensuring that the League has sufficient staff capacity to carry out its activities and that the organization does a better job of quantifying the value of its work.

Goals/Objectives/Strategies

(Several activities, i.e., tasks of a tactical nature, have already entered the implementation phase before or during the strategic planning process. While the purpose of this plan is not to outline specific action steps taken by the League, where substantial progress has been made in starting tactical implementation, this fact is noted in red under the appropriate strategy.)

Governance

Goal: Provide proper fiduciary oversight and ensure robust accountability from all ULGC volunteers, executive leadership and staff with clarity of vision regarding our mission.

Objective #1: The board of directors will act effectively and ethically in their duties related to overseeing the institution's mission, fiscal integrity and program quality, and in recruiting, supporting and evaluating the Chief Executive Officer.

Strategy #1: Board self-assessment—The board will regularly perform an analysis of its composition with an eye to identifying missing skill sets, including financial capacity for "giving or getting" and striking a balance between grassroots and "connected" individuals. *(Substantial tactical implementation initiated.)*

Strategy #2: Board education—The Executive staff will implement regular orientation sessions for the board regarding ULGC's array of services, plans and activities.

Strategy #3: Board engagement—The board will be more engaged in the process of program planning, execution and organizational capacity building along with the Executive staff.

Strategy #4: Organizational succession planning—The board will immediately begin the process of developing succession planning protocols for any member of the Executive staff or board of directors in order to minimize disruption to the orderly conduct of business by the League.

Objective #2: The board of directors will communicate more effectively with stakeholders and external audiences regarding the role and activities of the board.

Strategy #1: Board external communications—Working with the Executive staff and its marketing team, the board will be given the opportunity to review all mass communications to external audiences prior to issuance to ensure that the involvement of the board is clearly stated and understood.

Strategy #2: Board's public and media exposure—Members of the board will, when appropriate, participate in public forums, broadcast events and interviews regarding organizational activities.

Objective #3: The board of directors will strive for maximum ratings related to the board of directors' performance parameters for the National Urban League Assessment process.

Strategy #1: Board orientation—The board of directors will be kept informed of the performance parameters promulgated from time to time by the National Urban League. *(Substantial tactical implementation initiated.)*

Strategy #2: Board engagement—The board will operationalize whatever policies and procedures are necessary to ensure compliance with National Urban League Assessment standards. *(Substantial tactical implementation initiated.)*

Strategy #3: Board training—The board will avail itself of all training opportunities provided by the National Urban League through the affiliate relationship in order to ensure compliance with NUL guidelines and best practices. *(Substantial tactical implementation initiated.)*

Financial Support and Sustainability

Goal: Ensure the financial viability of the Urban League of Greater Cleveland.

Objective #1: Based on the mission and operational plans for the organization, determine funding requirements and realistic annual fundraising goals in advance of each fiscal year.

Strategy #1: Budget forecasting and resource allocation—The Executive staff, with assistance from the Board Finance Committee, will prepare an annual budget that realistically reflects the needs of the organization each year and how resources, when obtained, will be applied with maximum impact on program and staff performance. *(Substantial tactical implementation initiated.)*

Strategy #2: Fund development plan—The organization will prepare an annual fund development plan, identifying likely sources of funding for programs and activities budgeted for under Strategy #1 (above). *(Substantial tactical implementation initiated.)*

Strategy #3: Development of individual donor base—The board of directors will commit to increase the number of regular individual donors to the organization. Board members will be accountable to meet their annual “giving or getting” financial pledges.

Objective #2: Begin planning for the long-term sustainability of the organization.

Strategy #1: Board-directed reserves—The organization will begin planning for the creation of a board-directed restricted reserve fund used to guard against unforeseen eventualities which may threaten the existence of the Urban League of Greater Cleveland.

Strategy #2: Fee for service opportunities—Look for every practical opportunity to charge for services.

Public Awareness

Goal: Clarify the mission and activities of the Urban League of Greater Cleveland for the benefit of the widest possible audience.

Objective #1: Evaluate and update current agency marketing and branding.

Strategy #1: Develop and implement an overall agency marketing plan to include an annual report, agency collateral, program materials, social media, talking points, etc. *(Substantial tactical implementation initiated.)*

Objective #2: Enhance knowledge of areas of focus to ensure there is an equitable understanding of our efforts in Economic Empowerment, Education & Youth and Workforce Development.

Strategy #1: Develop and utilize social media platforms. *(Substantial tactical implementation initiated.)*

Strategy #2: Produce talking points and an “elevator speech” for use by board members and others.

Strategy #3: Engage in greater number of community outreach activities including co-hosting events.

Objective #3: Improve the League’s engagement of stakeholders 40 years of age and younger.

Strategy #1: Utilize social media platforms and other media and outreach activities targeting a younger demographic. *(Substantial tactical implementation initiated.)*

Strategy #2: Be more intentional and inclusive when seeking new board and advisory committee members.

Strategy #3: Expand the reach of the newly chartered Urban League Young Professionals Chapter. *(Substantial tactical implementation initiated.)*

Partnerships and Alliances

Goal: Continually seek to build meaningful collaborative relationships to expand the reach of Urban League services to its constituents.

Objective #1: Increase our partner network in existing Education and Workforce Development programs.

Strategy #1: Develop programs that attract partners.

Strategy #2: Include other service providers when writing grant proposals. *(Substantial tactical implementation initiated.)*

Strategy #3: Collaborate with established partners with demonstrated results.

Objective #2: Create and expand new strategic partnership relationships across all new programming initiatives.

Strategy #1: Develop programs that attract partners.

Strategy #2: Include other service providers when writing grant proposals.

Strategy #3: Collaborate with established partners with demonstrated results as well as smaller, newer innovative players.

Programming

Goal: Build capacity for healthier communities through advocacy in action that results in targeted programs and collaborative partnerships.

Objective #1: Continue and expand upon Economic Development programming with a minimum increase of 30% in entrepreneurs and businesses served annually by the end of 2020.

Strategy #1: Seek greater funding opportunities for staff expansion and capacity building. *(Substantial tactical implementation initiated.)*

Objective #2: Revitalize the Workforce Development Department with a minimum increase of 30% in clients served annually by the end of 2020.

Strategy #1: Create linkages between the educational sector (K-12 + colleges) and the League’s Workforce Development efforts, thereby permeating the boundaries between the two.

Objective #3: Continue to develop and expand Youth Programming and Education programming with a minimum increase of 30% in students served annually by the end of 2020.

Strategy #1: Create linkages between the educational sector (K-12 + colleges) and the League’s Workforce Development efforts, thereby permeating the boundaries between the two.

Strategy #2: Continue to work in the wrap around services and soft skills space.

Strategy #3: Explore additional niches and areas of need where the League is positioned to assist, such as serving as intermediaries for indigent college students; youth who are aging out of foster care; and youthful offenders.

Objective #4: Clarify the League’s Social Advocacy role.

Strategy #1: Ensure that our local League affiliate is following National Urban League guidelines for advocacy.

Strategy #2: Explore opportunities for partnering with the local branch of the NAACP.

Strategic Plan

Objective #5: Ensure that the organization has sufficient staff capacity and succession plans to execute its mission.

Strategy #1: Evaluate the “human capital” of the League including quality of the staff, performing job description reviews and revisions, revamping expectations regarding job performance and instituting training programs where necessary.

Objective #6: Institutionalize the collection of performance data across all Urban League program platforms to inform decision-making and planning, and to improve initiatives.

Strategy #1: Immediately begin to evaluate the most cost-effective CRM software solutions to deliver more robust metrics to measure strategic and operational goals used in decision-making and resource allocations.

Next Steps

Now that this initial planning document has been published, the board of directors will continue to proceed according to the strategic planning process as outlined by the National Urban League in its board of directors training held in Cleveland in September, 2017.

Among other things discussed in that training, the board has “articulated a shared vision for the future” and has assessed “the value of the organization to its constituents.” We have taken the “time to visualize, ponder and debate the future within the context of known facts and realities.”

Now, the job at hand is to convert the strategic goals, objectives and strategies into implementable tactics which will form part of the League’s annual or operating plans. These tactics will include specific action steps, timelines, budget requirements and the person(s) responsible for implementation and evaluation.

While the Executive team will have primary responsibility for developing the tactics and annual or operating plans, the board will appoint five working committees—Governance, Financial Support and Sustainability, Public Awareness, Partnerships and Alliances, and Programming—to oversee the work. Tactics will be prioritized according to the relative importance of the issue or need.



Recognizing that many of the issues and organizational needs presented in this document are of the “chicken or the egg” variety, some objectives and their associated strategies and tactics will take precedence (e.g. finances). However, within the next two year time span, all of the points raised in this plan will be addressed.

We now have a direction and a focus thanks to the individuals who participated in this process, and a path to follow for the next two years. As was stated earlier, we invite you to stay engaged with us as we work to make this plan a reality, not so much for the Urban League as an organization, but for the people we serve each and every day.

Executive Summary

Underwritten by a grant from the Cleveland Foundation, the Urban League of Greater Cleveland initiated a strategic planning process in the fall of 2017. The board of directors appointed a six person committee to undertake the work, and a consultant was engaged to support the committee's activities and assist the board in authoring the final document.

A work plan was developed over the course of several months which included five "focus areas" to investigate (Governance, Financial Support and Sustainability, Public Awareness, Partnerships and Alliances, and Programming.) The decision was made that a S.W.O.T. analysis (Strengths, Weaknesses, Opportunities and Threats/Challenges) would be the analytical tool of choice and that the initial plan would cover a two year period.

Two forms of data collection from stakeholders were chosen, an on-line survey and one-on-one interviews with those in leadership positions. One hundred twenty seven survey responses were collected of which 54 were completed entirely (43% completion rate) during the month of January, 2018. Eighteen community leadership interviews were completed between 1/29/18 and 3/12/18. (See Appendix for detailed survey and interview results.)

The S.W.O.T. analysis matrix resulting from these data points is as follows:



Executive Summary

An all-day board retreat was planned by the Strategic Planning Committee and held on April 14, 2018. The day began with a visioning exercise and review of the survey and interview results, and the resulting S.W.O.T. analysis. Working groups were formed according to focus area and developed an overall goal for each area, objectives and strategies. (According to National Urban League guidelines, implementable tactics and associated tasks are to be developed through a working committee structure over time and become part of the League's Annual or Operating Plan.)

There were several key findings from the research and S.W.O.T. analysis which form the basis for the strategic direction adopted by the board of directors. (Please see page 4 for a more expansive discussion of these findings.)

The Urban League of Greater Cleveland is a trusted community partner, not only for the African American community, but for the larger Northeast Ohio community as well. It is highly regarded because of its longevity, the work it has done over its 100-year history and its past and current leadership. Individuals are willing to support it financially, and the vast majority of those who have received services are satisfied with the quality of the work.

It is apparent that there are significant issues that need to be addressed by the governing body of the League and its staff in order to chart a new course for the next century. The fact that our data comes from significant community leadership and key stakeholders who are positioned to support the League's efforts, financially and otherwise, tells us that we need to take heed. In crafting the first stages of this plan, we have attempted to view the upcoming work through the lenses of their eyes.

One issue we recognized immediately is that over 87% of the survey respondents were 45 years of age or older. The lack of engagement by a younger constituency was dramatic. Many respondents noted this fact in their comments.

While individuals have a definite view of the roles to be played by the League in the abstract and support those roles as "important," the majority don't understand how the organization is governed, who the leadership is and what specific programs the League operates. Questions arose regarding how the League should strike a balance between programming and advocacy.

Marketing was considered weak or ineffective in telling the League's "story." There were also concerns expressed about staff capacity in addition to measuring results when it comes to program performance.

The financial stability and long-term sustainability of the organization was of paramount importance to many when addressing weaknesses and challenges.

The need for the institution of succession planning for both departing board members and senior staff was a major concern.

With these themes as the backdrop, the board of directors developed the following **5 Goals, 16 Objectives** and **36 Strategies** to address over the next two years:

Governance

Goal: Provide proper fiduciary oversight and ensure robust accountability from all ULGC volunteers, executive leadership and staff with clarity of vision regarding our mission.

Objective #1: The board of directors will act effectively and ethically in their duties related to overseeing the institution's mission, fiscal integrity and program quality, and in recruiting, supporting and evaluating the Chief Executive Officer. (4 Strategies)

Objective #2: The board of directors will communicate more effectively with stakeholders and external audiences regarding the role and activities of the board. (2 Strategies)

Objective #3: The board of directors will strive for maximum ratings related to the board of directors' performance parameters for the National Urban League Assessment process. (3 Strategies)

Executive Summary

Financial Support and Sustainability

Goal: Ensure the financial viability of the Urban League of Greater Cleveland.

Objective #1: Based on the mission and operational plans for the organization, determine funding requirements and realistic annual fundraising goals in advance of each fiscal year. (3 Strategies)

Objective #2: Begin planning for the long-term sustainability of the organization. (2 Strategies)

Public Awareness

Goal: Clarify the mission and activities of the Urban League of Greater Cleveland for the benefit of the widest possible audience.

Objective #1: Evaluate and update current agency marketing and branding. (1 Strategy)

Objective #2: Enhance knowledge of areas of focus to ensure there is an equitable understanding of our efforts in Economic Empowerment, Education & Youth and Workforce Development. (3 Strategies)

Objective #3: Improve the League's engagement of stakeholders 40 years of age and younger. (3 Strategies)

Partnerships and Alliances

Goal: Continually seek to build meaningful collaborative relationships to expand the reach of Urban League services to its constituents.

Objective #1: Increase our partner network in existing Education and Workforce Development programs. (3 Strategies)

Objective #2: Create and expand new strategic partnership relationships across all new programming initiatives. (3 Strategies)

Programming

Goal: Build capacity for healthier communities through advocacy in action that results in targeted programs and collaborative partnerships.

Objective #1: Continue and expand upon Economic Development programming with a minimum increase of 30% in entrepreneurs and businesses served annually by the end of 2020. (1 Strategy)

Objective #2: Revitalize the Workforce Development Department with a minimum increase of 30% in clients served annually by the end of 2020. (1 Strategy)

Objective #3: Continue to develop and expand Youth Programming and Education programming with a minimum increase of 30% in students served annually by the end of 2020. (3 Strategies)

Objective #4: Clarify the League's Social Advocacy role. (2 Strategies)

Objective #5: Ensure that the organization has sufficient staff capacity and succession plans to execute its mission. (1 Strategy)

Objective #6: Institutionalize the collection of performance data across all Urban League program platforms to inform decision-making and planning, and to improve initiatives. (1 Strategy)

Executive Summary

Now the job at hand is to convert the strategic goals, objectives and strategies into implementable tactics which will form part of the League's annual or operating plans. These tactics will include specific action steps, timelines, budget requirements and the person(s) responsible for implementation and evaluation.

While the Executive team will have primary responsibility for developing the tactics and annual or operating plans, the board will appoint five working committees—Governance, Financial Support and Sustainability, Public Awareness, Partnerships and Alliances, and Programming—to oversee the work. Tactics will be prioritized according to the relative importance of the issue or need.



Acknowledgments

The Urban League of Greater Cleveland would like to acknowledge the following for their contribution to the completion of this Strategic Plan:

- The Cleveland Foundation for its financial support as a part of its capacity building grant to the League in the 2017-18 fiscal year.
- The Strategic Planning Committee, chaired by Trustee Lee Chilcote, which spent many hours in the design and planning of this process.
- Steven A. Minter, our Sr. Advisor, who provided the thought leadership which brought us to this phase of our organization's development.
- Members of the board of directors who gave us their best thinking in crafting the goals, objectives and strategies for this plan.
- Our stakeholders and community leaders who gave of their valuable time in providing direction and feedback through the surveys and interviews which form the basis for this plan.
- Our staff members who provided logistical support for the planning and who will be responsible for much of the tactical implementation forthcoming from the plan.

Appendix

Urban League of Greater Cleveland Mission Statement (Updated)

The following Mission Statement was formally adopted on August 16, 2018:

The Urban League of Greater Cleveland is a community based organization whose mission is to enable African Americans and other Minorities to develop and realize their potential through education, research, advocacy and provision of services. The Urban League's work is focused in the following areas: Economic Empowerment, Education & Youth, Workforce Development, and is undergirded by Civil Rights & Racial Justice.

Urban League of Greater Cleveland Vision Statement (Updated)

The following Vision Statement was formally adopted on August 16, 2018:

Our aspirational vision is for funders, civic/corporate leaders and the broad community to recognize the Urban League of Greater Cleveland as the preeminent empowerment organization in Greater Cleveland for African Americans and other Minorities. This will be evidenced by providing services to an increasing number of individuals annually, increased funding levels, board representation, increased staffing capacity and the organization's ability to serve as thought leader, convener, facilitator and advocate on major issues facing constituents.

Emailed Survey Results & Findings

Of 127 responses collected, **54 individuals completed the emailed survey (43% completion rate).**

The **average time** spent completing the survey was **4 minutes and 50 seconds.**

Their **demographic breakdown** was as follows:

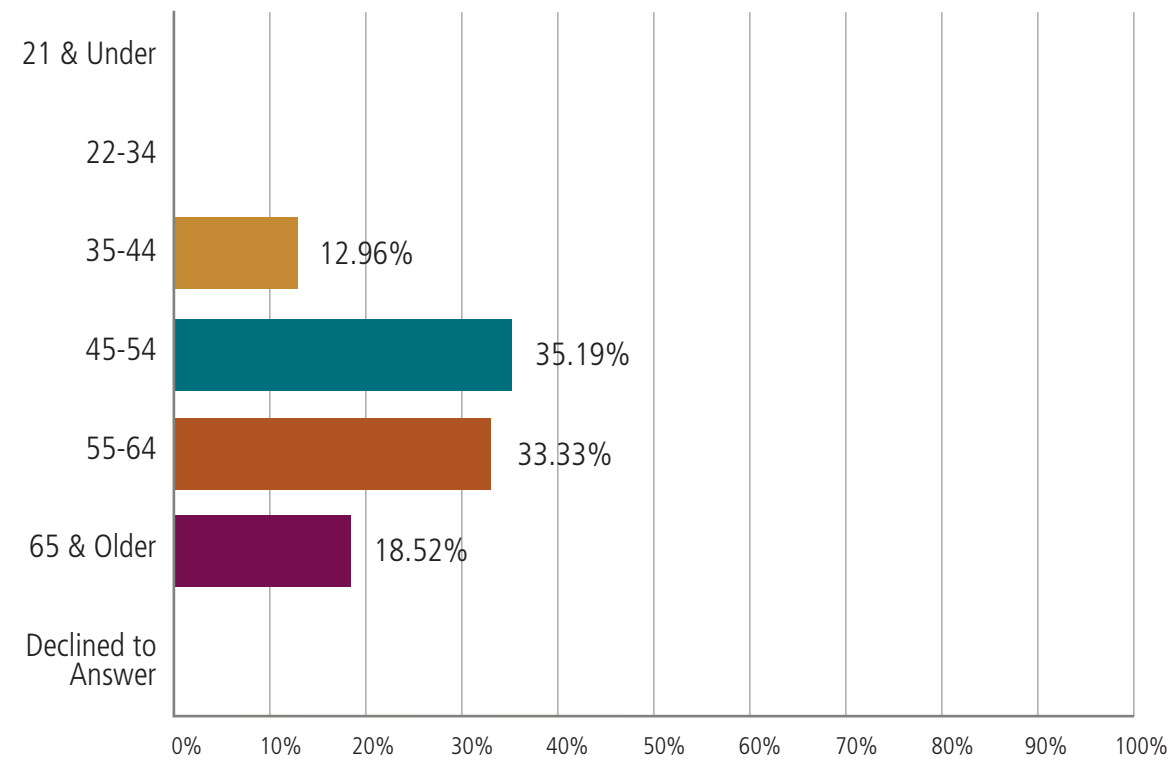
Sex

Female	30	58.82%
Male	21	41.18%
	51	

Age

35-44	7	12.96%
45-54	19	35.19%
55-64	18	33.33%
65+	10	18.52%
	54	

Q2 Age

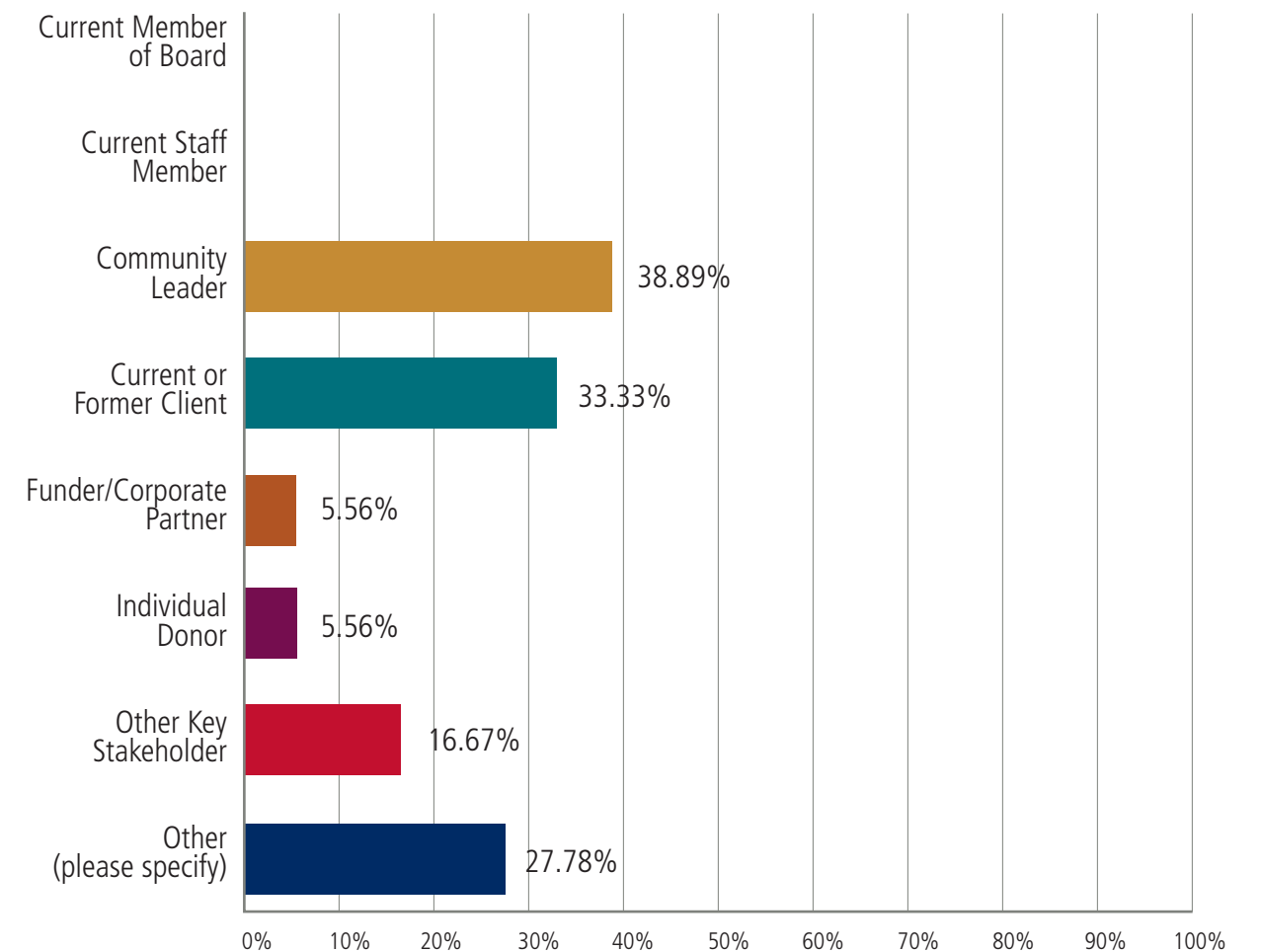


Individuals **classified their affiliation** with the Urban League as follows:

Affiliation with ULGC

Community Leader (self-defined)	21	38.89%
Current or Former Client	18	33.33%
Funder/Corporate Partner	3	5.56%
Individual Donor	3	5.56%
Other Key Stakeholder	9	16.67%
Other	15	27.78%
	54	

Q1 What is your affiliation with the Urban League of Greater Cleveland? (Please check all that apply)



When asked **what is the role of the Urban League of Greater Cleveland**, a text analysis of responses overwhelmingly involved the words "community, business, development, African Americans, education, advocate, minority and opportunities."

Q4 - What is the role of the ULGC?



- **93% believed** that **the role** they mentioned **was important**.
- **61%** of respondents **do not know how the League is governed** and operated.
- For **those who did know**, the majority of responses involved "board of directors, staff and board Governance."
- When asked **what kinds of services** they thought **the League should offer**, "business" was mentioned 31.5% of the time, followed by "training" (18.5%), "education" (14.8%), "employment" (7.4%) and "youth development" (5.6%).

Q9 - What kind of services do you think the ULGC should offer?



- The **greatest strengths** of the League mentioned were its positive impact in the "community" (25.9%), its "history" (16.7%) and its "reputation" (13%).

Q9 - The greatest strength(s) of the ULGC is/are...

(please complete the sentence)



- The **greatest weaknesses** of the League:
 - **involved the term "community"** in 18.5% of the responses. The verbatims were as follows:
 - Failure to network with others in the community for a better grasp on initiatives. Failure to retain young professionals that make a difference in their communities.*
 - Visibility in the wider community.*
 - Not enough financial support through membership or community support along with engagement of younger professionals to be self-sustaining.*
 - Awareness of what they do and the impact they make on the urban community.*
 - Its failure to engage and tap into the community.*
 - Lack of financial support from the community.*
 - A well-known "brand" with a long history of helping to build up the community—which still needs help and empowerment.*
 - ...making the community aware of its good work.*
 - ...forgetting the needs of the community changes.*
 - **involved the term "funding"** in 16.7% of the responses and referred to perceived difficulties in acquiring the necessary funding for operations and programming.
 - **involved the term "limited"** in 7.4% of the responses and referred to limitations in funding, reach and scope, follow-through and collaboration.

- involved the term “marketing” in 7.4% of the responses and referred to a perceived lack of resources devoted to marketing in the areas of membership promotion and making the public aware of the League’s services.

- involved the term “organization” in 7.4% of the responses. The verbatims were as follows:

Partnering with other organizations.

As with any organization, funding continues to be a challenge, so diversifying funding sources become even more critical.

Its staff and board leadership needs strengthened so it is able to attract more resources to accomplish its mission. While this is a chicken/egg problem, a “game-changing” leader of the organization is the best place to start in this evolution.

Too many competing organizations.

- involved the term “failure” in 6% of the responses. The verbatims were as follows:

Failure to network with others in the community for a better grasp on initiatives. Failure to retain young professionals that make a difference in their communities.

Its seeming failure to meet the needs of continuing to strive for relevance in a new day.

Its failure to engage and tap into the community.

➤ The **greatest opportunities** of the League involved 19 different key words or phrases.

Q12 - The greatest opportunity(ies) for the ULGC is/are...

(please complete the sentence)

Greater
 Urban League Social Cleveland Partnerships
 Government Greatest Able Continue
 Supporting voter Community
 Development Awareness Increased Education
 Outreach Collaboration Youth Small Business

Some of the more notable verbatims were as follows:

The greatest opportunities are for the League to be on the cutting edge of responding to community needs, especially as it pertains to the African American community. Collaboration is key!

Address many community needs that are crucial but not being addressed.

Defining or redefining its mission with clear goals that are articulated to the community.

Establishing results-oriented programming for African American youth throughout the Greater Cleveland community.

Increase involvement of community leaders/stakeholders in areas of importance. Maybe on committees/taskforces to gain additional insight and involvement.

To be a larger, louder and more important voice in the Cleveland community representing diverse Clevelanders.

...to do community outreach through a huge voter registration, education and mobilization drive for 2018. Voter registration by itself doesn't mean much unless you get people the information they need to make wise decisions, and get them to the polls to vote.

Increasing its collaboration with complimentary community organizations to eliminate duplication of efforts and take advantage of each party's respective strengths.

Supporting the development of a pipeline for future civic and government leaders.

Use this moment of greater racial awareness and frankness to push for full inclusion and equity.

Increased awareness and partnership with majority organizations and corporations.

Being located accessible to Greater Cleveland clients.

Providing training for jobs for people and helping small businesses connect to the decision makers in corporate America.

Promoting the benefits of the Urban League beyond ethnic and geographical boundaries.

To continue and improve the services offered to become the change needed in Cleveland through Urban League of Greater Cleveland partnerships and affiliations.

Continue to speak out and serve.

Minority business development.

The greatest opportunity for the ULGC is to position itself to help revitalize Cleveland as the next phase of manufacturing sets in over the next couple of decades moving from a cheap offshore labor model focused on globalization and specialization to a localized, smaller but flexible, consumer driven model.

An increased member base and grassroots organizing.

Improving upon social/digital media expression.

Youth entrepreneurship.

- The **greatest challenges** of the League involved 17 different key words or phrases with “funding” heading the list at 14.8%.

Q13 - The greatest challenge(s) for the ULGC is/are...

(please complete the sentence)

Greatest Challenge Service **ULGC** Corporate
Financial Support Serve **Community**
Money Funding Convincing **Organization**
Political Relevant Able **Getting** Overcoming **Answer**

Some of the more notable verbatims were as follows:

Funding—as with any nonprofit, there are so many that it becomes imperative that ULGC clearly defines and articulates what it is and what impact it has or plans to have in the community.

Some newer organizations are perceived to be making more impact in workforce and enterprise areas for inclusion.

Lack of direction, failures to define who it is, struggling philanthropic community, small staff.

Not enough community support.

Figuring out the way to become more connected to the community’s needs.

Getting information out about the organization.

Overcoming perceptions among Generation X and Millennials that the organization is outdated.

I can imagine that the new admin in Washington and the most recent tax policy might pose challenges to ULGC.

Getting people to attend its programming.

Reaching our children and teens, and convincing those who oppose its mission of its need and importance.

... convincing people that the power to vote is the most important power we have in this democracy.

Rallying people of all races around ending gerrymandering, ending voter suppression and removing abusive incumbents from political office.

Dealing with the conservative political leadership of our nation.

Lack of formal education among the population being served.

Buy-in from corporate America when it comes to training and what skills are actually needed and also truly giving opportunity to minority and female businesses, not just introductions.

They can’t service enough people to cover the need.

- 69% said that, if asked, they **would provide financial support** for the League.
- 80% thought there was **nothing else to be asked** in the survey.

Of the 20% who thought there were other questions to be asked, many of the responses dealt with inquiring about **other ways individuals could become involved with the League such as through membership or volunteering.**

(The remainder of the survey was for current or former clients.)

- When asked **what programs or services they do or did receive** from the League, the vast majority **related to receiving assistance with their business.**
- **If a former client, the years** they received those services spanned **2003 to 2017.**
- **87%** of current or former clients **expressed satisfaction with the quality of services received.**
- **When asked why**, most responses involved the **helpfulness of staff** support and **information received.**
- **57%** of respondents **no longer utilize** the resources or services of **the League.**

When asked why, responses included other **personal demands** on time and **no appropriate services available** to utilize.

Community Leadership Interview Results and Findings

Eighteen out of 22 requested interviews were completed between January 29, 2018 and March 12, 2018. The average interview length was 16 minutes with the shortest being 8 minutes and the longest 32 minutes.

Participant categories were as follows:

- Nonprofit executive - 3
- Private sector executive - 2
- Religious leader - 2
- Government official - 3
- Foundation executive - 2
- Philanthropist - 2
- Educator - 1
- Business owner - 2
- Civic leader - 1

Methodology: All participants were interviewed by phone, reminded of the purpose of the call and promised that the interview would take no longer than 15-20 minutes of their time. They were informed that their responses would remain anonymous and permission was asked to record the session for accuracy. All participants agreed to be recorded. (Recordings were destroyed once the final Strategic Plan was approved by the Urban League of Greater Cleveland board of directors.)

Participants were told they would be asked to speak to their perceptions of the strengths and weaknesses of, and opportunities and challenges for, the Urban League of Greater Cleveland. Their observations were to be made based on the five issue areas selected for review by the board: 1) Governance, 2) Financial Support and Sustainability, 3) Public Awareness, 4) Partnerships and Alliances, and 5) Programming.

At the conclusion of this portion, respondents were asked if there was anything else they would like to add that the board should take into consideration as it works on the League's strategic plan.

(Numbers indicate the times the same or similar response was mentioned under that particular area of inquiry.)

Strengths

- Programming/Mission - 10
- Leadership ("Marsha Mockabee") - 10
- History/longevity of the organization - 7
- Partnerships in the community and leadership in the City - 6

Weaknesses

- Marketing - 10
- Financial - 8
- Staff capacity/capability - 2
- Quality of governance - 1
- Metrics (lack of) - 1
- No succession plan in place for CEO - 1

Opportunities

- More collaborations - 8
- Minority business - 8
- Workforce development - 5
- Advocacy - 5
- Increasing public awareness - 3
- Inner ring/private schools - 3

Challenges

- Financial - 9
- Quality of governance - 3
- Collaborations (lack of) - 3
- Staff capacity/capability - 2
- No succession plan in place for CEO - 2
- Metrics - 1
- Marketing - 1

Additional Comments

- The need to seek collaborations - 11
- Challenges to the board to rise to the occasion - 5
- The need to staff up - 4
- The need for more outreach - 4
- The need for more direct contributions - 2
- Quality of governance - 2
- The need to support the CEO - 2
- The need for metrics - 2
- The need for younger perspectives - 2
- The need for a succession plan for the CEO - 1

Key Verbatims

(The following verbatims are representative of sentiments expressed in the community leadership interviews.)

Governance

Challenge the board of directors to do all they can to move the organization forward, including writing checks and getting others to write checks, being ambassadors, making connections. As Frank Jackson has been heard to say: "The cavalry ain't coming!"

The board should recognize how important they are, be willing to take risks, lift up the organization.

As you look for advisory and future board members, do what MLK did and seek out grassroots people in addition to the educated (children, elderly, etc.). Look for people who think outside the box, non-traditional voices. Usually a lack of vision comes from a lack of good and authentic leadership.

Use your power not so much to do things as to see that things get done. Urban League is in a unique position; you can be much bigger than you are by coming up with ideas and bringing people together.

I have no idea who the board chair or board members are or their financial participation which impacts solicitation of special gifts. If you don't have strong leadership at the board level, you have big problems.

It's hard to get CEOs involved in the community, but still need to bring senior level leaders to the table and engaged, or re-engaged with the Urban League. KeyBank—Beth Mooney, a demonstrated leader, an action person. The Health Care sector has to be engaged because of the number of people they employ. There are good heads of the regional banks, e.g. Huntington and PNC. The sports sector is not given enough attention: Haslam, Dolan, Gilbert. These should all be kept informed of what the Urban League is doing. The board chair needs to have conversations with these people, sometimes with the Urban League CEO, sometimes not.

The board should not only do a self-assessment now, but on an annual basis. It will drive the board to understand that a stronger board is needed.

One challenge or threat would be the failure to take seriously the outcome of the strategic planning work and implement the recommendations that come out of this work.

Financial Support and Sustainability

Marsha Mockabee has done a great job of taking it from the grave and has made the Urban League viable. Now how will it be made sustainable for the next 10 years?

It's a new day; what's the next horizon? More of the same does not work. Urban League will always be funded, but will it be funded at the levels it should? Will it be sitting at the big tables in town? They need to kick it into a new gear.

While the financial condition was greatly strengthened in the last few years, it still strikes a fragile balance with the need to rebuild their track record. The "damn building" put things on a precarious footing; dogged determination by a handful of folks in town kept the Urban League from completely going under; the rebuilding work and heroic efforts of one or two individuals in particular kept the Urban League a going concern.

There is competition for dollars in the philanthropic space, so you get mission creep.

Funders want to see you accomplish what you promised. Can you measure your results?

If we're not getting the money to do the things we want, we have to look at what we want.

You can't live off event planning. The organization needs strong commitments for long-term funding from individuals. I can't tell you when I've had a request in writing from the Urban League for a direct contribution. Many of us are on event overload. Individuals and corporations prefer making direct contributions. When you look at the tables, these events do not draw the top leadership. Tickets get circulated. That's not a great value. You don't necessarily have the people you want in terms of getting your message out.

Perhaps the board needs to be broadened to allow for more people who can contribute significant dollars.

Public Awareness

It feels like the current leadership and programming is stronger than the perception of it, so they need to work on communicating this to stakeholders.

They could do a better job of telling the full story of the League, the people they help, the programming; you don't see enough. Maybe the story isn't being told in enough places and circles.

People remember the Urban League of the past, but are not familiar with the Urban League of today. The community doesn't know the difference between the League and the NAACP and what each organization does.

There is a lack of clarity as to what it does. This is not unique to the ULGC, but true of Leagues in general. They can't articulate what the core mission is, seems like a hodgepodge of different projects.

The League has a proven track record of program delivery with measurable outcomes in Workforce Development and Business Development.

As you conduct these interviews, as you learn what some of us (community leaders) don't know, that should also be instructive.

Partnerships and Alliances

If the Urban League asked for more help and formed partnerships with other nonprofits, it could achieve more. I would encourage it to do so. If collaboration is increased, the pie will get bigger for everybody.

Don't see on a national or local level the movement being connected with the churches as in the past; the church needs a greater voice when the Urban League is planning and strategizing.

The League has a powerful, prominent brand, therefore could be a convener, help develop a collaborative model with a common agenda.

The Urban League is a strong connector, convener, neutral group that brings agencies and groups together to develop solutions.

You can't have partnerships of substance in this climate without a hard look at the impact of the deterioration in race relations and knowing how to skillfully do that. This starts with your board and then to your constituents and beyond.

Programming

Ensure that metrics are in place and work is data driven and you are able to show results. I'm not saying the Urban League isn't doing this, but funders look for this.

The voice of the organization has grown more silent, cooperative with the system. Should consider more of an advocacy stance along with more vocal groups like Black Lives Matter, and with the churches and synagogues in building an authentic, in-depth relationship. The climate of fear in the nation caused by the FBI, etc. and globally contributes to a reluctance to be more vocal.

You must get input from those you serve regarding their needs and programming to meet those needs. Go back to constituency to present the plan to see if any re-tooling is needed.

The League is walking the line between programming and advocacy; it needs to define its role between these two landscapes with a view toward raising the profile of the organization—what is its vision in terms of its role in the community?

There is rising visible racism in the country. What was unacceptable five years ago is now acceptable. What is the role of the Urban League in focusing on racial equity? The challenge is to carve out a visible role in the Education and Workforce Development landscapes; also advocacy.

The Urban League is an anchor and a go to institution that deals with attainment and achieving opportunity and economic anchoring, yet we still have within the Black and Minority community huge poverty rates, low workforce participation rates and many neighborhoods that are segregated and marginalized. How does an organization strike a balance to deal with these issues while being nimble enough to respond when a crisis such as Tamir Rice arises that calls for a voice?

The Urban League is doing a good job, is great and much needed, but not sure they will be the future institution they ought to be looking at the challenges and shifts we face in the world—being the institution of the 1950s vs. 2025. We have gone from societal shifts occurring every 40 years to every 24 months to every 13 months and now every three months.

It needs to be relevant to today, not forgetting the past, not mission creep, but mission stretch. How does a good organization become a great organization? What do you do exceptionally well? Then invest there. The John Maxwell 70/25/5 Rule: spend 70% of resources on things you do exceptionally well, 25% on the things you must shore up and 5% on what you don't do well.

Now that the fires are out, the Urban League has a different kind of mission. So Marsha Mockabee may need a different kind of team around her, not firefighters.

You have the right person in Marsha Mockabee; allow her the space to do her job.

She (Marsha) seems to be a "one man band" and may be stretched too thin, whether by design or necessity.

Marsha Mockabee has done an extraordinary job in keeping the Urban League afloat. With the reality of Marsha approaching retirement, transition planning for leadership by the board of directors must be thoughtful.

Does the Urban League have enough bandwidth (people) to take on a larger mission?

Find the sweet spot and try not to be all things to everybody, otherwise you can quickly become irrelevant.

When I think about the Urban League, it's all about empowerment—an agency that works to make sure everyone has equal opportunities...all minorities, gay and lesbian, females. It's an agency that does advocacy, research to ensure that everyone has equal opportunity.

Board of Directors

*(*Indicates member of Strategic Planning Committee)*

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