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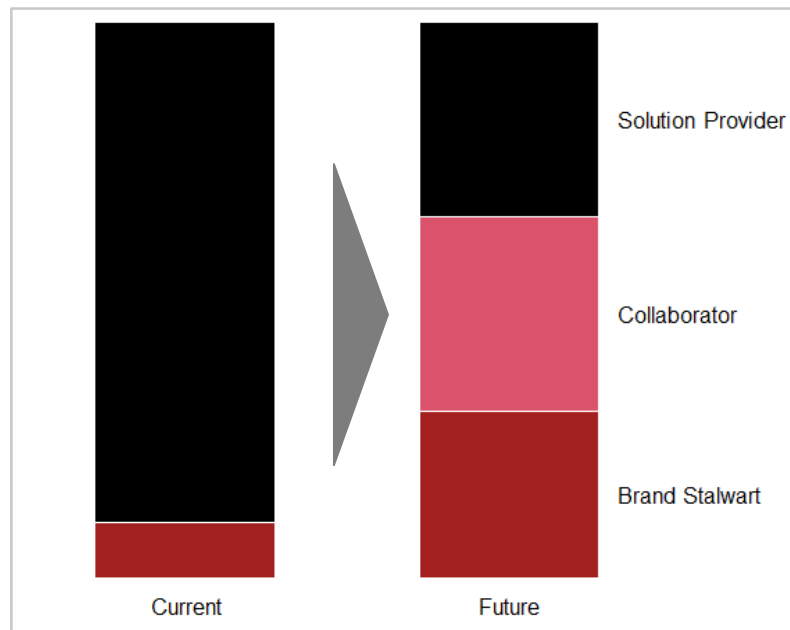
CUL Strategic Plan Update Presentation

October 7, 2020



Need for new strengths as a ‘Collaborator’ and enhancements in ‘Brand Stalwart’ position were identified

Shift in Focus



Future State Strategic Changes Rationale

Narrow and Deepen **Solution Provider**

- CUL is currently stretched thin and it is critical to retain select offerings it is positioned appropriately to provide without sacrificing quality and effectiveness

Build **Collaborator** Strengths

- At-scale partners in the Chicago market have the leading capabilities and are potentially better positioned to provide overlapping programs

Enhance **Brand Stalwart** Position

- As the only affiliate representing the African American community in the Chicago market, CUL needs to be a voice for the community
- Thought leadership and advocacy is an essential part of CUL’s ability to assess and respond to the community needs

*Above allocations are directional/indicative of focus and efforts

Three foundational charters were also recognized and detailed alongside with CUL leadership and board members

Strategic Charters

**Narrow and Deepen
Solution Provider**
Program Department Heads

Build Collaborator Strengths
*External Affairs & Research &
Policy*

**Enhance Brand
Stalwart Position**
*External Affairs, Research &
Policy, and Development*

Foundational Charters

Culture & Leadership
CEO

**Fundraising Innovation &
Donor Engagement**
Development and CEO

Analytics & Technology
Research & Policy

“Narrow and Deepen Solution Provider” Charter

CUL should be a Solution Provider for proven programs and transition everything else to an alternate model

Rationale

CUL is currently stretched thin and it is critical to retain only select programs it is positioned appropriately to provide without sacrificing quality and effectiveness

Capabilities Impacted

- Service Consistency & Quality
- Program Design & Innovation
- Program P&L/Performance Management
- Project Execution & Change Management

Priorities

1. Evaluate existing range of offerings within a program to shortlist proven offerings and services
2. Identify existing programs and offerings that could be considered for a partnership based model
3. Deepen existing proven programs and new offerings
4. Ensure that the program offerings matches the community needs identified

We anticipate completion of the priorities and action items within 6 months

Priority	Possible Actions	Timeline
1. Evaluate existing range of offerings within a program to shortlist proven offerings and services	<ul style="list-style-type: none"> • Develop criteria/decision factors for activity reductions • Determine a list of programs and activities to move away from based on reduction criteria • Establish formal process/approach for evaluation of programs that also enables screening and de-emphasizing offerings (every 6 months) • Select core team that will drive the evaluation taking into account regulatory, requirements from alliance commitments 	< 1 month
2. Identify existing programs and offerings that could be considered for a partnership based model	<ul style="list-style-type: none"> • Set parameters for what a successful partnership programs look like • Build process for transitioning programs/services to a partnership model • Identify prospective programmatic partners and conduct due diligence (overlaps with Collaborator charter) 	1 - 3 months
3. Deepen existing proven programs and add new offerings	<ul style="list-style-type: none"> • Evaluate location focus expansion beyond just the southside of Chicago • Assess demographic reach/penetration within the target community (gender, age, sexual orientation, etc.) and identify under-penetration opportunities 	1 - 3 months
4. Ensure that the program offerings matches the community needs identified	<ul style="list-style-type: none"> • Create a process for tracking satisfaction of clients referred to external organizations • Enhance processes for programs to meet quality assurance, grant compliance, and track impact/outcomes 	3 - 6 months

Bold indicates more notable actions

Before making programmatic changes, a few considerations will need to be taken into account

Decisions

- Which programs will be reduced and which programs are “proven” to move forward with?
- What activities (based on input from program directors) can be provided by other organizations or don't make sense for CUL to provide?
- How do we build out a credible health offering to the community in response to COVID-19 and beyond?

Costs

- Market research required to deepen proven programs
- Transitioning expenses to transfer program to another provider or partner
- Technology for metrics tracking
- Additional resources for ongoing program evaluation and adaptation to emerging needs

Risks/Challenges

1. Difficult managing current needs of the community and expectations of funders
2. Changes in the way programs are run over the current funding cycle could potentially affect the funding commitments
3. Future changes of programmatic offerings need to be in line with how funders want to help
4. Find the right delivery model (including partnership) and staffing to provide mental health capacity for youth
5. Concerns over diluting the offering when scaling programs (e.g., IMPACT)

Out-of-Scope

- Essential programs that are part of the NUL - NUL provides funding opportunities, guidance, and resources for core programs

“Build Collaborator Strengths” Charter

'Build Collaborator Strengths' is a strategic lever to enhance impact and amplify reach of CUL's offerings

Rationale

Our objective is to deliver programmatic services where we are leading and refer clients to partner non-profit organizations for the remaining offerings rather than serve them directly

Chicago market offers at-scale partners with capabilities that are potentially well positioned to provide overlapping programs

Capabilities Impacted

- Partnership Identification and Due Diligence
- Partnership Formation
- Partner Governance and Contract Management

Priorities

1. Define types of strategic partnerships and informal alliances
2. Create "best fit" criteria for partnerships
3. Develop process for ongoing partnership and alliance identification opportunities
4. Develop process for formalizing partnerships
5. Outline individual department responsibilities and accountabilities towards partnerships

Underlying actions are critical and require expediency

Priority	Possible Actions	Timeline
1. Define types of strategic partnerships and informal alliances	<ul style="list-style-type: none"> Outline scope of desired partnerships (e.g., funding, programs, advocacy, events, in-kind support (media, tech)) and the nature of each partnership (e.g., affiliate, co-delivery, referral) Take an inventory of existing partnerships and evaluate effectiveness across categories and criteria Identify/list the organization's needs that can be met through partnerships and develop an initial list of prospective partners 	< 1 month
2. Create "best fit" criteria for partnerships	<ul style="list-style-type: none"> Define CUL's value proposition - what we bring to the table/what can we offer to partners Draft a document outlining "best fit" criteria for each type of partnership 	< 1 month
3. Develop process for ongoing partnership and alliance identification opportunities	<ul style="list-style-type: none"> Create a partnership committee - assign responsibilities to individuals to "own" relationships (representatives from EA, development, research & policy, 1-2 program department heads) Create a process for vetting and responding to programmatic partnership requests (internal scorecard to standardize process) Create a process for board recommendations of partners, communicating intent, and initiating introductions to partners 	1 - 3 months
4. Develop process for formalizing partnerships	<ul style="list-style-type: none"> Draft template for agreements/contracts Develop checklist for procedure/sign-off on who can approve partnerships Create advertising/pitch materials to provide to the board and individuals approaching potential partners (best-fit criteria and partnership types win-win outline are a starting point) 	< 1 month
5. Outline individual department responsibilities and accountabilities towards partnerships	<ul style="list-style-type: none"> Create a dedicated entity/role for managing partnerships Create a platform/database for inventory of partners and relationship management Develop process for evaluating effectiveness of partnerships through objective metrics to demonstrate value Create a sample "best practices" for partnership engagement (e.g., communication cadence) 	1 - 3 months

Bold indicates more critical items

There are several decisions, costs, and risks that should be accounted for when pursuing the charter

Decisions

- How much should CUL partner for the sake of amplifying our own impact versus supporting smaller grassroots organizations?
- What parameters should determine who CUL partners with and who is “off-limits”?
- Should we have a centralized function for partnership management or department level control?

Costs

- Resources/time/effort for identification and conducting diligence of partnerships
- Legal contract/agreement support
- Tracking of success metrics on partnerships and maintenance of contracts (time/effort costs)

Risks/Challenges

1. Brand/reputation of partners can cannibalize CUL brand
2. Quality concerns on partners ability to execute/uphold the partnership deal (equivalent risk for CUL not following through)
3. Expectation from NUL to partner with an organization that doesn't align with the new strategic direction (content and role of partnership not aligned to mission)
4. Funding risk if partnerships are refused
5. Existing partnerships don't fit the future criteria or desired alignment
6. Lack of supply of great partners in the community or an unwillingness to take on additional partners
7. Tokenism from larger organizations or corporate partners

“Enhance Brand Stalwart Position” Charter

Enhancing the Brand Stalwart Position is necessary to supporting the other strategic pillars

Rationale

As the only affiliate representing the African American community in the Chicago market, CUL needs to be a voice for the community

Thought leadership and advocacy is an essential part of CUL's ability to assess and respond to the community needs

Capabilities Impacted

- Community/External Relations
- Thought Leadership & Communication
- Marketing/Campaign Events
- Volunteer Involvement

Priorities

1. State a clear mission and common objective
2. Develop a unified voice of CUL's brand through tools and content
3. Increase flexibility to pivot programming to meet emerging needs
4. Increase reactivity to public incidents
5. Improve reporting of metrics (ease, frequency, consistency, and standardization of measurements)

Mission statement was clarified and metrics with targets were established to help gauge ongoing progress

Former Vision Statement

A stronger African American community is a better Chicago

Former Mission Statement

The Chicago Urban League works for economic, educational, and social progress for African Americans and promotes strong, sustainable communities through advocacy, collaboration, and innovation.



New Vision and Purpose Statement

Economic and racial equity for Black Chicago

New Mission Statement

The Chicago Urban League works to achieve equity for Black families and communities through social and economic empowerment.

Organization-Level Metrics

Track select metrics to gauge progress towards mission

- **Advocacy:** Pieces of legislation supported, articles published
- **Client Engagement:** Number of members touched, number of members that attended events, number of members that participated in programs
- **Funding:** Number of donors, total revenue from donors

Organization-Level Metrics

By 2025, CUL will increase the overall impact on the community by...

- Driving deeper thought leadership pieces by **3x**
- Increasing the number of members touched by **2x**
- Increasing total revenue from donors by **2.5x**

The underlying actions can be executed in under 6 months

Priority	Possible Actions	Timeline
1. State a clear mission and common objective	<ul style="list-style-type: none"> • Adjust language of mission to include racial equity lens • Detail out the impact of adjusted mission and strategy on policy, program delivery and internal processes and identify actions • Conduct a brand perception survey to establish a baseline with constituents to improve understanding of clients, gaps in meeting expectations, and confirm “top-of-mind” relevance 	<p><1 month</p> <p>3 - 6 months</p>
2. Develop a unified voice of CUL's brand through tools and content	<ul style="list-style-type: none"> • Develop cross-program messaging that details the implications and rationale of individual programs as they relate to racial equity • Build tools for stakeholders/ambassadors to explain who we are and what we do (elevator pitch materials) that takes into account updated mission • Create a digital asset management database to house all marketing materials • Create a template/standard for all marketing messaging (managed by external affairs) 	1 - 3 months
3. Increase flexibility to pivot programming to meet emerging needs	<ul style="list-style-type: none"> • Conduct frequent program reviews/evaluations to ensure programs are meeting the community needs • Establish flex and shared resources that are versatile and can be re-oriented quickly (assessed on a quarterly basis) to deploy towards meeting emerging needs and respond to public incidents 	1 - 3 months
4. Increase reactivity to public incidents	<ul style="list-style-type: none"> • Develop PR framework to increase the speed at which CUL can respond to events/incidents and balances thoughtful understanding of impact on all constituents • Launch a research and policy roundtable to stay informed on issues affecting the community • Produce position statements, thought leadership, and op eds based on causes being monitored through the roundtable 	3 months
5. Improve reporting of metrics (ease, frequency, consistency, and standardization of measurements)	<ul style="list-style-type: none"> • Define “equity” measures (mostly external) and track against those measures (managed by research and policy & director of learning and evaluation) • Establish a standard set of program and organization-level impact metrics - including client level satisfaction (becomes a basis for influence funders and internal direction shifts) • Develop a central source for aggregating impact metrics (both external and internal) to easily generate reports • Create a repository of client success stories to share across all media platforms 	3 - 6 months

Bold indicates more notable actions

Like the other charter, we debated questions around key decisions, costs, and risks when creating the charter

Decisions

- Do we have leadership (including the board) consensus on racial equity focus as the umbrella issue?
- Do we have the commitment from the technology needed to do the work?
- How will the flex/shared resource structure work in practice?

Costs

- Technology platform to record/maintain client success stories
- Technology platform to produce and track metrics Flex/shared resources
- Facilitation of perception survey (aim to get in-kind support)
- Template/tools development (elevator pitch, etc.)

Risks/Challenges

1. Losing relevance to other organizations by not capitalizing on the opportunities presenting by the COVID-19 crisis
2. Funding implications by pursuing funders that will allow us to pivot to serve emerging needs
3. Change management implications
4. Getting buy-in from departments and staff members to commit to the new direction of the brand (e.g., brand guidelines)

Out-of-Scope

- Dedicated marketing team - would like to expand the capacity of external affairs down the road but current funding and resource availability prevents this now

“Culture & Leadership” Charter

'Culture & Leadership' charter is foundational to creating an organization exhibiting excellence

Rationale

Setting the right values guides employee behavior and ultimately pushes our mission further

Capabilities Impacted

- Governance
- Internal Communication
- Performance and Incentives Management
- Cultural Values & Practices

Priorities

1. Improve internal communication and increase transparency to build trust
2. Invest in talent and professional development of staff
3. Bridge department siloes to increase collaboration across programs
4. Create an environment of stability
5. Expand board involvement for solutioning

The proposed actions incorporates resource-light, best practices that can be implemented in less than 3 months

Priority	Sub-Priority	Sample of Potential Actions	Timeline
1. Improve internal communication and increase transparency to build trust	Share the wins of the organization to boost morale and create momentum	<ul style="list-style-type: none"> Periodic staff meetings for dissemination Newsletter/CEO monthly update video setting tone of excellence 	< 1 month
	Create channels for feedback	<ul style="list-style-type: none"> Anonymous suggestion box Quarterly team check ins with 360 feedback sessions 	< 1 month
2. Invest in talent and professional development of staff	Set clear goals and metrics to measure success, effectiveness, and performance	<ul style="list-style-type: none"> Adjustment to current performance assessment approaches/criteria emphasizing accountability (clear behavior identification and measurement approach) High performer career guidance and mentorship program Concrete measures for executing culture & leadership actions 	< 1 month
	Ensure the right staff for the job- high-caliber leadership and talent	<ul style="list-style-type: none"> Revamp recruiting process to attract top talent New hires/replacement of mismatched staff (reassign resources and upskill to accommodate new technologies) Redefine future HR lead and potential to assume administrative responsibilities 	1 - 3 months
	Acknowledge staff successes	<ul style="list-style-type: none"> Reward/incentive system (monetary reward, shoutout during internal meeting or newsletter, lunch with Karen, point reward system, match a charitable donation) Peer-to-peer recognition program to nominate coworkers 	1 - 3 months
3. Bridge department siloes to increase collaboration across programs	Resolve distrust and communication failures	<ul style="list-style-type: none"> Cross department standing meetings 	< 1 month
	Improve teaming culture	<ul style="list-style-type: none"> Co-delivery across departments for select offerings/courses Team building activities 	< 1 month
4. Create an environment of stability	Conduct succession planning at the board and staff level for the long term	<ul style="list-style-type: none"> Draft a succession policy/framework that outlines the mechanics of responsibility transfers Document clearly the responsibilities for each role to aid in transfers (e.g. "playbook") 	1 - 3 months
5. Expand board involvement for solutioning	Institute two way communication between CEO and members of the board	<ul style="list-style-type: none"> Set cadence for progress reports on strategy execution and internal updates Distribute a newsletter to the board 	1 - 3 months
	Continually pursue alignment on the direction of the organization	<ul style="list-style-type: none"> Ongoing presentation of strategic plan (charters for each strategy pillar) during the board retreat 	< 1 month

Bold indicates more critical items

Alike the other charter, we debated questions around key decisions, costs, and risks when creating the charter

Decisions

- What key positions need to be restaffed and which roles and responsibilities need to be adjusted?
 - CFO
 - Grant writer
 - Positions requiring upskilling

Costs

- New people salaries
- Professional development training
- New technologies for upskilling
- Team building exercises

Risks/Challenges

1. Difficulty getting staff buy in and executing on change management requirements
2. Adverse morale from shifts in leadership and more drastic staffing change
3. Difficulty finding and retaining top talent
4. Execution challenge in succession planning due to limited knowledge of staff performance
5. Limited staff to engage such a large board

“Fundraising Innovation & Donor Engagement” Charter

Fundraising Innovation & Donor Engagement is a critical charter to strengthen CUL's competitiveness and sustenance

Rationale

Broadening of fundraising through the right channels, technologies, and tools

Increasing transparency of funding impact for greater trust and retention

Capabilities Impacted

- Donor/Funder Channel Development
- Grant Writing
- Grant Program Compliance
- Donor/Funder Relationships & Retention
- Donor/Funder Experience Management

Priorities

1. Develop and implement modern funder engagement techniques
2. Expand grant writing capacity
3. Expand beyond programmatic and event fundraising

Fundraising charter has three key priorities with several underlying actions to be completed in the next 6 months

Priority	Sub-Priority	Actions*	Timeline
Develop and implement modern engagement techniques	Attract and target various donor types	<ul style="list-style-type: none"> • Segment donors and create guidelines on how to engage with each segment 	1 month
	Invest in follow-through and ongoing engagement capabilities	<ul style="list-style-type: none"> • Create a virtual model for events as an ongoing parallel revenue stream • Create a white-label app to drive deeper engagement through sharing of content and stories 	1 - 3 months
		<ul style="list-style-type: none"> • Set a routine cadence for calls/outreach to share news and impact metrics with top donors (quarterly) • Convert funders into ambassadors and advocates through a variety of engagement opportunities • Expand reach of current and potential donor pools beyond just one representative at a firm 	3 - 6 months
	Increase donor touchpoint and interaction frequency through channel diversity	<ul style="list-style-type: none"> • Leverage social media to engage with donors, thank donors, and share content with donors • Invest in cost efficient interaction points to share recent updates and information 	3 - 6 months
Expand grant writing capacity	Establish a dedicated grant writing capacity and employ stricter guardrails on grant acceptance	<ul style="list-style-type: none"> • Hire a full-time grant writer and support team for prospecting, vetting, and writing proposals • Define stricter guardrails and guidelines on grant acceptance based on mission, fit, and feasibility • Develop template for pursuing and drafting proposals and track win rate metrics of proposals/grants 	1 month
Expand beyond programmatic and event fundraising	Increase unrestricted donations	<ul style="list-style-type: none"> • Use current social and political landscape (e.g., COVID-19) as a catalyst to spread mission and compete for higher corporate giving dollars • Conduct PE roundtable to establish a fund (focus on sustainability, SME, entrepreneurship) • Engage with other UL to draw on additional opportunities on funding at the local level 	3 - 6 months
	Pursue new funders to cover emerging needs	<ul style="list-style-type: none"> • Identify, confirm, and categorize funders that are more flexible (dedicated to the brand) to expand and change the scope of a grant • Pursue program independent funding by selling the overall mission • Shorten the funding cycle to have more agility to respond to emerging needs 	3 - 6 months
	Pursue small, high-volume giving as well as mid-size giving	<ul style="list-style-type: none"> • Become a “virtual convener” to tap into affiliate groups and connect to the wider employer network • Develop a plan to target HNWI/wealthy individuals 	3 - 6 months
	Increase focus on millennial donors	<ul style="list-style-type: none"> • Leverage/showcase millennial clients to promote the brand through speaking at events/sharing successes 	3 - 6 months

Bold indicates more notable actions

*charter actions simplified/shortlisted for ease of presentation

Several considerations exist around key decisions, costs, and risks for successful execution

Decisions

- What will the composition of the grant writing team be?
- Where do we find the resource bandwidth to implement/configure lead generation software?
- What content can be used on the white-label app? What is readily available and what needs to be created?

Costs

- New grant writer salary
- Per-hour cost of additional contracted grant writers (depending on demand)
- Technology and content costs
- Cause marketing costs (if small high volume funding pursued)

Risks/Challenges

1. Creating content for the white label app that is engaging and relevant for clients
2. Need and program alignment of an employee matching module
3. Transparency and access to metrics that clearly outline impact from a Employer based employee matching program
4. Risk of diluting core sources of funding by pursuing less established sources of funding (e.g., small, high-volume giving)
5. Campaigning capabilities that go beyond the traditional funders and recognizes other influencers
6. Availing opportunities offered and demands created by current situation with a leaner/limited staffing model
7. Not fully embracing the shift because of resource limitations

“Analytics & Technology” Charter

The Analytics & Technology charter establishes enabling capabilities critical for organization to move forward

Rationale

Investing in data analytics, management platforms, remote capabilities and automation is the foundation for long-term sustainability and enables the organization to scale its impact

Capabilities Impacted

- Platform/Technology Infrastructure & Support
- Client & Donor Data Management
- Business Intelligence & Reporting

Priorities

1. Evaluate existing landscape and improve technology solutions serving strategic charter and functional/department needs
2. Mature infrastructure to support remote delivery model of programs/services
3. Improve buildings and technology infrastructure (e.g. facilities, wi-fi, etc.)
4. Leverage the Board to access relationships/future potential partners who could be accessible for tech solutions or funding

The 4 priorities should be completed in under 6 months

Priority	Possible Actions	Timeline
1. Evaluate existing landscape and improve technology solutions serving strategic charter and functional/department needs*	<ul style="list-style-type: none"> • Address key gaps to donor and program tracking tools and data, financial and HR systems down to program level • Rationalize and standardize portfolio of tools and address any knowledge training gaps towards usage of tools • Standardize raw data in order to create a central data source that aggregates all department-level data (internal and external data) - key indicator dashboard • Ensure technology/solutions in place meet all data privacy requirements 	1 - 3 months
2. Mature infrastructure to support remote delivery model of programs/services	<ul style="list-style-type: none"> • Build/leverage platform to provide virtual offerings to overcome social determinants and barriers to access • Invest in classroom technology for client workshops that engage the clients effectively (couples technology with creativity and entertainment) • Invest in tools to protect confidential information and create safe virtual client interactions (one-on-one counseling sessions) 	1 - 3 months
3. Improve buildings and technology infrastructure (e.g. facilities, wi-fi, etc.)	<ul style="list-style-type: none"> • Identify and address gaps in current hardware/physical technology capabilities needed to enable programs, workshops, classrooms, and other client services and outfit client spaces with necessary functionalities • Reframe/establish a process for maximizing organization-wide use of department-specific technology resources • Identify and deploy inexpensive IoT and smart technology to improve reduce costs and long-term energy efficiency • Repurpose existing spaces to comply with COVID-19 guidance 	3 - 6 months
4. Leverage the Board to access relationships/future potential partners who could be accessible for tech solutions or funding	<ul style="list-style-type: none"> • Request recommendations for a technology partner to guide through the entire technology planning process • Make targeted requests for technology support and infrastructure at cost by leveraging partnerships and Board members' connections to large technology companies • Leverage Entrepreneurship Center's contacts in tech and emerging startups to gain access to technology and accelerators 	< 1 month

Note: Given the scope and involvement of this priority, we recommend requesting additional consulting services to assist in a full current state assessment, future state requirements, vendor selection, and implementation process

Bold indicates more notable actions

A few key factors will influence the execution of this charter

Decisions

- What is the right mix of systems and tools?
- What is the right amount of money to spend on a technology solution?
- What is the balance between in-person and remote/digital delivery of programs?
- What level of oversight should the organization maintain in terms of department-level technology spend?

Costs

- Technology solution that meets capability requirements and needs identified in other charters
- Relationship management platform for clients and partners
- Integrated system for aggregating business processes and metrics across all departments of the organization

Dedicated funding available for infrastructure and technology improvements from the MacArthur Foundation

Risks/Challenges

1. Difficulty rolling out new platform/need to upskilling and education
2. Staff resistance/change management
3. Risk of moving too quickly for particular department initiatives that distract from the baseline capabilities needed
4. Finding a technology solution that meets all the identified capability criteria at an affordable price point

Out-of-Scope

- Advanced cloud-based solutions
- Advanced features and bells/whistles on tools and software

Costing, Roadmap and Next Steps

Estimated a total investment of \$515 K in business and technology resources to execute on the priorities

High Level Approach

Two cost categories were estimated:

1. Business resource
2. Technology resource



Sizing buckets were used to estimate hours and likely project duration



- Business resource rates distinguish between staff-level rates (\$40/hr.) and executive level-rates (\$85/hr.)
- Technology costs provision for software licensing, vendor platforms, equipment, and customization costs

Initiative Cost Buckets

Charters	Total Projected Business Costs (Incremental)	Total Technology Costs
Solution Provider	\$30,000 <i>Dedicated resource</i>	\$5,000 <i>Surveys and Analytics</i>
Collaborator Strengths	-	\$20,000 <i>Partner CRM</i>
Brand Stalwart	-	\$20,000 <i>Digital Asset Mgmt., Metrics</i>
Culture & Leadership	\$180,000 <i>CFO, Training</i>	\$10,000 <i>Upskilling</i>
Fundraising & Engagement	\$80,000 <i>Grant Writer(s)</i>	\$60,000 <i>Virtual Event, CRM, White Label App, Lead Gen</i>
Analytics & Technology	\$30,000 <i>Vendor Evaluation</i>	\$80,000 <i>Infra, Remote Delivery, HR/Financials</i>
Total	\$320,000	\$195,000

Roadmap sequences these priorities over the next 9 months

Charter	Priority	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Solution Provider	A1: Evaluate existing range of offerings to shortlist proven offerings									
	A2: Identify existing offerings that could be considered for a partnership based model		A1							
	A3: Deepen existing proven programs		A1							
	A4: Ensure that the program offerings matches the community needs identified									
Collaborator Strengths	B1: Define types of strategic partnerships and informal alliances									
	B2: Create "best fit" criteria for partnerships									
	B3: Develop process for ongoing partnership and alliance identification opportunities		B2							
	B4: Develop process for formalizing partnerships									
	B5: Outline individual department responsibilities and accountabilities towards partnerships		B1							
Brand Stalwart	C1: State a clear mission and common objective									
	C2: Develop a unified voice of CUL's brand through tools and content				C1					
	C3: Increase flexibility to pivot programming to meet emerging needs									
	C4: Increase reactivity to public incidents		A1							
	C5: Improve reporting of metrics (ease, frequency, consistency, and standardization of measurements)		A1							
Culture & Leadership	D1: Improve internal communication and increase transparency to build trust									
	D2: Invest in talent and professional development of staff		A1							
	D3: Bridge department siloes to increase collaboration across programs									
	D4: Create an environment of stability					D2				
	D5: Expand board involvement for solutioning									
Fundraising & Engagement	E1 + E2 + E3: Develop and implement modern engagement techniques									
	E4: Expand grant writing capacity									
	E5 + E6 + E7 + E8: Expand beyond programmatic and event fundraising		E2							
Analytics & Technology	F1: Evaluate and improve existing technology landscape serving business productivity and engagement needs									
	F2: Mature infrastructure to support remote delivery model of programs/services									
	F3: Improve buildings and technology infrastructure (e.g. facilities, wi-fi, etc.)									
	F4: Leverage the Board to access potential partners who could be accessible for tech solutions or funding									

● Dependency

■ Enabling priority

■ Strategic priority

Successful implementation requires a dedicated Program Management leader to coordinate the charter efforts

Execution of Priorities

Stand up ProMo

Identify a ProMo leader to oversee:

- **Communication** – establishes a consistent review cycle and meeting cadence
- **Monitoring** – ensures the program remains on track and tracks financial and operational metrics
- **Integration** – coordinates activities across the projects/teams in terms of timing and content

Solution Provider
Calmetta

Collaborator
Stephanie

Brand Stalwart
Calmetta

Culture & Leadership
Karen

Fundraising & Engagement
Chuck

Analytics & Technology
Stephanie

At a Program level...

- Commit to targets
- Finalize execution plan
- Secure resources
- Plan launch

Change Management

Risk Mitigation

Budget Compliance

ProMo Leader

Charter Leader