



## 2024 - 2026 Strategic Plan

### About One South Euclid

One South Euclid (OSE) is a non-profit Community Development Corporation that was founded in 2009 by community and business leaders to address the housing crisis in South Euclid. In its six-year start-up phase, it opened a bank account, trademarked its name, increased Board membership, identified projects and priorities to be addressed, and entered into a collaborative agreement for professional services with the City of South Euclid. In the ensuing years, it increased its commitment, presence and relevancy in the community to ensure its vibrancy. This proposed fourth strategic plan (2024-2026) is a dynamic blueprint for OSE's continued growth as it enters its 15<sup>th</sup> year and works to help support the revitalization of South Euclid's residential and business communities.

### Background

OSE's first strategic plan (2015-2017) set the foundation and framework for its sustainability. It established the organizational structure to support its mission, programs, and desired community impact. The second plan (2018-2020) focused on building organizational awareness and growth to meet prioritized community needs. Residential, commercial and senior landscape grant programs were established and awarded, while social events to promote community engagement, camaraderie and fun were held.

The 2020 pandemic caused OSE to put much of its strategic plan vision on hold and quickly shift its priorities to provide support to families experiencing food insecurity and financial assistance to small business owners. As a result of these unexpected needs and changes in plans, OSE's Board decided to review and update the current plan, adjust for any environmental conditions required, and to ensure the strategic plan remains relevant and viable through 2023.

The 2021-2023 plan focused on hiring our first Executive Director and enhancing organizational and fundraising infrastructure. The 2024-2026 plan continues the priorities of enhancing organizational and fundraising infrastructure while exploring new opportunities for housing development and strengthening small businesses. The members of OSE's Board who adopted this plan at the February 8, 2024 Annual Meeting are:

Len Calabrese, *Treasurer*

Amy Crawford

Jillian Dinehart, *Vice President*

Jess Fitzgerald

Raja Belle Freeman

Steve Haynie

Patrick Hyland

Patrick Kenney

Rick Krivanka, *President*

Tammy Lease

Lisa Mack, *Past President*

Tara Nichols

Al Paynter

Joe Pollack

Rita Ross, *Secretary*

Kim Scott

Natalie Stamper

Michelle Taylor-Brooks

Denise Turner

Elaine Yeip

EX-OFFICIO MEMBERS

Keith Benjamin

Julie Mostov

EXECUTIVE DIRECTOR

Annette Iwamoto

\*Executive Committee-TBD

## Mission, Vision and Core Values

The purpose of OSE's strategic plan is to align its work with its mission, vision and core values. The mission is the starting point for planning and the vision is what OSE hopes to achieve. The strategic plan is the map that guides OSE from its mission to the realization of its vision through goals, objectives, action plans and action steps. Additionally, organizational values help drive its staff and members' conduct and advise the Board to reconsider any strategies that might be in opposition to these standards.

**Mission:** To promote sustainable economic, social and cultural connections in South Euclid.

**Vision:** To lead and assist others towards a better future by ensuring a thriving and vibrant residential and business community for all.

### Core Values:

**Diversity** We are committed to building an inclusive, multicultural and equitable community.

**Integrity** We exercise responsible leadership with transparency, fiscal prudence and informed decision-making.

### Community

**Engagement** We serve the common good with a commitment to listen and respond to all.

## Strategic Planning Process

In a series of meetings, the Board members and each Committee (since much of OSE's work is accomplished through its committees) were given questions that asked for discussion of the best accomplishments over the past 3 years, and hopes for continued or new directions that needed to be addressed. Strategic questions, issues and directions were identified for further discussion and response.

The Board, and the Executive, Governance, Revitalization, Fundraising and Community Engagement Committees and the May-Green Subcommittee were asked:

- What are our 2-3 best accomplishments - things you are most grateful for?
- What are our 2-3 hopes for continued or new directions we should address?
  - Identify strategic questions, issues and directions for 2024-2026:

### Major accomplishments based on the OSE Strategic Plan for 2021-2023:

- Hiring new staff with a highly qualified and effective Executive Director, Annette Iwamoto and Manager of Programming and Communications, Barbie McCann.
- Recruiting an AmeriCorps VISTA staff person, Carl DeScott, to develop strategies to meet the needs of small businesses and entrepreneurs in South Euclid.
- Achieving financial stability with significant assets.
- Growing our major annual fundraiser, Mingle at Mayfield, and instituting the inclusion of Hometown Heroes Awards.
- Seeking and obtaining significant grants to support our work.
- Developing a growing presence, visibility and positive reputation throughout the community.

- Continuing our collaborative partnership with the city for Mayfield-Green development.
- Providing grants for residents to make exterior home repairs, for businesses to make exterior renovations, and for seniors to assist with landscaping and snow removal.
- Building and sustaining organizational momentum.
- Re-establishing a Community Engagement Committee with new priorities.
- Fostering new murals in the city.
- Sustaining a good cooperative relationship with the city.
- Initiating an annual Restaurant Week.

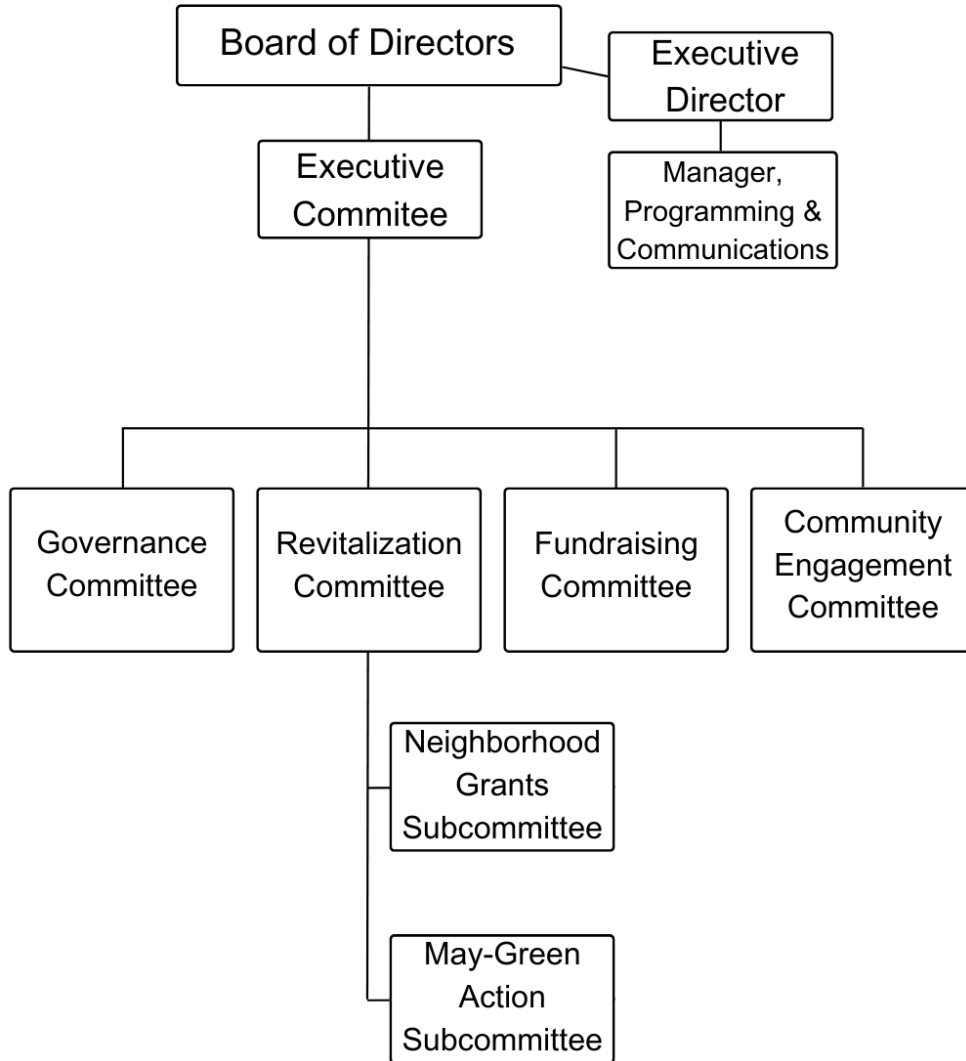
### **Strategic Directions for 2024-2026:**

1. Sustain and enhance the organizational infrastructure of our Board and staff to:
  - Provide excellence in management, governance, and service productivity.
  - Establish sound policies and procedures.
  - Maintain timely Board membership transitions and leadership succession planning for Executive Committee officer positions and Committee Chairpersons.
2. Optimize existing sources of revenue and generate new sources of future revenue and fundraising. This is needed given major changes in the funds received from Build-Grow-Thrive, the major source of our funding in past years which is the renovation and sale of properties and homes.
3. Plan for the future optimal use and sale of properties we now have:
  - Seventy (70) vacant lots, and new properties to be obtained in subsequent years;
  - The Ardendale - Green property as a legacy development with the best possible service and lasting value to our community.
4. Collaborate with city leadership and staff and our wider community in planning the next steps for the development of our major business districts: Mayfield-Green, Green-Monticello, and Cedar-Center.
5. Expand efforts to foster community building and mutually supportive relationships.

The following pages present OSE's organizational chart and the identified goals, objectives and action plans for 2024 through 2026. The goals are organized by Committees who lead the work in each designated area, recognizing overlapping areas of responsibility and collaboration.

# Organizational Chart

## One South Euclid



## Executive Committee

**Goal:** Sustain an organizational infrastructure that reflects excellence in management and establishes sound policies and procedures.

- **Objective 1:** Support and ensure the excellent staffing OSE has developed with an Executive Director, Manager of Programming and Communications, and the use of an AmeriCorps Vista volunteer to achieve greatly increased levels of activity and to provide for organizational sustainability.
  - **Action Plan**
    - Maintain open, honest, collaborative, and mutually supportive relationships between the Board, Executive Director and staff.
      - **Action Step**
        - Conduct an annual job performance review to recognize accomplishments and to identify annual goals and needed adjustments to enhance effectiveness.
- **Objective 2:** Develop an integrated annual work plan and budget with quantifiable performance goals for implementation by committees.
  - **Action Plan**
    - Oversee development of annual work plan and budgeting process.
      - **Action Steps**
        - Review Strategic Plan items with committee chairs twice/year.
        - Conduct a quarterly review of projected vs. actual budget.
        - Convene a Strategic Plan Ad Hoc Committee every three years (next: 2026).
- **Objective 3:** Develop a comprehensive fiscal management plan to address and optimize changing and new revenue streams to sustain OSE's mission.
  - **Action Plan**
    - Optimize Management of the Build | Grow | Thrive Program
  - **Action Plan**
    - Improve Fiscal Operations and Revenue Stream Management
      - **Action Steps**
        - Contract with an accountant who can deliver timely and accurate financial statements.
        - Conduct an annual review of banking services to evaluate the quality of services and returns on investments.
        - Leverage One South Euclid's 15th Anniversary in 2024 to cultivate larger donations.
        - Continue identification of new, alternative revenue streams, especially through additional fund-raising efforts and grant writing with full engagement by the Board.
        - Identify potential funding opportunities typical of CDC operations in other cities in addressing mutual goals.

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- **Objective 4:** Collaborate with the Revitalization Committee in supporting Continued Development of the Mayfield-Green District
  - **Action Plans**
    - Effectively manage and execute the goals for the \$50,000 CDCLP/Mandel Foundation Grant (placemaking, public art, and community events).
    - Create a development plan and strategy for the property on South Green and Ardenale Roads that identifies development partners, builds upon the community listening and visioning sessions, and provides a facility that can be of long-term value and pride in serving our community.
    - Support development of a Merchant Association.
    - Collaborate with the city in community building activities in the Food Truck Park.
  
- **Objective 5:** Manage resources effectively by prioritizing projects with each Board Committee and adhering to sound fiscal policy.
  - **Action Plans**
    - Support work of the Fundraising Committee for an annual major fundraising event (Mingle at Mayfield) as well as new fundraising events throughout the year.
    - Support work of the Community Engagement Committee to expand the engagement of residents and businesses in South Euclid and OSE through diverse programming and volunteer opportunities that deepen community building and ongoing listening.
    - Create a Marketing and Communications plan.
    - Assess technology needs and determine the best available products for OSE.
    - Explore and determine the right direction for the development of the Friends of OSE Campaign in order to advance fundraising and further marketing and civic engagement strategies.
    - Develop strategies and tactics in alignment with OSE's strategic plan to advance racial justice, equity and inclusion internally and within the community.
    - Provide sufficient oversight to ensure long-term sustainability.

## Governance Committee

**Goal:** Sustain an organizational infrastructure that reflects excellence in governance.

- **Objective 1:** Build and sustain Board strength by conducting an annual recruitment and nominating process that:
  - Meets organizational needs (mix of individual skills, strengths and background experiences);
  - Reflects and invites diversity in community demographics (gender, age, race, culture, socioeconomic status, geography, organizational representation and perspectives);
  - Considers up to 3 members who may not live or work in South Euclid but offer needed skills, expertise and connections they can bring to the Board.
  
- **Action Plan**
  - Generate and continually update a list of potential board candidates throughout the year.
    - **Action Steps**
      - Develop and manage a matrix of current board member backgrounds and strengths.
      - Determine OSE needed skills and capabilities that new Board members could provide.
      - Identify community and business members who possess missing skill sets/expertise.
  
  - **Action Plan**
    - Design and conduct a consistent, on-going recruitment process.
      - **Action Steps**
        - Continually develop timely ways to better tell our story to the wider community so more people understand: What is OSE?
        - Foster a growing awareness about OSE and the opportunities to serve on committees and the Board at various community events throughout the year.
        - Make effective use of social media including exploring the potential use of new platforms.
        - Connect with PTAs and other community organizations and build capacity for future OSE board and committee members.
        - Create a recruitment packet to share with candidates. Include marketing materials and Statement of Expectations.
        - Invite candidates to begin service on a Board Committee.
        - Plan social meetings of candidates with Board members.
        - Conduct interviews of candidates by Governance Committee members to offer insight and perspective into OSE and an understanding of the commitment and responsibilities involved in board membership, and to determine what the candidate might bring to the organization.
        - Secure a brief biography and Statement of Expectations of nominated candidates for a Board vote in December.

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**Objective 2:** Support Board members in meeting expectations for service.

- **Action Plan**
  - Design and hold an orientation for new members within one month of being elected to the Board (January) and prior to their first meeting in February.
  
- **Action Plan**
  - Following orientation, identify the appropriate role the new members might assume on behalf of the organization and collaboratively determine committee assignments.
  
- **Action Plan**
  - Conduct an annual Board member self-evaluation each fall.
    - **Action Steps**
      - Continue using the annual online Board member self-evaluation tool in early fall (September). The tool contains a dashboard for key performance indicators, including attendance at board and committee meetings, financial support, attendance at special events, etc.
      - Contact individual board members as needed (October/November) to review dashboard results and address any questions and ongoing commitments.
      - Address emerging collective issues, needs and suggestions with the Board.
  
- **Action Plan**
  - Develop and implement an annual plan to encourage and support educational opportunities for board members and staff.
    - **Action Step**
      - Allocate continuing education funds in the annual budget and determine a plan to disburse funds in an equitable and appropriate manner based on needs.
  
- **Objective 3:** Develop an effective Board Leadership Succession Plan for Executive Committee officer positions and Committee Chairpersons to ensure successful transitions and to optimize the capacity of the Board.
  - **Action Plan**
    - Identify and cultivate board members for Board leadership/officer positions and Committee Chairpersons.
      - **Action Steps**
        - Identify candidates well in advance of annual transitions.
        - Use creative ways to foster comfortable engagement such as co-chair and pro-tem roles.

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- **Objective 4:** Develop, clarify, monitor and make recommendations regarding OSE's governance structure and practices to ensure compliance with applicable laws and desired organizational outcomes based on strategic plan.
  - **Action Plan**
    - Periodically review OSE's governing documents and amend them as necessary.
      - **Action Step**
        - Review By-laws, Statement of Expectations, Agreement with the City of South Euclid, and contracts.

## Fundraising Committee

**Goal:** Secure sufficient revenue streams and contributions to support the long-term sustainability of OSE.

- **Objective 1:** Continue to build and expand the fundraising infrastructure for OSE.
  - **Action Plan**
    - Determine all the components required for a comprehensive year-round fundraising infrastructure given changing revenue streams in Build-Grow-Thrive, the major source of our funding in past years. Continue to ask: “What more is possible?”
      - **Action Steps**
        - Collaborate with Board members, city staff and other key leadership to determine potential donors and funding opportunities.
        - Build upon and expand the fundraising capacity of Mingle at Mayfield and Hometown Heroes.
        - Anticipate and develop new opportunities to design and pilot year-round fundraising and raising significant funds.
          - Schedule a major fundraising event in the summer of 2024.
        - Seek and obtain significant grants to support our work.
        - Research and develop the potential fundraising possibilities with large and small businesses based in South Euclid.
        - Explore the potential and needed steps to develop a “Friends of OSE” group to support the organization with time and money.
          - Create different levels of giving with benefits.
          - Develop fundraising ideas by polling each member.
        - Explore the potential for OSE to manage contracts as the property developer working directly with building contractors to gain a greater share of revenue for properties sold. Include consideration of mixed-use development and apartments with ongoing revenue streams to OSE.
        - Consider supporting scholarship opportunities reflecting OSE Core Values.

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- **Objective 2:** In collaboration with the Board and the Community Engagement Committee, foster a growing presence, visibility, and positive reputation for OSE throughout the community.
  - **Action Plan**
    - Present and promote the amount of OSE reinvestment into the community through Build-Grow-Thrive and OSE grants (citing the latest total figures for homeowners and for storefronts).
      - **Action Step**
        - Send welcoming mailings to new residents and new businesses to build awareness and engagement with OSE. Offer OSE mixers for new residents.
    - Present the growth in community event participation that relates to the roots of our OSE mission with compelling metrics.
      - **Action Step**
        - Generate participation metrics for sponsored /supported community events showing growth: Intersection, Rock the Block, reinforcing healthy diversity and community connections.
- **Objective 3:** Develop/purchase and maintain a fundraising database to track gifts and pledges.
  - **Action Plan**
    - Choose a fundraising software program that helps OSE find prospects and manage its donor pool in order to analyze donor activity and monitor fundraising performance.
      - **Action Step**
        - Collaborate with the Executive Committee, Executive Director and Manager of Programming and Communications to choose the software program.
- **Objective 4:** Create policies and procedures and collateral marketing materials to support fundraising requests.
  - **Action Plan**
    - Clarify rules about what kinds of gifts are accepted and cash/check handling practices.
    - Clarify procedure for gift processing, data entry, reporting and messages of thanks.
    - Create a case statement for potential individual donors based on the strategic plan.
      - **Action Step**
        - Create marketing materials related to sponsorships and giving opportunities.

## Revitalization Committee

**Goal:** Work to secure our community's economic future through selective revitalization projects coordinated with those of the city and its Master Plan.

- **Objective 1:** Support programs and activities that increase property values in our neighborhoods, such as “Build-Grown-Thrive,” residential resale program and the Neighborhood Grant Program.
  - **Action Plan**
    - Focus new efforts on the “Build” portion of the Build-Grow-Thrive program to attract new infill housing construction as rehab/resale becomes more challenging.
      - **Action Steps**
        - Find optimal ways to market all properties available for sale.
        - Optimize/maximize prices given market conditions.
        - Emphasize desirability of living in SE referencing Cleveland.com article and highlighting community advantages.
        - Tell stories of “Why SE?”
        - Anticipate additional future vacant lots that may become available.
  - **Action Plans**
    - Assess Neighborhood Grant Program funding opportunities annually, both categories and individual grant limits, to align with the OSE budget.
    - Support and engage realtors by participating in the Annual Realtor Day.
    - Address the growing demand for rental property.
    - Explore the potential of OSE becoming a property developer.
  - **Action Steps**
    - Investigate potential funding sources for upfront development/construction costs.
    - Identify marketing tools.
    - Consider the idea for a raffle of a dream house built in SE.

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- **Objective 2:** Support programs and activities that drive revitalization and economic development in our commercial districts.
    - **Action Plans**
      - Source funds to support the Storefront Renovation Grant Program.
    - **Action Plans**
      - Facilitate the Mayfield-Green Action Subcommittee
        - **Action Steps**
          - Expand business owner/merchant outreach to promote economic development in the downtown district.
          - Support formation of a Merchant Association in the May-Green District.
    - **Action Plans**
      - Support the formation of Merchants' Associations in other business districts.
      - Explore opportunities for land and/or building acquisition, such as the Garden Drive development.
      - Collaborate with Heights-Hillcrest Chamber of Commerce (HRCC) on business development.
      - Formalize and expand public art programs and mural projects.
      - Create a development plan and strategy for the property on South Green and Ardenale Roads
        - **Action Steps**
          - Identify development partners who can:
            - Build upon the listening and visioning sessions.
            - Provide the best possible multi-use/mixed use opportunity with affordable and market-rate housing and a desirable business that fosters community vitality.
            - Provide a potential revenue stream for OSE.
            - Fulfill OSE's mission with a facility that can be of long-term value and pride in serving our community.
- **Objective 3:** Support the exploration of new grant and revenue opportunities through foundations and organizations to fund revitalization programs.
  - **Action Plans**
    - Meet and talk with other CDC's to learn best practices in developing applications and obtaining sustainable funding.
    - Develop increased and diverse funding sources that will enable OSE to increase funding for its residential, commercial and community revitalization programs.

## May-Green Action Subcommittee of the Revitalization Committee

**Goal:** Expand outreach to business owners, merchants and other organizations in the Mayfield-Green District in cooperation with the Revitalization Committee and the city to promote sustainable economic growth and development in the downtown district.

- **Objective 1:** Support the formation of a Merchant Association in the May-Green District.
  - **Action Plans**
    - Initiate a process of meeting 1:1 with business owners:
      - Visioning: What would you most like to see to build your business and this business district?
      - How can we be of service to you?
      - Follow up by bringing merchants together to foster camaraderie, a collective vision and a Merchant Association.
      - Work hand in hand as OSE with the Merchant Association, helping them to see creative possibilities beyond what they see.
      - Foster a spirit of “We are stronger together.”
    - Build upon outreach to businesses in identifying and mapping existing businesses and helping businesses to drive economic development.
    - Convey “We know businesses are here and care about them. “
- **Objective 2:** Support development of the Ardendale – Green Road Property.
- **Objective 3:** Promote the Food Truck Park in cooperation with the city.
- **Objective 4:** Support implementation of the \$50,000 Community Development Corporation Leadership Program grant to further enhance the Mayfield-Green District.
- **Objective 5:** Explore further creative ways for OSE to best collaborate with the city in planning the next steps for the development of the Mayfield-Green District.
  - **Action Plans**
    - Explore opportunities for land and/or building acquisitions in the May-Green District leading to transformative development with cooperative business owners.

## Community Engagement Committee

**Goal:** Expand the engagement of residents and businesses in South Euclid and OSE through diverse programming and volunteer opportunities that sustain and grow South Euclid as a diverse and inclusive place to live, work and play - where people *Come Together and Thrive*.

- **Objective 1:** Strengthen grassroots support and neighborhood groups to build neighborhood and city-wide pride and commitment.
    - **Action Plan**
      - Convene neighborhood organization leaders 1-2 times per year to share successes and hopes in building community engagement and positive community spirit.
        - **Action Steps**
          - Create a list of neighborhood and community leaders to contact.
          - Discuss the way or ways we can engage them:
            - Meeting in a group, one-on-one meetings, virtual, etc.
            - Develop agenda and possible discussion points.
          - Explore areas of collaboration: e.g.  
What can OSE offer them as a leader/neighborhood organization?  
How can they assist OSE as an organization?
          - Recognize and honor what they have done in the community.
          - Coordinate with City officials and staff.
    - **Action Plan**
      - Encourage the start-up of new neighborhood groups.
        - **Action Steps**
          - Provide how-to-get-started resources and contact persons.
          - Provide grants for first-time neighborhood block parties and social events.
- **Objective 2:** Plan and grow participation in an Annual Restaurant Week each June.
  - **Action Plan**
    - Continually recruit more restaurants
    - Enhance communications to engage more people.
- **Objective 3:** Coordinate community outreach efforts with OSE Staff and Board members at various community events throughout the year.
  - **Action Plan**
    - Decide on events to attend.
    - Coordinate a presence and/or volunteers at event table/display areas.
    - Develop opportunities to seek input of people's hopes and desires.

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- **Objective 4:** Explore ways to reach out to businesses in the community to introduce OSE (in collaboration with other OSE committees).
  - **Action Plan**
    - Develop a target group of businesses to contact each month.
      - **Action Steps**
        - Collaborate with OSE and city staff to obtain a list of businesses to contact.
        - Develop printed material to share with businesses as a source of introduction.
        - Discuss the way or ways we can engage them:
          - Meeting with them in a group, one-on-one meetings, virtual etc.
          - Develop agenda and possible discussion points.
        - Recognize and honor what they have done in the community.
        - Explore areas of collaboration: e.g. What can OSE offer them as a leader/business organization? How can they assist OSE as an organization?
        - Get names of specific contacts at different businesses to sustain continuing personal contact and develop a working relationship/rapport.
        - Discuss possible mentorship with the business owners and youth (high school juniors and seniors).
        - Consider a business mixer for larger businesses/companies.
- **Objective 5:** Build and organize an OSE volunteer corps based on assessing events and groups where volunteers are needed in cooperation with OSE and city staff.
- **Objective 6:** Implement community programs and events that enhance social cohesion and unity.
  - **Action Plan**
    - Use and adapt ideas from Values-In-Action and Appreciative Inquiry to foster opportunities and conversations to build a positive community culture.
- **Objective 7:** Explore the possibility of developing a process to foster deeper understanding and mutual respect between youth and police officers. (Sports events? Appreciative Inquiry conversations?)
- **Objective 8:** Grow Committee membership (open to all Board and community members.)
  - **Action Plan**
    - Explore development of an intern program for high school students to learn about OSE and the community.