



Case Study:

Strategic Planning for a Youth Services Organization

The client needed upgrades to its governance, leadership and fundraising. The Bayer Center helped them transition in all three areas – now well-equipped for the future.

The Client

The client was a youth-serving nonprofit (among the largest in the state) with administrative headquarters and 3 regional offices. It had a longstanding history and wide community recognition as well as stable and successful leadership -an executive director who had served for 37 years and who had grown the organization's budget by almost 30 million, as well as an energetic and visionary second-in-command.

However, the organization did not have a history of advance planning. They also were somewhat constrained by hierarchical decision-making and leadership structures. Its board, while filled with capable and gifted people, was largely following the executive director's lead. Furthermore, its funding stream was almost entirely from government and needed diversification.

These issues were taking on increased urgency as the executive director was considering retirement. After discussion, the organization contracted with the Bayer Center for Nonprofit Management for a strategic planning process that would focus on these issues.

Our Work

Bayer Center staff started the process with an assessment, which collects information from a variety of different perspectives in order to get a full and updated picture of the organization. Board members, staff and clients (children and families) participated in focus groups and one-on-one discussions. Because of the state-level profile of this organization, the lead consultant also interviewed a variety of top policy makers on their perceptions of the agency.

The picture that developed was somewhat unexpected. Before the assessment, the organization didn't feel confident in its reputation at high levels – overly focused on any mediocre result. The assessment revealed both great concern over enormous needs for the target audience as well as huge confidence in the organization and a desire for it to take on much more.

As the planning process continued, board committees formed to guide progress towards key goals. Each goal had accompanying tasks, responsibilities, and timelines, which helped communicate expected progress as well as keep everyone accountable to results.

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The Result

The project went through phases of consultant engagement, but maintained a strong connection over the course of 3 years. That allowed not only for the strategic planning process, but support and troubleshooting of the implementation stage.

Over the course of the contract, the executive director's plans for transition, which had been on a frequently-shifting timeline, became firm. Both director and organization received support in navigating the difficult path through letting go, and navigating an internal promotion with integrity.

Board members shifted from passivity into true governance. The relationship between the board and director matured, becoming collaborative and transparent. The assessment work crystallized the organization's understanding of their potential and possibilities waiting for their involvement. The intervention moved them from a place of strength to a place of power, with increased ability to vet opportunities according to strategic objectives, and to leveraging their talents for increased community outcomes.

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