



Developing strategy toward a more sustainable future

Client

A small, private foundation serving families and organizations throughout the US.

Challenge

Difficult economic times amid successful execution of the mission of this organization created an ironic challenge for this focused, 10-year old foundation: how to continue serving its growing client base in the face of a declining endowment and significantly fewer opportunities for external funding.

Approach

Working collaboratively with the CEO and Executive Director, we:

- Analyzed the current situation, including potential new strengths or approaches
- Designed and executed a working session to assess competitive position and strategic options
- Proposed and considered together alternate options and the implications of each choice on both immediate operations and future objectives
- Strove to balance the need to honor the passion behind the mission with fiscal and environmental realities

Result

Together with the client, we crafted several clear strategic paths for further investigation. We outlined and understood the financial and operating implications of each path, including the critical responsibilities and roles for each of the principals. Via facilitated discussion, we synthesized ideas and identified the nature of the balance between the future aspiration and the client's current reality. And, we identified key questions and potential resources to help the client to 'flesh out' and pursue its options more effectively. At the conclusion of the engagement, we recommended next steps to allow the client to fulfill current commitments, alleviate the current fiscal drain, and build toward their future. Currently, the client is refining its fundraising strategy to better sustain its operating costs and reduce the reliance on endowment funding. And it is pursuing a new Web 2.0 communications and marketing strategy. In this way, the client will fulfill its mission while creating the building blocks it needs to sustain the foundation well beyond 2009.