



From Strategy to Success: A Case Study



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From Strategy to Success

Nonprofit organizations gauge their success by how well they achieve their mission. A common characteristic of successful nonprofits is their understanding of the importance of clear strategic priorities. The most effective organizations — those that achieve the greatest sustained impact over a long period of time — keep one eye on the environment in which they work, revising their strategy in response to changing times.

Simply developing a strategy, however, is not enough. To be truly meaningful, strategic priorities must be translated into action. Organizations must work through questions like: *Do we have the right staff mix and structure to bring these strategies to life? How might our programs and services need to change or grow? Does our organizational culture support implementation of our strategic priorities?* Moving from strategy to implementation and execution, strengthening internal staff capacity and leadership along the way, is the key to a successful planning process.

Using La Piana Consulting's [Real-Time Strategic Planning](#) framework, adapted to reflect its specific needs and culture, Grand St. Settlement has built on the success of its first 100 years and positioned itself to meet the challenges and opportunities of a changing world. Developing this degree of adaptability, from a position of strength, is but the latest chapter in the story of Grand St.'s success. Through this case study, we present this story, identifying lessons that can be applied by any nonprofit.

About Grand St. Settlement

Grand St. Settlement is celebrating 100 years of service — and is doubling down on 100 more. In the past year, the organization's staff and board engaged in a process that models how nonprofits can move from planning to action, and from strategy to success. This case study describes how this multi-service community organization chose an approach to strategic planning, what they learned, and how the results have prepared them to effectively manage growth and respond to future opportunities. For more information, visit: www.grandsettlement.org.

About La Piana Consulting

Since 1998, La Piana Consulting has helped hundreds of nonprofits and foundations leverage organizational strategy, structure, and culture to realize their goals. The firm is nationally recognized for its leading-edge thinking and practice on strategy, business planning, and partnerships, and its original methodologies have been adopted across the social sector. For more information, visit: www.lapiana.org.

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Organizational Background: Remembering the Past and Envisioning the Future

Grand St. Settlement (Grand St.) opened its doors in the early 1900s in response to the emergent needs of immigrant populations flocking to New York City. As community activists and philanthropists became more aware of the need for neighbors to work together to overcome isolation and exclusion and to challenge broken systems, the settlement house movement emerged to encourage neighbors to give of their time, talents, and resources to lift one another out of poverty, build a community, and in turn, enrich the quality of their own lives. Grand St. was founded to focus these efforts in Manhattan's Lower East Side, then one of the most densely-populated places in the world.



Over time, New York has become increasingly diverse in terms of nationality, ethnicity,ⁱ and sexual orientationⁱⁱ — and increasingly divided by class. Today, roughly half of its residents live in poverty.ⁱⁱⁱ The Lower East Side has mirrored these changes. Over ten years ago, the area began to experience rapid gentrification, prompting The National Trust for Historic Preservation to place the neighborhood on a list of America's Most Endangered Places. This trend is now continuing across the East River in Brooklyn.

Through its deep commitment to high-quality services, inclusivity, and cultural competency, Grand St. has become deeply embedded in the communities it serves, while continuing to evolve to reflect their changing strengths and challenges. With a paid staff approaching 350 full- and part-time individuals, Grand St. provides hope along with a path toward family and community success.

Grand St. has, for decades, served its historical base in the Lower East Side and the Brooklyn communities of Williamsburg and Bushwick. Over the past two years, Grand St. has experienced significant growth in programs and scope, expanding beyond this base into other high-need Brooklyn neighborhoods — including East New York, Brownsville, and Bedford Stuyvesant. Its model of service — partnering with community leaders and residents to develop and deliver programs that are relevant and appropriate for each specific community — provides a continuum of human services and programs for all ages.

Recently, Grand St. has pursued several new opportunities to further its mission and sustain its growth:

- In 2013, it was named the local community partner for Essex Crossing, a history-making development project on the Lower East Side. Grand St. negotiated a 20-year rent agreement valued at \$12 million, with an additional \$2 million from developer Delancey Street Associates, to build a new intergenerational community center in a building that will provide much-needed low-income housing to seniors.
- In 2014, Grand St. completed a facilities assessment to reimagine how services are delivered at its Manhattan hub, located in a three-story brick building in the middle of the Gompers Houses public housing development. This upgrade and redesign will better position Grand St. to serve the needs of the 3,400 low-income community members — from infants to seniors — that participate in programming at this center.
- In addition, Grand St. was pre-approved by New York City to develop supportive housing, coupled with on-site services, in Brooklyn.

Today, Grand St. provides services in 13 sites on the Lower East Side and 21 sites in Brooklyn.

Grand St.'s growth has also been fueled by an expansion of its youth programming in the last two years, much of which has been spurred by a five-year, \$8 million federal grant awarded in 2015 to strengthen early childhood education in 11 locations throughout Brooklyn. As part of President Obama's Early Education Plan to expand high-quality early learning through the Early Head Start-Child Care Partnerships, Grand St. now serves 450 children and families annually. It has also expanded youth development programming through School's Out New York City, providing high quality learning opportunities (including STEM) and creating pathways to success for young people:

- Community School Initiative is a comprehensive multi-year, whole-school reform designed to raise the performance of 94 schools.
- Cornerstone Centers provide engaging, high-quality programs for adults and young people year-round.
- Project Speak Out Loud offers a safe and supportive space for LGBTQ youth.

In 2016, Grand St. grew to include five Cornerstone Centers (three on the Lower East Side, and two in Brooklyn) in New York City Housing Authority Community Centers. Based on its success with these programs, Grand St. was awarded nine additional Cornerstone sites beginning in 2016, six of which are located in Brooklyn.

Over the last five years, Grand St.'s budget has grown 25 percent, to \$22.2 million in fiscal year 2016. It receives funding from a variety of sources, including government contracts, foundation and corporate grants, donations from individuals and corporations, and a five percent endowment drawdown. Grand St. continues to strategize ways to adjust its business model to support costs related to its recent growth, and to support the entrepreneurial and innovative thinking that has led to this success.

Grand St.'s significant, rapid growth was one of the key drivers in the organization's decision to engage in strategic planning in 2016.

Planning from a Position of Strength

Several factors can motivate an organization to engage in revisiting its strategy or developing a new set of strategic priorities. Leadership transition, opportunities for growth or other organizational change, and achieving organizational milestones can all create the impetus to step back and answer some key questions: *Who are we as an organization? What do we want to accomplish, and are we doing that? How can we do better?* For Grand St., all three came together to stimulate a commitment to strategic planning.

Grand St. marked its centennial in 2016. This historic milestone coincided not only with its recent transition to new executive director, Robert Cordero, but with the chance to leverage several significant capital projects. In addition, Grand St.'s recent successful growth into Brooklyn had raised the question as to whether it should continue to present itself as a Manhattan or Lower East Side organization that happens to also work in Brooklyn, or whether its identity had evolved into more of a city-wide entity.

The hiring of a new executive director, in particular, motivated the organization to engage in strategic thinking. When asked by the new leader about strategic priorities, board members expressed them in different ways. According to then-Board President Sylvia Montero, "It was clear to us as a board that we needed a process to develop a clear understanding and agreement regarding priorities, particularly given the significant growth we had experienced over the past several years."



Together, these factors opened a window of opportunity to revisit its strategies, structure, and culture, and to ensure that these elements were aligned behind a vision of success for the future of the organization and the communities it serves.

The Real-Time Approach to Strategy Development

Through a competitive bidding process, Grand St. selected La Piana Consulting to support this work. Executive director Robert Cordero describes what the organization was looking for: “We wanted clarity about strategies to be explored, tested, and put into practice, and to be aligned throughout the organization — board, management team, staff, and key partners and stakeholders — to resource and deliver on these strategies.”

This need dovetailed with La Piana’s approach to strategy development. Framing strategy as a *coordinated set of actions designed to create and sustain a competitive advantage in achieving a nonprofit’s mission*, the consultant engaged all levels of the organization in a comprehensive process to articulate Grand St.’s organizational identity (as either a Manhattan-based organization or an entity with more of a city-wide perspective), confirm its vision for the future, understand the market in which it operates and the opportunities presented by this market, and determine how to best focus its unique strengths.

At each step in the process, Grand St.’s board or Executive Team was called upon to make decisions. To ensure that these decisions are sound, that they leverage Grand St.’s competitive advantage, and that the full organization aligns behind the best choices, the organization also developed a set of criteria to use in reaching its decisions — a *Strategy Screen*. This decision-making tool would not only prove essential to the current strategy development process, but will continue to inform the organization’s ongoing strategic thinking.

“We wanted clarity about strategies to be explored, tested, and put into practice, and to be aligned throughout the organization — board, management team, staff, and key partners and stakeholders — to resource and deliver on these strategies.”

Robert Cordero, Executive Director

Woven throughout this process was an understanding of the important role played by Grand St.’s organizational culture in successfully delivering on its strategic priorities. Understanding culture provides a window into how people within the organization view what and how the organization operates, as well as how they’d like that to change (or not), and gives clarity to leadership so that they are not operating on false assumptions about staff and board perceptions. And so, beyond the discussions of organizational identity, market, and competitive advantage, an assessment of the organization’s culture was completed early in the strategy development process. Armed with a better understanding of its culture, Grand St. developed strategies, and plans for their implementation, that included the type of culture development needed for success.

Project Outcomes

Grand St. sought several outcomes through this process, including that it would:

- Be in a stronger position to successfully achieve its mission, through greater understanding of the external environment in which it operates, and through agreement on and confirmation of key strategies to respond to this environment
- Gain greater clarity about the current state and culture of the organization and an enhanced focus on its priority work, issues, challenges, and opportunities
- Clarify its understanding of its unique strengths and organizational identity, and how these support its strategic choices
- Identify an organizational structure that is aligned with carrying out its strategies and will enable it to successfully achieve its mission
- Develop clear guidance for how the organization will make ongoing decisions aligned with organizational strategies
- Increase the skills and capacity of its staff and board to make ongoing strategic decisions, enabling the organization to respond to changes over time

With thoughtful planning, and ongoing leadership from the Strategic Planning Committee, Grand St. successfully achieved these outcomes.

The Project

Ultimately, the goal of every strategy development project is to create a foundation for success, and to align the organization to build on that foundation. To this end, Grand St.'s work was framed as having three phases: 1) Developing and confirming its strategic priorities; 2) Developing plans to translate these strategies into operational plans; and 3) Implementing those plans successfully to create maximum impact. In navigating this trajectory, everyone throughout the organization would understand Grand St.'s overall direction and the reasons why resources were focused on specific areas of work. Through this framing, the process would also deliver on one of the key outcomes identified by the board: a clear and consistent understanding of Grand St.'s identity and organizational strategy.

Grand St.'s leadership sought to engage the entire board and staff in this process, and to use it as an opportunity to identify and build the skills of staff leaders throughout the organization. In keeping with this goal, La Piana partnered with a Strategic Planning Committee, comprised of board members, senior staff, and other staff leaders. Starting with an initial launch meeting in September of 2015, this committee guided and shaped the process to ensure it would produce the outcomes needed by Grand St. Christina Lopez, Grand St.'s Deputy Director of Youth Services in Brooklyn, describes the value of staff involvement: "Staff truly had a say, had input. The key questions came from staff and the organization. This allowed staff to see the big picture and how this process fit in with our work as an organization."

Developing Strategic Priorities

Over the next six months, the board and staff, through a series of facilitated discussions, considered both existing opportunities to strengthen the organization's impact, as well as new opportunities presented by market trends and the evolving needs of the communities it serves. To assess these options, the organization analyzed its place in the market and its unique strengths, as well as data gathered from external partners, supporters, funders, and public officials. Framed by the decision-making criteria articulated in the *Strategy Screen*, Grand St. used all of this information to develop a set of strategic priorities.

Grand St. identified two strategic priorities to pursue, in addition to continuing its ongoing work as well as advancing the capital projects in which it was already engaged. The organization prioritized:

- Identifying and pursuing opportunities to strengthen its work and impact in specific communities in Brooklyn
- Building on its history of mobilizing families, staff, board, and volunteers in response to relevant issues as they arise, and seeking to more intentionally incorporate advocacy into its work by building internal capacity to engage in community education and outreach, helping residents to better understand and act on their shared self-interest regarding policy matters, and educating and conducting outreach to key influencers (e.g., elected/appointed officials, policymakers, community leaders)

Understanding the Role of Organizational Culture

Simultaneously, Grand St. engaged its staff and board in an assessment of its organizational culture. Using the Organizational Culture Assessment Instrument (OCAI; www.ocai-online.com), Grand St. developed a clearer understanding of its current culture, and the type of culture preferred by staff and board. This phase of work first enabled staff and board members to complete an online survey in which they shared their perspectives on Grand St.'s current culture, and on the type of culture they would prefer to see in the organization. Following an analysis of the results by the consultant, staff and board engaged in a series of facilitated discussions about these results, teasing out how the current and preferred culture might help advance the organization's strategic priorities, and how the culture might need to evolve to better position Grand St. for success.

“Staff truly had a say, had input. The key questions came from staff and the organization. This allowed staff to see the big picture and how this process fit in with our work as an organization.”

Christina Lopez, Deputy Director of Youth Services, Brooklyn

Both board and staff members described the current culture as one that fosters teamwork, support, and a close-knit environment, both internally and in relation to its work with program participants and volunteers. Historically, this culture has been key to Grand St.'s ability to retain highly-qualified and

committed staff, volunteers, and board members, to become truly embedded within the communities served by the organization, and to be seen as a partner with these communities in seeking to create meaningful positive change. As such, there was a desire to retain elements of this culture going forward across all levels of the organization.

The board and executive staff, however, also understood the need for the culture to evolve and include elements fostering greater entrepreneurship and innovation in response to a dynamic market. Through a series of conversations, this understanding became clearer for everyone working at Grand St. As a result, the organization

determined that the type of culture needed to successfully pursue its identified strategic priorities must blend notions of teamwork, support, and family, with an appreciation for how the external environment affects the organization's work and ability to achieve its mission. Recognition of this shift was deemed so critical to Grand St.'s future success that a specific planning team was created (as described below) to ensure that implementation of the strategies across all areas of the organization included intentional and explicit steps to make this shift.



Translating Strategy into a Blueprint for Success with Staff Teams

With board approval of its strategic priorities in January 2016, Grand St. shifted its focus to implementation planning. The process was guided by several key questions, including: *What steps are needed to implement this strategy? What resources and skills are needed to implement this strategy? What's the timeline for implementing this strategy? What's the budget, and from where might the funding come, to implement this strategy?* Staff teams were created to develop plans to implement each of its key strategic priorities. Consisting primarily of relevant supervisory staff, these teams were charged with engaging other staff and external sources to gather information and input as needed. This ensured that each team had the expertise and information needed to develop their respective plans.

Through the winter and spring of 2016, these staff teams met, conducted needed research, and developed plans to:

- Implement clear and thoughtful expansion of its work in key Brooklyn neighborhoods
- Build internal staff capacity regarding advocacy, as a first step toward broader engagement in this type of work

Additional staff teams developed plans to further pre-existing capital priorities, including:

- A social enterprise café to be launched in the Essex Crossing development
- A new community center, also to be housed in Essex Crossing
- The reimagining and renovation of the organization's Manhattan hub

Ever mindful of the importance of organizational culture, the need to strengthen its ability to define success and measure progress against that definition, the need for strong administrative and operational systems, and the desire to continue building Grand St.'s internal staff capacity and leadership, additional teams focused on:

- Leadership and Organizational Culture
- Data, Evaluation, and Quality Assurance
- Program Integration and Innovation
- Development and Communications
- Capacity and Infrastructure

Robert Cordero reflects on staff involvement on these teams: "The greatest value of the planning teams has been the identification of leaders throughout the organization who can embrace a piece of the strategy, help shape it, and push it forward — and then hold leadership accountable for moving it forward. This also facilitates holding team members accountable for their ownership and involvement."

Coordinated by the staff Executive Team (Executive Director, Director of Development and Communications, Managing Director of Youth and Community Development, Managing Director of Early Childhood and Senior Services, Director of Human Resources, and Director of Capital Projects), each team developed individual plans. The Executive Team integrated these individual plans into a comprehensive three-year implementation plan for 2017-20. This plan was then used to create Grand St.'s FY 2017 budget, to ensure that implementation would be properly resourced and, in fact, begin to happen.

"The greatest value of the planning teams has been the identification of leaders throughout the organization...."

"Through this work, we have created a different level of energy for staff; they are involved and have ownership of something bigger than their daily work, and get to see the impact of these efforts."

Robert Cordero, Executive Director

Cordero adds, "Through this work, we have created a different level of energy for staff; they are involved and have ownership of something bigger than their daily work, and get to see the impact of these efforts."

Bringing Strategy to Life through Implementation

Grand St. began to implement its plans as early as the summer of 2016. Depending on the strategy and resource availability, implementation has ranged from launching neighborhood assessments and building partnerships in different Brooklyn communities, to developing more detailed plans for the social enterprise café at Essex Crossing, to launching five new Cornerstone Centers in Brooklyn and a Brooklyn hub in Williamsburg. The Grand St. board and staff understand that implementation of its full portfolio of



strategic priorities will take time, in some instances as long as two to three years. They also understand the critical need for these services, and the value they bring to the lives of community residents, so there is a sense of calm urgency underlying this implementation work. As with all of its work, Grand St. seeks to get it right, but to do so along a meaningful timeline.

Overcoming Challenges Along the Way

As with any organizational change process, several challenges arose during the course of the project. Addressing these challenges not only moved the work forward, but also provided learning opportunities for board members and staff — learning that will serve Grand St. in its daily, mission-critical activity and in future efforts at strategy development.

Challenges included:

- Selecting the right external partner to guide the process
- Ensuring robust staff engagement, while continuing to deliver high-quality service
- Evolving and adapting the organizational culture
- Shifting focus from strategy development to implementation planning
- Ensuring that board members can fully immerse themselves in the process

Selecting the right external partner to guide the process – The board understood and agreed on the need to explore the organization’s strategy — but, as with any board, individual members have had different types of experience with strategic planning, and therefore different views as to the type of process they sought. Through ongoing discussion between board leadership and the executive director, board members came to appreciate what was, for some, a different approach — one that focuses on



the value of developing overall organizational strategies, understanding the implications of organizational culture, and then using these to develop realistic and actionable implementation plans. Sylvia Montero, Board President, shares her perspective on the process: “This work was distinctly different from my experience with strategy development processes in the corporate sector. Rather than create a “strategy book,” the resulting “living document” from this process will serve Grand St. going forward.”

Ensuring robust staff engagement, while continuing to deliver high-quality ongoing service – Grand St. sought to use this process as a way to identify and cultivate staff leaders throughout the organization — individuals who understood organizational culture and strategy, and who could help move these forward. Engaging these emerging leaders, and providing opportunities for all staff to have meaningful input in the process while these staff members also attended to their day-to-day work responsibilities required a realistic and thoughtful approach.

This was addressed in two key ways. First, including staff on the Strategic Planning Committee, as the central partner with the consultant, provided an important vehicle for staff perspectives to be incorporated into the planning and delivery of the process. Also, senior leadership sent consistent and clear messages that the strategy development and implementation planning work were a high priority, and that managers and supervisors would need to work with their staff to integrate this work into their usual responsibilities. Reflections from Sylvia Montero include: “I was quite impressed with how deeply into the organization we went in order to get input, knowledge, and buy-in from all levels of the organization, and to benefit from the thinking of those who would need to implement our roadmap. This also provided the executive director and senior leadership with an ongoing opportunity to model the type of organizational culture that would best align with our strategic priorities.”

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Sylvia Montero, Board President

Evolving and adapting the organizational culture – The OCAI and ensuing discussions enabled staff to develop a common language around the culture they experienced. Concepts like “family,” “teamwork,” and “partnership” were surfaced as being integral to Grand St.’s work and identity, and to interactions among staff and between staff and program participants. It was clear to all involved that this culture created a strong foundation from which future work could be envisioned. Also clear, however, was the need to adapt the culture to include more of a market orientation. Notions of market awareness and innovation will continue to be incorporated into every aspect of the organization’s work, helping staff to integrate these concepts so that they — along with family, teamwork, and partnership — become hallmarks of Grand St.

Shifting focus from strategy development to implementation planning – This phase of the work was intentionally left less well-defined from the outset, as leadership wanted to first have staff experience the process of strategy development without getting drawn down into tactical, operational questions. While this helped staff to gain a clearer understanding of the distinction between strategy and planning, it also challenged the organization to think through what effective implementation planning would entail. Engaging in this thinking earlier would have helped smooth the transition from strategy to planning. Even so, with guidance from the consultant, staff leadership developed an implementation planning process that afforded considerable opportunity not only for meaningful staff input but for the continued development of leaders at all levels of the organization. This built staff capacity to engage in future implementation planning in a way that truly reflects the needs of the organization and its culture, and that blends intentionality with the flexibility to respond to change.

Ensuring that board members can fully immerse themselves in the process – Setting organizational strategy is typically within the purview of the board. Depending on their level of engagement with and understanding of an organization’s work, and their ability to commit the time to participate in a meaningful way, the board’s role can range from deep immersion in strategic thinking to simply approving what has been developed by staff leadership. Grand St. board members are sincerely engaged in the organization’s work, with many of them volunteering in other capacities and having long-term connections with the organization. Gathering broad board input was challenged, however, by the structure of their engagement.



Aside from those five board members serving on the Strategic Planning Committee, which met multiple times throughout the process, the broader board of 22 members participated only in one full-day strategy development session. During this session, the consultant engaged participants in visioning and mission-related discussions, market and trend analysis, confirmation of key strategic questions, development of the *Strategy Screen* with which to answer these questions, and then ultimately developing the answers. This session is best done as a standalone meeting, given

the time needed and what it requires from the participants, but this is not always feasible. Combining this with a board business meeting extended the time required of members, and stretched them beyond capacity. In hindsight, this fatigue could have been avoided by keeping the strategy discussion separate from the regular board meeting, engaging individual board members in advance of the strategy session to ensure they understand what is to be accomplished during the session, and providing clarity about time and work expectations for all board members from the outset to deepen their understanding of and involvement in the process.

Lessons Learned

Through its journey, the organization gathered important lessons about how to increase the likelihood of success in a change process and the impact of this type of process on the staff and board.

What have we learned about strategy development and change processes?

Confirming organizational identity and competitive advantage are important building blocks for growth and strengthening impact.

Organizations don't often take the time to articulate their identity or analyze their place in a competitive market, and then work to ensure that these align with their strategic choices. By explicitly doing so, and by gaining input from sources external to the organization, Grand St. developed a stronger sense of "organizational self-esteem." This new sense of organizational identity enabled Grand St. to value its historical roots, and to carry these forward as it continues to expand. Clarity about identity has also helped strengthen board members' ability to serve as ambassadors for Grand St., while also helping staff reflect on Grand St.'s role in the community and their specific role within the organization, including what it is about the organization that motivates staff to stay. Also, engaging staff in discussions about Grand St.'s place in the market builds their understanding of how the organization differs from (or is similar to) others, an understanding that can foster a more thoughtful and intentional approach to new program development.

Understanding culture is critical to the success of any significant change process.

Grand St. had leadership stability for 20 years, and the organization's culture was aligned with that leader's behaviors and values. A new executive director brought a different perspective on the type of culture needed for organizational success, now and in the future. It was critical to create space in this process to understand various perspectives on culture, and for the organization to agree upon the type of culture that best positions them for success.

Once agreement was reached, and the organization determined that its culture needed to evolve, it became critical for the board to understand how to make this cultural shift. Also, staff don't necessarily think about culture, *per se*, and its impact on their work. The structure of this process, and the intentional inclusion of culture as a key consideration in the discussions, were instrumental in beginning the culture change process. Both board and staff members came to share a common understanding of the impact of culture on organizations, generally, on the type of culture that existed at Grand St., and how that culture could facilitate or hinder the organization's ability to move forward with its strategic priorities.

Lessons Learned At-A-Glance

- Organizational identity and competitive advantage are foundational building blocks
- Organizational culture is critical to any change process
- Explicit decision-making criteria can enhance rapid adaptability
- Understanding what an organization will not do can allay concerns about missed opportunities
- Engaging staff in leadership roles builds buy-in for changes
- Strategic clarity paves the way for aligning new staff behind strategic goals
- Balancing staff engagement in strategy work and their daily work requires deep attentiveness and communication
- New staff and board members will need to be informed of the strategic process and decision making
- Organizational leadership must be champions of the process — they play a unique role critical to its success

Reaching agreement on explicit criteria to guide decision making can change how organizations respond and adapt to changes in a dynamic environment, and whether these responses increase the likelihood of mission success.

For Grand St., the development of a Strategy Screen was among the most valuable tools that came out of the project. Grand St.'s executive team and supervisors (and other staff to different degrees) have integrated the concepts reflected in the Screen into their thinking and decision making. As a result, it has become easier for the executive director and the executive team to arrive at unified, reasoned decisions more quickly.

Understanding when and why an organization declines to pursue certain opportunities minimizes the fear of passing up potential funding in an increasingly competitive funding environment.

Deciding what an organization will not take on is as strategic a decision as what it decides to pursue. Developing a sound strategy that leverages its competitive advantages, along with an explicit set of decision-making criteria, can help an organization assess whether the pursuit of certain opportunities would, in fact, strengthen its impact. A “big aha” for Grand St. came out of a discussion of how far it would go to “just accept” what came its way, as it enabled them to be



clear about priorities and direction — and to say “no” as appropriate. It is particularly important to have this discussion when, as in the case of Grand St., an organization is experiencing rapid and significant growth, while working to ensure that such growth is sustainable.

How has this process affected our board and staff?

Engaging staff in leadership roles in a change process strengthens their willingness and ability to create change.

By engaging his executive team in a leadership role in both the strategy development and implementation planning phases of this work, Grand St.'s executive director helped kick-start their transition from a process-heavy shared culture toward one that is more results-oriented and values thoughtful, timely decision making. Staff at all levels, but particularly those with management and supervisory responsibility, are now more willing to create change because they participated in the strategy development process, and are therefore invested in the strategic priorities. In addition, changes resulting from this process — particularly those related to staff roles and structure — are seen as part of the organization's efforts to align with its strategic priorities, rather than a dislike of or dissatisfaction with a specific individual. Staff have developed a greater appreciation for the need to align systems and structures in support of organizational strategies, and greater willingness to participate in creating this alignment.

Strategic and cultural clarity inform recruitment, orientation, and ongoing support for new staff; this, in turn, helps integrate new staff more quickly into the culture and work of the organization.

Through this process, Grand St. came to understand that program *and* administrative staff needed to be on board with the cultural and strategic direction of the organization. As a result, Grand St. has transitioned to new leadership in development and information technology, with managers who approach their work in a way that is more aligned with its priorities going forward. Grand St.'s leadership has included strategic and cultural elements in its onboarding of these new staff — recognizing that since they did not experience the change process in the same way as existing staff, they will need explicit coaching about the process and its impact on the organization's work — while also modeling the organization's new approach to decision making.

Balancing deep staff engagement in strategy development and implementation planning requires ongoing attention and nurturing.

Prioritizing staff involvement in these processes can overwhelm staff at times, as the demands of participation compete with the demands of their everyday work. Clarity regarding expectations and roles can help maintain this balance, which Grand St. sought to achieve by engaging staff in implementation planning teams, and explicitly articulating the roles of these teams. The structure of



these teams can also help maintain this balance. While including administrative and operational staff on each team may have resulted in greater attention to the infrastructure needs for the individual plans, doing so would have dramatically stretched the capacity of these individuals. And so, it was more effective and efficient to have the executive team incorporate and synthesize administrative and infrastructure needs across all strategies.

Also, simplifying the process of informing and updating staff about how their role is contributing to the overall effort can help reduce the time staff spend on this process, at the expense of their ongoing work. As such, the use of various tools (e.g., graphics, flow charts) can contribute to maintaining balance for staff.

Staff and board change over time, so all will not have had the same level of experience with your organization's approach to strategy development and implementation planning.

Following the adoption of its strategic priorities, Grand St. added eight new members to its board of directors and hired two new staff, none of whom had participated in the process described here. Board leadership and the executive director have noted this change in players, and understand that a threshold question the next time they engage in strategic thinking is deciding how deeply to go (or not go) in explaining this current process and its outcomes to those members of the staff and board who may not have participated this time around.

Organizational leadership must have confidence in the change process employed, and they will be critical to its success.

The executive director, with the support of executive and other supervisory staff, is charged with carrying out the plan and implementing its strategic priorities, and must have confidence that the process will produce effective results. For Grand St., the hiring of a new executive director in the context of recent major growth and its upcoming centennial provided an opportunity to re-think how the organization approaches strategy. The new executive director wanted a process that was not traditional, more open, and less structured in the output (i.e., not so directive in terms of goals, objectives, etc.). The process described here fit those desires, and so resulted in outcomes that matched the vision and approach of new leadership. This has resulted in stronger implementation plans, and greater alignment across the entire organization in support of its strategic priorities.

Conclusion

Like many nonprofits with long histories of service, Grand St. is reflecting on its past accomplishments and planning for a vibrant future. Through this process of defining its strategic priorities and developing sound implementation plans, Grand St. is well positioned to make the most of the opportunities it faces and to address new challenges that may emerge. Grand St. and La Piana Consulting share the hope that this case study — including the successes, challenges, and lessons learned — helps to illuminate the critical link between the development of sound strategy and its execution, and that it informs and inspires others to make the journey from strategy to success.

ⁱ The Changing Racial and Ethnic Makeup of New York City Neighborhoods, The Furman Center For Real Estate and Urban Policy, 2011
http://furmancenter.org/files/sotc/The_Changing_Racial_and_Ethnic_Makeup_of_New_York_City_Neighborhoods_11.pdf

ⁱⁱ New York Still Has More Gay Residents Than Anywhere Else in the U.S., *The New York Times*, March 23, 2015
http://www.nytimes.com/2015/03/24/upshot/new-york-still-has-more-gay-residents-than-anywhere-else-in-us.html?_r=2&abt=0002&abg=0

ⁱⁱⁱ The CEO Poverty Measure 2005-2012, New York City Office of the Mayor, April 2014
http://www.nyc.gov/html/ceo/downloads/pdf/ceo_poverty_measure_2005_2012.pdf