

## **Major Philanthropic Foundation Case Study**

### *Aligning the organization around a common future strategy*

“It was time to draw a line in the sand and say this is who we are and what we care about.” *Sr. VP of Programming*

“We wanted to get the thinking of the whole organization. We wanted to work on the desired culture of talking across boundaries toward a productive end.”  
*Director of Program and Organizational Learning.*

#### **Challenge**

After more than 70 years as one of the nation’s largest foundations, this Foundation was struggling to see how its grant-making was really making an impact to the health, education and livelihood concerns that were its focus.

In spite of the extensive grant-making and decades of careful work with grantees, there was a sense that the Foundation was not making as big an impact in the lives of those they were trying to help as they could. Throughout the Foundation, people had been asking for clearer priorities. The mission was so broad that it had enabled the organization to operate like multiple foundations. Many areas operated independently of each other. The leadership wanted to create a single foundation. To do this they needed to involve absolutely everyone from support staff to executives in one conversation.

#### **Approach**

A consulting team<sup>1</sup> met with senior leaders and a planning team of a cross section of staff to outline a design to engage almost all 200 members of the Foundation in a significant conversation about the Foundation’s vision and strategy. Everyone from program staff to board members to kitchen and security personnel were invited. The design of this meeting would involve both small and large group dialogue in a process of recognizing different perspectives on the Foundation’s past and present activities, before designing the desired organizational future together. This large group approach would be in marked contrast to the foundation’s traditional approach of having 30 people at an off-site to develop some plan and asking everyone else to sign on afterwards.

The whole organization met over two and a half days to have a sustained conversation about the future of U.S. programming and operations. The purpose of this conversation was to build a new strategic framework for guiding the Foundation towards a clearer vision for its role. The perspectives of a wide range of stakeholders were shared and everyone’s voice was heard. By the mid-point of the meeting, the consultants helped the whole group to recognize what they all held in common for the desired future. They then began to build what was termed a “strategic framework” for achieving this future vision.

#### **Results**

The conference led to concrete outcomes that have given real direction to the Foundation.

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