



Case Study:

Direction-Setting Process for a Community-based Organization

Swinging the Compass! An organization needed a renewed sense of direction. It ended up with a clear sense of its purpose – both for staff and board and to share with the outside world.

The Client

The organization was justifiably proud of its history in the community, serving as the voice of local business interests for over 110 years. However, this volunteer-driven organization found itself with little wind in its sails. The board was having trouble retaining part-time administrative help, and there were few clear benefits to paid membership, which constituted its economic engine. Members were weary of board meetings that seemed to have more minutiae (where should we hang holiday decorations?) than meaning. They had recently bid to be absorbed by a larger and more powerful community based organization, but the other organization wasn't clear there was enough added value to justify the effort. They were asked to conduct a capacity assessment and strategic planning process before any final decision.

Board members came to the Bayer Center requesting help in refocusing on their mission, vision, and in increasing community engagement.

Our Work

No organization exists in isolation, so the Bayer Center frequently begins with an assessment or "environmental scan". This process helps a group step out of the immediate presenting issues (how can we develop enough value to be a good candidate for merging?) into a clearer view of the whole picture. Through interviews and document review, Bayer Center consultants collected information that would help the organization see itself and the current community context.

With that picture at their fingertips, board members could determine how to chart the course ahead. The Bayer Center facilitated three meetings with board members. The first allowed time to absorb information on the context, and the second was an opportunity to build on that information and generate a new mission and vision statement that captured their hopes and excitement for the work. These meetings helped define what the dedicated but exhausted group was not going to take on or discuss. During the third meeting, members identified three areas of focus and specific goals for their work.

Many boards, especially those with fresh talent, struggle to understand their roles as board members. In volunteer-led organizations board members often take on the work of the organization, which frequently increases role confusion. The meetings included exploration of board composition and responsibilities for a board in that kind of organization, sharing tools that would make it easier to develop agendas and keep meetings on a productive tack.

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The Result

During the course of the meetings, the organization realized their mission had significant differences from the organization with whom they'd originally hoped to merge. The question shifted from "how do we rebuild ourselves as a candidate for merging?" to "what are our own organizational strengths and goals for the next era?" Confident in its new mission and focused on a narrower area of impact, the organization has updated its programs, membership benefits and website, which now clearly reflects the value of paid membership, as well as newly-developed membership levels.

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Feedback from a board member involved with the engagement concluded, "The Bayer Center helped us stay focused on our mission and primary goals." With that direction determined, the organization has come out of the doldrums and is on its way.