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Strategic Planning For A Multi-Organization Nonprofit Entity: A Case Study Of The Connecticut Boys & Girls Clubs' 2007-2008 Strategic Planning Process

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STRATEGIC PLANNING FOR A MULTI-ORGANIZATION NONPROFIT ENTITY:
A CASE STUDY OF THE CONNECTICUT BOYS & GIRLS CLUBS'
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Abstract

The purpose of this case study analysis is to explore the development of Connecticut Boys & Girls Clubs' Three Year Strategic Plan in order to discover the strengths as well as the areas to improve for future statewide strategic planning initiatives. Through a series of interviews, an online survey and thorough document reviews, I examined the process CT Boys & Girls Clubs used in 2007-2008 to develop a statewide, multi-organization strategic plan. To provide context, I also conducted a thorough literature review focused on strategy, strategic planning and collaboration management.

The findings and analysis reveal that the Strategic Planning Taskforce made concerted efforts to develop a comprehensive, statewide strategic plan to identify and respond to the pressing issues facing CT Clubs. The strategic planning process incorporated a number of the strategic planning steps that are widely agreed by academics and practitioners to be important in the strategic planning process. However, some aspects of CT Clubs' strategic planning process were a hindrance to CT Clubs' implementation efforts.

Based on the research findings and the literature review, I present a set of recommendations for CT Clubs to consider for future statewide strategic planning initiatives. First, stakeholder engagement should be increased from the start to ensure a variety of voices are heard. Second, planners should participate in a scenario process to brainstorm as many scenarios as possible in order to develop strategies that will be sound for all plausible futures. Third, individual strategic plans (those written by local Clubs) should be considered in the development of the statewide plan. Fourth, the statewide plan should address only on a few of the most pressing issues facing the CT Movement of Boys & Girls Clubs. Fifth, more time and resources should be devoted to assessing the internal and external environments of the CT Movement.

Lastly, planners should establish agreements to ensure timely and effective implementation efforts.

Introduction

Acronyms & Definitions

BGCA   Boys & Girls Clubs of America (the national, federated organization)

CPO   Chief Professional Officer (also known as the executive director)

CVO   Chief Volunteer Officer (also known as the board president)

CT Alliance   Connecticut Alliance of Boys & Girls Clubs

CT Area Council   Connecticut Area Council of Boys & Girls Clubs

CT Clubs   Boys & Girls Club organizations located in the state of CT

CT Movement   The community or movement of Boys & Girls Club organizations in Connecticut (staff, volunteers, donors, youth served and their families)

SWOT Analysis   A popular strategic management method to assess Strengths, Weaknesses, Opportunities & Threats

Taskforce   Strategic Planning Taskforce for the 2007-08 strategic planning process

Three Year Strategic Plan   Three Year Strategic Plan of Boys & Girls Clubs in the State of Connecticut (2008-2010)

Background

      With the support of Boys & Girls Clubs of America (BGCA), the Connecticut Alliance of Boys & Girls Clubs (CT Alliance) and the Connecticut Area Council of Boys & Girls Clubs, the sixteen autonomous Boys & Girls Club organizations located in the state of Connecticut developed their first statewide strategic plan in 2007-2008. The multi-organization entity undertook strategic planning to create direction for statewide efforts in reaching and serving more of Connecticut's youth. Although some concerted effort was made to implement the Three Year Strategic Plan upon its completion in the spring of 2008, such as establishing implementation committees for each of the four priority areas, little to no progress was made since 2008 to implement the Plan.

      Based on the anecdotal evidence I have discovered since I began working for the CT Alliance in August 2010, the statewide implementation committees up to this point have lacked the necessary leadership and commitment to execute the strategies in the plan. I chose this topic for my Capstone because I was interested in learning why the strategic planning process had not yielded the intended results. More importantly, I wanted to explore how CT Clubs could best utilize their collective power and resources to strategically plan and make collective decisions in the future.

      In this qualitative case study, I provide a critical analysis of CT Boys & Girls Clubs' 2007-2008 strategic planning process. I chose to provide a critical analysis as it seemed the most valuable way to contribute to CT Clubs and assist with their future collective strategic planning initiatives. It is my hope that this study on the Three Year Strategic Plan for CT Clubs will contribute to the ongoing discussion of how strategic planning for an inter-organizational entity

should look, what inputs are needed and what kind of process should be used to yield a highly successful and operational strategic plan.

Research Statement

The purpose of this case study analysis is to explore the development of CT Boys & Girls Clubs' Three Year Strategic Plan in order to discover the strengths in the process as well as the areas to improve for future statewide strategic planning initiatives.

Primary Research Questions

1. Why do multi-organizational entities undertake strategic planning?
2. What resources and/or support mechanisms are needed for a multi-organizational strategic planning process to be successful?
3. What kind of process best facilitates the development and implementation of a multi-organizational strategic plan?

Methodology

The primary methods I used for gathering data include documentation review, four interviews and a short, online survey. The documents reviewed for this case study include minutes from meetings of the CT Alliance's General Membership, CT Alliance's Board of Directors and the CT Area Council. I interviewed the consultant who was hired to facilitate the strategic planning process and methodically craft the strategic plan based on the discussions of the planners. Additionally, I interviewed three individuals within the Club Movement who were

involved, to varying degrees, in the development of the Plan as well as in the implementation efforts.

I chose to use several methods for gathering data in order to diminish the limitations of using a single strategy and increase my ability to effectively interpret the data and produce recommendations likely to be accepted and acted upon. Although the topic of strategic planning is non-sensitive, I made every effort to ensure that the research project was carried out with the highest ethical standards and that all individuals who participated in the study through interviews and surveys were informed of the research and any potential risks in participating in the research.

Organizational Background

Currently, the sixteen autonomous Boys & Girls Club organizations in Connecticut, all of which are affiliated members of BGCA, work collaboratively to improve the social, educational and physical welfare of the more than 60,000 young people they serve in Connecticut. The mission of BGCA which most local Clubs also adopt as their own is as follows: "To enable all young people, especially those who need us most, to reach their full potential as productive, caring, responsible citizens" (Boys & Girls Clubs of America, 2011).

Clubs in the state of CT work in collaboration through three main forums: 1) CT Alliance, 2) CT Area Council and 3) the CT Association. The primary distinction among the three forums lies in the groups with whom each interfaces. The CT Alliance, a 501(c)(4) corporation, adheres to and liaisons with the executive-level staff, mainly the CPOs, of its member Boys & Girls Clubs to carry out its mission. The CT Alliance was established in 2003 with the primary mission to raise funds from the State of Connecticut and its agencies on behalf of its member organizations, the sixteen Clubs in the state of CT. The CT Alliance also provides

a forum on a bi-monthly basis for inter-club communications and the exchange of ideas and information among member Clubs for the purposes of enhancing youth development efforts and effectively responding to the common challenges facing Clubs in the state.

Boys & Girls Clubs' area councils play an important role in the national movement of Boys & Girls Clubs in that they provide a voice for local Club leaders at the national BGCA level. An area council is an organization within a defined geographical area of which all of the BGCA organizations within that area are members. "As an arm of the Boys & Girls Club Movement, area councils are frequently the channel through which ideas, suggestions and proposals flow to the National Council—the governing body of BGCA" (Boys & Girls Clubs of America, 2007, p. 22) The CT Area Council spans the state of Connecticut and consists of board volunteers from each of the sixteen Clubs in the state, who will be referred to as the board liaisons to the Area Council. The board liaisons to the CT Area Council benefit from participating in area council events and activities at three different levels. At the individual level, the CT Area Council provides opportunities for both networking and learning. At the local Club level, board volunteers have opportunities to promote their respective Clubs at statewide gatherings as well as identify other boards' best practices to take back for their respective boards to consider implementing. Lastly, board liaisons benefit from the CT Area Council at the national level, BGCA, because they are given a voice to influence national policy. Likewise, BGCA greatly benefits from the local and state voices influencing their policies because it is often policies with buy-in at all levels which succeed.

The Professional Association of Boys & Girls Clubs is a forum primarily for Club program professionals to engage, network, learn and gain support and recognition. More specifically, the CT Association provides Club program professionals with support and financial

aid for professional training and development, recognition for outstanding performance and/or programs, mentoring and networking opportunities with other Club professionals and opportunities to presume leadership by serving on committees or task forces. As stated in BGCAs Professional Association Chapter Manual (2011), "We, as professionals, are supportive of one another and firmly believe that what is good for the Boys & Girls Clubs is also good for our professionals" (p. 1).

Through these three distinct forums, the sixteen Boys & Girls Club organizations in Connecticut are set up with the means to collaborate with one another in all areas of their management and operations, such as program development, board cultivation, human resource management and professional development. However, because each Club is autonomous with its own executive leadership and board of directors and sets its own strategic direction, statewide or inter-Club collaboration is purely voluntary. Membership in BGCA and their shared mission is what binds these youth development organizations and leads them to collaborate.

With the support of BGCA, the CT Alliance and the CT Area Council, CT Clubs developed their first statewide strategic plan in November 2007, with the assistance of a consultant, for the purpose of defining direction for statewide efforts and increasing Clubs' impact in the state of Connecticut. The General Membership of the CT Alliance and the CT Area Council approved the three-year plan in March 2008, and the plan was approved by all members' boards of directors by September 2008. During the strategic planning session in November 2007, Club professionals and board volunteers present were asked to serve on an implementation committee of their choosing. Each of the four implementation committees, comprised of Club professional staff members and board volunteers as well as representatives of BGCA, was

charged with developing a detailed work plan for implementing their respective priority area of the plan and carrying it out.

Literature Review

This literature review addresses the following questions:

1. What is strategy and what role does it play within an organization?

2. What is strategic planning and what should it aim to accomplish?

3. What are the key factors in effective strategic planning?

4. What are the characteristics of collaborative management?

Strategy

What is strategy?

Strategy has historically been associated with war, and the word itself stems from the Greek word, *strategia,* which means "generalship" (Grant, 2002, p. 16). In Sun Tzu's *The Art of War*, strategy is defined as "an overall plan for deploying resources to establish a favorable position" (as cited in Grant, 2002, 17). This ancient Chinese treatise written by Sun Tzu, a high ranking military general, is one of the oldest known and most widely read book on military strategy. The concept and usage of *strategy* did not infiltrate the corporate management scene in the United States until the 1950s and early 1960s. Once the concept was widely accepted, corporations began establishing planning departments which carried out decision-making in a highly scientific and rational manner. Alfred Chandler (1962) in *Strategy & Market Structure* defined strategy as "the determination of long-range goals and objectives of an enterprise, and the adoption of courses of action and allocation of resources necessary for carrying out these

goals" (as cited in Bolman & Deal, 2003, p. 62). Over the last forty years, the concept of strategy has changed. Some strategists incorporate intuition, experience and emotion, while other strategists maintain that strategy should be a precise, calculable practice.

Michael Porter, one of the most revered strategic management thinkers of our time, argues that strategy is primarily focused on competitive positioning requiring the strategist to focus on the structural conditions in the competitive landscape. "In essence, the job of the strategist is to understand and cope with competition" (Porter, 2008, p. 79). Porter is one strategist who understands strategy to be a fairly calculable practice of examining five competitive forces: industry rivals, customers, suppliers, potential entrants and substitute products. Prahalad and Hamel, distinguished academics in the field of strategic management, believe that strategy was more about stretching the company and leveraging its resources in the competitive environment in order to achieve the ultimate outcome (as cited in Grant, 2002). Mary Coulter (2008) of Missouri State University maintains that strategy is, in essence, an organization's goal-oriented plans and actions that align the organization's capabilities and resources with the opportunities and threats in its external environment. In contrast, Cynthia Montgomery, a faculty member at Harvard Business School and the former chair of Harvard's Strategy Unit believes that strategy has "lost breadth and stature" (2008, p. 54) and has become a competitive game plan resulting in the loss of organizational purpose. Montgomery states, "Strategy doesn't just position a firm in its external landscape; it defines what a firm will be" (2008, p. 55). Furthermore, purpose should be at the heart of strategy, according to Montgomery, and that purpose answers the fundamental questions of who are we and what makes us distinctive.

How should strategy be developed?

Robert M. Grant, (2002) a leading U.S. economic strategist who maintains that a company's internal resources and competencies shape its competitive edge more than its external environment, states that strategy development requires both rational analysis and intuition, experience and emotion. Grant (2002) defines strategy as "a unifying theme that gives coherence and direction to the actions and decisions of an individual or an organization" (p. 4). An academic who is known for challenging Michael Porter's views on competitive advantage, Grant understands strategy as a linkage between the firm/organization (goal, values, resources, capabilities, structure, systems, etc) and its external environment (including economic, social, political and industry).

Henry Mintzberg, an internationally renowned academic and author of several books on strategic planning for nonprofit organizations, holds a differing opinion from the many strategists who argue that strategies are deliberately developed. Through observation and field work, Mintzberg (1994) asserts that many strategies are formed deliberately as well as fortuitously, where they emerge from experiences and processes. Mintzberg maintains that neither kind of strategy is inherently good or inherently bad; effective strategies are usually made up of characteristics of both emergent strategies as well as deliberate strategies (Mintzberg, 1998). Years later, Mintzberg remained steadfast to this notion. Mintzberg (2001) stated, "A realized strategy can emerge in response to an evolving situation, or it can be brought about deliberately, through a process of formulation followed by implementation" (p. 68). Michael Bourne, Mike Gregory and John Mills (2002), strategists in the for-profit sector also contend that strategies tend to be partly deliberate and partly emergent, stating "In practice totally deliberate or totally

emergent strategies are most unlikely; they are best viewed as the ends of a continuum along which real strategies lie" (p. 9).

Most strategists agree that strategy can serve different functions within an organization. Grant (2002) identifies three main functions. First, strategy can serve as support for decision-making, and it does so by constraining or limiting the range of decisions to consider. Strategy can also serve as a process for coordinating and communicating. However, Grant claims that for strategy to serve in this function, the strategy process must act "as a communication mechanism within the firm" (p. 29). Lastly, strategy forces the organization to set goals and therefore it serves as a target to be reached. Grant points out the findings from Hamel and Prahalad (1980) which show that seemingly unreasonable ambition turns out to be a critical success factor for start-up companies.

Strategic Planning

What is strategic planning?

Many academics in the field of strategic management agree that strategic planning is an important component of strategic management. Theodore Poister and Gregory Streib (1999), prominent academics in the field of public administration, argue that strategic management must encompass a process for periodically developing strategic plans and the resources to implement those plans. As defined by Poister and Streib, strategic planning "blends futuristic thinking, objective analysis, and subjective evaluation of goals and priorities to chart future courses of action that will ensure the long-run vitality and effectiveness of the organization" (1999, p. 309). Carolyn M. Freeland (2002), an academic in strategic management and a strategic planning

facilitator for professional and trade organizations, presents a simpler definition: "the essence of strategic planning is to reposition the organization for a better future" (p. 60).

George Steiner, one of the most prolific business planning writers of our time, maintains that strategic planning in American corporate management since its conception in the 1950s and 1960s has been associated with formalized documents because that is how the Romans first defined strategy—through the use of maps and blueprints (as cited in Mintzberg, 1994). Companies first adopting strategic planning put emphasis on the manifestation of the planning—the plan itself. During this time, planners carried out *strategic planning* in the form of budget exercises (Mintzberg, 1994, p.6). The planners were focused solely on planning strategies, not implementing them.

In Strategy Safari (1998), Mintzberg describes ten distinct schools of thought shaping the study and practice of strategy formation, or strategic planning, over the last half century. As described by Mintzberg, each school has been influenced by empirical evidence at that time in history coupled with the emerging theories in strategic management. The first three schools of thought, spanning the 1960s to the 1980s, were prescriptive in nature—focusing on how strategies should be developed. The schools developed in the 1990s to present have been more descriptive in nature—describing how strategists develop strategies. The field of strategic management has changed drastically since the 1960s when it was an extremely rigid and structured process, and "today it constitutes a dynamic if disparate field" (Mintzberg, 1998, p. 352). Today, nonprofit organizations consider the underlying elements of organizational norms and culture as well as the individual and organizational identities. The practice of strategic planning is now considered to be a more holistic, inclusive and multi-disciplinary process.

As discussed previously, Mintzberg (1998) maintains that strategy formation is oftentimes a mix of deliberate efforts as well as emergent design and, therefore, sees the process as organic and free-flowing. He defines strategic planning as an extremely fluid process of "learning through which creative strategies evolve" (1987, p. 66). Robert Grant (2002), among other academics, utilizes Mintzberg's understanding of strategy development as a fairly fluid process but combines it with rational analysis and planning. Diverging from Mintzberg and Grant is John Kay (2000), a leading UK-based business economist, who argues that strategic planning is not about planning for the future or speculating what the future will bring. Rather, Kay maintains that strategic planning is an opportunity to analyze the organization's position in the external environment and take steps to improve that position for the future.

John Bryson, a renowned professor of public affairs with a specialization in the strategic management of public and nonprofit organizations, states, "Strategic planning is not an end in itself, but merely a set of concepts to help leaders make important decisions and take important actions" (Bryson, 1988, p. 46). John Bryson's (2004) *Strategic Planning for Public & Nonprofit Organizations* has become a popular reference in the nonprofit strategic management field. Bryson's strategic planning approach described in this book is adapted from Poister & Streib's (1999) model of strategic planning which can best be described as a strategic management process.

In *Strategic Planning for Public & Nonprofit Organizations* (2004), Bryson presents a series of steps to follow for developing a strategic plan but emphasizes that each strategic planning process is unique to the organizational environment and, therefore, these linear steps should serve as a guide rather than as a roadmap. The ten steps Bryson's presents are as follows: initiate and agree on a process, identify organizational mandates, clarify organizational mission

and values, assess the external and internal environments, identify the strategic issues facing the organization, formulate strategies to manage the issues, review and adopt the strategic plan, establish an organizational vision, develop an implementation process and, lastly, reassess the strategies and the strategic planning process. Although these steps are sequential, Bryson underscores how strategic planning is, and should remain an iterative process as it incorporates and necessitates simultaneous thinking and acting. For example, an organization may wish to develop a vision statement early on in the strategic planning process as a means of developing inspiration and guidance among the planners. Concerning the implementation of a strategic plan, Bryson (2004) recommends that strategic plans or other agreements address key issues that will affect the plan's implementation. He recommends that planners address the following in as much detail as possible:

- implementation roles and responsibilities of oversight bodies
- expected results and specific objectives and milestones
- specific action steps and relevant details
- schedules
- resource requirements and sources
- a communication process
- review, monitoring and midcourse correction procedures
- accountability

(p. 50)

What should strategic planning aim to accomplish in public and nonprofit organizations?

Organizations of all types (companies, government agencies and nonprofit organizations) have adopted strategic planning to better position themselves for the future, but their intended outcomes vary greatly. Based on empirical evidence, academics and practitioners in the strategic management and organizational development fields maintain that numerous benefits ensue as a result of strategic planning. However, experts in the strategic management field do not agree on a specific set of benefits or outcomes of the process, in part, because an agreed upon definition of

strategic planning does not exist, nor a process or formula to use in developing the strategic plan. Mintzberg (1994) argues that both the concept and the practice of "planning" have lacked a clear definition because planners have promoted vague ideals rather than working to achieve viable and strategic positions.

Poister & Streib (1999), notable academics in the field of public administration, suggest the purpose of strategic planning is to identify and respond to the most fundamental issues facing an organization as well as address the subjective question of purpose and the often competing values that influence mission and strategies. Bryson (2004) also believes that strategic planning must address the fundamental issues and that the process be filled with purposeful wandering to identify all of the issues at play and to dream up both the possible and seemingly impossible ways to address those issues. Moreover, Bryson believes that purposeful wandering leads planners to think critically, act intelligently, and learn. With creativity and imagination as key ingredients in the strategic planning process, Bryson (2004) maintains the organization can set itself up for achieving far greater success than what stakeholders had originally imagined.

Bryson's (2004) concept of strategic planning is very similar to strategic management in which a leadership group manages the main activities in the strategic planning process but leaves much of the content of individual strategies to others. Other leading strategists also understand strategic planning to be a systematic and participatory process led by senior level management. For instance, Mintzberg, Ahlstrand and Lampel (1998) view strategic planning as a "process strategy". Michael Barzelay (2001), a professor of public management at the London School of Economics and an acclaimed writer in the field of new public management, views the strategic planning process as a "processional model of decision-making" (p. 56). Johnson, Melin and

Whittington, authors of *Strategy as Practice: Research Directions and Resources* (2003)

understand strategic planning to be an activity-based process (as cited in Bryson, 2004).

Allison and Kaye (2004), two influential text-book authors who played instrumental roles

in defining strategic planning for the nonprofit sector, assert that strategic planning is essentially

two tools. First, it is a leadership tool which seeks to answer the question: Are we doing the

right thing? Second, it is a management tool which seeks to answer the question: Are we doing

things right? Freeland (2002) discusses the importance of strategic planning for nonprofit

organizations and presents a number of benefits to be derived from strategic planning. Since

nonprofit organizations experience regular turnover of board volunteers, strategic planning is

extremely valuable as it "enables volunteers and staff to take advantage of changing

environmental conditions not only to reduce environmental threats, but also to create

opportunities for the organization" (p. 1). Freeland (2002) also emphasizes how strategic

planning creates a proactive environment for the organization as it sets clear goals and direction,

focuses on the long-term welfare of the organization, facilitates involvement and leadership from

both volunteers and staff and presents benchmarks for success.

Peter Schwartz (1996), an author and co-founder of the Global Business Network, an

elite corporate strategy firm, suggests using the scenario process approach in order to identify all

the possible futures for strategy development. Scenario planning, as defined by Schwartz, is a

"tool for ordering one's perceptions about alternative future environments in which one's

decisions might be played out" (p. 4). The scenario process, seen as an accompaniment to

strategic planning, was defined by Pierre Wack in the 1970s. It is carried out by brainstorming as

many scenarios or futures as possible in order to make strategic decisions that will be sound for

all plausible futures.

What are the key elements in effective strategic planning?

Robert Grant (2002) highlights four common factors of successful strategies: 1) any goal identified in the strategic planning process must be simple, consistent and long-term; 2) the competitive environment must be thoroughly understood; 3) resources must be objectively appraised (exploiting internal strengths while protecting areas of weakness); and 4) strategies must be effectively implemented.

Thomas McLaughlin who wrote *Nonprofit Strategic Positioning* (2006), the first nonprofit-oriented book to describe strategic positioning as an alternative to traditional strategic planning, believes that in order for strategic planning to be a success for nonprofit organizations, it must remain an ongoing process. It cannot be a singular activity done once a year or once every three years. Therefore, McLaughlin suggests nonprofit organizations undergo "strategic positioning" which gives ample space for creativity in a structured manner.

For a strategic planning process to truly be effective, a great deal of preparation and information gathering must first be done. Most strategists recommend a thorough assessment of both the internal and external environments be done, but there are differing opinions as to what approach to use in this assessment. The SWOT Analysis, a technique developed in the 1960s and 1970s and credited to Albert Humphry, has been widely used by many corporations and organizations in preparation for strategic planning. A product of what Mintzberg (1998) defines as the "Design School," the SWOT Analysis involves defining the objective of the organization or project and mapping out the internal and external factors that will positively or negatively impact the pursuit of achieving that objective. Robert Grant, a critic of the SWOT Analysis, sees the technique as arbitrary classification that does not have a place in strategic planning. To assess

the environments, Grant (2002) recommends that one carefully identify external and internal factors and appraise their implications (15). Another method for assessing internal and external environments is the Growth-Share Matrix developed in the 1970s by Bruce Henderson of the Boston Consulting Group. The BGC Growth-Share Matrix, used as an analytical tool, displays the various functional units on a graph of the market growth rate verses the market share relative to competitors. The McKinsey's 7S Framework is another tool used for assessing a company or organization's internal and external environments. Developed by the business consultants Waterman and Peters in the 1980s, the 7S Framework examines seven internal and inter-related factors of the organization, which are as follows: strategy, structure, systems, staff, style, skills and shared values. The 7S Framework is based on the premise that all seven internal factors influence an organization's ability to change, and these factors must be aligned in order for the organization to be successful.

Paul Dobson, Ken Starkey and John Richards (2004), three prominent academics and strategists from the United Kingdom, assert that in order for a firm or organization to effectively analyze strategic issues, three components of the firm must be well-defined—1) mission, 2) place in its environment and 3) scope and direction of growth. Grant (2002) maintains that an organization should be a learning organization to survive in the long run and, in effect, develop and implement sound strategies. As defined by Peter Senge (2006), the director of the Center for Organizational Learning at the MIT Sloan School of Management and author of *The Fifth Discipline: The Art and Practice of the Learning Organization*, learning organizations are those where "people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together" (p. 3). To effectively execute strategies,

leaders must be continually reevaluating their decisions and learning in each step of the process. Learning is a key element in executing strategies, according to Larry Bossidy and Ram Charan (2002) in their best-seller entitled, *Execution: The Discipline of Getting Things Done*.

Additionally, the strategic plan should be forward-leaning as its purpose is to lead the organization to future opportunities. Two scholars who are most critical of contemporary strategic planning, Gary Hamel and C. K. Prahalad (as cited in Senge, 2006), have found in their field research that most managers, when pressed, "will admit that their strategic plans reveal more about today's problems than tomorrow's opportunities" (p. 196). The strategic plan needs to also focus on the long-term goals rather than short-term economic gains. Mintzberg (1994) asserts, "Organizations that favor planning may be driven toward a short-run economic focus that can impede not only social, but ironically, also long-run economic performance" (p. 195).

Collaborative Management

What are the characteristics of collaborative management?

The vast majority of strategic planning literature focuses on the inputs, process and outputs of strategic planning for a single organization, leaving very little to practitioners who are leading or facilitating strategic planning for multi-organizational entities. However, a great deal of literature has been developed in the last two decades focusing on collaborative management which seeks to understand how collaboration may provide value to members, and how collaboration is practiced as well as prescriptions for how collaborative activities can be improved to maximize the "collaborative advantage" for members. Before describing collaboration management, it is necessary to first consider why coalitions form in the first place.

Bolman and Deal (2003) state: "A coalition forms because members have interests in common and believe they can do more together than apart. To accomplish their aims, they need power." (p. 192).

Huxham and Vangen (2003), two leading fellows at the Advanced Institute of Management Research, a UK-based management research institute, describe collaborative advantage as "the desired synergistic outcome of collaborative activity suggesting that advantage is gained through collaboration when something is achieved that could not have been achieved by any organization acting alone" (p. S62). Collaborative management is understood by practitioners and academics as a process requiring multiple stakeholders to work together to achieve a shared goal or outcome. Most research on collaborative management has focused on large social or environmental issues, such as poverty reduction, public health and natural resource management, all of which require a range of stakeholders to work together to achieve shared outcomes. Several challenges are inherent to collaborative, multi-organization processes. Huxham and Vangen (2000) maintain that ambiguity of the partners involved is inherent (as cited in Huxham and Vangen, 2003). Eden and Huxham (2001) find that defining the collective goals is extremely difficult for multi-organization entities. Another challenge is recognizing the varying resources that organization members bring to the collaboration, and this inequity inevitably leads to members seeking different sorts of returns of varying degrees. As a result, members' commitment levels often vary, which creates a great deal of tension. Another major tension often existing in collaborative processes relates to balancing member autonomy while holding members accountable to getting things done in the collaborative environment (Huxham and Vangen, 2003).

Smith Tewksbury and Charns (1992) in *Collaborative Management in Healthcare* assert that greater emphasis is placed on shared leadership in collaborative management settings because of the lack of traditional hierarchy. However, Vangen and Huxham (2003) argue that collaboration management requires a lead role with skills in facilitation and coordination as opposed to the traditional, more authoritative leadership style. This "partnership manager" is charged with ensuring that all members have a voice and their participation is secured to achieve the collaborative advantage. Based on immense data collection in partnership environments, Vangen and Huxham (2003) conclude that partnership managers tend to play a dichotomous role. On one hand, the partnership manager serves as a replacement for traditional autocratic decision-making, and he or she does this by politicking and manipulating the collaborative environment in order to achieve the collaborative advantage. On the other hand, the partnership manager works to embrace, empower, involve and mobilize members in order to create and sustain a spirit of collaboration. Therefore, partnership managers, if fulfilling both roles as described above, "operate constantly from opposing perspectives and manage interactions between those opposing perspectives" (Vangen and Huxham, 2003, p. S73).

How should strategic planning be carried out in a collaborative setting?

Bryson, Crosby and Ackerman (2004) recommend that planners in a collaborative setting strongly consider the reason for collaborating because "[collaboration] requires an immense amount of effort, communication, and nurturance" (p. 387). Furthermore, Bryson (2004) maintains inter-organization networks require a dominant coalition to "sponsor and follow the [strategic planning] process" as well as a "process champion" to ensure it is effectively implemented in a timely and efficient manner (p. 34).

Bryson, Crosby and Ackerman (2004) also suggest that planners need to work to reframe the existing reality in order to identify the collaborative advantage, ensure leadership, devote significant time and attention to the initial agreement phase, build a strong constituency for collaboration, develop a clear plan for the process and a governance structure and coordinate all aspects of the collaboration. Reframing the existing reality can be done by evaluating and reevaluating the organization's current situation. Mintzberg (1994) states, "Now true strategic reorientation—a major shift in perspective, quantum in nature—usually requires the championing of a novel point of view and the challenging of established assumptions, including set categories of strategy and of structure" (p. 200).

To ensure all aspects of the collaboration are effectively planned and executed, Chrislip (2002) advises planners in collaborative settings carefully develop formal agreements to serve as building blocks in the process. Chrislip (2002) maintains that formal agreements should be established to address the following:

- the existence of a shared concern
- who will work on this concern
- how they will work together
- how to understand the relevant information
- how to define the problem or vision for the future
- what strategies should be pursued
- what the action steps and responsibilities will be for pursuing them
(p. 54)

Findings

Background

For the purpose of transparency in this research, I will discuss my role in the CT Alliance and its impact on this research. The CT Alliance brought me on staff in August 2010 as their 2010-2011 VISTA member. My primary responsibility was to serve local Clubs in various

aspects of operations, and my secondary responsibility was to assist the CT Alliance with reinvigorating the Three Year Strategic Plan. Concerning the latter, I was asked to work with the CT Alliance executive director to reinvigorate the implementation committees and provide the necessary management and technical support to execute the strategies in the Plan, which I have been doing since October 2010.

I became interested in learning more about the 2007-2008 CT Clubs' statewide strategic planning process after having had several informal discussions with individuals who served on the Strategic Planning Task Force in 2007-2008 and who questioned the relevancy of the Plan and its strategies today. Therefore, I went into this research with preconceived ideas about the Three Year Strategic Plan and the process which produced the Plan. Although I made every effort to prevent my preconceived ideas from influencing this research project, my biases cannot be fully avoided in this research as it is inevitable in any qualitative research project. Therefore, I urge the reader to keep these possible biases in mind.

Introduction

The findings in this case study emerged as a result of three qualitative research methods, documentation review, four interviews and an online survey. I reviewed a number of documents for this study including minutes from CT Alliance General Membership, CT Alliance Board of Directors and CT Area Council meetings as well as letters, emails and memos the CT Alliance sent to the Strategic Planning Committee and to the 16 Clubs throughout the strategic planning process.

The individuals interviewed include the consultant who the CT Alliance hired to facilitate the strategic planning process and write the strategic plan based on the strategic planning retreat.

Although the consultant had completed consultancy projects with other Boys & Girls Club organizations and their affiliated state alliances, this consultant was an independent contractor and had no direct affiliation with any of the 16 CT Clubs or with the CT Alliance. I also interviewed three Boys & Girls Club stakeholders who were involved, to varying degrees, in the development of the strategic plan as well as in assisting in the implementation. One of these individuals served as the executive director of the CT Alliance and the other two were board volunteers who served on separate boards of directors. To maintain confidentiality, the individuals interviewed remain anonymous. They are referred to in this paper as Interview #1, #2 and #3. Although the consultant's name is not shared, I will cite the information gathered from the consultant for the purpose of maintaining clarity in the research findings.

I developed a short, online survey for the purpose of developing a better understanding as to how CPOs (Chief Professional Officers) view strategic planning for their own organizations as well as at the statewide level. I shared the survey with all CT Club CPOs, 16 in total, with a description of the purpose and a request that they participate and complete the 6-question survey. I also highlighted the fact that participation in this research is completely voluntary and that all survey responses are completely confidential. Out of the 16 CPOs with whom I shared the survey, nine CPOs completed it.

The Value of Strategic Planning Among Connecticut Club Chief Professional Officers

Before discussing the preparations for and development of the strategic plan, I believe it is essential to first share the findings related to the perceived value of strategic planning among CPOs (Chief Professional Officers). As stated above, I conducted an online survey to which nine CPOs responded. Out of the 9 respondents, 5 CPOs indicated that their Clubs develop a strategic

plan on an ad hoc basis, meaning that strategic planning is not a regularly scheduled practice for their Clubs. One CPO shared that a strategic plan is developed every 2 to 3 years, and 3 CPOs shared that a strategic plan is developed every 3 to 5 years. Concerning the importance of strategic planning, 6 out of the 9 CPO respondents selected the response reading: "It is an essential component that provides coherence and direction to the actions and decisions of the organization." 2 respondents said that strategic planning is "very important," and 1 respondent said that strategic planning "does not influence or shape the organization to any noticeable degree."

According to the survey results, a number of factors influenced CPOs' decisions to participate in the development of the Three Year Strategic Plan. Nearly all of the respondents, (8 out of 9) selected the factor, "Perceived benefits for all Clubs in the state." Additionally, 7 out of the 9 selected "Perceived benefits for your Club" as a major factor influencing their decision. 4 respondents selected "Endorsement by other Boys & Girls Clubs in the state" as a major influencing factor, and 5 respondents selected "Endorsement by BGCA and the CT Alliance." Only 2 respondents selected the "Your board of directors' support for the statewide strategic planning efforts" option as a major influencing factor.

Preparing for the Strategic Plan

According to Interviewee #1, discussions about a statewide strategic plan began around 2005 with some stakeholders in the CT BGC Movement discussing the need to develop a strategic plan specifically for the CT Alliance. As discussions progressed, it became clear to these stakeholders that a strategic plan for the CT Alliance would not be sufficient; rather, they

needed to explore the possibility of creating a statewide strategic plan for CT Clubs that would cover all areas of collective efforts.

In 2005 to 2006, the CT Alliance and BGCA established the Strategic Planning Taskforce to further discussions around statewide strategic planning. At its inception, the Taskforce was responsible for the following: reviewing and approving the strategic planning process (content and logistics); serving as a "sounding board" for the Alliance Executive Director for all strategic planning related activities; overseeing the Strategic Planning Questionnaire; based on the Questionnaire, craft strategies and share with the Alliance General Membership to seek their input and approval; oversee the finalization of the Plan and initiate its implementation; and meet periodically to review the Plan and recommend changes to the General Membership. The Taskforce was comprised of 12 members, including the consultant, executive director of the CT Alliance, 6 executive directors of CT Clubs, 2 board volunteers of local Clubs, BGCA's regional service director and BGCA's regional government relations director.

The CT Alliance proposed the idea of hiring a consultant to assist in planning the strategic planning process and facilitate the strategic planning session. During the discussions leading up to hiring a consultant, the Taskforce determined that the consultant would not be involved in developing or executing the implementation plan of the Strategic Plan. Rather, Clubs [the planners] were responsible for developing the priority areas and strategies, creating an implementation plan and implementing the plan. The Taskforce also played a very significant role in that they were overseeing the successful completion of the four major phases in the strategic planning process: pre-planning activities, on-site planning facilitation, drafting of the Three Year Strategic Plan and framing the associated Work Plan.

Interviewee #1 indicated that the consultant was chosen for this project because this individual had been involved as an independent consultant in a number of strategic planning processes for Clubs throughout the country as well as for a couple of state alliances of Boys & Girls Clubs. The consultant was introduced to planners as an individual who "brings a wealth of knowledge and experience to our session having provided long-term and strategic planning support to… numerous private foundations, universities and several BGC State Alliances and BGC organizations" (memo from the CT Alliance dated December 2007).

The consultant spent nearly a year planning the development of the strategic plan, conducting regular conference calls with key stakeholders of CT Clubs (both professionals and board volunteers) as well as with BGCA representatives. When the time drew nearer to the strategic planning retreat, the executive director of the CT Alliance and the consultant formed the Strategic Planning Committee to assist in structuring the 2-day retreat/session. The consultant worked in a facilitative manner with this Planning Committee which allowed it to define the process and resources to be used in the statewide strategic planning process). Emphasizing the importance of process, the Consultant stated in our interview: "The process is as important as the content. How do we engage and involve local board volunteers? What are the steps? These are something we need to do to have a successful session."

Strategic Planning Session

According to meeting documentation as well as interviews, the strategic planning session, which took place on November 15-16, 2007, was conducted in a day and a half. A total of 26 representatives of CT Clubs attended the session, 9 of whom were board presidents of various Clubs. The others in attendance were a mixture of Club executive directors and representatives

from the CT Alliance and BGCA. Included in this group were the President of the CT Alliance, who was also representing a CT Clubs, and the President of the CT Area Council, who was also representing a CT Clubs. 15 out of the 16 Clubs in CT had at least one representative who attended the strategic planning session. The consultant facilitated the session.

The first day (4 hours in length) was focused on preparing participants for the strategic planning process—providing them with the necessary information and resources to develop a coherent and strategic plan. This portion of the session included a presentation by a Club volunteer to inspire active participation and engagement for the future of CT Clubs, presentations on national trends of Club state alliances and area councils (given by BGCA professionals) and a report from the executive director of the CT Alliance on the accomplishments of the Alliance. Following these prepared presentations, participants engaged in a brainstorming session entitled "Key Challenges and Priorities for CT Clubs" followed by a second brainstorming session entitled "State-Wide Efforts—Purpose Statement Development", each of which lasted for approximately 30 minutes). Following a presentation by an exemplary Boys & Girls Club kid, the consultant moved the participants into another brainstorming session to develop the Purpose Statement. Lastly, the President of the CT Alliance and the President of the CT Area Council gave a joint presentation entitled, "Together, Our Direction."

Day 2 of the session, which consisted of seven working hours, included a summary/recap of the previous day's brainstorming sessions and a brainstorming session to develop a S.W.O.T. Analysis. The consultant recalled that participants then identified priorities or pressing issues which emerged from the S.W.O.T and categorized these priorities or issues into theme areas. However, according to a participant in the strategic planning session, this was not the case. "The moderator kind of set what the strategic areas were going to be without asking the participants

where they wanted to focus or where they wanted to go" (Interview #3). The data gathered also indicates that the Strategic Plan Development Task Force identified these priority areas in advance of the session.

According to the consultant, once participants identified the themes of the pressing issues, they split into groups, with each group focused on a particular theme area. The consultant then gave each group the task of developing strategies and the overall statement to summarize the themed area of issues. These groups, established early on in the strategic planning session, later evolved into the four implementation committees that were included in the Three Year Strategic Plan and tasked with implementing the Plan.

Towards the end of Day 2, all planners were brought back together in a group session to discuss and approve a Vision Statement followed by identifying "Next Steps." The consultant ordered the activities in such a way that participants examined the big picture and agreed on the four priority areas and then zoomed in to focus on individual priority areas and strategies. Before concluding the strategic planning session, the participants were asked to zoom out again to carry out visioning. Having identified priority areas and possible strategies for each area, the participants were able to build a vision defining how Clubs in CT will work collectively to achieve their goals.

Four separate implementation committees had been established by the close of the 2-day strategic planning session, and each implementation committee was tasked with implementing the strategies in their priority area (Interview with Consultant). To learn what the priority areas were, please see the "Content of the Three Year Strategic Plan" section below or the entire Plan in the appendix. Each implementation committee was comprised of Club professional staff members and board volunteers as well as

representatives of BGCA. The majority of implementation committee members were representing local Clubs as either CPOs or board volunteers. All members of the implementation committees had also participated in the 2-day strategic planning session.

Content of the Three Year Strategic Plan

The 2008-2010 Three Year Strategic Plan approved by the General Membership of the CT Alliance, CT Area Council and the boards of directors of 15 of the 16 member Clubs, included the following components: Background Statement, Shared Purpose, Guiding Principles (4 in total), Shared Vision for 2010 and four Strategic Priorities with corresponding Objectives (5 to 7 Objectives for each Priority Area), a list of the Strategic Planning Committee members and a list of attendees in the "Thursday Training & Input Session."

The Plan is attached in the Appendix; therefore, the content will not be discussed in great detail. However, I would like to provide the shared purpose and an overview of the four priorities defined in the strategic plan as each serves as a blueprint for its corresponding Implementation Committee. These priority areas were defined following discussions at the 2-day Strategic Planning Session in which the consultant and participants identified and agreed upon the following issues facing Clubs in CT:

Shared Purpose:
Working together, we utilize our collective power to develop resources necessary to IMPACT young people in Connecticut.

Priority Area One: Program Integrity
Goal: Clubs "provide a powerful network of youth development programs and prevention activities throughout the state. Together, they are committed to providing high quality outcome-based programs that are responsive to community needs."

Priority Area Two: Collective Power
Goal: "… Collectively the organizations [CT Clubs] serve as the premiere youth development collaboration statewide and provide a voice for all young people in Connecticut."

Priority Area Three: Human Resource Development
Goal: "… Together, Boys & Girls Clubs in Connecticut are dedicated to support and strengthen Board and staff resources to benefit all Connecticut Boys & Girls Club organizations."

Priority Area Four: Financial Stability for Statewide Efforts
Goal: "… A staff driven, volunteer supported long term focus on diverse and dependable funding and realistic budgeting/expectations with well communicated outcomes will result in resources necessary to support Boys & Girls Club collaborative efforts statewide."

Follow-up from the Strategic Planning Session

Following the 2-day strategic planning session in November 2007, the consultant reviewed, synthesized and refined the four thematic areas and their respective strategies as well as the shared purpose, guiding principles and shared vision. Next, the consultant produced a draft strategic plan in December 2007 and sent it to the CT Alliance and the Strategic Planning Taskforce for review and comments.

According to documentation, a member of the Strategic Planning Taskforce who serves on a Club's Board of Directors shared a concern during this period of feedback pertaining to the overall strategic planning process. This individual sensed that many of the stakeholders did not feel a part of the process, in particular Clubs' board members, and suggested that more be done to solicit buy-in using both top down and bottom up approaches. Soliciting buy-in from all of the Clubs and their boards was already underway during this time; therefore, change was not made regarding this concern.

Two of the BGCA and CT Alliance staff members expressed concerns about some of the strategies in the plan and shared a couple of recommendations for improving the plan. Minimal revisions were made, and the draft plan was shared with the individuals who participated in the strategic planning session. The CT Alliance sent the draft plan with the following request:

> Please review the attached draft and forward any questions, concerns and suggested changes to me as soon as possible… Your input will be incorporated into the final draft that will be distributed to each of our Clubs by February 8, 2008 in anticipation of a joint Area Council/ CT Alliance General Membership meeting scheduled for March 5, 2008 in Hartford. Plan approval and organizational buy-in will be sought at the March 5th meeting.

During this second phase of review, only one CT Club executive director shared a concern which related to one of the plan's strategies: "Explore the feasibility of creating a statewide Development Director position". The director who shared the concern participated in the strategic planning session and did not recall this strategy being agreed on by the participants.

"After a lengthy and candid discussion" the General Membership of the CT Alliance and the CT Area Council unanimously approved the three-year plan at the joint meeting on March 5, 2008 with the request that the executive director of the CT Alliance provide a "template resolution for Board action" to share with every Boys & Girls Club organization in CT. The CT Alliance followed up on this request and sent a letter, dated March 10, 2008, to every member Club's board providing an overview of the Three Year Strategic Plan and its intended purpose:

> The "[strategic plan] was designed to serve as a blueprint that will guide our Connecticut Alliance, Connecticut Area Council and through these two organizations, the sixteen Boys & Girls Clubs in our state, over the next three years… the detailed Work Plan development and implementation that grows from this strategic plan will identify and hopefully provide the actions and resources needed to strengthen your club as well as our entire state movement."

Enclosed in this letter was a resolution template for the Club to use at its next board of directors meeting. 15 out of the 16 Club in CT obtained board approval on the full Three Year

Strategic Plan, which included approving all four priority areas. By September 2008, the CT

Alliance had received signed resolutions from 15 of the 16 member Clubs' boards of directors.

Implementation Efforts

The Three Year Strategic Plan has not been fully implemented to the degree it was

intended when developed in 2007. According to the consultant, individuals involved in the

development of the strategic plan created work groups at the strategic planning session for the

purposes of sharing information and planning implementation for each of the four identified

priority areas. By the end of the session these work groups had evolved into the "implementation

committees." The intended role of each implementation committee was to lead implementation

efforts for the respective priority area to achieve the stated goals. Because the consultant's

contract with CT Clubs only included activities relating to planning and facilitating the

development of the Three Year Strategic Plan, the consultant did not continue working with CT

Clubs to oversee or ensure its implementation. The consultant shared, "They were to do the work

plan, and that was stated in our Letter of Agreement. I wasn't given the task of developing the

work plans or supporting their efforts."

Rather, the consultant left implementation committees and the CT Alliance with

"Workplan Detail Sheet" templates and the hope that these templates would be helpful in the

implementation efforts. The Workplan Detail Sheet template included the space for defining the

"Planned Measurable Outcome" as well as the series of "Tasks/Activities" to achieve the

outcome. An Instructions page was provided by the consultant, which included how to develop a

Planned Measurable Outcome for each Recommendation in the Strategic Plan priority area. The

consultant recommended in the Instructions page that after year one each implementation

committee should develop new Workplan Detail Sheets covering years 2 and 3 because it is likely that they "will not take [implementation planning] to the same level of detail as on the Year 1 form"

The executive director of the CT Alliance, in a letter dated, March 10, 2008, stated, "The detailed Work Plan development and implementation that grows from this strategic plan will identify and hopefully provide the actions and resources needed to strengthen your club as well as our entire state movement." Although it is not formally stated in any of the strategic planning documents or meeting minutes, the interviewees indicated that the CT Alliance's presumed role in the implementation of the Plan was to offer the necessary staff support to each implementation committee to carry out the activities and achieve each outcome and, in so doing, move closer to their priority area goal. However, the CT Alliance's primary responsibility to its member organizations is to raise funds from the State of Connecticut and its agencies on behalf of its member organizations, the sixteen Clubs in the state. As shared in an interview, undertaking the leadership needed to implement the Three Year Strategic Plan would have required the CT Alliance to devote a significant portion of its already limited resources to the efforts. The implementation committees, being strictly voluntary, required significant technical and management support from the CT Alliance or another body to create operational workplans and achieve the intended results in the Three Year Strategic Plan, and this support was not readily available when the Plan needed to be implemented.

Several interviewees shared that many implementation committee members did not give the Three Year Strategic Plan priority. The majority of implementation committee members were CPOs and board volunteers from individual Clubs who answered first and foremost to their own boards of directors and followed their own organizational strategic plans. In reference to the

Implementation Committee focused on "Financial Stability for Statewide Efforts," one interviewee stated, "someone said that the directors of all Clubs really only answer to their board, and most boards don't want them spending time on resource development with other clubs" (Interview #2). Another interviewee stated, "One of the problems we're facing is that implementation committee members are coming from individual Clubs with their own strategic plan and are torn between implementing the broader version of the strategic plan and their individual strategic plan, and that's something that needs to be explored in updating or creating a new strategic plan for the BGCs of CT."

Consistent with the research data, the implementation committees did not complete any workplans with detailed activities and thus failed to move into the implementation process. Moreover, the implementation committees did not reconvene after the Three Year Strategic Plan was approved by the CT Clubs' boards. A member of an implementation committee said, "Our goal was to implement that plan, obviously, that's why we spent time on it and after a year or two, it died." Similarly, another member of an implementation committee maintained, "… there's been so much time elapsed between the time [the Three Year Strategic Plan] was written and the execution of the plan, which is the problem of many strategic plans… they are put on a shelf without being implemented."

Based on anecdotal evidence, the CT Alliance looked to new opportunities to increase its own capacity so it might reinvigorate the Three Year Strategic Plan. By establishing a partnership with the AmeriCorps VISTA program in Connecticut, the CT Alliance was granted a full-time AmeriCorps VISTA member to increase its own organizational capacity to help reinvigorate the implementation committees as well as build the capacities of individual Clubs. As stated by one of the interviewees, "the implementation did not progress in any way shape or

form until the VISTA member arrived… and [the VISTA member's work] translated into jumpstarting at least a couple of those committees. But even now you can see some of the issues associated with that."

Discussion and Analysis

The findings of this case study reveal that the CT Alliance and its General Membership—CT Clubs—made concerted efforts to develop a comprehensive, statewide strategic plan to identify and respond to the pressing issues (presented above) facing CT Clubs. The strategic planning process, led by a core group of senior-level leaders in the CT Movement, incorporated a number of the strategic planning steps that are recommended by many academics and practitioners. Since this research is a case study analysis of the Plan, I will discuss both the strengths and the areas for improvement which emerged from the case study.

For this critical analysis, I used Poister and Streib's (1999) set of principles which John Bryson (2004) uses as the foundation for his approach to strategic planning—the Strategic Change Cycle. Bryson's Strategic Change Cycle is a strategic management process in which "a leadership group manages the main activities in the strategic planning process but leaves much of the content of individual strategies to others" (p. 32). Poister and Streib's eight principles of strategic planning describe what the process should be and what it should accomplish. I chose Poister and Streib's principles as a framework for this critical case study analysis because they emphasize the importance of considering the political, social and economic realities in both the internal and external environments, which I find to be particularly useful for this case study of a multi-organization strategic planning process.

I present Poister & Streib's eight principles in the context of the 2007-2008 CT Clubs'

statewide strategic planning process, discussing ways in which each principle was practiced or

not. As stated by Poister & Streib (1999), the eight principles are as follows:

Strategic planning…

1. is concerned with identifying and responding to the most fundamental issues facing the organization;
2. address the subjective question of purpose and the often competing values that influence mission and strategies;
3. emphasizes the importance of external trends and forces as they are likely to affect the agency and its mission;
4. attempts to be politically realistic by taking into account the concerns and preferences of internal and especially external stakeholders
5. relies heavily on the active involvement of senior-level managers and sometimes elected officials, assisted by staff support where needed;
6. requires the candid confrontation of critical issues by key participants to build commitment to plans;
7. is action oriented and stresses the importance of developing plans for implementing strategies; and
8. focuses on implementing decisions now so as to position the organization favorably for the future.

(p. 309)

Principle #1: Strategic planning is concerned with identifying and responding to the most fundamental issues facing the organization.

I consider this principle to be one of the most pertinent for CT Clubs' statewide strategic

planning efforts. The plan addressed the priority areas for the CT Movement—areas which were

identified by the Taskforce prior to the 2007 strategic planning session. These areas included

Program Integrity, Collective Power, Human Resource Development and Financial Stability for

Statewide Efforts. This expansive scope is extremely broad for a conventional strategic plan, let

alone a multi-organization plan such as CT Clubs' Three Year Strategic Plan. I argue that this

plan comprised of four priority areas and 23 objectives is much too large for the CT Clubs'

volunteer-led, multi-organization plan. As stated by the consultant, "it's their voluntary

commitment that will make it happen". The CPOs and their volunteer-led boards who believed it

would benefit their respective organizations were the ones who invested their time and resources into the planning process and wanted to see the Plan implemented. Moreover, these same stakeholders were expected to continue investing their time and resources in implementing the plan and its 23 objectives. What emerged from the document review and the interviews is that some stakeholders wanted instead to devote their time and attention to a few specific and achievable objectives and ones that would likely impact all Clubs in the state. The Plan encompassed all of the pressing issues facing the CT Movement, creating an overly-ambitious set of objectives. This multi-organization strategic plan should have mirrored a framework for inter-organizational collaboration and focused on a couple of specific areas, particularly those areas which have outcomes that could only be achieved through collaboration such as resource development. A multi-organization strategic plan functions quite differently from a conventional strategic plan in the sense that it is developed and implemented voluntarily. Therefore, a statewide plan should be kept simple and focus only on the most pressing issues facing all member organizations, and those issues should be identified by a broad range of stakeholders participating in the strategic planning process.

Principle #2: Strategic planning addresses the subjective question of purpose and the often competing values that influence mission and strategies.

With the help of the consultant, planners involved in the 2008-2009 statewide strategic planning session discussed and agreed upon the Shared Purpose, Guiding Principles and the Shared Vision for 2010. The Shared Purpose served as a reminder of why stakeholders should collaborate, which was "to develop resources necessary to IMPACT young people in Connecticut." The Plan's lengthy vision statement, Shared Vision for 2010, described the desired state of the Boys & Girls Club Movement in CT included, among others, the desires to be a

"sharing" environment and to be recognized as the "premier youth development organizations in the state."

Clarifying the organizational mission and values is particularly critical for a multi-organization entity. According to Bryson (2004), agreeing on the mission and values means "identifying the collaborative advantage to be gained by working together, that is, what they gain together that creates public value that they cannot achieve alone" (p. 37). Despite the fact that planners discussed and agreed upon the common purpose, guiding principles and a shared vision, the data collected indicate that the time devoted to developing these principal components of the strategic plan was inadequate. Because the discussions were confined to a short time block, these discussions also lacked depth. As a result, planners as well as other stakeholders in the planning process did not fully address the competing values that influence Clubs' individual missions and strategies.

Principle #3: Strategic planning emphasizes the importance of external trends and forces as they are likely to affect the agency and its mission.

Agreed by most scholars and practitioners in the field of strategic planning for nonprofit organizations, a strategic planning process requires a thorough assessment of the forces and trends in the internal and external environments in order to acquire an accurate understanding of the political, economic, social, educational, technological and physical landscapes. Robert Grant (2002) asserts that planners must carefully identify external and internal factors and appraise their implications in order to develop effective strategies. Although Grant (2002) does not promote using the S.W.O.T Analysis method to examine these trends and factors, he maintains that it is extremely important in strategic planning to monitor the variety of forces and trends in the internal and external environments.

This principle was realized, to a small degree, in the development stages of CT Clubs' Three Year Strategic Plan, primarily through the S.W.O.T. Analysis. During the 2007 strategic planning session, representatives from BGCA presented to the group on national trends of Club State Alliances and Area Councils, and the CT Alliance shared opportunities and challenges experienced and observed in the state of CT. Following these formal presentations, the planners were given only a 30-minute period to develop a S.W.O.T. Analysis based on the information provided. Although some effort was exerted in preparing the S.W.O.T. Analysis, it appears that planners needed significantly more time and information to develop a SWOT Analysis and, in effect, capture the various trends and forces affecting the Boys & Girls Club Movement in Connecticut.

A statewide multi-organization plan, like the Boys & Girls Clubs', requires greater effort to assess the complex internal and external environments than a single organization requires in its strategic planning process. Sixteen different organizations with separate and unique stakeholder groups are contributing to the Plan and will be the key stakeholders affected by the Plan's delivery. Although CT Clubs share a brand identify and mission, they are vastly different in terms of the communities they serve, the resources available to them and the political landscapes in which each organization is located. Therefore, it is important to define these sixteen organizations individually to understand their unique internal and external environments. Since they are also engaging in collective strategic planning, CT Clubs must also be defined collectively in order to identify the most appropriate collective strategies and position themselves strategically in the external environment. As stated by Bryson (2004), "strategic planning focuses on achieving the best fit between an organization and its environment." In the case of CT Club's

statewide strategic planning process, the data collected indicates that only minimal progress was made to assess the internal and external environments of CT Clubs and the CT Movement.

Principle #4: Strategic planning attempts to be politically realistic.

Poister and Streib (1999) also maintain that strategic planning should be "politically realistic by taking into account the concerns and preferences of internal and especially external stakeholders" (p. 309). Undoubtedly, this was a major feat for CT Clubs as they are sixteen autonomous, not-for-profit organizations governed by their individual boards of directors, but it is an extremely important principle in a multi-organization strategic plan. Many of these sixteen autonomous organizations also have their own organizational strategic plans. According to the responses from the online survey to CPOS, 67% of CPOs viewed strategic planning as "an essential component that provides coherence and direction to the actions and decisions of the organization." Moreover, all of the surveyed CPOs, (9 in total), stated that their respective Boys & Girls Club organizations participate in strategic planning at the local, single-organizational level. Given this information, an overarching statewide strategic plan, such as the Plan, should take into account the broad scope and range of local Clubs' strategic plans. However, CT Clubs' individual strategic plans were not examined prior to or during the 2007-2008 statewide strategic planning process. In failing to do so, the stakeholders most likely missed noticing some common strategies among Clubs as well as some common limitations or constraints faced by Clubs which would have been extremely useful in developing a statewide plan. If CT Clubs' individual strategic plans had been reviewed and strategies synthesized into a practical framework, then the planners would have been able to more effectively interpret the political realities of CT Clubs and craft a statewide plan to reflect those realities.

Examining Clubs' individual strategic plans is not the only method for capturing the political realities of the Boys & Girls Club Movement in Connecticut. A strategic planning process should be led by a diverse group of planners or in this case, member organizations, to provide the necessary buy-in and to gain an understanding of the various interests and concerns at play. CT Boys & Girls Clubs' multi-organization strategic planning process was planned and led by a cross-section of Clubs in CT, the Strategic Planning Taskforce. The Taskforce, led by the CT Alliance, reviewed and approved the strategic planning process, served as a sounding board for the CT Alliance for all strategic planning related activities, developed strategies to commence the strategic planning session and oversaw the finalization of the plan. Because the Taskforce consisted of a cross-section of CT Clubs, their collective efforts in all the above mentioned activities established buy-in to the plan. Also, their discussions over several months highlighted some of the political realities of the CT Movement which, to some degree, was absorbed into the plan.

Principle #5: Strategic planning relies heavily on the active involvement of senior-level managers.

The active involvement of senior level managers is not only important for a conventional (single organizational) strategic plan but it serves as a critical element of a multi-organizational strategic plan requiring high level collaboration in every step of the process, from the planning of the process to the implementation of the plan. The Club leaders who initiated the discussions around statewide strategic planning appeared to understand this principle from the start. The CT Alliance engaged a select number of senior level leaders in the CT Boys & Girls Club Movement and brought them into the early discussions, namely CPOs and CVOs of some CT Clubs as well as senior leadership from BGCA. Emerging from these discussions was the Strategic Plan

Development Taskforce and, later, the Strategic Planning Committee which took a leadership role in the development and implementation of the strategic plan. It was because of this senior-level engagement from 2005 to 2007 that the abstract idea of strategic planning moved into an action-oriented strategic planning session followed by the development of the plan.

The active engagement of the Taskforce and the CT Alliance were key elements in the successful development the Three Year Strategic Plan. Bryson (2004) maintains inter-organization networks require a dominant coalition to "sponsor and follow the [strategic planning] process" as well as a process champion to ensure that the plan is effectively implemented in a timely and efficient manner (p. 34). This dominant coalition can be critical for launching an inter-organizational strategic planning process and keeping it moving forward. Additionally, a well-designed dominant coalition that represents a range of the network's stakeholder interests can represent the political landscape of the contributing organizations.

In the 2007-2008 statewide strategic planning process, the Strategic Planning Taskforce served as the dominant coalition and played a critical role in the development of the plan, but its momentum was not sustained past the finalization of the Plan. Rather than sustaining the momentum of the Taskforce through the implementation stage, the consultant appointed the implementation committees at the 2007 strategic planning session to lead the implementation efforts. However, these implementation committees did not have a *process champion* to guide their processes and work. The interviews revealed that some planners saw the CT Alliance as the *process champion* to direct efforts, but this perspective was not shared with everyone. The CT Alliance recognized that it did not have the necessary resources or the proper charge by its member organizations to lead implementation efforts.

The plan's implementation necessitated active involvement from key leaders in the CT Movement, which it had to some degree. Because of senior-level engagement from CT Clubs from 2005 to 2007, the abstract idea of strategic planning turned into an action-oriented strategic planning process culminating in the development of the Three Year Strategic Plan. However, individuals leading the strategic planning process failed to formally designate or nominate a *process champion* responsible for ensuring that the plan would be implemented. As a result, implementation committees were left to their own peril to finish their work plans and begin implementing strategies within their respective priority area.

Principle #6: Strategic planning requires candid confrontation of critical issues by key participants to build commitment to plans.

Led by the consultant, the Taskforce held a number of discussions prior to the 2007 strategic planning retreat to discuss and agree on the objective of statewide strategic planning, the process by which to follow and the intended outcomes. The consultant and Taskforce spent nearly a year planning the development of the strategic plan, conducting regular conference calls with key stakeholders of CT Clubs (both professionals and board volunteers) as well as with BGCA representatives. Notes or minutes from these conference calls were not available for this research; however, a couple of individuals interviewed indicated that these conversations were frank and covered various issues and areas of concern. These candid conversations in the months leading up to the strategic planning session were critical to the process as they provided the opportunity for members of the Taskforce to forge a common understanding of the objectives for collective planning and the steps to follow in the process.

Bryson, Crosby and Ackerman (2004) suggest that planners need to work to reframe the existing reality in order to identify the collaborative advantage, ensure leadership, devote

significant time and attention to the initial agreement phase, build a strong constituency for collaboration, develop a clear plan for the process and a governance structure and coordinate all aspects of the collaboration. Based on the findings in this case study, it is apparent that the Taskforce succeeded in reframing the existing reality during the strategic planning process and achieved the activities mentioned above. Members of the Taskforce candidly discussed critical issues throughout the 2007-2008 process, but unfortunately these discussions ended once the plan was approved by the sixteen contributing organizations.

Principle #7: Strategic planning is action oriented and stresses the importance of developing plans for implementing strategies

As discussed earlier in this section, the implementation committees were entrusted with "Workplan Detail Sheet" templates with the expectation that these templates be turned into working documents, but these work plans were not completed and the Three Year Strategic Plan was only partially implemented. The Taskforce, CT Alliance, CT Area Council and BGCA emphasized from the very beginning the importance of creating and maintaining an action-oriented strategic planning process; however, the implementation committees which were charged with implementing the plan failed to complete the work plans and commence the implementation efforts in a timely manner.

In order for a diverse group of organizations to effectively lead the multi-organization strategic planning process, it is essential that they establish and agree on a sequence of agreements. Chrislip (2002) asserts that parties to a voluntary, multi-organization collaboration must establish agreements on the following: a shared concern, who will work on this concern, how the parties will work together, how they will understand the information, how parties will define the problem and/or vision, what strategies should be pursued and what the action steps

will be to pursue the strategies (as cited in Bryson, Crosby, Ackerman, 2004). The CT Alliance initiated the discussions with this principle in mind and proceeded in like manner to launch a series of agreements to develop and obtain buy-in from at least the majority of CT Clubs and address key issues concerning the collaboration and the development of the strategic plan. However, the CT Alliance and Strategic Planning Taskforce did not establish specific agreements concerning the implementation of the plan. Instead, the implementation committees were entrusted with "Workplan Detail Sheet" templates with the expectation that these templates be turned into working documents. These work plans were not completed, however. An interviewee shared, "I think the perception was that the groups would be more self-initiated. The committees' chairs would take a proactive role in getting the committees together and implement that aspect of the plan. And that didn't happen." The implementation committees were left with only this implied understanding, not an explicit agreement or statement of understanding. The statewide collaboration following the development of the plan lacked formal agreements which would have sustained commitment and developed the necessary structure for implementation.

Additionally, leaders must continually reevaluate their decisions and learn in each step of the process in order to effectively execute strategies. Learning is a key element in executing strategies, according to Larry Bossidy and Ram Charan (2002) in their best-seller entitled, *Execution: The Discipline of Getting Things Done*. Bossidy and Charan (2002) stress that execution is a discipline and, therefore, should be an integral part of strategy. They also stress that execution is the major job of the business leader and that it must be a core element of an organization's culture. Because CT Clubs failed to formally designate a *process champion*, they lacked the leadership necessary to build strategy execution into the organizational culture and ensure the Plan's implementation.

Principle #8: Strategic planning focuses on implementing decisions now so as to position the organization favorably for the future.

Because a multi-organizational strategic plan is developed and implemented voluntarily, this principle of implementing right away is a critical factor as stakeholder engagement will dwindle as the planning team disperses. Unfortunately, the plan was not implemented immediately following the planning process, and most of the plan has sat idle since 2008. Implementation is the single most critical component of strategic planning as it is what generates and drives strategic management for the organization. Moreover, strategic management is what keeps an organization on the path for learning, growing and reaching new heights. Freeland (2002) emphasizes how strategic planning leads an organization to create a proactive environment, set clear goals and direction, focus on its long-term welfare, involve volunteers and staff at all levels and establish benchmarks for success. Without concerted efforts to implement the plan, the CT Movement will likely face challenges to becoming proactive and achieving their collective goals.

Additionally, Freeland (2002) maintains that strategic planning is extremely valuable to nonprofits that experience regular turnover of board volunteers because strategic planning "enables volunteers and staff to take advantage of changing environmental conditions not only to reduce environmental threats, but also to create opportunities for the organization" (p. 1). Should a strategic plan set idle, the organization experiencing leadership turnover will not be able to effectively adapt to environmental changes or grow in any meaningful and substantive ways. Since CT Clubs' executive leadership levels regularly change, a statewide strategic plan must be implemented in order to create the environment which facilitates growth and prosperity for the organization.

Key Findings

Through this critical case study analysis focused on the development of CT Clubs' Three Year Strategic Plan, important and meaningful lessons emerged that could be of value for CT Clubs' future statewide strategic planning initiatives. I will begin by looking at the aspects of the statewide strategic planning process that put CT Clubs at an advantage and contributed to the achievement of developing a statewide strategic plan. First, the analysis reveals that the Three Year Strategic Plan was developed first and foremost because CT Clubs believed they could benefit from this collective planning and collaboration. Despite the various challenges associated with bringing together 16 different Boys & Girls Club organizations to work in a strategic planning session, a spirit of collaboration was developed in 2007-2008 to create a participatory process because CT Clubs understood the collaborative advantage. Although this spirit of collaboration did not infiltrate the implementation stages, it was a formative aspect of CT Clubs' strategic planning process. Second, a high percentage of CT Clubs' CVOs and CPOs engaged in the strategic planning process because it was led by the Strategic Planning Taskforce, a cross-section of CT Boys & Girls Clubs made up of CPOs and CVOs as well as staff from the CT Alliance and BGCA's regional office. The Taskforce served as the dominant coalition, what John Bryson (2004) describes as the sponsor of the strategic planning process, and played an integral role in turning the idea of collective planning into a reality for CT Clubs.

It is also important to consider the aspects of the multi-organization strategic planning process that put CT Clubs at a disadvantage and impeded the implementation of the plan. First, the Strategic Planning Taskforce failed to formally engage a broad range of stakeholders of the Boys & Girls Club Movement in CT during the months leading up to the strategic planning session. By engaging a broad range of stakeholders, the Taskforce would have been able to

capture various interests and ideas, ensure that all voices were included in the process and better

identify emergent strategies. Second, the individuals leading the strategic planning process failed

to review local Clubs' strategic plans and, therefore, did not entirely identify local Clubs'

strengths and limitations to developing and implementing a statewide strategic plan. This step is

critical because planners engaged in a multi-organization strategic planning effort should

consider the decisions and priorities that have already been set by the contributing organizations.

Lastly, the scope of the Three Year Strategic Plan was incredibly expansive and its strategies

were too comprehensive for a multi-organization entity to realistically put into practice.

Moreover, because the Three Year Strategic Plan covered four large priority areas and included

23 objectives (or rather strategies), it was difficult for the CT Alliance and implementation

committees to sustain planners' interests in the long-term to implement the Plan.

Recommendations

Despite the various challenges associated with bringing together 16 different Boys &

Girls Club organizations to plan collectively, individuals who facilitated the 2007-2008 strategic

planning process succeeded in involving a wide range of CT Clubs' CPOs and CVOs in the

planning stages and developing a spirit of collaboration. As a result, the Plan was developed and

implementation committees were established. Because this case study is a critical analysis of CT

Boys & Girls Clubs' 2007-2008 strategic planning process, I have developed a set of

recommendations for CT Clubs to consider for future strategic planning initiatives.

The first recommendation for CT Clubs is to increase stakeholder engagement from the

start to include a variety of concerns and interests at the planning table and allow for frank and

open discussions concerning collective planning. The Taskforce should hold a series of

consultations with CPOs and CVOs from various types of CT Clubs, including small and large, urban and rural, and resource rich and resource poor. By engaging a wide range of stakeholders, the Taskforce will gather valuable insights, ideas and opinions from a wide range of CT Clubs and be better equipped to ensure that all voices are heard. Planners will also likely develop strong buy-in from contributing organizations, which is essential in a multi-organization collaboration. Additionally, priority areas as well as strategies will likely emerge from these consultations, creating a more holistic, inclusive and multi-disciplinary process—a contemporary understanding of strategic planning for nonprofit organizations. Moreover, strategic planning, according to Henry Mintzberg (1987), is an extremely fluid process of "learning through which creative strategies evolve" (p. 66). By increasing stakeholder engagement beginning in the initial stages of strategic planning, the process will become a learning opportunity and will more appropriately reflect the political realities of the Boys & Girls Club Movement in Connecticut.

As part of this stakeholder engagement to prepare for strategic planning, it could be worthwhile to invite a sample of CT Clubs' CPOs and CVOs to participate in a scenario process. This process, developed by Pierre Wack in the 1970s, would provide CT Clubs the opportunity to deepen the discussions around critical issues faced by CT Clubs. As described in the literature review, participants in a scenario process brainstorm as many scenarios or futures as possible. The purpose of this exercise is set the stage for planners to make strategic decisions that will be sound for all plausible futures. According to McLaughlin (2006), strategic positioning (a different way to approach strategic planning) must be simple, easy to understand and useful in any circumstances. Planners using the scenario process begin by examining the driving forces of the organization which, according to Schwartz (1991), leads planners to discover deeper, more fundamental forces that would not have otherwise been found. It is likely that this exploratory

process will also provide CT Clubs with the opportunity to talk candidly about the current state of the Boys & Girls Club Movement in CT as well as the possibly conflicting ideas about what the future holds for the Movement. Next is the most important component of the scenario process, which is to brainstorm as many scenarios or futures as possible. The outcomes of the scenario process can then be used to develop strategies that will be sound for all or most of the plausible futures.

Another recommendation is to review individual strategic plans (those written by local Clubs) prior to developing a statewide strategic plan which will help planners identify strengths and limitations to developing a multi-organization plan. By reviewing CT Clubs' individual strategic plans, the Taskforce and planners at large will be better able to consider the decisions and priorities already established at the local Club level. Additionally, this activity will help planners identify priorities that depend on collective action.

CT Clubs also need to devote significantly more time and resources to assess the forces and trends in the internal and external environments. Planners should devote an entire meeting to assessing the environments and then synthesize the findings to share at the next meeting. Developing an assessment of the internal and external environments should be considered a process in and of itself. As part of this assessment, it is important to consider these sixteen organizations and the communities in which they operate as well as their collective environments—the internal environment of the CT Movement and the external environment of the state of Connecticut. By devoting significant time and resources to assessing the internal and external environments, planners will develop a clearer understanding of the political, economic, social, educational, technological and physical landscapes. As a result, planners will be able to

position the CT Movement strategically and identify the most appropriate strategies for CT Clubs to execute collectively.

Concerning the strategic plan, planners should keep the statewide strategic plan simple and focus only on a few of the most critical areas, particularly those areas which can only be achieved through collaboration that could not have otherwise been achieved. This strategic plan should be seen as a framework for collaboration with strategies pertaining to those objectives that can only be achieved through collaboration. For the next statewide strategic plan, I recommend including significantly fewer objectives but enough objectives to sustain the multi-organization plan throughout its timeframe.

Lastly, the Taskforce should establish a series of agreements relating to all stages of strategic planning, from the initial agreement to collectively planning and through the implementation of the plan. David D. Chrislip (2002) recommends that agreements for voluntary, multi-organization collaborations address the following areas: a shared concern, who will work on this concern, how the parties will work together, how they will understand the information, how parties will define the problem and/or vision, what strategies should be pursued and what the action steps will be to pursue the strategies (as cited in Bryson, Crosby, Ackerman, 2004). Chrislip's recommended agreement items will be particularly applicable to CT Clubs' next statewide strategic planning process.

In addition to these areas to include in formal agreements, I recommend that the planners also establish agreements focused specifically on the implementation stage to ensure that the plan will be implemented. These agreements should include three main components: 1) clear benchmarks to measure each implementation committee's performance in implementing its respective portion of the strategic plan, 2) timelines for each priority area to ensure that the

implementation committees execute their work plans in a timely manner, and 3) a process for monitoring and evaluating the implementation of the strategic plan. These agreements should be made as soon as the implementation committees are established—the sooner the better. According to John Bryson (2004), parties in inter-organizational settings may need to agree on implementation details before committing to a shared strategic plan. Bryson's suggestion indicates the weight that implementation bears on the strategic planning process as a whole, a significance it so rightly deserves. Bosidy and Charan (2002) fervently claim, "Execution is not just tactics—it is a discipline and a system. It has to be built into a company's strategy, its goals, and its culture" (p. 6).

Conclusion

Using a variety of data collection methods, I examined the process CT Boys & Girls Clubs used in 2007-2008 to develop a statewide, multi-organization strategic plan. I also conducted a thorough literature review focused on strategy, strategic planning and collaboration management to provide context to the case study. The findings of this case study reveal that the CT Alliance, CT Area Council and CT Clubs made concerted efforts to develop a comprehensive, statewide strategic plan to identify and respond to pressing issues facing CT Clubs. The strategic planning process was led by a core group of senior-level leaders in the CT Movement and incorporated a number of the strategic planning steps that are recommended by many academics and practitioners. More importantly, the Strategic Planning Taskforce succeeded in identifying the collaborative advantage and using it to create and maintain a spirit of collaboration throughout the development of the Three Year Strategic Plan. Although some aspects of CT Clubs' 2007-2008 strategic planning process hindered CT Clubs' implementation

efforts, the spirit of collaboration achieved during this process should be celebrated. Should CT Clubs, CT Alliance and the CT Area Council choose to undertake another strategic planning process again in the near future, this spirit of collaboration developed in 2007-2008 can easily be revived and brought back onto center stage.

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Appendix

Data Gathering: Interview Questions

Interview with Consultant:
1. Please describe the strategic planning process you used in 2008.
2. What process did you use for creating the work plans?
3. What were the roles and responsibilities of the Implementation Committees?
4. What were the primary objectives of the "Thursday Training and Input Session" and how were the objectives achieved?
5. What steps were taken to prepare for the strategic planning process?
6. What, if any, obstacles did you or other stakeholders face in the strategic planning process?
7. How was the strategic plan model developed or chosen for this multi-organizational strategic plan? What influenced your decision-making process?
8. If you were asked to facilitate another three-year strategic plan for the Boys & Girls Clubs in Connecticut, what would you do differently, if anything?
9. In what ways, if any, is multi-organizational strategic planning different from strategic planning with a single entity, such as a local Boys & Girls Club organization?

Interviews with Boys & Girls Club stakeholders:
1. Please describe the strategic planning process you used in 2008.
2. How were the strategic areas established?
3. What were the roles and responsibilities of the implementation committees?
4. What steps were taken to prepare for the implementation of the Plan?
5. What were the primary objectives of the "Thursday Training and Input Session" and how were the objectives achieved?
6. What obstacles, if any, have you experienced as a participant in the strategic planning process or in its implementation that followed?
7. If you were involved in another strategic planning process for the Boys & Girls Clubs in Connecticut, what would you recommend, if anything?

CT Boys & Girls Clubs' Three Year Strategic Plan

BOYS & GIRLS CLUBS
In Connecticut

Serving Connecticut's Youth

Strength in Numbers

The Three Year Strategic Plan
of Boys & Girls Clubs
in the State of Connecticut

2008 – 2010

Background

The Boys & Girls Clubs Movement traces its roots back to Connecticut, with the first Club – the Dashaway Club – starting in Hartford in 1860. Since that time, the Boys & Girls Clubs in Connecticut have had a rich and productive history serving the young people of Connecticut and working together as leaders in the field. Through the Connecticut Alliance of Boys & Girls Clubs and the Connecticut Area Council, they have exemplified the potential and delivered the results that can be realized through cooperative, collective efforts for the good of children and young people.

Connecticut Boys & Girls Clubs have strength in numbers – strength in statewide locations; strength in youth served by Clubs; and strength in collective human and financial resources. Boys & Girls Clubs in Connecticut today include 16 organizations operating 41 Club sites serving over 62,000 youth and 34,000 Club members. Their budgets total $19 million, with 153 full-time staff and 403 part-time staff. This collective synergy supports the enhancement and expansion of Boys & Girls Club services throughout Connecticut.

As the Boys & Girls Clubs in Connecticut collectively look to their future, this document provides their coordinated, collaborative direction. It provides their shared mission and vision, along with the principles that will guide the collective work and efforts of the Clubs. Four strategic priority areas are identified – 1) Program Integrity; 2) Collective Power; 3) Human Resource Development; and 4) Financial Stability for Statewide Efforts, with goals and objectives for each.

With the successful implementation of this plan and the participation and support of Boys & Girls Clubs of America, the Connecticut Alliance of Boys & Girls Clubs and Connecticut Area Council will mobilize and support local Clubs to be their very best in reaching and serving Connecticut's children and young people.

Boys & Girls Clubs in Connecticut

(Name removed for the purposes of confidentiality), President
Connecticut Area Council

(Name removed for the purposes of confidentiality), President
Connecticut Alliance of Boys & Girls Clubs

December 2007

Boys & Girls Clubs in Connecticut

Shared Purpose

Working together, we utilize our collective power to develop resources necessary to IMPACT young people in Connecticut.

Guiding Principles

Collectively, Boys & Girls Clubs in Connecticut commit to:

- share and benchmark best organizational and program practices with accountability and outcome measurement,
- mobilize collective power of Club organizations, and their Boards and professionals,
- develop volunteer and professional human resources in support of statewide efforts, and
- ensure financial stability of statewide efforts.

Shared Vision - 2010

Looking to our future and the successful implementation of this plan, the Boys & Girls Clubs in Connecticut will be:

- a "sharing" environment between Clubs, with best practices and shared efficiencies.
- led by engaged, well informed, trained Board volunteers and Club Executives, through regular, well attended statewide meetings and training sessions.
- outcome-oriented, documenting impact and telling the Club story.
- supported by a strategy capable of developing statewide financial resources for Clubs that augment their local efforts.
- developers and managers of a statewide endowment to support statewide efforts.
- positive stewards and promoters of the Boys & Girls Club brand in Connecticut.
- viewed as the experts on children and recognized as the premiere youth development organizations in the State of Connecticut.

Strategic Priorities

1. Program Integrity
Boys & Girls Clubs in Connecticut provide a powerful network of youth development programs and prevention activities throughout the state. Together, they are committed to providing high quality outcome-based programs that are responsive to community needs.

2. Collective Power
Sixteen Boys & Girls Club organizations representing and serving all socio-economic and ethnic backgrounds in 41 service locations across the state provide services to 62,000+ young people annually. Collectively the organizations serve as the premiere youth development collaboration statewide and provide a voice for all young people in Connecticut.

3. Human Resource Development
Strong governance and leadership, whether at the local or state level, requires well prepared, committed volunteers and professionals. Together, Boys & Girls Clubs in Connecticut are dedicated to support and strengthen Board and staff resources to benefit all Connecticut Boys & Girls Club organizations.

4. Financial Stability for Statewide Efforts
Long term, impactful statewide efforts require stable, sustainable financial support and resources. A staff driven, volunteer supported long term focus on diverse and dependable funding and realistic budgeting/expectations with well communicated outcomes will result in resources necessary to support Boys & Girls Club collaborative efforts statewide.

Priority Area One: Program Integrity

Goal: Boys & Girls Clubs in Connecticut provide a powerful network of youth development programs and prevention activities throughout the state. Together, they are committed to providing high quality outcome-based programs that are responsive to community needs.

Committee: *(Names removed for the purposes of confidentiality)*

Objectives:
1. Develop state funding support for general Club programming and increased impact of Clubs, through increased member participation.
2. Provide mandatory opportunity to share information quarterly (ideas, best practices, benchmarks)
3. Encourage all 16 Clubs to offer program opportunities in 5 core program areas with articulated goals, objectives and measurable outcomes.
4. Perform a local needs assessment – children, families, communities – in each of the Club-serving communities for planning and service provision purposes.
5. Collect consistent statewide data in key areas, including but not limited to Graduation rates; Post secondary education; Academic achievement; Crime; Teen pregnancy; and Pre- and post league and program surveys.

6. Establish a statewide Club Quality Council, incorporating Lean Six Sigma principles.

Priority Area Two: Collective Power

Goal: Sixteen Boys & Girls Club organizations representing and serving all socio-economic and ethnic backgrounds in 41 service locations across the state provide services to 62,000+ young people annually. Collectively the organizations serve as the premiere youth development collaboration statewide and provide a voice for all young people in Connecticut.

Committee: *(Names removed for the purposes of confidentiality)*

Objectives:
1. Hold interesting, engaging joint meetings of the Alliance and Area Council to streamline Board and Staff involvement.
2. Explore options and implement a Plan to support and sustain strong, streamlined Area Council and Alliance functions and to take advantage of other statewide opportunities.
3. Schedule regular "ALL CLUB" meetings, to address statewide issues, including Alliance, Area Council and other ventures.
4. Develop an effective, rapid, cutting edge communications network for effective, consistent communications among Clubs as well as with key state leaders and stakeholders.
5. Promote, protect and market the Boys & Girls Club brand in Connecticut.

Priority Area Three: Human Resource Development

Goal: Strong governance and leadership, whether at the local or state level, requires well prepared, committed volunteers and professionals. Together, Boys & Girls Clubs in Connecticut are dedicated to support and strengthen Board and staff resources to benefit all Connecticut Boys & Girls Club organizations.

Committee: *(Names removed for the purposes of confidentiality)*

Objectives:

1. Develop a plan and provide quality training on pertinent topics as identified by key staff and Board members.
2. Design and provide opportunities for statewide recognition for local volunteers and staff supporting statewide initiatives.
3. Create and implement a Succession Plan for Alliance and Area Council leadership.
4. Research, identify and recruit "key" individuals: business leaders, influential community leaders, alumni to support the Movement within CT at the Area Council and State Alliance level.
5. Explore ways to obtain greater levels of participation by Board members at Area Council and Alliance events (job description, calendar of events, sites, and schedules.)

<u>Priority Area Four: Financial Stability for Statewide Efforts</u>

Goal: Long term, impactful statewide efforts require stable, sustainable financial support and resources. A staff driven, volunteer supported long term focus on diverse and dependable funding and realistic budgeting/expectations with well communicated outcomes will result in resources necessary to support Boys & Girls Club collaborative efforts statewide.

Committee: *(Names removed for the purposes of confidentiality)*

Objectives:

1. Develop a Three-Year Plan and commitment among Clubs for statewide fundraising activities and events.
2. Explore the feasibility of creating a statewide Development Director position.
3. Develop long term funding of the Connecticut Alliance and other statewide efforts in order to cover administrative and management costs.
4. Establish a statewide endowment in support of Connecticut-wide Boys & Girls Club activities.
5. Develop an efficient and cost-effective mechanism for joint purchasing (eg: electricity, fuel, and insurance) for Clubs.
6. Establish/expand statewide partnerships as part of broadening the base of government funding sources (state appropriations, department grants/programs, and federal sources).
7. Establish regulations for local Club commitment to receiving and participating in statewide funding opportunities.