

Syracuse University

Maxwell School of Citizenship and Public Affairs

Program for the Advancement of Research on Conflict and Collaboration

Leading IslandWood Teaching Note

Uses of the Case

This case provides an opportunity for students in public management and nonprofit courses to sort through the problems of a startup organization and apply the techniques they are learning to systematically determine its direction and priorities as well as develop a strategy for achieving them. It also effectively communicates the quandary of managers who arrive in new positions with the aim and intention to make significant change, but who face substantial challenges along the way. This case helps students practice the necessary strategies to effectively navigate the political, operational, and authorizing environments in a real marketplace so that an organization's ambitious vision can be realized.

The case can be taught in the first year of a traditional public administration, public policy, or public affairs degree and in executive programs as well. Master's in Business Administration programs may also include management cases that focus on nonprofit organizations. This case may satisfy an MBA program's teaching objectives thanks to the lead agency's interesting business model that includes revenue generating programs that help off-set core programs that inherently operate at a loss.

This case is the Snow Foundation Award Winner for the best case or simulation in Collaborative Nonprofit Management in our 2011-12 "Collaborative Public Management, Collaborative Governance, and Collaborative Problem Solving" teaching case and simulation competition. It was double-blind peer reviewed by a committee of academics and practitioners. It was written by David Cook and Lauren Guzauskas of The Daniel J. Evans School of Public Affairs at the University of Washington. This case is intended for classroom discussion and is not intended to suggest either effective or ineffective handling of the situation depicted. It is brought to you by E-PARCC, part of the Maxwell School of Syracuse University's Collaborative Governance Initiative, a subset of the Program for the Advancement of Research on Conflict and Collaboration (PARCC). This material may be copied as many times as needed as long as the authors are given full credit for their work.

This case is divided into A and B sections each of which includes specific **learning objectives**.

Case A:

- Differentiate between and suggest improvements in the mission, vision, and strategy; and
- Design a strategy using multiple frameworks.
- Identify major organizational challenges, elements of a stable solution, and viable options.

Case B:

- Understand how markets influence an organization's strategy and sustainability;
- Utilize the strategic triangle and six forces market analysis to design organizational strategy; and
- Identify key questions, or criteria, to evaluate the merits of alternative program expansion strategies by comparing benefits and challenges of providing extension services or enlisting a partner to do so.

Case C:

- Discover IslandWood's actual implementation of strategic initiatives as an addendum to the A and B Cases.

This case is designed to provide the maximum amount of flexibility for the instructor. Case A can be taught separately, or in conjunction with Case B, and Case C, which currently is not a part of this teaching note, can be used as a follow-up during class discussion. Suggested assignments are provided in this teaching note at the conclusion of each case's analysis.

This teaching note is written using specific frameworks; however, other frameworks may be added at the instructor's discretion to illustrate specific issues in the case. The frameworks are discussed in the following sections that elaborate how to use the case to illustrate each of the learning objectives listed above.

Overall Case Synopsis

This case depicts two distinct time periods and critical decision-making points, each featured in a different section of the case. Case A begins with the hiring of Ben Klasky as the new executive director of an outdoor education nonprofit called IslandWood in 2005. Ben is charged with creating a new strategic plan that will help rectify the organization's challenges with financial stability, staff morale, and programmatic identity. In Case B, the timeline jumps to 2008, when the organization is on its way to realizing key initiatives set out in its strategic plan, the results of an organization-wide collaboration. At that point, Ben has earned confidence as the organization's leader from key stakeholders and begins planning for the next stage of IslandWood's development. To do that, Ben and other organizational leaders conduct a market analysis and identify criteria for new partnerships.

Case A

Case Summary and Observations

The case focuses on the hurdles met by the executive director of IslandWood, a nonprofit organization located in Bainbridge Island, Washington. IslandWood was founded by Debbi and Paul Brainerd as a premier environmental learning center for underserved urban youth. It was initially equipped with a state-of-the art facility on 255 acres of untouched land with diverse

ecosystems. In four and a half years, the organization welcomed and then transitioned three executive directors and experienced some turnover at the director level. The organization was in need of stable leadership when Ben Klasky began as the new executive director at the opening of Case A.

Primary challenges for Ben Klasky and IslandWood:

Programmatic Identity

The organization's core competency was the School Overnight Program (SOP), which brings 4th, 5th, and 6th graders onto the IslandWood campus so they can experience outdoor science education, often called inquiry-based education, to not only educate youth, but inspire a lifetime of environmental stewardship and academic passion. The SOP primarily hosts underserved students who qualify for free and reduced lunch, the common proxy for low-income students. The majority of the students who fit this demographic were in the Seattle Public Schools (SPS) district, which was one of IslandWood's primary stakeholders, but located outside of their immediate community on Bainbridge Island. This caused a misunderstanding with residents on Bainbridge Island who thought that IslandWood was going to be a resource for their children.

Other programmatic offerings included:

- A residential graduate program – students complete a year of their Master's in Education degree through the University of Washington teaching in the SOP, and taking classes at IslandWood. They provide well-trained teaching source for IslandWood's programming, at a lower cost than full-time faculty.
- Community programs – adult residents come to IslandWood to participate in fee-based classes like cooking and bird-watching. Other activities include family specific days for Halloween, the Mochi Festival, etc.
- Conventions and Retreats – IslandWood's facility could be rented out on the weekends for eligible company meetings. Ben saw this as a significant opportunity for revenue generating programs, but some staff members and board were motivated by the education initiatives and concerned about drifting into too many fee-for-service programs.

Staff morale –

The founders of IslandWood, Paul and Debbi Brainerd, had been heavily involved in the direction and operations of the organization since its founding in 1998. They were the primary donors, and maintained an active voice in IslandWood's decision-making processes throughout its early years. Debbi, who had the initial vision for the IslandWood, was often at the organization, which contributed to some of the staff turnover at the director level. This turnover was due to internal conflicts arising during the organization's start-up phase. Some staff had very high demands on their time, and did not share the same vision and drive as the founders. There were also three distinct organizational cultures working within the staff: academics, nonprofit professionals, and corporate professionals. When Ben came on board, the staff had recently experienced furloughs due to financial struggles. One of his primary objectives was to create a culture of inclusiveness and constructive collaboration to alleviate any residual tensions within the organization.

Financial Stability –

In 2005, the SOP program cost IslandWood approximately \$500 per student to deliver. Schools paid the established fee rate of \$205-225 per student, unless they qualified for a scholarship based on the number of high-need students. Of the 3,500 students served per year, 66% of the students qualified

for scholarships so schools paid as little as \$50 for each child. IslandWood's scholarship endowment generated income to cover the remainder per student.

IslandWood also has a maintenance endowment to help ensure that the cost of long term maintenance of the state-of-the-art facility does not become a fundraising burden. However, the annual administrative and operating costs for the organization are still a primary concern when Ben arrived. With direct program expenses, administrative and operating expenses, the cost to IslandWood for each student in the SOP was \$500. The gap between the \$225 student payment/scholarship and \$500 cost, although intentionally designed into the business model, is predicted to increase and will continue to require funding from other sources. Ben is faced with the strategic goal of serving more students, but knows that each new student is costing the organization money like many nonprofits (e.g. homeless shelter).

The audited financial statements are provided in the case from Fiscal Year 2004 (July 1, 2003 – June 30, 2004) along with selected notes from the auditor. Students will have varying levels of financial acumen, but should be able to make the following observations:

- IslandWood, which had assets of over \$50 million, had an annual budget of \$4.6 million and basically broke even, finishing in the red by a small \$51,134 .
- IslandWood had received significant contributions through the capital campaigns and endowments, which were restricted funds that could not be used for operations. So the organization strove to maintain adequate cash flow, and had a \$750,000 line of credit with an outstanding balance of approximately \$250,000 at the end of 2004. Though the organization was still working toward financial sustainability, it was well on-track at its early operational stage.
- 67% of IslandWood's annual functional expenses are for program services. Within program service expenses, Education Programs account for \$1.8 million or 60%, and the remaining 40% were spent on Educational Conferences/Community Programs (\$1.2 million) to help cross-subsidize the core Education Programs.

Use of Frameworks to Accomplish Learning Objectives

Learning Objective: Differentiate between and suggest improvements on the mission, vision, and strategy.

Suggested reading: Rangan,2004 and Kotter, 1996 and (optional) Dobel 2005.

- Review IslandWood's vision and discuss if it meets Kotter's necessary characteristics.
 - Question: What would Kotter think of IslandWood's vision? Why? What improvements would you make? Why?
- Use Rangan's analysis to create a board diagram for the strategy stairway with the class
 - Questions: Can you determine IslandWood's mission from its operational mission? The order of the steps within the strategy stairway are not fixed, how did IslandWood create theirs?
- Have students build out the blueprint of the strategy platform in small groups and present to class.
 - In-class assignment: Describe IslandWood's strategy platform showing distinctive aspects of each area. What are the leverage points? Weaknesses?
 - Client and market
 - Funder and donor
 - Program and service delivery
 - Organizational development and governance

Learning Objective: Design a strategy using multiple frameworks.

Suggested reading: Mark Moore, Creating Public Value, Chapter 3

Transition from Rangan's strategy platform to Mark Moore's Strategic Triangle to demonstrate one way of using a framework to determine strategy. The broad tests within Mark Moore's strategic triangle overlap and help build the elements of a stable solution as outlined by Jonathan Brock.

First, outline what is actually happening right now at IslandWood in a table and organize the classes' contributions in three primary categories: public value, authorizing environment, and operational capacity.

To begin the class discussion, the instructor can position students *in* the case to elicit their observations and responses within Moore's framework. An opening question could be:

- Question: If you are a director or staff member at IslandWood, how do you feel about working there when Ben takes over?

The instructor can further solicit this information from the class by asking the following questions and probes:

1. *Operational capacity* - What are the major capacity or operational issues for IslandWood?
2. *Authorizing environment* – What is IslandWood's standing within the authorizing environment? What about Ben's? The Brainerd's (this may be a good time to have the class describe the founders' strengths and weaknesses)? Who is out there that matters to IslandWood? Are there any major constraints on IslandWood?
3. *Public value* - What formal and informal policies and programs does IslandWood offer that benefit the public?

Below is a sample board diagram:

Public Value	Authorizing Environment	Operational Capacity
<ul style="list-style-type: none">• Provide valuable environmental education to disadvantaged students• Primarily serve Seattle students• Preserve 255 acres• Programs must support Washington's education guidelines• Provide services to local community	<ul style="list-style-type: none">• Bainbridge residents not supportive• Board defaults to founder• Founder has not had faith in previous executive directors• Educational staff want to focus on quality not quantity of students served• Founder able to solicit gifts from peers, but often difficult due to assumption of prosperity	<ul style="list-style-type: none">• Financially unstable core program• Under-utilized facility• Establishing organizational policies• Students do not want to leave campus• Staff have low morale and high turnover• Grad students are cheap teachers, but are they providing quality instruction?

Notice that some of the components in each broad area are positive and would pass Moore's test. In fact, the public value section includes objectives that are derived from the organization's mission and define IslandWood's range of operation. Outside of that range of operation, according to Moore, they will lack resources.

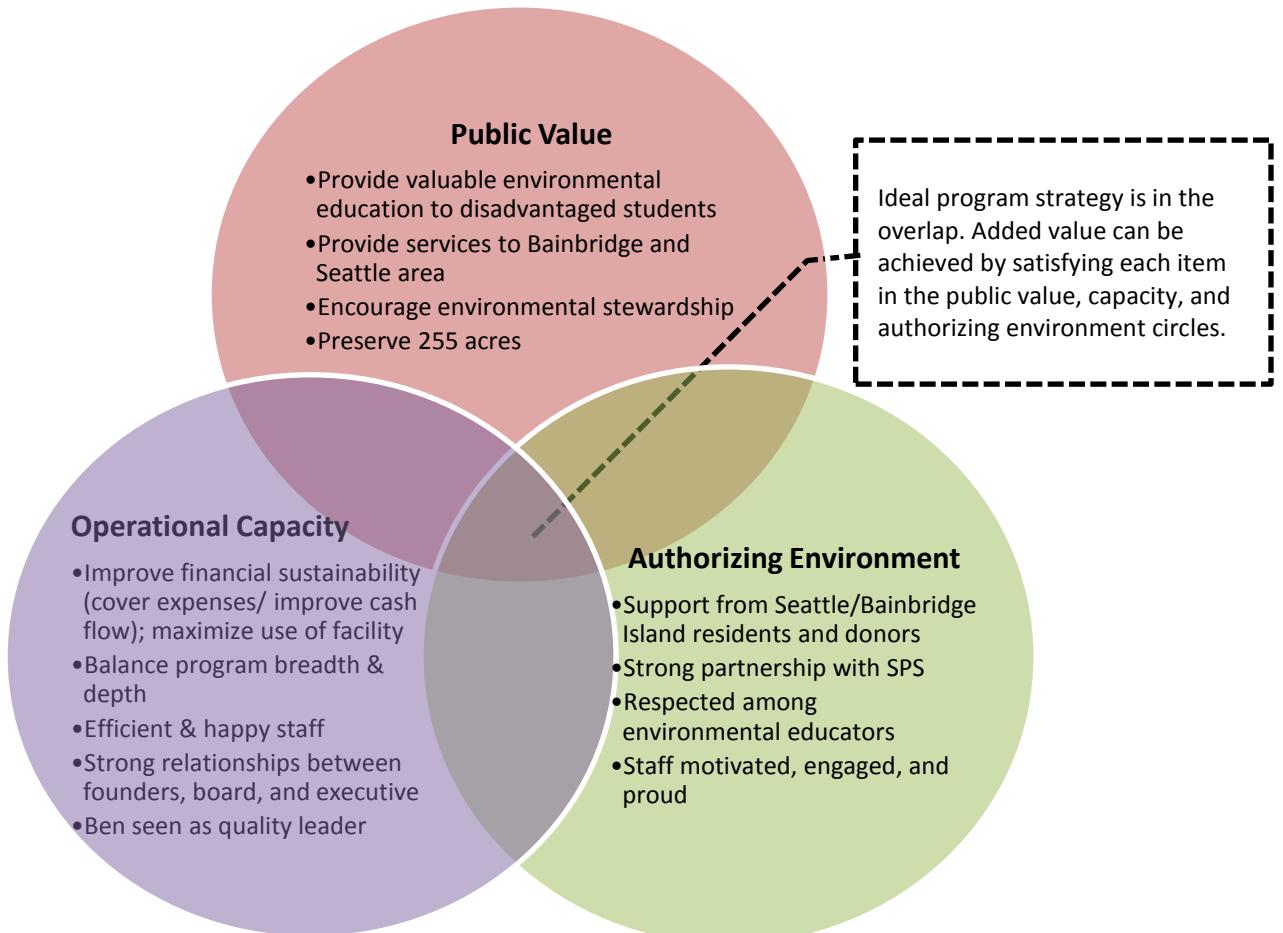
The instructor will gather more issues in each category than provided in the preceding discussion and the board diagram sample above. Unfortunately, most leaders including Ben Klasky will not be able to fix all of the issues at once. To find the primary priorities that Ben should focus on to determine his strategy, you can narrow the list by asking the class the following question:

On what priorities should Ben focus given the challenges and opportunities in the triangle?

The instructor can use this question to create Moore's strategic triangle and identify the overlap where success may be more likely and add value. This analysis allows students to practice weighing the many forces and variables present in a situation and determine *how* and *where* to focus effort to make an impact.

By using Moore's strategic framework, students can see how the issues within IslandWood are coupled together. For example, the public and staff value serving low-income students and providing quality services, but that program is not financially sustainable. Meanwhile, fundraising suffers because of the organization's reputation of affluence. By prioritizing and reducing the list and moving it into the triangle, students can identify what solutions or outcomes would be both preferred and realistic based on the class analysis. The triangle diagram can then be filled with the ideal situations that IslandWood needs, by retaining the positive items and reversing the problems and negative items in the previous table.

Mark Moore's Strategic Triangle, Sample board diagram:



Learning Objective: Identify major organizational challenges, elements of a stable solution, and viable options.

Suggested reading: MoreTools by Jonathan Brock

Creating the diagram clearly shows the overlap between each of the broad areas. Students can now start to identify the elements of a stable solution from the Jonathan Brock framework. These elements, also called intermediate outcomes or milestones, will help IslandWood achieve each of the above descriptions within its authorizing environment, public value, and capacity.

Elements of a stable solution define a desired outcome that can be identified through the previous analysis, but do not imply use of a specific strategy or tool. Many of these conditions can be achieved through a variety of methods, including long-term and short-term strategies. The class should be able to establish a list of **elements of a stable solution**. Some examples include:

- SOP program reduces costs to improve financial sustainability;
- Staff and partners from Seattle Public Schools are highly invested in and help create programming; and
- IslandWood staff leadership has the appropriate decision-making autonomy and is trusted by all stakeholders.

The class discussion can conclude by breaking the class into small groups and have each one prepare and present Ben's strategic plan based on the triangle analysis and present to the IslandWood board (the rest of the class).

Suggested Assignment

Have students read Case A, Chapter 3 from Mark Moore's book *Creating Public Value, MoreTools* by Jonathan Brock, Kotter, and Rangan and develop a two page memo that outlines Ben's strategic plan to the board for the upcoming retreat. The memo should include IslandWood's mission and vision, critical issues, elements of a stable solution, and suggested viable options that will achieve those solutions. Additionally, consider assigning J. Patrick Dobel's *A Note on Mapping: Understanding who can Influence your Success*, and encourage students to map IslandWood's environment (actors, stakeholders, authorizers, etc.) prior to developing a strategy, and attach the map to the memo.

Case B

Case Summary and Observations

Case B begins with a summary of the progress made by Ben Klasky and his team at IslandWood after the strategic plan rollout in 2005 through 2008. The student discovers that the strategic plan included the following initiatives (the first two have significant traction):

- Maximize capacity of on-campus programs by increasing enrollment, and launching a capital campaign to build a new lodge that will host students as well as the adults attending conferences at IslandWood.
- Maximize revenue-generating programs, such as summer camps, conferences, and community events.
- Improve financial stability by creating an operating endowment (IslandWood already has a scholarship and maintenance endowment) to avoid becoming overburdened by fundraising for unrestricted funds.

Ben, the board, and Debbi decide that they cannot expand the campus any further than the addition of a fourth lodge, or it will “become a city in the woods.” Therefore, in order to serve more students they must explore partnership options with other organizations to both build on the quality and quantity of their current programming. To ensure that IslandWood invests in finding new partnerships that will expand their capacity and services he transitions a long-time employee and experienced educator, Pat O’Rourke, into the role of Director of Outreach and Partnerships.

O’Rourke finds a slew of possible partners who are also competitors including the North Cascade Institute (NCI) in Sedro-Wolley, Washington; Olympic Park Institute (OPI) in Port-Angeles, Washington; and Wilderness Awareness School (WAS) in Duvall, Washington. In addition, she finds additional information on other competitors and substitute services, which is provided in an attachment (Exhibit 1). The attachment different information on the various organizations and is not organized in a particularly helpful way on purpose. Instructors may receive complaints from students, but can point out that most times information is inconsistent and raw and that part of the analytic challenge is to make decisions with incomplete and imperfect data. As Oster explains, competitors are organizations that share a significant number of characteristics with IslandWood and substitutes are in related markets; a substitute for IslandWood could be outdoor educational instruction that is not in an overnight setting like the curriculum provided by the Homewaters Project.

Use of Frameworks to Accomplish Learning Objectives

Learning Objectives:

- Understand how markets influence an organization’s strategy and sustainability; and
- Utilize the strategic triangle and six forces market analysis to design organizational strategy.

Suggested reading: Sharon Oster and review Mark Moore

If you have already had the class read Case A, now is a good time to revisit the Strategic Triangle from the previous session. Ask students to identify areas of the triangle that have changed now that they have the updates provided in Case B: particularly, how has this new information changed the authorizing environment and organizational capacity?

- Students now have more information about IslandWood’s fellow community-based organizations, a three year programmatic impact study and additional financial information. In addition, the founders have transitioned away from operations and programs have further expanded beyond serving students.

If you teach Case A and Case B together, you might begin the discussion of Case B by asking the class to imagine that they work at IslandWood at the end of the B Case. Ask them, how they feel about working at IslandWood now as compared to when Ben took over? Why? In particular, how do they, as IslandWood staff, feel about the prospect of expanding IslandWood programming off-site? Why? What are the pros and cons of expansion?

Now you can transition into a new market analysis framework that emphasizes those new external factors that ultimately help determine whether or not a nonprofit succeeds or fails.

The first step in doing a market analysis is assessing the organization’s scope and its core competency. Ask the class the following questions:

- How well do IslandWood’s programs fulfill their mission?

- Do all of their programs fulfill the mission equally well? Which ones are more effective and why? Which less effective and why? What is their most valuable and unique programming?
- How competitive (or positioned) are they in their market? In the Northwest? The U.S.? The globe?

The ten year strategic planning document provided as an attachment to the case identifies the primary strategy of IslandWood as “expand and ensure continued excellence in educational programming including SOP, School Partnerships, Graduate Programs, and Teacher Education.” These four components of their educational programming would be considered by Oster as IslandWood’s *scope*, or *market definition*. Despite IslandWood including four components of their educational programming, the instructor should probe the students to do a more complete assessment to identify one primary core competency by asking students the question:

What is the primary competency in IslandWood’s educational programming? How can you tell?

Students should conclude that the School Overnight Program (SOP), which serves more than 3,000 students, is the organization’s core competency because IslandWood was founded as “*A School in the Woods*,” to provide place-based education within its acres of diverse ecosystems. In addition, some might argue that the Graduate Program is part of IslandWood’s operational model that helps them provide their SOP programming.

Once you have identified IslandWood’s core competency with the class, you can begin to create a board diagram based on Oster’s six forces market analysis. This market analysis helps students practice creating a strategy that responds to external competitors and potential partners in a way that Mark Moore’s Strategic Triangle does not address as explicitly.

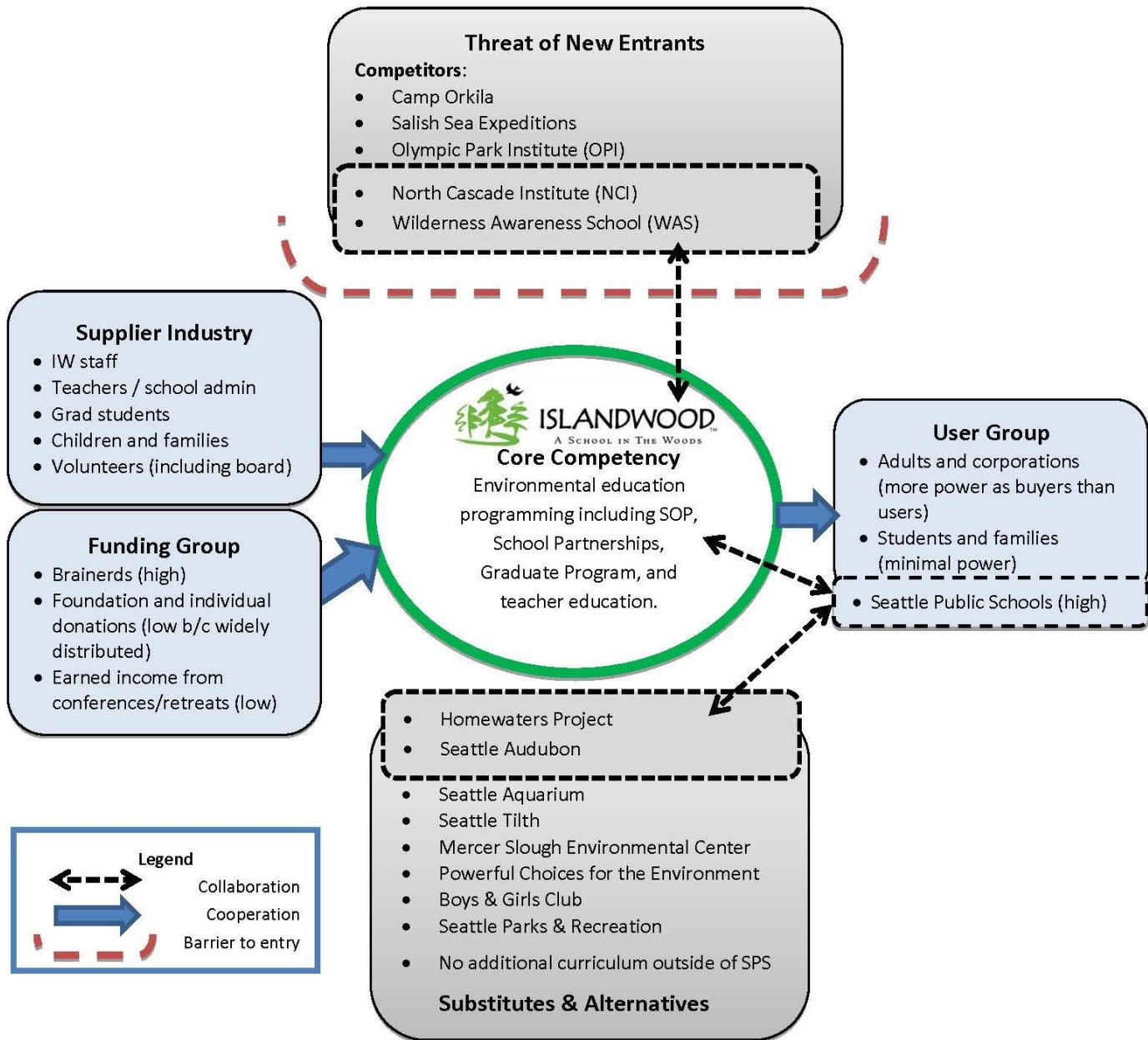
To build the board diagram, you can divide the class into the areas within Oster’s analysis, assign them the following questions, and debrief the groups quickly in sequence, or the instructor can solicit the responses from the entire class. The suggested groups and/or questions are as follows:

- On one side of the core competency bubble draw a section for **User Group** and ask, Who does IslandWood serve? How strong are the relationships between IslandWood and its different user groups? What do IslandWood’s primary clients need? What do they want (as evidenced by current demand)? How much bargaining power (via exit or voice) do they have with IslandWood?
 - Response: students/families (medium), Seattle Public Schools (high), and adults/corporations (medium).
- On the opposite side of the user group, draw another bubble for **Funding Group**: How is IslandWood funded? How much power do these donors have over IslandWood?
 - Response: the Brainerds (high), private donations (low), and revenue for conferences/facility rental (low).
- On the same side as the user group, draw a bubble for **Supplier Industry**: Who helps IslandWood operate? Who uses IslandWood’s services? How is the strength or weakness of the various suppliers related to IslandWood’s competitors or substitutes?
 - Response: IW staff, teachers/school administrators, graduate students, children/families, and volunteers. Many of these groups have a lot of other options,

like grad students who would like to obtain their master's in education. However others, like teachers, may have fewer options for overnight programs near Seattle.

- The case identifies a couple of **Competitors**, list those on another side of the core competency.
 - Class suggestions: Camp Orkila, Salish Sea Expeditions, Olympic Park Institute (OPI), North Cascade Institute (NCI), and Wilderness Awareness School (WAS).
- The options for **Substitutes and Alternatives** is the broadest area in this analysis and should be drawn opposite of competitors. Who offers substitutes or alternatives to environmental education? How well do these substitutes meet the needs of IslandWood's customers? How much power do the providers of the substitutes have?
 - Class response: Teachers may not provide additional experiential curriculum outside of standard Seattle Public School district issued curriculum to their students. Others include: Homewaters Project, Seattle Aquarium, Seattle Audubon, Seattle Tilth, Mercer Slough Environmental Center, and Powerful Choices for the Environment. Beyond environmental education, students may also suggest Boys & Girls Club and Parks & Recreation.
- The **Barrier to Entry** into the marketplace for new nonprofits can be significant. For IslandWood's core competency of residential education, they include the cost of building a quality reputation and the cost of providing the food and lodging for an overnight program.
- What are the **relationships** like among the actors in the environmental education (and related) fields in Seattle? Puget Sound? Northwest? Specifically, given the relationships among IslandWood's competitors/substitutes and IslandWood's core competence, how can Pat and Ben cultivate new partnerships? Which organizations would make strong potential partners? Why?

Board Diagram for IslandWood market analysis – Sharon Oster



Note: Please feel free to express the power and influence of different groups as another factor in this diagram by emphasizing (using size, boldness, etc.) those that have more power than others like the Brainerds within the funding group, or the collective power of the Seattle Public School district in the user group. Also notice that the core competency is noted as “environmental education programming” and not specifically “place-based” education, this can be a point of debate for the class (as it was for the staff at IslandWood).

As the above diagram shows, the market analysis helps layer external organizations onto other primarily internal decision-making frameworks. IslandWood’s core capability and program strategy should be a reaction to the market analysis’ assessment of opportunities and threats.

Learning Objective:

- Identify key questions, or criteria, to evaluate the merits of alternative program expansion strategies by comparing benefits and challenges of providing extension services or enlisting a partner to do so.

Suggested reading: Xavier de Souza Briggs article “Perfect Fit or Shotgun Marriage?”

The Briggs article provides students with a framework that can guide them to ask and then answer a variety of questions as they arrive at the decision of *how* to expand IslandWood’s programming and with *whom*.

In the case, Ben and the IslandWood Board decide that they would like to expand their programming off-site to avoid creating a ‘city in the woods,’ and then create a staff position to explore partnerships. Begin the class discussion about expansion by asking the class for non-partnership options. You are looking for them to evaluate the following opportunities for IslandWood:

- IslandWood could ‘**make**’ their own off-site programming;
- IslandWood could ‘**buy**’ or contract with another organization for their off-site instruction; and finally,
- IslandWood could ‘**partner**’ with other organizations through joint work.

A board diagram can be produced to illustrate the generic strengths and weaknesses of each option based on class comments. A few ideas for the board diagram are listed below, but the students should be able to provide far more.

Option	Strength	Weakness
Make	Maximum control, learning, and identity/reputation benefits	Resource intense
Buy	Clear role definition through contract and can generate savings	Do not have <i>full</i> control of product
Partner	Shared control and risk; can produce better and more	Risk of miscommunication of expectations, accountability

The instructor can now ask the question about IslandWood’s expansion strategy, “Given IslandWood’s core competence in Oster’s diagram, do you think they should make, buy, or partner for their off-site programs? Why?

Now that students have both the Oster and Briggs framework, ask them to take it a step further and discuss their suggested criteria and next-steps for the organization. You can start this by asking the following questions and capturing the responses on the board:

- Question: If you opt to partner and you were Ben, what questions would you want O’Rourke to answer before presenting a potential partner organization to you?

Students may respond to this question by moving through the interlocking components of the following frameworks:

- Mark Moore’s strategic triangle – i.e. Does the partnership add value? Are authorizers engaged in the partnership? Is it operationally feasible?

- Oster's market analysis – i.e. Is the partner a competitor? How does their reputation compare to ours? Does this partnership improve our competitive edge in our industry? What is in it for IslandWood?
- Briggs' strategic questions – Does it add legitimacy? What outcome do we want to create together? How *partnered* should we be?

The class will likely generate a list of considerations for partnering that looks something like this:

- Does the partnership add value? What are my organization's **mission & aims**? How might a partnership help achieve them compared to working unilaterally?
- **Who is participating?** Are the right partners involved?
- How is the partnership "governed?" **Who has authority** to make decisions about what? How well will our voice be heard?
- How **likely is it that the partnership will succeed** & achieve critical objectives...if we participate? ...if we don't participate?
- What are the **risks** (e.g., goal displacement) and **costs** (funding, staff time, other foregone opportunities, etc.) of the partnership?
- What **resources could my organization bring** to the table? What can our potential **partners bring**?
- What resources and opportunities of the collaborative (now; in the future) could **benefit my organization** (e.g., staff, learning, funds)? What are the **potential reputational benefits** of partnership (e.g., political support)?
- What are my organization's **other partnership commitments**? How "partnered" should we be?
- Are our **work styles and values** compatible?
- Is there an **exit option**?

After the class creates a common set of criteria, the instructor can divide the class into small groups to review the B case again along with the table of Pat O'Rourke's findings. Ask the groups to identify the top two or three candidates for partnership and have them present their findings and rationale to the class.

Suggested Assignment

Propose a set of criteria and partnership opportunities for Ben to consider that will enable IslandWood to expand their services. In your two page memo, be sure to include answers to the following questions:

- How should IslandWood try expand their services? Which partnerships or combination of partnerships would provide the most sustainable, impactful services for IslandWood's clients and stakeholders?
- What are the tradeoffs of forging these partnerships? How difficult or easy would it be to implementation these new partnerships?

Wrap Up

Ben Klasky stepped into IslandWood when it was at a tumultuous time in its development and provided the organization with guidance and stability. Students simulated the decisions that Ben had to make by using key frameworks. In sum, those frameworks can be applied as follows:

- **V. Kasturi Rangan and J.P. Kotter:** To determine the ideal mission and vision to guide the organization's decisions.

- **Mark Moore's strategic triangle:** To determine the most impactful space to invest resources for organizational change – i.e. within the overlap of public value, organizational capacity, and authorizing environment.
- **Jonathan Brock** – To help determine the components of a strategic plan of action including responses to major organizational challenges through elements of a stable solution and viable options.
- **Sharon Oster's six forces analysis** – To determine an organization's core competence and evaluate the external forces that impact an organization's competitiveness in their industry.
- **Xavier de Souza Briggs** – To help determine whether or not to make, buy, or partner with other organizations to either expand or improve programming.

Attachment

For additional insight, you will find an overview of IslandWood's strategic plan completed in December of 2007. This serves as a summary of the plan created by Ben after Case A and provides an organizational foundation for conversations in Case B (Exhibit 1).

Case C

Case Summary

This case is a brief addendum to the events of the A and B Cases, intended to bring the readers up to date (as of spring 2012) regarding IslandWood's strategic partnerships initiative. It should be shared with students after they have completed any assignments related to the A and B case.

References

Xavier de Souza Briggs, “Perfect Fit or Shotgun Marriage?: Understanding Power and Pitfalls in Partnerships,” (5/03), at www.community-problem-solving.net.

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J. Patrick Dobel and Angela Day, “A Note on Mapping: Understanding Who Can Influence Your Success,” The Electronic Hallway, 2005.