

THE
WHELAN
GROUP

Strategic Advisors
to Nonprofits

DESIGN TRUST
FOR PUBLIC SPACE

Design Trust for Public Space

Strategic Plan Recommendations

Final Report
October 2012

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**Part I:
Context**

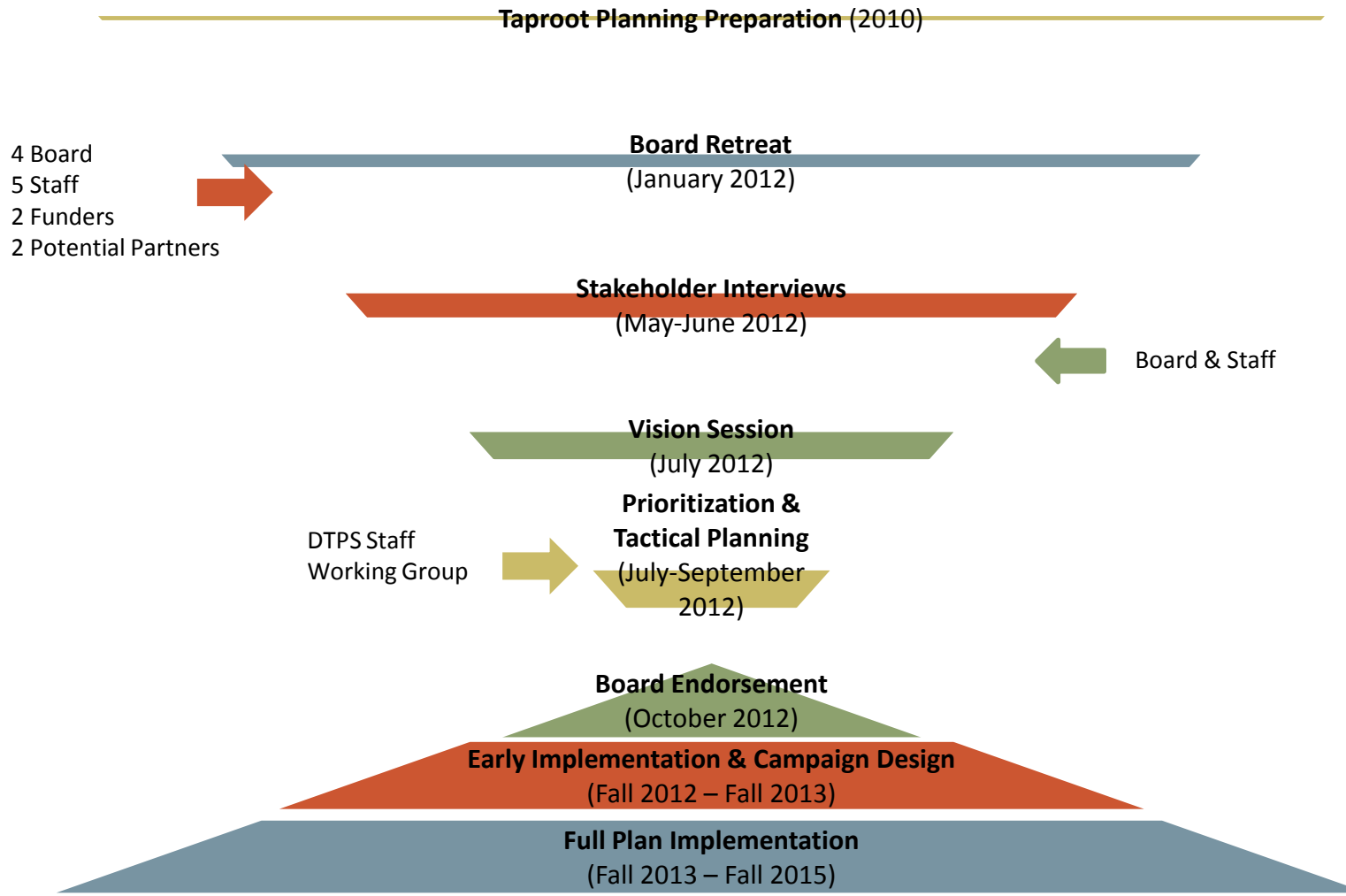
Introduction

The Design Trust for Public Space (DTPS) has improved the quality of public space and the dialogue around it in New York City for 17 years, championing new ideas and nascent projects. It has broadened the definition of public space by embracing a range of sites, issues and arenas. When DTPS was founded, it stood relatively alone in its field – though not without models and precedent – to provide think-tank-like planning services focused exclusively on public space.

Much has changed since DTPS' inception. New York City has experienced the proliferation of organizations concerned with the quality of public space and design, many which have taken on similar issues and even adopted planning methodologies that follow DTPS' successful fellow model. DTPS itself is a much different organization today than it was 17 years ago, with paid professional leadership of stature, a growing Board, and a track record that has set a standard for the quality of product delivered by each project. Yet DTPS' impact and reputation are largely unknown beyond the design community.

It is now time to carefully consider DTPS' continuing role in the public space arena and DTPS has embarked on a Strategic Planning process to plot a course for its future at a key moment in its evolution. **The Whelan Group** (TWG) was engaged to facilitate this process, building on earlier planning work by The Taproot Foundation, gathering a wide range of inputs that provide a platform for the Board and new staff leadership to make critical decisions about direction. What follows is an ambitious vision, embraced by a range of stakeholders, and a tactical roadmap for the organization to realize these aspirations.

An Engaged and Inclusive Process





**Part II:
Vision**



Vision Statement

As a nationally recognized model, the Design Trust transforms public space to benefit all New Yorkers and build better cities through innovative design solutions.

This Vision Statement is rooted in the following core concepts, which were echoed by the Board and staff throughout the planning process:

1. There is a healthy tension between DTPS' mission, which emphasizes purpose, and the organization's aspirational vision, which concentrates on the future and serves as a source of inspiration – for the Board, staff, funders and beneficiaries alike.
2. The vision elements that emerged during the Visioning Charrette include “catalyst, transformative, impact, actionable, systemic change, synergistic, multi-disciplined, NYC laboratory with national implications, expand view of design.”
3. Thanks to a mayoral administration that supports sustainable design and a population that advocates for a more livable city, New York City has emerged as a leader in reclaiming and redefining public space. DTPS is uniquely positioned to capitalize on and influence this trend with NYC as its laboratory, while also striving to have national impact.

The Board's Role

To achieve our vision, the Strategic Plan calls for investments in talent, content, marketing and communications. The Board must play a central role in developing the resources to achieve these ambitious goals:

- The Board will **take responsibility**, together with staff leadership, **for meeting the goals** of this Strategic Plan. The Executive Committee will ensure sufficient funds are allocated in the annual budget for plan initiatives, assign responsibility for Board-driven tasks, regularly review progress and enable course corrections if necessary.
- **Empower and support the Executive Director** in assembling a crack team that has the in-house capacity and expertise to implement policy and deliver service, and effectively promote and steward the organization.
- The Board will **develop and steward the resources** needed to support DTPS and its vision. Board members will work with staff to increase the impact of the DT Council and the annual benefit on the bottom line, design and oversee a 20th Anniversary Campaign to underwrite Plan initiatives, collaborate with the Executive Director on new partnership development and ongoing cultivation and stewardship of DTPS' important institutional funders and partners.
- Undertake a concerted and **strategic Board development and recruitment initiative** to grow the voluntary leadership and bring new skills, expertise, resources and connections to bear.

By 2015, the Board will contain at least **20 active members**, engaged in fundraising, friend-raising and advocacy, **providing at least \$100,000/year in unrestricted operating support**, leading the campaign initiative and using in-house **communications/marketing expertise** to support the staff in elevating DTPS' profile.

The Staff's Role

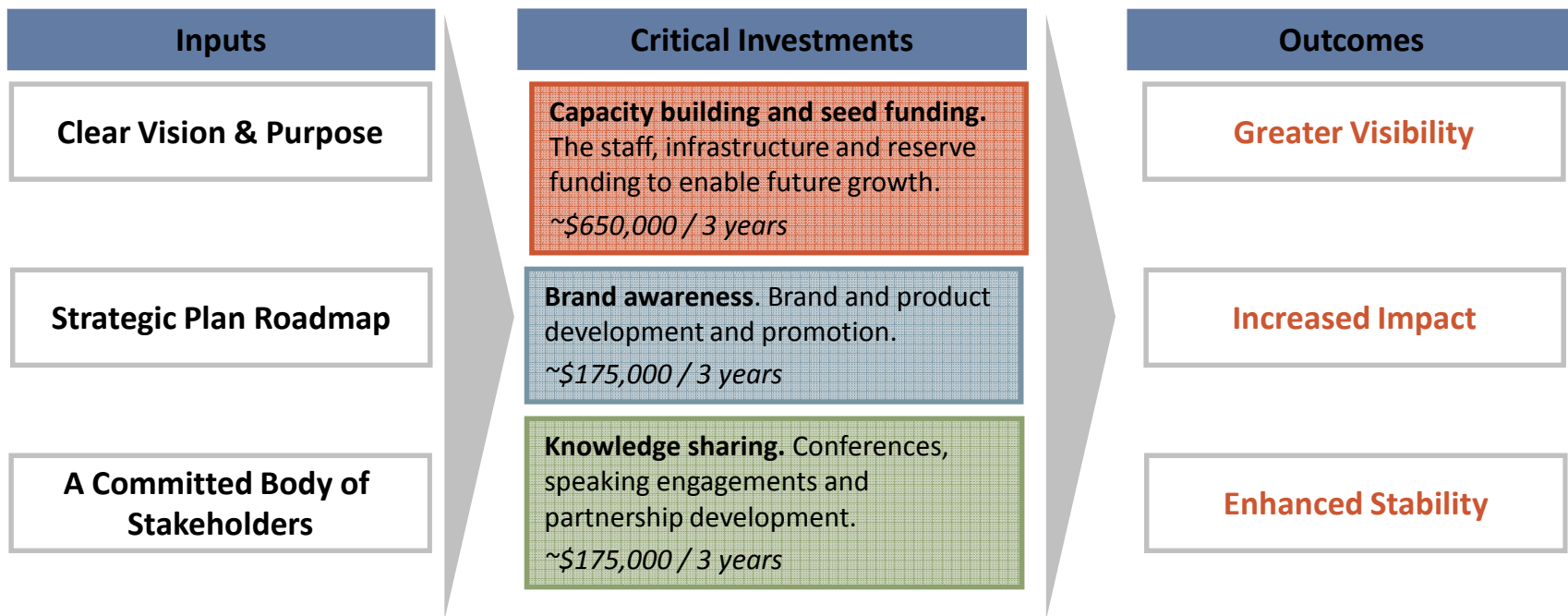
To achieve our vision, the Strategic Plan calls for investments in talent, content, marketing and communications. To achieve the ambitious goals laid out in the Plan, the staff will:

- **Use the tactical plans** as a tool for developing annual operating plans and to tracking progress. The Deputy Director will facilitate mid-year progress reviews, and integrate amendments or adjustments as needed.
- **Develop and add voluntary expertise** in the areas identified by the Executive Director as the most pressing issues in the public space arena, around which primary projects are focused over a three-year period.
- **Add programmatic capacity** to support dual project approach and fee-based service delivery.
- **Drive product and service delivery** with the support of DTPS' voluntary leadership and Fellows.
- Benefit from additional **marketing, communications and branding expertise** through a combination of consultant engagement, professional development and potentially, new hires.

By 2015, led by its nationally recognized Executive Director, the organization is supported by a program staff viewed as experts in the field including fundraising, communications and marketing talent capable of elevating DTPS' profile, impact and sustainability.

Underwriting the Vision

Together, the Board and Staff will realize the Vision. A comprehensive **20th Anniversary Campaign** for DTSP is the proposed vehicle, raising approximately **\$3.5m over three years** (\$1m in new funding, inclusive of Founder’s Circle) to support operating expenses along with targeted investments in strategic initiatives, special projects, and financial security.



Critical capacity investments will support DTSP’s important work including the execution of **two major city-wide initiatives and three community projects** over the next three years.
 ~\$2,500,000 / 3 years for project funding and other general operating expenses

**Part III:
Strategic Goals**

Organizing Themes

Five major goals for the Strategic Plan arose from the July 2012 Visioning Charrette, and from extensive interviews with Board, staff, funders and other stakeholders at the beginning of the process.

1. **Mission Focus.** A unifying message that articulates who we are and what sets us apart from others in the field.
2. **Financial Security.** Fiscal stability through a broader range of funding streams, e.g. earned income, philanthropic funding, etc.
3. **Measurable Impact.** Benchmark-driven metrics that measure performance and effectively communicate successes.
4. **Thought Leadership.** Enhanced local and national recognition for creative and effective approaches to solving public space challenges.
5. **Organizational Effectiveness.** Operational best practices to optimize Board and staff collaboration and effectiveness.

Prioritization and planning sessions were then held with the staff and Board representatives to develop the strategies and tactics that support each of these five strategic goals. These goals are outlined on the following pages.

Mission Focus

- Ensure DTPS' Mission and core values reflect our purpose and organizational priorities and present a simple, unifying message that articulates why we exist and what we do to achieve our vision.
- Clearly and consistently promote the Mission, distinguishing its value relative to other organizations concerned with similar issues, and as a national model for best practices in public space planning.
- Refresh the DTPS brand and identity to reflect our impact locally, regionally and nationally.



Financial Security

- Use modified project selection process to promote advanced fundraising initiatives and secure multi-year funding commitments.
- Develop an earned income platform to leverage DTPS talent and methodology for new technical assistance and advisory revenues as well as fee-based services.
- Develop and grow major donor engagement through: (1) a campaign that celebrates DTPS' 20th Anniversary while raising resources to underwrite strategic plan initiatives, (2) increased membership to the DT Council, and (3) a revised annual benefit strategy.
- Expand institutional fundraising using the Strategic Plan as a tool for resource development, identifying prospects whose priorities align with multi-year project theme and deepening relationships with potential civic partners.
- Explore partnership opportunities through the lens of greater financial security.



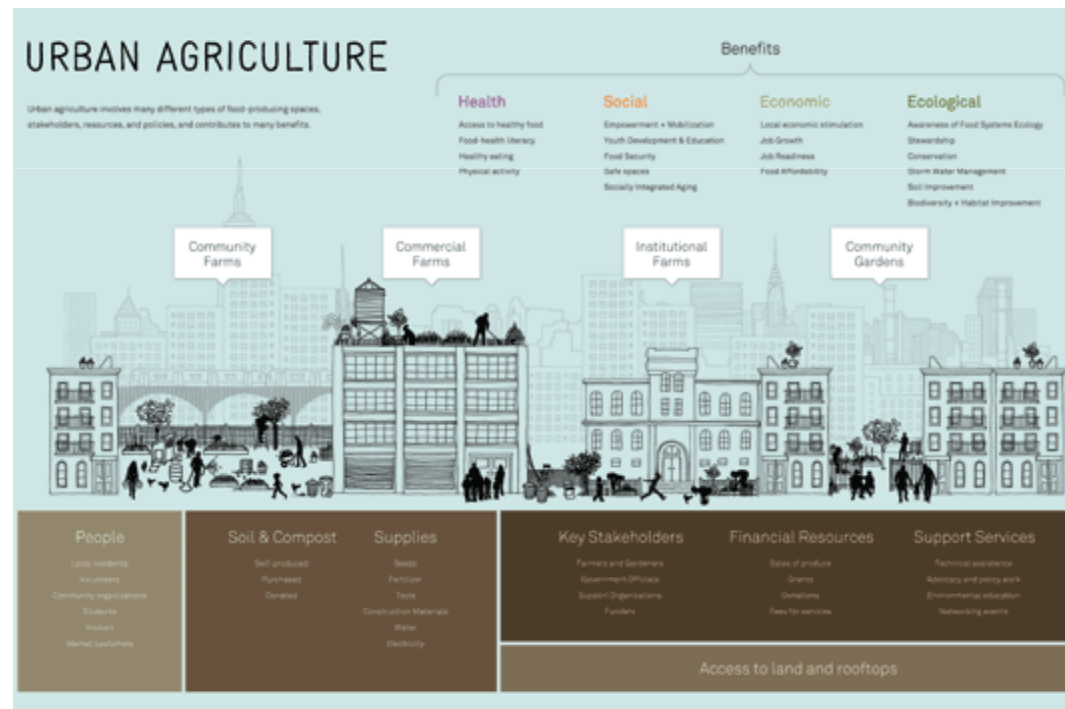
Measurable Impact

- Develop universal project framework, metrics/performance indicators, evaluation tools and a process that allow the Design Trust, its Fellows and its partners to measure program performance and impact.
- Establish clear, impact-oriented goals for each project that help DTPS measure and prove project success.
- Introduce new approach to project selection and a complementary promotion strategy to market a directed RFP for “primary” projects and an open call for smaller “community” projects.
- Explore institutional and organizational partnerships that potentially expand Design Trust impact.



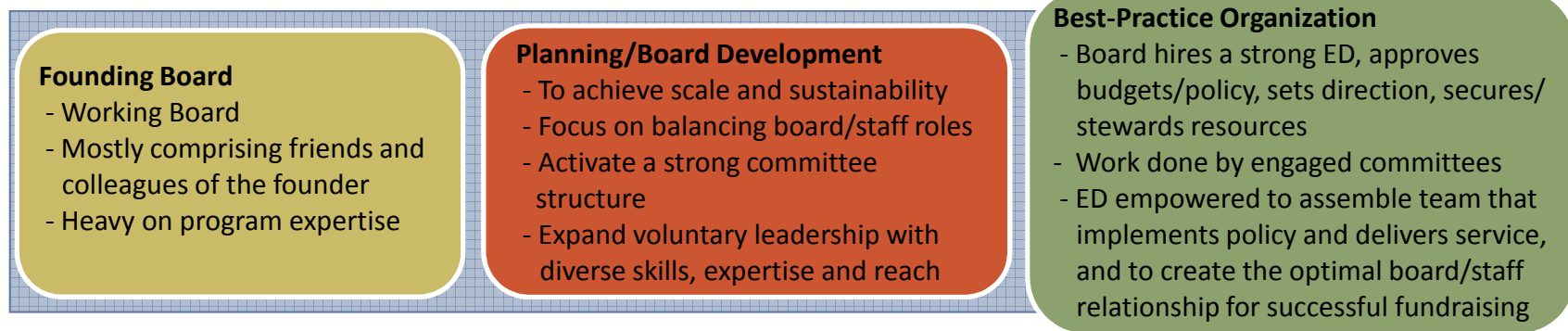
Increased Visibility & Thought Leadership

- Design a locally-focused strategy that educates a broad range of constituencies about specific accomplishments and our long term impact on New York City and also leverages Fellows and project partners as ambassadors to increase visibility.
- Develop and implement a strategy to increase the organization’s profile nationally through speaking engagements, promotional opportunities featuring Fellows and a conference or symposium that is tied to the 20th Anniversary.
- Build Board and staff with necessary marketing and communications expertise to raise awareness of Design Trust’s work.



Organizational Effectiveness

- Focus the Board on best practices in governance including empowering the Executive Director, supporting and overseeing Strategic Plan implementation, attracting resources and generating connections.
- Launch a Board Development initiative to optimize the role of the Board in advancing the plan and securing the resources needed to underwrite the vision.
- Form a 20th Anniversary Campaign Committee with responsibility for campaign design and execution.
- Reallocate staff responsibilities and revisit organizational structure to support enhanced external relations efforts (marketing, communications, fundraising, strategic partnership development).



It's vastly easier to attract and retain solid Trustees and a highly qualified staff with balanced Board/staff roles

Part IV: Implementation

Implementation Process

- The Deputy Director is responsible for maintaining and updating the Strategic Plan spreadsheet (see example below), initiating mid-year progress reviews, and integrating amendments or adjustments.
- All staff and the Board will use the Strategic Plan spreadsheet as a working document to develop annual tasks and to track progress.

		Timeframe		Estimated Cost	Potential Sources	Lead/Responsible		Metric	Expected Outcomes
		Start	End			Staff	Board		
GOAL #1: CLARIFY MISSION AND IDENTITY									
Strategy A Identify core concepts that unite DTPS projects as national models for best practices in public space planning.									
<i>Tactic #1</i>	Complete project retrospective over DTPS' 17-year history to (1) identify recurring topical themes, (2) organize projects by product line/deliverable and (3) identify examples of ongoing DTPS engagement/advisory/TA following project completion	9/1/2012	9/30/2012	\$0	n/a	Dep Dir	n/a	DTPS can articulate the plumb lines that connect projects topically and in terms of product/deliverable	
<i>Tactic #2</i>	Present to Board		10/10/2012	\$0	n/a	Dep Dir	Full		
Strategy B Revisit mission statement and core values to ensure they reflect vision and organizational priorities.									
<i>Tactic #1</i>	Assign a team with up to 2 members of the staff and up to 3 members of the Board to review mission/re-write if necessary		Underway	\$0	n/a	C&DA	Ad hoc sub-com	DTPS has a simple and unifying statement that articulates who we are and what sets us apart from others in the field	DTPS celebrates enhanced brand awareness and recognition as a national leader in the realm of public space from the funding community, among the broader NYC design community and among those concerned with improving quality of life in our city
<i>Tactic #2</i>	Present to Board		10/10/2012	\$0	n/a	TWG	Full		
Strategy C Promote!									
<i>Tactic #1</i>	Develop key message points that clearly articulate purpose and value proposition, suitable for presentation	10/15/2012	12/31/2012	\$0	n/a	Dep Dir	n/a	Board and staff are able to serve as fundraisers, friendraisers and advocates, all delivering a unified and consistent message	
<i>Tactic #2</i>	Facilitate training session/town hall with board and staff to ensure that message is universally understood		January Board Meeting	\$0	n/a	Dep Dir	Full		