

# CASE STUDY

## 100 YEARS YOUNG



### A Case Study in Digging Deep and Taking the Long View

#### The Strategic Dilemma:

A significant cultural institution prepared for its centennial celebration with great pride and a dose of desperation. As their 98th year began, the leadership surveyed the long-standing mission and current operational reality with profound concern. They had served the mission well over its long history, continually evolving to fill the urgent needs of their community. Yet, now it was struggling

to deliver on today's needs on a campus built for bygone days.

*How could they prepare for a celebration when so much of what they were today needed significant investments?*

As the board and staff leadership looked ahead, they acknowledged a new compelling vision of the future was needed BEFORE they could begin to plan a celebration of a storied past.

#### The Engagement and Our Approach:

Focused Momentum<sup>®</sup>(FM) was hired to lead a long-range strategic planning project that would lay the foundation for the next evolution of this extraordinary organization.

Over a 5-month strategic planning engagement (a Strategic Summit<sup>®</sup>), the FM team assisted the leadership team in: crafting a new vision, outlining the core elements of a new campus for a fundraising capital campaign, defining guidance on how to engage and enroll the community in the centennial celebration, as well as creating a plan to incorporate program priorities from the international governing organization.

Just one of these project goals would be a significant outcome for a strategic planning project, but the FM team was charged with addressing all four within less than a five-month timeframe was a considerable challenge. The FM team would rely on ALL of its skills and experience to bring this engagement to a successful conclusion.

A firm grasp of the facts and the flexibility of our creative process made the difference in leading this strategy development effort. FM skillfully prepared a strategic assessment that revealed what was not working with current operations and what new priorities must be addressed for future success. These facts also strengthened the

leadership team's resolve for tough decisions. FM also fully utilized its group strategy development tools to spark new thinking when the team was struggling. Such as when momentum stalled drafting the new direction, FM created a word association game that revealed the deeper meaning behind their discussions and broke open deep shared emotions about the future.

FM leveraged graphic recording techniques to create visual metaphors that illustrated how the elements of the mission could be leveraged to build-up to the ultimate vision. Building on participant's personal vision statements, the FM team created, in real-time, a comprehensive and compelling vision for their future.

The admiration for the institution, its mission, and exceptional standing in their community compelled the highest excellence from the efforts of staff and volunteer leadership. They were fearless in their examination of the status quo and demonstrated bravery to make hard decisions about cutting legacy programs to make room for the future. Their ability to embrace the complexity of the unknown and stay true to their vision was inspiring. This project was indeed one of our most meaningful planning projects for the FM team.

#### Results:

Today, you walk through the campus and buildings drawn by the FM graphic recorder during our strategy sessions. The centennial celebration engaged greater numbers of their community in their new institutional vision contributing to their success with their fundraising campaign. Today they are not only viewed as a leader in

their local community but throughout their state.

FM has been fortunate to be asked back repeatedly over the years to continue the strategy development process. The core of that long-range vision created with those amazing people in 2004.