

CASE STUDY

PLANNING MUST GO ON



A Case for Examining Critical Decisions in the Midst of a Global Pandemic

The Strategic Dilemma:

Over the last few years, this innovative and highly revered educational non-profit expanded beyond its funding resources and reached an unsustainable point. So, after a tumultuous year, which resulted in the removal of their Executive Director (ED) and a 50% cut in their programs, the Board of Directors set a goal to establish their relationship with the newly hired ED with a collaborative update to their Strategic Plan.

The Engagement and Our Approach:

In the winter of 2019, the leadership team selected Focused Momentum[®] (FM) to lead this critical planning effort, and the first strategy session was scheduled for April 2020. The global pandemic forced a complete shutdown of normal operations. Just as the organization was establishing new remote delivery of programs, the first phase in the strategic planning project was scheduled to begin.

A quick call in late March produced a renewed commitment to the need for the planning discussions as well as the timetable to complete these discussions. A challenge was given to the FM team to meet all project commitments within the restraints of the health orders.

The engagement process was immediately modified to deliver the same results with 100% remote engagement of stakeholders. The most significant changes were to the timing and length of the now virtual planning meetings and the preparations needed to ensure the virtual meetings time would focus on the right discussions

Results:

All strategic plan deadlines were met, and participation in the virtual planning meetings exceeded typical board meetings. The organization's leadership felt a greater sense of clarity on its near term focus and under what conditions it would entertain expansion. The new ED gained a deeper level of confidence in her leadership

Although unified in their decisions to change leadership and right-size their organization's operating budget, there were many open questions as the organization look towards its next fiscal year. One unresolved question was: were they working to rebuild their program offering back to its former level, but with healthier funding criteria, or was the organization's mission fundamentally changed based on the new realities of the fund environment?

with the highest level of participation of diverse stakeholders.

- The full-day meetings were split into two four-hour sessions to sustain deep engagement when conducting strategy discussions virtually.
- Working closely with the new ED and Board President, the FM team clarified the core of the organization's mission and drafted possible future scenarios that would be used during strategy sessions to explore how to deliver on the heart of their mission as funding was secured. This approach meant that Cecilia Lynch, FM's chief strategist, shaped the strategy development discussions before the group planning meetings to a greater degree than would be required for a pre-COVID strategy session.
- The FM team also worked quickly to bring the graphic facilitation element into the virtual planning format so that participants would benefit from the boost in their strategic thinking capabilities that this real-time artistry inspires.

charter as she worked to make rapid progress on the highest priorities.

The Focused Momentum team modified its strategic planning process to deliver the same level of strategic thinking insights and group engagement within the virtual planning meeting environment.