



## BACKGROUND

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Over recent years, this innovative and highly revered educational non-profit expanded beyond its funding resources and reached an unsustainable point.

# PLANNING MUST GO ON

A Case for Long-Range  
Planning in the Midst of  
High Change

## THE STRATEGIC DILEMMA

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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.

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

# A Case for Long-range Planning in the Midst of High Change

## THE ENGAGEMENT AND OUR APPROACH

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

A quick call in late March produced a renewed commitment to the need to stick to the planning timetable. This challenge of doing so within the restraints of the pandemic health orders was given to the FM team. The engagement process was immediately modified to deliver the same results with 100% remote engagement of 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 Executive Director (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.

## THE RESULT

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 charter and was able to make rapid progress on the highest priorities with the clarity the strategic plan provided.

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