

GULF COAST COMMUNITY FOUNDATION

COVID Strategic Planning Toolkit *Adapting Your Strategic Plan in Uncertain Times* - Webinar Supplement Whitney Crettol, Senior Strategist & Board Governance Consultant

Nonprofit leaders were thrust into an unparalleled crisis this spring with the onset of the coronavirus pandemic. In an all-hands-on deck response, attention understandably shifted to the present. Remote work was set up, masks were purchased, and you mastered zoom; but this disruption is going to be with us for a while, so what's next? Now is not the time to stop thinking strategically or to abandon your strategic plan – in fact, it can be one of the most powerful tools to guide your organization through uncertain times. Given the magnitude of what has occurred however, your strategic plan may need some adjustments.

This toolkit contains exercises designed for adapting a strategic plan that was created pre-pandemic. It addresses two current challenges:

1. The need to check in and possibly redefine priorities, given that the environment we're working in has undergone massive change.
2. Ensuring your strategy is operationalized and includes processes for active implementation that will make it a nimble, living plan.

Taking these steps can help your organization transition from reactive mode to your next strategic moves, allowing you to go forward with more adaptive capacity and positioned for recovery. So, let's get started!

Getting Ready: Quick Scan

The purpose of the Quick Scan is to gather information about what has changed in your organization's internal and external environments since the last planning effort. This step lays the foundation for subsequent leadership conversations.

Stakeholder Input

In addition to providing needed first-hand perspective to the planning process, reaching out to stakeholders for their input has the additional benefit of strengthening relationships. Under the current circumstances, surveys are probably the most feasible and expedient way to collect this stakeholder input. **The most valuable voices to hear from in informing your strategic thinking are those of the constituency you serve.** You may also want to solicit input from staff or volunteers, especially those who work with constituents on the front line. In addition, a quick survey of board members regarding the mission statement will determine whether or not you should conduct Exercise #1.

In the spirit of re-invention, there are some key strategic questions nonprofits should broach in determining priorities and direction in the COVID disrupted environment. Consider the following recommendations:

Those We Serve	Staff	Board	Recommended Areas of Inquiry
X	X		What changes have occurred or are anticipated in our core constituency and their needs?
X	X		What temporary new activities or delivery methods that we have implemented should we consider keeping?
X	X		What pre-existing activities are of declining relevance in the new reality?
X	X		Who else is addressing needs of our constituents and how might we work together to increase impact?
		X	Mission: Clear & understandable? Relevant to current community needs? Level of support for the statement as currently worded (1-5 scale)?

Internal & External Data

You might also want to pull together key internal data on your organization's activities such as service utilization numbers, participant outcomes, and revenue. Relevant external data might include community-level indicators or regional/state/national trends reported recently in your mission field.

Whatever information is selected, it should be compiled in a user-friendly format. For example, narrative responses can be organized by themes, and numeric data is best presented dashboard-style or by using graphs and charts. Share the Quick Scan results with Planning Team members to read prior to embarking on the exercises.

The exercises that follow can be conducted virtually or in-person, segmented in 45-90 minute sessions or strung together into a longer retreat format. Your Planning Team should include the board and Executive; some organizations may also choose to include additional stakeholder representatives. For organizations with many employees, the action planning exercise could be undertaken solely by staff.

Exercise #1: Mission Clarity (45-60 Minutes)

Unless your board just adopted an updated mission statement, it is a good idea to test the current level of clarity and support. If board responses to the mission-support question above average less than a “B” (or 4 on a 5-point scale), it’s probably time for revision.

Planning Team Session Steps:

- Post the current mission statement. Identify whether it contains “How” language and strike it (usually anything following the words “by” or “through”). The mission should leave open the possibility of different methods for accomplishing it. COVID has been a jolting reminder that how you carry out your work may change!
- Determine if the remaining language is a compelling statement that has high support from the group. If not, proceed to the next step.
- Conduct a group brainstorm to generate words or phrases in response to each of the following (record responses on a flipchart or videoconference screen sharing tool):
 - **Who** are the core constituents we aim to serve?
 - **What needs** of our core constituents do we address?
 - **Why** do we do this work - what difference are we trying to make in the larger community?
- Identify the descriptors in each category for which there is greatest consensus.
- Ask for 2-3 volunteers with creative writing skills to act as a wordsmith team and provide a timeline for their work.

Revision Process:

- The wordsmith team develops a mission statement draft building from the identified consensus concepts.
- Sends the draft to all Planning Team members and solicits feedback.
- Repeats as needed until the draft has a high level of support.

Exercise #2: Establish Current Priorities (90 Minutes)

Terminology varies, but all strategic plans should describe the organization's top priorities (or goals) based on an analysis of community need. This exercise is intended to re-evaluate priorities in light of the dramatic changes that have taken place. The result may be to affirm your previously identified priorities, replace some and retain some, or to establish a completely new set.

Planning Team Session Steps:

- Sequentially discuss each question as well as the data portion from your Quick Scan, asking participants to identify what stood out as **key points** (record responses on a flipchart or videoconference screen sharing tool).
- Post and review the current priorities/goals from your existing strategic plan.
- Given the key points discussion and previously identified priorities, ask each participant to answer the question: *What are the top priorities we should focus on during the next 12 months?*
- A helpful technique for displaying responses is to post each on a large sticky note or virtually using NoteApp as shown in the webinar. The notes can be moved around on the wall or virtually and put into lists by theme. Group consensus is easy to see by the length of the different lists.
- Establish the top 3 priorities, by voting if necessary.
- Priorities can be drafted or updated as formal goal statements consistent with the method used in your existing plan. This is another good task to forward to a wordsmith team.

Exercise #3: Choosing High Impact Strategies (90 Minutes)

Strategies are the major methods used to carry out your priority goals, for example programs, services, initiatives, or collaborative ventures. Keep in mind that while strategic planning involves making choices about what your organization will do, it is equally important to determine what it will **not** do. Especially in times of great change, a previously effective strategy may be experiencing a decline in impact. In an environment of limited resources, organizations can benefit from an openness to “organized abandonment” – the conscious evaluation and letting go of activities that are losing relevance. By doing so, resources are freed up to support new strategies that can better meet current community needs.

Planning Team Session Steps:

- Develop a Strategy Screen – This is a set of criteria that can be used to evaluate the relative strength of different strategy choices.
 - Start by posting two universal criteria: *Supports our Mission*, and *Builds on our Strengths*.
 - Generate ideas for additional criteria unique to your organization (e.g. reaches a large number of constituents, financially self-sustaining, is a best practice, can be delivered in a pandemic-compatible way, etc.)
 - Select a total of no more than 5-6 items around which there is consensus to constitute the strategy screen.
- Address one priority goal at a time:
 - With the strategy screen in mind, give participants time to individually identify potential strategies for achieving the goal. If the goal is an existing one and strategies were outlined in the prior plan, these should be reviewed as part of the thought process. Strategies may include current activities, current activities with modifications, or new activities.
 - Share, record, and sort all of the strategy ideas into categories using the sticky note technique to reveal levels of consensus.
 - Repeat for each additional goal; save all of the results for use in action planning.
- Come to a decision about what time horizon should be utilized for the action plan (3, 6, or 12 months).

Exercise #4: A Near-Term Action Plan (90 Minutes Per Goal)

An action plan operationalizes your strategy, creates a clear path forward, and is the key to keeping a strategic plan living and nimble. Action planning is a detailed task best completed by a small group (3-6 people), preferably those who will be involved in implementation. This exercise can be undertaken by a single group, or by separate groups tailored to the content area of each priority goal. If separate groups are utilized, at least one person (usually the Executive) should be a consistent member across all of them.

Action Planning Session Steps:

- Address one priority goal at a time:
 - Review the list of strategies generated in the previous exercise. If the number of strategies is large, or there is not an obvious order of priority among them, participants can utilize the strategy screen to rank them. Ranking may be done in a

general way, or more quantitatively by using a point system to designate how well a strategy meets each criterion (e.g. High = 3, Medium = 2, Low = 1).

- Starting with the highest ranked strategy, identify specific tasks that should be carried out during the given timeframe (3, 6, or 12 months).
- For each task, identify one individual who is responsible for ensuring the work is completed, either by shepherding it or doing it directly, and a date by which the task should be completed (see example).
- Repeat for additional strategies.

GOAL #1: Increase supports to stabilize resident households and prevent eviction.

Strategy/Tasks	Person Responsible	Completion By
Strategy A – Case management pilot project.		
1. Approach ABC about a contract position.	Barb Smith	July 10, 2020
2. Draft contract to management team for input.	Barb Smith	July 31, 2020

Tips for Nimble Implementation

- Assemble your results into a revised plan document. If your organization had previously established values and vision statements, be sure to include them as well.
- Present the plan to the board for adoption.
- Share the plan with all staff and communicate highlights to the organization's constituents, partners, funders, and the community.
- Establish a regular schedule to convene the management team (e.g. weekly or bi-weekly) and use the action plan as a central point to:
 - Review progress,
 - Identify barriers and come up with solutions as a team,
 - Make mid-course corrections, including adjusting timelines & inserting additional tasks as the need emerges.
- Provide a progress update to the board on a regular schedule (e.g. monthly).
- Post the mission, priorities, and strategy screen where they can be seen during board meetings (on the wall, on the agenda, virtually) and utilize them to evaluate choices in leadership decision-making.
- Schedule sessions for action plan development 4-6 weeks prior to expiration of the current action plan. Present draft action plans to the board for approval.
- Maintain a mindset of continuous learning and improvement.
- Be intentional about sharing and celebrating implementation successes!

Please contact us at l3@gulfcoastcf.org if you have questions about this toolkit, need help applying it to your unique situation, or wish to request external facilitation for the process to adapt your strategic plan.