

Focus: Tactical focus

Timeline for Work: 1-2 weeks

Major Goal: Crisis Response Plan: Establish remote working processes and recalibrate services

	SUGGESTED PRIORITIES & QUESTIONS	YOUR PRIORITIES & QUESTIONS	YOUR PLAN
PEOPLE	Priorities		
	Questions		
PROGRAMS	Priorities		
	Questions		
FINANCES	Priorities		
	Questions		
FUNDRAISING	Priorities		
	Questions		
MKTG/COMM	Priorities		
	Questions		
SYSTEMS	Priorities		
	Questions		

Focus: Continues to be mostly tactical

Timeline for Work: Weekly or bi-weekly

Major Goal: **Multiple Response Plans** that maintain financial health and morale

	SUGGESTED PRIORITIES & QUESTIONS	YOUR PRIORITIES & QUESTIONS	YOUR PLAN
PEOPLE	Priorities	Focus on team morale and work/life balance Routinize remote work Response team updates plans as needed	
	Questions	What cross training do we need? Do staff need new training/professional development? Do we need layoffs, furloughs, staff re-assignments or additional staff/volunteers?	
PROGRAMS	Priorities	Adjust programs for new delivery models and changing needs of clients or ability to deliver	
	Questions	How are our constituents experiencing new program delivery? What is working? What needs adjustment?	
FINANCES	Priorities	Update budget and cash flow analysis Keep up with financial reporting Continue to identify cost savings measures	
	Questions	Do we need to trim major costs? Do we need to negotiate payments with our landlord and vendors?	
FUNDRAISING	Priorities	Create short-term plan to retain current donors Reach out to major donors personally	
	Questions	Has our case for support changed? Are there new sources of crisis funding?	
MKTG/COMM	Priorities	Continue external and internal communications Develop new messaging strategy for different audiences	
	Questions	How do we involve donors in communications? Do we need to update our messaging? Do we need to update our web site?	
SYSTEMS	Priorities	Identify what is working and what is not to make changes	
	Questions	Is staff clear on new flow of work? Are new systems needed?	

Focus: Strategic focus

Timeline for Work: 30-45 days

Major Goal: 3-6-12 month Dynamic Plan

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| <p>1: Form dynamic planning committee of the board with key staff</p> <p>2: Affirm Mission, Vision, Values</p> | <p>3: Form hypotheses for impact of current situation on the organization over the next 3-6-12 months</p> <p>4: Assess key strengths and weaknesses</p> | <p>5: Define your Dynamic Plan (e.g., new strategic direction with goals)</p> <p>6: Define what success will look like at the end of 3-6-12 months</p> |
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	SUGGESTED PRIORITIES & QUESTIONS	YOUR PRIORITIES & QUESTIONS	YOUR PLAN
PEOPLE			
Priorities	Create staffing goals		
Questions	Do we have the right staff and skills in place to adjust to longer term changes? Will we need to re-deploy staff and/or incorporate new items in the job descriptions?		
PROGRAMS			
Priorities	Create program goals		
Questions	What is our distinctive competency today? Do our constituents need different programs going forward? What services are we able to provide?		
FINANCES			
Priorities	Create financial goals		
Questions	How has our budget changed? What is our biggest budget risk? Are there new sources of earned revenue to tap? If survivability is doubtful, should we consider merging with a stronger organization?		
FUNDRAISING			
Priorities	Create fundraising goals		
Questions	How have our funding sources been impacted: major donors, broad base, corporations, foundations, government? What will be the most effective strategies going forward? How much do we think we can raise in the next 3-6-12 months?		
MKTG/COMM			
Priorities	Create communications goals		
Questions	How will we communicate organizational changes to different constituencies? Which channels will be most effective?		
SYSTEMS			
Priorities	Create system infrastructure goals Establish Business Continuity goals to prepare for future crises		
Questions	Are our systems ready for full onboarding? Are there major processes that need to be changed? How will we prepare for future crises? Is our data secure?		

Focus: Strategy in place, new day-to-day tactical decisions

Timeline for Work: 4-6 months

Major Goal: Implementation of new Dynamic Plan with Outcomes Monitoring

	SUGGESTED PRIORITIES & QUESTIONS	YOUR PRIORITIES & QUESTIONS	YOUR PLAN
PEOPLE	Priorities	Transition staff to new plan Ensure that staff understand roles and responsibilities	
	Questions	How can we ensure safe and orderly return to workplaces? How can we help our people adjust to reality of changed structure and staffing?	
PROGRAMS	Priorities	Define program changes and orderly implementation of each program	
	Questions	How can we best roll out new programs or phase out old ones?	
FINANCES	Priorities	Implement and monitor new financial plans	
	Questions	Did we accurately project? If not, what adjustments are needed? Are we appropriately executing defined structural changes?	
FUNDRAISING	Priorities	Redefine our case for support Implement new fundraising plan	
	Questions	How can we get in front of donors' "fear factor"? How can we keep our board engaged? When it is time to launch a capital campaign?	
MKTG/COMM	Priorities	Communicate roll-out plan clearly to internal audiences Implement new communications plan for external audiences	
	Questions	How are our constituents responding to our communications?	
SYSTEMS	Priorities	Establish detailed workplans for infrastructure changes Create Business Continuity plan	
	Questions	Are our new systems working? Have we adequately addressed data security? Are we prepared for another crisis?	