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Organizational Planning During the COVID-19 Crisis

Thursday, April 9, 2020, 1:00 – 2:00 p.m. ET

Description:

Organizational planning is critical to both stability and growth. But the current situation calls much of this work into question. How could/should you approach an existing strategic plan or processes that are already in motion? How can you plan in and for this moment when the framework is shifting on a daily basis? What are the opportunities presented by these unique circumstances? What can you do right now? Join strategic planners from [Julep Consulting](#) and [Community Resource Exchange](#) to learn more, discuss the issues, and get answers to additional planning questions you are grappling with.

Moderator/Panelists:

Jeanie Kirk, Julep Consulting (Moderator)

Jeanie is a grant writer and project manager working to support the environment, education, human rights, justice reform, racial reconciliation, data literacy, and social justice. Most recently, Jeanie served as the grants officer for the [Prison University Project](#).

Rick Little, Julep Consulting

Rick is a specialist in organizational growth and management, who advises for-profit and non-profit companies in the areas of organizational and staff structure, finance, strategic planning, human resources, risk mitigation, and communications, with a particular focus on organizations looking to scale.

Randall Quan, Community Resource Exchange

Randall is the Senior Consultant at [Community Resource Exchange](#) and provides management consulting, training and coaching to nonprofit and public sector organizations and leaders. Randall focuses on strategy and strategic planning, governance, leadership development, and financial management.

Jasmine Nielsen, Julep Consulting

Drawing on two decades of experience leading nonprofit organizations, Jasmine provides strategic advisement, facilitation, coaching, and training to boards, executive directors, and senior

management. Her holistic approach to organizational development encompasses strategic planning, governance, fundraising, and communications.

What we mean by planning:

1. Organizational planning - strategic plans and shorter range
2. Program delivery
3. Growth or contraction
4. Need to know what we're doing tomorrow and what we're doing in the future

Jasmine's Best Practice Recommendation(s):

Often our instinct is to leap right in, but it's as much about the process as the **product**

Be intentional and, as much as possible, try to involve others. We think better together.

People need to have buy-in if they are going to implement and constantly pivoting or delivering something slapdash will wear staff down.

We're all over responding in various ways right now, important to have a check on your own reactions.

Folks are feeling really insecure, need to touch base and feel like they have some control.

Randall's Best Practice Recommendation(s):

To give your organizations flexibility and options when you're planning during a crisis, focus on your Theory of Change (e.g., core purpose, target population, and key outcomes you're trying to achieve with the target population).

Too often, we focus on what we do (e.g., programs and activities we run) rather than what change or success we want to achieve. Focusing on outcomes over activities helps us stay focused and aligned and open to new programs, activities, or ways of operating and delivering services.

Rick's Best Practice Recommendation(s):

In times of crisis, we are necessarily forced to change the way we operate. Systems, methods, projects, roles must all be reevaluated and revised to adapt to the new conditions -- look at how we're all having to devise new solutions to problems in every part of our lives, both professional and personal.

Which means there's a huge amount of creativity and innovation being generated by this crisis. And it's likely that you're coming up with a lot of new, interesting, effective, and efficient solutions, some of which are short-term solutions necessary to get you through this storm, but many of the solutions you're developing may also serve you in the long run.

So, as you're being forced to adapt and innovate, think of it as an opportunity for your organization to evolve, shedding systems and methods that no longer serve you, and developing new solutions that will allow you to operate more efficiently and effectively even after this crisis passes.

Where should a program being when thinking about doing planning during a crisis?

- o Ask what your organization has to offer; what is unique about the work you do? And, how might that “unique feature” be applicable/helpful in this moment.
- o Focus on the immediate needs; focus on right now.
- o Ask what you need to do to do to “protect” your participants, organization, program partners, staff.
- o Don't focus too much on future planning until you have a really good understanding of the future (even the summer).
- o Take a good look at your organization's mission, values, vision (don't start this process if you have not) and look at the current landscape and think about how you engage/enact this mission/vision right now.

How/when do you know when to “step back” and plan, instead of keep moving forward

- o Now is not the time to embark on a strategic planning process (the ground is shifting too quickly).
- o Spend the next few weeks/months dealing with what is right in front of you.

What should we do if our program is just starting?

- o This could be the time to engage planning (so it can be put in motion later).
- o Have your projects lined up that you want to create in the future (in particular if you need funding).
- o This is not the time to develop new funder relationships, but to definitely to have thoughts about who might be your possible new funders

What types of organizational work can we do right now?

- o Lots of professional development resources are free right now

- o Wellness (for staff and yourself) needs to be part of professional development (look into it now)
- o What are the projects/things that have been on the “back burner”

Who do we do the work organizational planning with (who do we invite to the planning process)

- o Form a task force to help support your efforts
- o Invite board and staff members (and maybe volunteers)
- o If you have access to your program participants ask them to join your efforts
- o Delegate responsibilities
- o This might be the moment to start to develop new partnerships (need to resist the urge to contract and instead think about how you can expand/reach out)

Last Piece of Advice/Closing Thoughts

- o Step back, take a breath, really focus and remain measured. (Jasmine)
- o Remain adaptable and innovate and put your focus on adapting to the current situation; there will be solutions that come out of this that you will want to continue implementing. (Rick)
- o Find the opportunity and innovation that will connect to your core work; ask: what are the ways we can deliver programming in new ways? (Randall)