

Conducting Strategic Planning During COVID-19



Presented by
Sarah Glatt
Paper Crane Associates

Part of the Recover, Rebuild, Renew Series





Our goals for today

- Understand how planning can guide decision-making in times of change and uncertainty
- Understand why success and failure of a strategic plan is based, not on what is decided in the strategic planning process, but on how the process is set up
- Explore how strategic planning during the covid pandemic and the economic recession is both different and better than what we did prior to these dual crises
- Hear from two peers in the field about their experiences with strategic planning in covid



COVID-19 has impacted charities across the country as they try to pursue their missions amidst dual health and economic crises.



More than a year after the start of the pandemic, the COVID-19 crisis continues to have a significant impacts



But organizations responded differently

Some organizations pivoted, changed, and responded...

while others struggled to find their path forward in a rapidly changing world.



How did they differ?

For some, their plans were the cornerstone of every decision, ensuring that decision-making was centered around their priorities.

For others organizations, their plans felt irrelevant and decision-making was driven by other factors



Having a strategic plan is an asset in any crisis. When things are changed drastically or quickly, having a strategic plan in place can provide clarity in decision making.



What a strategic plan is and how and why to build one



A strategic plan is:

- A clearly articulated and compelling vision that serves as a unifying and inspirational rallying cry.
- A road map to guide achievement of the goals, monitor progress, and make midcourse corrections.
- An understanding of the resources required to achieve those goals.



On bumpy roads, a strategic plan helps you:

- Stay focused on the most important things
- Know whether a decision supports or impedes progress towards your mission, vision, and goals
- Understand how your business model and capitalization structure can underwrite and weather changes



Organizations which thrived in times of uncertainty relied on their strategic plans to guide their every step



**Mini case study:
Fitchburg Art Museum
with Rebecca Wright**



Regardless of your path in 2020, you now have the ability to choose what path you take in 2021 and beyond



Contrary to popular opinion, the success of a strategic planning process is defined by how the process is set up, not by its outcomes



The stages of strategic planning





**The four critical questions to answer
when designing a planning process**



1) What questions does this planning process need to answer?

- About our takeaways from 2020?
- About what matters to us and how we capture that in our mission, vision, core values, and theory of change
- About who we serve, what we offer, and what impact we want to have
- About how we operate and fund our work?



2) Who needs to be involved and what should their role be?

- Whose input do we need?
- Who needs to buy-in to the process and to emerging conversations and directions?
- Who will make decisions?



3) What information do we have and need?

- What data might be available?
 - Program
 - Donor and membership
 - Financial
- Who could you get more information from? What do you want to learn from them?
How could you get that information?



4) How can this process help us achieve our goals?

- How can our planning process itself deepen our commitment to diversity, equity, inclusion and justice, not just in the outcomes of the process, but in how we carry out the process?



**Create a process that reflects
current covid guidelines & lessons
learned**



Planning in covid

- How does planning during covid and the recession impact how and when we plan?
- How does planning during covid affect how we engage stakeholders?
- How can these changes further our mission, vision, and core values and our diversity, equity, inclusion, and justice commitments?



Planning in covid is actually better (really!)

- Engage more stakeholders who might not be local or able/willing to commit so much time
- Collaborative software allows for more easy in-meeting work time and for easier after-meeting processing
- Increases accessibility options for participants
- Easier to schedule than in-person meetings
- With everything upended, many organizations are thinking more creatively to build back better



**Scenario planning helps to explore
big forks in the road**



Scenario planning:

- Explores the potential implications of two or more paths
- Looks at the implications on mission, vision, audience, impact, staffing, business model etc of each path
- Can be used to look at changes within your control (like opening something new, growing something) or outside your control (like openings/closings related to covid)

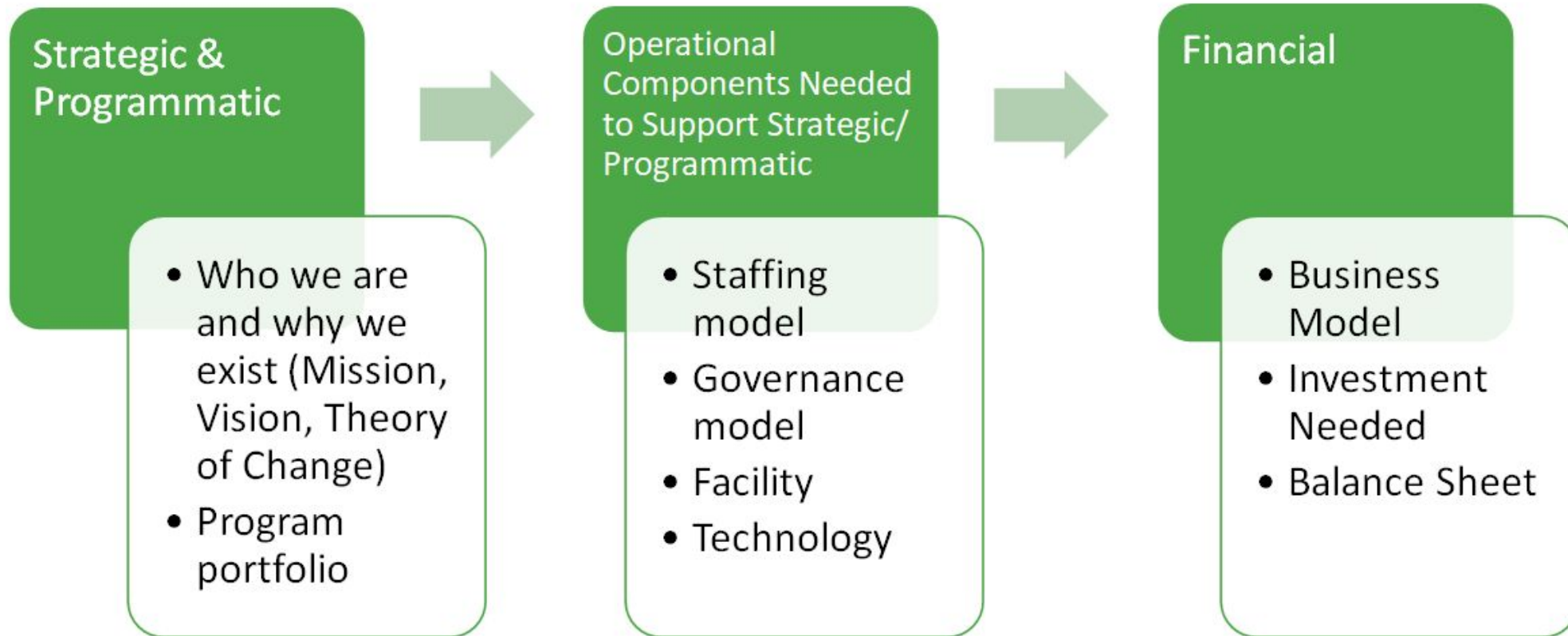


Use scenario planning to explore

- Changes to your programs
- Changes to your business model
- Covid and timing of opening/closings/reopenings
- Length and depth of recession
- Timing of when in-person events and fundraisers will be possible and highly attended



The strategic planning order





The Old North Church
& HISTORIC SITE

**Mini case study:
Old North Church Foundation
with Nikki Stewart**



Your strategic plan will guide 2021 and beyond

- Stay focused on the most important things
- Know whether a decision supports or impedes progress towards your mission, vision, and goals
- Understand how your business model and capitalization structure can underwrite and weather changes



Your strategic plan will drive decision-making

- Does this contribute to what the overall organization aims to accomplish?
- Can we do it exceptionally well?
- Is this something that we can do in keeping with our core values?
- How big is the scale and impact of this project?
- Do we have the resources available to do it?



Your strategic plan will guide your work

- Drive progress towards your mission, vision, and goals
- Do the most important things each day, week, month
- Align your resources with your priorities



Thank you and time for questions!

Paper Crane Associates

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