Leading Through Crisis:

A Practical Guide to Action

A Combined Contribution of

21st Century Leadership Skills and

Providence World

Written by:
Dr. Jerry Burch, Dr. Jana Burch
(21st Century Leadership Skills)
Dave Rudko
(Providence World)

21st Century Leadership Skills

PROVIDENCE

Leading Through Crisis

Copyright © 2020 by Gerald and Jana Burch

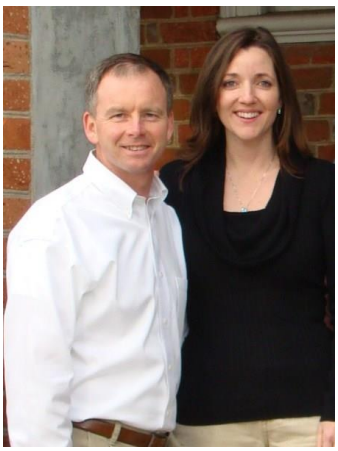
21st Century Leadership Skills, LLC

All rights reserved

ISBN: 978-1-7348709-0-9

Printed in the United States of America

About the Authors



Dr. Gerald (Jerry) Burch is an Assistant Professor in Management at Texas A&M University in Commerce. He has his PhD in Organizational Behavior from the Virginia Commonwealth University, a Masters of Science in Operations Research from the Naval Postgraduate School in Monterey, CA, and an undergraduate degree from the University of Texas in Austin. He has over 30 years experience leading organizations in the private, government, and academic sectors.

Dr. Jana Burch has her EdD in Educational Leadership Policy Studies from Tarleton University, a Masters of Education in Educational Psychology with emphasis in Gifted Education and Talent Development from the University of Connecticut, and an undergraduate in Education from Piedmont College. She has over 20 years of experience developing curriculum and leading educational programs and teaching curriculum design for the University of Connecticut and the University of Virginia.

Drs. Jerry and Jana Burch have presented their research at numerous conferences and have over 30 management and education articles published in peer-reviewed journals.

Dave Rudko is the Chief Operating Officer for Providence World. He has his Masters of Science in Operations Research from the Naval Postgraduate School, and a Bachelors of Science in Political Science from the United States Naval Academy. He has over 30 years experience building and leading cross-functional teams in demanding and diverse operating environments across the public, private, and social sectors. Utilizing his vast experience and certifications in Coaching, Training, and Human Behavior Consulting, Dave assists individuals and organizations propel growth through the implementation of proven leadership and organizational development principles that drive the disciplined thoughts and actions necessary to achieve excellence.

Table of Contents

Introduction

Embracing your role as a leader during a crisis

The world today seems very different than it did a few months ago. We are in the middle of a global crisis with the spread of the COVID-19 disease. Every day we are bombarded with news about the increase in cases, and the rise in number of those who have died. World leaders are trying to slow the spread of the disease. However, the uncertainty of how this virus will affect our lives, and organizations, has caused many to panic. These are the times when people are looking to leaders to find a way forward.

A crisis is defined as a time of intense difficulty, trouble, or danger. It normally is a result of a sequence of unwelcome events that lead to a time of uncertainty. It is this level of uncertainty that creates panic and requires those in leadership positions to embrace their roles and lead their organizations through the crisis. The first step in leading well is to embrace our role as a leader. In the space below, please commit to leading by completing the following statement:

"I will embrace my role as a leader of _____, and will lead them through this crisis." (Fill in the blank with the organization/team you are choosing to lead and write the sentences in the space below.)

_____

_____

_____

_____

Many of you are feeling the stress of the current crisis. It is probably no surprise, your followers are feeling the same level of stress.

What we often forget is that we have all lived through some pretty incredible crises already in our lives. Every generation has those crises that define them. And with every one we have had in the past, leaders step forward and lead their organizations through the uncertainty surrounding the crisis. The organization becomes stronger and better prepared for the world ahead. This crisis provides an opportunity for us to be those leaders for our organizations and communities.

John Maxwell says a crisis doesn't make a leader, instead it reveals them – it provides opportunities for leaders to best utilize their experiences and talents. However, good leaders, or even great leaders, still struggle because all leaders, in a time of crisis, are subject to:

- Thinking about what could happen, instead of what is happening
- Negative thinking, based on unproven news and information
- Uncertain anxiety, due to change that cannot be controlled

As a leader, you must avoid these thoughts. You must be optimistic and focused on finding solutions that will allow your organization to move through this crisis. You must resist the anxiety associated with the uncertainty ahead.

There are two key principles that will help you during this time:

1. Progress Principle. Research has shown a major predictor of satisfaction at work is whether you feel like you are making progress.
2. 80/20 rule, or the Pareto Principle. The idea is that 80 percent of the problems you encounter, come from 20 percent of your issues. Additionally, 80 percent of your mission impact will come from 20 percent of your services. Identifying and working on the 20 percent that matters most will guide 80 percent of your mission success. You do not have to solve every problem – instead, make progress by solving the biggest problems.

The purpose of this manual is to give you a step-by-step guide to help you identify the problems, develop solutions, and lead your organization through this crisis. We will supplement this manual with teleconferences to help guide your actions and to give you the opportunity to ask questions.

You will notice the steps in this manual are broken down into what we refer to as days (Day 1, Day 2, etc.). This does not necessarily mean they have to be done on sequential days. It is a process, designed to help you make progress over time, based on the time you make available.

We are in this together and we will make it through this crisis, one day at a time.

Dr. Jerry Burch

Dr. Jana Burch

Dave Rudko

Day 1 – Command and Communication Plan

You have embraced your role as a leader of a group of people. Today you will start making progress towards leading your team, through this crisis.

The information for this day is broken down to give you the tasks you need to accomplish today, and then give you background information to help you complete your tasks.

Communication is key to ensuring your organization is prepared to execute the plan your leadership team develops to address the crisis. As the leader, you need to communicate frequently, and intentionally, with the organization, and to spend even more time listening to the organization members. During times of crisis, these communications become increasingly important.

People need information about the crisis and they need to know what to do during the crisis. Your leadership team must have a means of continuous and direct communication, both internal and external to the organization.

Task 1 – Establish a command and communication plan

The objective of this task is to determine how people, inside and outside of the organization, will communicate throughout the crisis. You should start by developing a plan for those inside the organization. Remember the Pareto Principle? 80 percent of your communication problems will come from 20 percent of the issues. Knowing how to communicate, during this time, is part of the 20 percent. You will solve 80 percent of your organization's communication problems, if you develop an effective policy, and then inform others of the policy, on how to best communicate during this crisis.

Step 1 – Determine who is in charge of each of the services (operations, education, counseling, social work, etc.) your organization provides. The objective of this task is to develop a complete list of who is responsible for every service your organization provides.

On the next page is the *Service Responsibility Sheet*. List every service your organization provides on this sheet. You will notice the following services apply to every organization, so they are already listed on your *Service Responsibility Sheet*.

- Overall leadership of the organization
- Paying, or compensating, your staff
- Paying other bills
- Ordering supplies
- Communicating with external stakeholders (donors, etc.)

After listing all of the services, write the responsible person's name next to each of the services.

This *Service Responsibility Sheet* will help identify who each organization member, or volunteer, should contact for each service area throughout the crisis.

Service Responsibility Sheet

Service	Who is responsible?
Overall Leadership of the Organization	_____
Paying (compensating) Staff	_____
Ordering Supplies	_____
Communicating with External Stakeholders	_____
Paying other Bills	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Step 2 – Make an emergency contact information sheet with all of the organization members and volunteers. The objective of this task is to have a means of communicating with every organization member. If your organization has fewer than 25 people, all of the emergency contact information can be on one page. However, if your organization is larger, you should separate your contact information into the service areas you identified in Step 1.

Communication responsibilities should also be distributed. A common rule is that you should not have more than 10 people for each person to share information with. The leader should communicate directly with the leadership team, who communicates with those responsible for services, who communicate with those people performing the services. For example, the leader communicates with the person in charge of education, and the person in charge of education communicates with all teachers. Distribute the entire list to all of the leadership team members. You now have a means of communicating information with all of your organization members and volunteers.

Next, you must inform each organization member and volunteer how they can communicate with those within their service area, and with the person in charge of their area. For example: everyone in education services should have the contact information for each of their coworkers, and the person responsible for education.

Step 3 – Determine how your leadership team will communicate with the organization as a whole. The purpose of this task is to determine how the leadership team will give information to the entire organization, at one time. It is often important to share information with every member of the organization. This means your leadership team must have an effective method of communicating with your organization members, as a group. This may be easy, if your organization is small. However, it must be considered for every organization, regardless of size.

In the space below, write the primary means, and a secondary means, of how your leadership team will communicate with your organization. Next, write the primary means, and a secondary means, of how your organization members can communicate with your leadership team. An example may be that your leadership team will communicate with the organization primarily through email. However, if email fails, the secondary method will be through direct phone calls.

How the leadership team will communicate with the organization.

Primary _____ Secondary _____

How the organization will communicate with the leadership team.

Primary _____ Secondary _____

Organization members need to know what they need to do to move through this crisis. They look to their leaders for direction, which brings us to the first rule of crisis leadership.

Rule 1 - Leaders must be available (both physically and mentally) during a crisis.

You must schedule time to communicate with your organization and let them know your leadership team is developing a plan to address the current crisis. This is the time to be optimistic, realistic, and direct. Organization members need to know their individual roles to best support each other, and you must build their trust so they know the leadership team is acting in the best interest of the organization, and the organization members.

Rule 2 - Leaders must communicate directly with organization members. They must help members to remain calm, support each other, and build trust in the leadership team.

Step 4 – Determine how your leadership team will communicate with the external stakeholders, as a whole. The objective of this task is to identify how information about the organization will be shared with external stakeholders. This means your leadership team must have an effective means of communicating with your external stakeholders, as a group. In the space below, write the primary means, and a secondary means, of how your leadership team will communicate with your external stakeholders. Next, write the primary means, and a secondary means, of how your external stakeholders can communicate with your leadership team.

How the leadership team will communicate with external stakeholders.

Primary _____ Secondary _____

How external stakeholders will communicate with the leadership team.

Primary _____ Secondary _____

Congratulations! You have completed the first task in leading your organization through this crisis. You have developed a successful plan to communicate both internally and externally. Your team is making excellent progress.

Task 2. Communicate with your organization.

The objective of this task is to let your organization members know what the organization is doing to plan for continued operations during the crisis. The leadership team should prepare a message to communicate with the entire organization, and volunteers, the following information:

1. The leadership team is preparing a plan to address the crisis, and assessing how the crisis has affected the organization's ability to meet the mission and vision.
2. Who is in charge of each service area.
3. How they will receive their communication.
4. How they can communicate with those in charge.
5. How important they are to the work your organization provides.
6. Why cooperation and commitment are critical to ensure strong teamwork.
7. When they can expect updates.

Task 3. Communicate with your external stakeholders.

The objective of this task is to let individuals and teams outside your organization know what the organization is doing to best serve children and families throughout the crisis.

Step 1 – Determine your external stakeholders. The purpose of this task is to determine all of the people and organizations you normally work with, or could work with, during this crisis.

List all of the people and organizations you normally work with. This list should include donors, people you buy supplies and equipment from, people you serve, etc. List the contact information (primary and secondary means) for each external stakeholder. Write this information on your *External Stakeholder Contact Information Sheet*, located on the next page.

Step 2 – Determine potential organizations to collaborate with throughout the crisis. The purpose of this step is to identify other organizations you might be able to work with to provide services more efficiently and/or effectively throughout the crisis. These organizations might:

- Provide similar services – communicating with these organizations can help you identify ways they are dealing with the crisis and potential solutions to avoid duplicating efforts.
- Provide services needed to support your customers – communicating with these organizations may help you identify better ways to provide those in need with the services they require.
- Provide services needed to support your organization members or volunteers – communicating with these organizations may help you identify ways to better equip your organization members or volunteers.

Gather the contact information for these organizations and add them to the *External Stakeholder Contact Information Sheet*.

External Stakeholder Contact Information Sheet

External Stakeholder	Primary Contact Information	Secondary Contact Information

Step 3 – The leadership team should prepare a message to communicate with all external stakeholders. The objective of this task is to provide external stakeholders with information about how your organization is dealing with the crisis. Your leadership team should prepare a message with the following information:

1. The leadership team is preparing a plan to address the crisis, and assessing how the crisis has affected the organization's ability to meet the mission and vision.
2. Who is in charge of each service area (as applicable).
3. How they will receive their communication.
4. How they can communicate with those in charge.
5. How important they are to the work of your organization.
6. When they can expect updates.

After you have completed these three tasks, you have learned about Rule 3 of crisis leadership:

> *Rule 3 - Leaders must ensure they communicate regularly and thoughtfully with external stakeholders.*

Once the command and communication plan is communicated to everyone inside the organization and you have established good communications with external stakeholders, efforts must focus on getting a detailed execution plan in place so team members can continue to fulfill the mission.

You have successfully used both the Progress Principle and the Pareto Principle. You have made progress by developing a Command and Communication Plan. This step alone will eliminate 80 percent of the communication issues that would normally interfere with mission success. Congratulations!

The remainder of the information today is designed to help you communicate effectively throughout the crisis. Please do not skip this section, it contains very valuable information that will greatly improve overall communications within your organization and with external stakeholders. We have broken this into two sections.

1. Discusses basic communication styles to improve communications, both internally and externally.
2. Discusses what you can do to keep your external stakeholders aware of how your organization is responding to the current crisis.

Communicating clearly and effectively

There are many communication styles, but we can reduce them to four types based on the personality style of the person sending or receiving the message. Personality styles can be defined by two criteria: (1) whether the person is task-oriented or people-oriented and (2) the pace of the person. When we work through the combinations of the two criteria, we get four different styles:

1. Faster paced, task-oriented – motivated by challenges, choices, and control
2. Faster paced, people-oriented – motivated by recognition, approval, and popularity
3. Slower paced, people-oriented – motivated by security, appreciation, and assurance
4. Slower paced, task-oriented – motivated by quality, excellence, and value.

Take a minute to evaluate the four personality styles listed above and think about which style you believe you are, and which are the styles of your team members. Personality styles significantly influence the way we send messages and the way we receive them.

Those who are task-oriented will tell others which tasks need to be completed and will want to end the communication so they can return to their tasks. This type of communication is very effective when the person sending the message has the same personality style as the one receiving the message. They are speaking the same language.

What happens when our task-oriented person communicates with a people-oriented person? Many of you have experienced this in previous conversations. The task-oriented person is focused on task achievement and the people-oriented person wants to discuss how people feel. Both the sender and receiver can quickly become frustrated. This task versus people situation is a major source of conflict in organizations and a major contributor to miscommunication and the increase of stress. Crisis situations require additional effort to achieve the balance of completing tasks, while considering the feelings and needs of people.

Research shows that 65 percent of the population are people-oriented. This is why it is very important to be focused on the well-being of the organization and the organization members, especially during times of crisis. Leaders who speak primarily about the tasks (task-oriented) are likely to cause 65 percent of their team to believe they do not care about the people in the organization. This is a disaster, in itself. Those leaders who heed our warning to communicate more frequently with their organizations potentially stand to make matters worse, because they may more frequently be delivering the message that tasks are more important than people.

Communications must be delivered considering the feelings of the organization members. Starting each discussion talking about people first, and then tasks, will be most effective for the majority of people. One word of warning. Those of you who are people-oriented must address the tasks that need to be accomplished to ensure successful execution of the plan. There is a balance between people and tasks, both must be included.

The second part of personality style is the pace. A similar conflict will arise between those who are faster paced and those who are slower paced. Those who are slower paced need time to process. They need time to gather data. Crisis situations are very difficult for them, because

they do not like change. On the other hand, the faster paced individuals will feel like the slower paced members of the team are preventing progress. There are benefits to both sides. The leader must balance moving the organization forward while ensuring the decisions being made are based on data and thoughtful consideration. Once again, crisis situations require additional effort to achieve the necessary balance.

Research shows that 60 percent of the population are slower paced. They need time to think and to respond. Communicating quickly to this group of people creates a potential situation of distrust between organization members and among your leadership team. Communicating too fast and requiring short-term deadlines may result in some people feeling as though they are being rushed into change, working with undefined expectations, and/or being required to produce results that are not accurate. Some may think you are hiding details, while others may feel you do not care about providing them with the necessary information. Slow the conversation down to allow these members time to ask clarifying questions and feel appreciated as valued members of the team.

Communications during a crisis must be established to best ensure messages are accurately being received and trust is being established. Adjusting your communication style will ensure you are meeting each of these requirements.

These recommendations on how to incorporate principles of personality styles into your communications will help you best connect with both your internal and external stakeholders.

Communicating with External Stakeholders

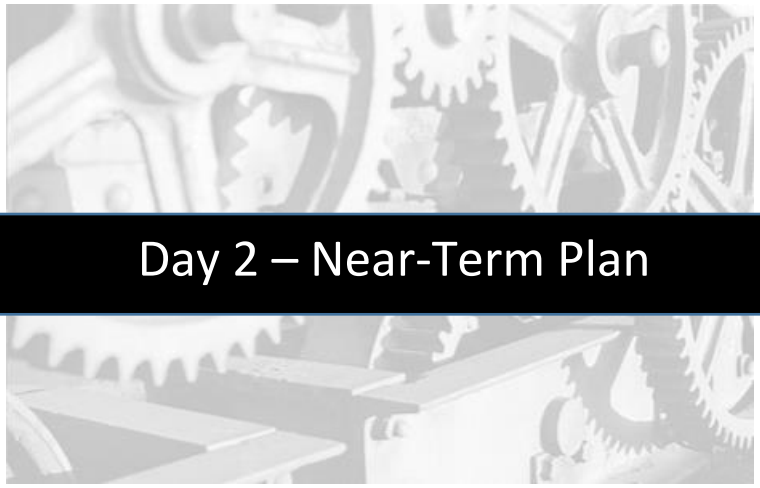
Times of crisis create a special need for organizations to communicate their plans more frequently and intentionally with external stakeholders. Hopefully, you have started communicating through emails, podcasts, social media, and/or website updates. As you continue to keep your external stakeholders updated about your progress, remember your communications should be designed to continue building trust with these stakeholders.

Trust means you must be kind, open, honest, reliable, and competent. These qualities must be the cornerstone of the messages you are sending. For each correspondence with your external stakeholders, you must:

- Demonstrate you are considering the well-being of those you serve, your organization members, and your external stakeholders. Be compassionate and appreciative.
- Openly and quickly discuss both positive and negative effects coming from your response to the current crisis. Speed matters. Discuss events as they occur to prevent stakeholders from thinking you are hiding details. Respond to correspondence (letters, email, phone calls, etc.) quickly.
- Be honest. Your stakeholders will find out the truth. Do not exaggerate the positive, or negative, effects of the crisis on your organization.
- Make decisions based on organizational values so you can demonstrate your ability to care for your team while continuing to perform your mission.

- Tell them your plan. You must demonstrate you have a plan in place, are keeping up with situational changes as they occur, and are leading your team. It is ok to acknowledge uncertainty. The future is uncertain, but we still need a plan to take care of those we serve.

Remember, the purpose of communications with your external stakeholders is to demonstrate your team is continuing to make an impact with the resources you have been entrusted. Make sure your organization is positively responding to the crisis and regularly communicating with your stakeholders.



Day 2 – Near-Term Plan

You have established a Command and Communication Plan and now it is time to begin planning your way through this crisis. Today you will start thinking about how the crisis is affecting your organization and what actions the organization needs to take to best respond to the crisis.

Yesterday in Task 1, you listed all of your services on your *Service Responsibility Sheet*. Today you need input from your leadership team on the feasibility of being able to conduct all of your previous mission, under the current conditions.

Task 1 – Start gathering data about the crisis.

The purpose of this step is to prepare your leadership team to make good decisions, based on data. Your leadership team should be actively answering the below listed questions for each of the service areas. You may need assistance from other organization members to help you answer these questions.

1. How is the crisis affecting your organization?
2. What is the crisis preventing you from doing?
3. What opportunities to serve currently exist?

You will soon be developing a plan to guide your organization through this crisis. Planning during a crisis involves gathering data and forecasting during times of uncertainty. Gathering data at this time may not be easy since previous data may no longer be relevant. This makes planning very difficult. However, you will not make good decisions if you do not have good data. Do not spend an excessive amount of time trying to predict the future. Recall the Pareto Principle, 80 percent of the effects, come from 20 percent of the causes. You need to find the things that matter, and collect data on those things.

Task 2 – Gather your leadership team to determine which functions will be maintained in the near-term.

The purpose of this task is to evaluate how the crisis will affect the services your organization provides. You will conduct a more detailed evaluation of your services in the upcoming days. Today, you are making decisions on what you will do over the next few days, until the detailed evaluation can be completed.

Here we see another example of the Pareto Principle. It is likely your organization is spending 80 percent of your resources (time and money) to accomplish only 20 percent of your services. You need to determine if this is occurring, so you can adjust the current plan as necessary.

Your role as a leader is to set the vision for the future. During a crisis, this means the short-term and mid-term goals will certainly change, and may also require changing the long-term organization vision. Today you are focusing on the short-term goal of identifying the services that must remain open, at this time. You will have time in the next few days to work on the mid-term goals. Complete the following five steps for every service your organization provides.

Step 1 – Choose one service your organization provides and write the service at the top of the *Service Evaluation Sheet* provided on page 15. The purpose of this step is to identify the service being evaluated.

Step 2 – Determine what would happen if this service was not provided. The purpose of this step is to decide which services are critical. Ask your leadership team what would happen if this service was not provided. Who would be affected? What would be the impact? Put this information in the *Service Evaluation Sheet*.

Step 3 – Determine if there are obstacles that may limit, or stop, your organization from performing this service. The purpose of this step is to evaluate if the crisis will reduce your ability to, or prevent you from, conducting a service. If an obstacle exists, can it be removed, with a reasonable amount of effort? Write this information on the *Service Evaluation Sheet*.

Step 4 – Determine if another organization can provide this service more effectively, or more efficiently, throughout the crisis. The purpose of this step is to find potential organizations to collaborate with, or those which may be better trained or equipped to provide the service. This applies to services your organization currently provides and to services being provided to your organization. Write this information on the *Service Evaluation Sheet*.

Step 5 – Determine if your organization should continue providing this service, in the short-term. The purpose of this step is to evaluate both the possibility of providing this service and the need to provide this service. Remind your leadership team of the organization's values, mission, and vision. If the organization does not have these established, you should first discuss with your leadership team to determine (1) the core values most important to the organization, (2) why the organization exists (mission), and (3) what is the desired future end-state of the organization (vision).

Answer the following three questions on your *Service Evaluation Sheet*:

(1) Can the service be provided? (Yes or No)
(2) Is the service essential? (Yes or No) This can be determined by evaluating the effect not performing the service will have on the children and/or families you exist to serve.
(3) If the answer to questions 1 and 2 are both yes, determine which organization should provide the service.

Step 6 – Complete Steps 1-5 for each service your organization provides.

Step 7 – Make a list of the services that will be provided, and those that will be temporarily suspended. The purpose of this step is to finalize the decision about which services will remain operating throughout the crisis. Your leadership team has completed the *Service Evaluation Sheets* for each service, so you have the information about your services and a recommendation. However, the leadership team should review one last time to make sure the services you are planning to provide align with the organization's values, allow you to still meet your mission, and continues moving your organization towards your vision.

You must also list the services you are temporarily suspending. You may be able to conduct these services in the future, however they are not possible at this time.

Service Evaluation Sheet

Service _____

Effect of not performing this service:_____

_____

_____

_____

_____

Obstacles that prevent your team from performing this service: _____

_____

_____

_____

_____

Can another organization provide the service more effectively or efficiently: _____

_____

_____

_____

_____

Questions:

1. Can the service be provided? (Yes or No) _____
2. Is the service essential? (Yes or No) _____
3. Who should provide the service? _____

You have already made great progress today. Determining the services your organization can, and should, provide is a huge step forward.

Task 3 – Develop a plan to get organization members back to work

There are two purposes for this Task. First, your organization members need to conduct the services your leadership team has determined essential. Second, people need to make progress. The Progress Principle applies to everyone in the organization.

Your organization members want to help the organization get through the crisis. One of the worst things a leader can do during a crisis is to not invite their organization members to be a part of the process. This is especially important for those who are no longer coming to work as a result of guidance, or direction, provided by the federal or local governments. The truth is, your organization members want to be involved in solving the problem and making a difference.

As you complete this task, be sure to consider how the crisis may be affecting your organization members. Do they have family issues that have been created by the crisis? You must be compassionate to their needs, while also working to balance the organizational needs.

Step 1 – Have organization members, and available volunteers, perform their required tasks for all services still being conducted. The purpose of this step is to have organization members and volunteers return to their tasks in a manner that is as similar as possible to the way they were conducted before the crisis began.

Step 2 – Have organization members, and available volunteers, perform other tasks that support a selected service. The purpose of this step is to assign organization members and volunteers whose service has been temporarily stopped to complete new tasks for support services that are continuing to be provided. The following actions should be considered:

1. Find ways to perform jobs remotely.
2. Identify how the crisis is affecting the ability to perform jobs or provide services.
3. Identify ways to overcome the problem locally.
4. Find out how other organizations are dealing with the problem.
5. Gather data about how the crisis could affect the population being served.
6. Talk to those you serve to see if they have additional needs not being met.
7. Find new partners to potentially collaborate with.

Task 4 – Communicate the new information to your organization

The purpose of this task is to inform the organization members about the decisions that have been made. You and your leadership team have made some significant decisions today and you need to let your organization members know what you have decided.

> *Rule 4 - Leaders must inform organization members of decisions being made and discuss the values used to make those decisions.*

Step 1 – Communicate new information to your team. The purpose of this step is to inform your organization members and volunteers about the decisions that have been made.

Using the primary means of communication you listed in your Command and Communication Plan, you should address the following with your team:

1. Remind them of the organization's values.
2. Decisions the leadership team made about the services that will remain operating at this time.
3. Services that have been temporarily suspended.
4. How the organization values were used to make these decisions.
5. Limitations and alternative actions to help the organization continue providing services.
6. Services being provided may change, based on the response to the crisis.
7. The leadership team is continuing to evaluate how the crisis will affect their organization's processes and services over time.
8. Who to talk with about problems they are currently encountering, or may encounter.
9. How the crisis is affecting your organization members and volunteers.
10. Thank everyone for doing their part to help work through the crisis.

This concludes the tasks for today.

You have again made great progress. You and your leadership team have made deliberate, considered, and responsive decisions about how your organization will adjust to the current crisis. You are doing a great job leading your organization through this crisis.

Please read through the following important information to prepare yourself for tomorrow.

The Leadership Cycle

Leaders help others grow, by taking them where they have never gone before. These are new times, and since you have decided to take this training, you are probably in a leadership role. At this moment, you are taking your organization on a path they have never been on before. In order to lead well, you must focus on the fundamentals of leadership while emphasizing the importance of reassuring those you lead.

Leaders must:

- Make plans to ensure the well-being of their people and their organization.
- Prepare their team to execute the plans they have developed.
- Execute the plan with their team and ensure it remains aligned with organizational values, mission, and vision.
- Monitor the well-being of their team and their organization, and prepare to return to the planning phase as requirements change and opportunities arise to improve processes and procedures.

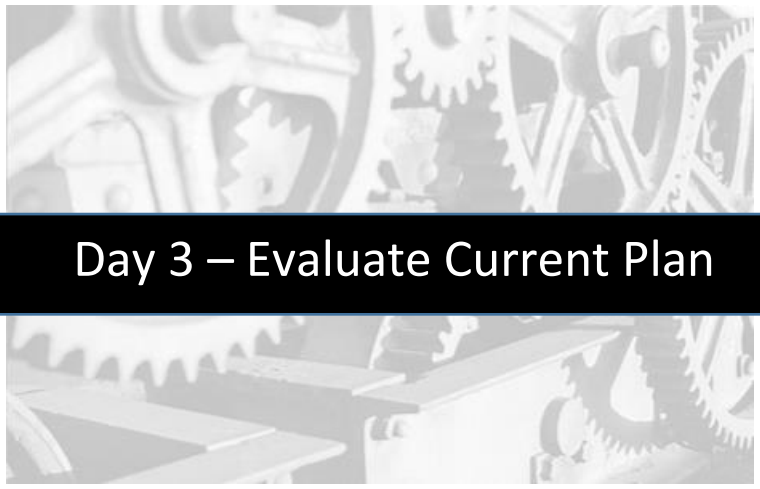
This cyclic process is referred to as the Leadership Cycle.

.

During what we will call "Ordinary Times," the leadership team develops a plan and prepares to execute the plan. The staff and volunteers execute the plan and the leadership team monitors the execution. The introduction of a crisis immediately affects execution. This is not part of the original plan, so the Leadership Cycle moves less effectively, or stops altogether, until the cycle of planning, preparing, executing, and monitoring begins again.

Your team is ready for you to start this cycle to lead them through this crisis. You need to develop a new plan and prepare your team to execute the plan. The stress being felt by the organization will start to subside as soon as a new, workable plan has been presented to the organization. Your leadership team has identified those services your organization must provide for the near future. You have developed a Command and Communication Plan and shared it with your organization members and external stakeholders. You are now ready to plan and prepare how your organization will provide services throughout the crisis.

> *Rule 5 – During a crisis, leaders must develop a new plan and immediately prepare their teams to execute that plan.*



Day 3 – Evaluate Current Plan

You have made significant progress by building your Command and Communication Plan and identifying the services your team will continue to perform during this crisis. Today we will continue to make progress by looking at how the crisis is affecting the processes you use to complete the services your organization provides to others.

The first task today is going to take the coordinated efforts of many people. You will need to start this task early and let those involved know the process will take time, especially if your team provides many different services. You may have to repeat this process several times throughout the duration of this crisis. Be sure to use the information on personality styles discussed in Day 1 as good communications are necessary for successful planning.

Task 1 – Take a detailed look at how the crisis may affect each of your processes.

The purpose of this task is to evaluate how each step needed to provide a service is affected by the current crisis. By now, you may have already seen how this crisis is affecting the services you provide others. It is time to gather information about how the current crisis is going to affect each of your service areas now, and in the near term.

If you have a larger organization (25 or more people), you may want to accomplish this task by assigning it to those leaders responsible for each service. If this is the case, schedule a meeting with all people responsible for services later in the day to collect, and consolidate, all of the issues onto one document for the entire organization.

This task is going to take several hours and may require you to reach out to others who serve children and families for answers. You should start by listing all of the services your organization provides. Examples include: financial support to staff, fundraising from donors, medical support to local community, food bank, advocacy materials, foster care program, adoption services, etc.

You and your leadership team will be completing a *Steps to Provide Service Evaluation Sheet* (page 22) for each of the services you listed on the *Service Responsibility Sheet* on Day 1.

Choose the first service and invite one or two members of your organization, who are experienced in providing this service, to discuss how the current crisis could affect this area. Fill out a *Steps to Provide Service Evaluation Sheet* for each service provided by your organization.

Step 1 – List all of the steps required for this service. The purpose of this step is to ensure you are considering every step required to provide a service. It is important to list every task involved in the process. Here is an example of providing lunch to the members of the local community.

Service: Provide Lunch to Local Community

1. Determine the number of people needing lunch
2. Make a list of supplies needed
3. Go to the food store
4. Purchase supplies
5. Bring supplies to the meal preparation area
6. Prepare food
7. Package food for delivery
8. Deliver lunch to the local community members

Step 2 – Determine how the crisis could affect each step of the process. The purpose of this step is to focus attention on each step, and how the crisis may affect the ability to perform this step. We will continue our example of delivering lunch to the community for the first three steps.

Service: Provide Lunch to Local Community

1. Determine the number of people needing lunch. *The crisis has caused a shortage of food. It is very likely more people will need food.*
2. Make a list of supplies needed. *The crisis may cause a shortage of the items you require at the local food store. Can some food items be substituted?*
3. Go to the food store. *The crisis may prevent access to the food store you originally planned to purchase the supplies, as well as other stores and markets in your local area.*

Step 3 – Consider ways to overcome potential barriers. The purpose of this step is to find ways to complete each step, by doing things differently, when the original plan is not achievable. Write these items on the *Steps to Perform Service Evaluation Sheet*.

Step 4 - Identify which step is most likely to be affected by the crisis. The purpose of this step is to prioritize which steps will be affected the most by the crisis. Evaluate how much of an effect this barrier is going to have on your organization being able to complete this step. Place a number (1 being lowest, 10 being highest) next to each of the barriers. Determine which barrier you gave the highest level of concern (closest to 10) and list it as the top item in the category labeled "Priorities" on the *Steps to Perform Service Evaluation Sheet*. Continue working down the list, identifying the next highest barrier and transferring it to the "Priorities" section.

Continue these steps for each of your processes. In addition to evaluating each of the services your organization provides, be sure to also complete a *Steps to Perform Service Evaluation Sheet* for:

1. Meeting financial needs of your organization members.
2. Meeting nutritional needs of your organization members.
3. Meeting the medical and dental needs of your organization members.
4. Meeting the emotional and mental needs of your organization members.

Steps to Perform Service Evaluation Sheet

Service _____

Steps

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____

Barriers

Ways to Overcome Barriers

Priorities

Step 5 – Gather all of the completed *Steps to Perform Service Evaluation Sheets* from the service area leaders. Make a combined list of all the potential barriers impacting your organization processes. Have your leadership team evaluate which of the barriers will have the most negative impact on your organization's ability to provide the current services and functions. Write those barriers in the space below. You will notice that several of the issues have a common solution. This is a great time to see the Pareto Principle in practice. You should see that if you are able to remove 20 percent of the most significant barriers, then about 80 percent of the related problems should be resolved. Finding ways to overcome these barriers will help your team identify solutions that will be most impactful throughout the crisis.

Most Important Barriers Facing Organization Processes and Functions

Service	Barrier Facing Organization Processes and Functions

Task 2 – Communicate with organization members

The purpose of this task is to communicate decisions that were made today, to your organization members and volunteers.

Using the primary means of communication, let your members know:

1. The leadership team has evaluated the processes that affect each of the services.
2. The leadership team will be revising the current plan to best operate in the current crisis.
3. Their help in identifying potential barriers and recommended solutions remains very important to the organization's mission of providing critical services during the crisis.

The progress you have made today identifying your processes, and the things that can affect those processes, will benefit your organization throughout this crisis and for years to come. You have also seen the Pareto Principle in practice. Sharing this information with your organization members will help them gain confidence in the organization's ability to continue providing important services to children, families, and the community throughout the crisis.

Your leadership team is doing a fantastic job guiding the organization through the crisis – keep up the great work!

Day 4 – Evaluate Resources and Requirements

Businessman, and writer, Max DePree said, "The first responsibility of a leader is to define reality." You have identified barriers your organization will need to overcome. This is a very important first step in helping understand the realistic state of your organization. As you continue planning, remain optimistic. You now have a better understanding of requirements and are making necessary changes.

Today, you are beginning to develop your plan for how your organization will change the current processes to respond to issues arising from the crisis. The final goal is to make sure your processes are changed where required, so your team can best serve children and families.

The first step is to determine which functions, or services, will be provided over the next few months. By now, you are most likely seeing the impact this crisis is having not just on non-governmental (not-for-profit) organizations, but on businesses and governments as well. As you plan during this crisis, you need to identify all available resources and new requirements. This information is critical for your team to determine existing, and projected, shortfalls.

To complete the following tasks, you will need access to financial and personnel data, along with your leadership team and those responsible for all financial and human resources decisions.

Task 1 – Determine the resources available

In this task, you will list all available resources on the *Available Resources Sheet* located on page 27. The purpose of this task is to identify the resources available to your team. This is a starting point. It is a reality check to see what your resources will look like throughout this crisis. You will track all of this information in the *Available Resources Sheet*.

Step 1 – List all current assets. The purpose of this step is to identify financial assets available to your team. In the "Financial" section of the *Available Resources Sheet*, list account balances for all of your financial accounts (savings, checking, etc.) Funding may be affected during times of crisis, so only include financial support you know will be available. This includes finances you

already have on hand plus projected funding you have confirmed with supporting activities (donors, businesses, other non-governmental organizations, governments, etc.) Add up all of your financial assets and enter this amount in the "Total" blank.

Step 2 – List personnel available. The purpose of this step is to identify people who will be available to you throughout the crisis. This crisis may cause some of your people to stop working, or reduce the amount they will be able to work. List the total number of people you have on staff (paid) and the number of volunteers you expect to have throughout the crisis. Enter these personnel numbers, along with their respective service area, on the *Available Resources Sheet*.

Step 3 – List collaborative partners. The purpose of this step is to identify collaborative partners you may be able to work with in order to avoid duplication of efforts and best provide services to those in need throughout the crisis. List collaborative partners, those you are currently working with and those you may be able to work with, and the services you believe they may be able to provide throughout the crisis. Please remember, the crisis is affecting these organizations as well. You need to talk with your collaborative partners to determine which services they will still be providing throughout the crisis. List the service area and the resources the collaborative partner makes available to your organization on the *Available Resources Sheet*.

Step 4 – List all other assets you have available to your organization. The purpose of this step is to identify other resources you believe will be available throughout the crisis. List all of the "Other" assets you have to meet your current service requirements. Examples may be number of beds, medical supplies, respirators and other personal protective equipment, vehicles, computers, training materials, etc.

You have now identified all of the resources you have to fulfill your organization's mission, throughout the crisis. As a result, you have a better understanding of how your available resources can be used to serve your local community. This is a big step forward.

Available Resources Sheet (Financial, Personnel, Collaborative Partners, Other)

Financial	**Type**	**Amount**
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
		Total _____ **(4f)**

Personnel	**Service Area**	**Number**
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	Total	_____

Collaborative Partners	**Service Area**	**Type of Resources**
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Other	**Items**	**Number**
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Task 2 – Determine special skills or knowledge needed due to the crisis

The purpose of this task is to identify any special skills or knowledge your organization will need to address the current crisis. Often, a crisis will require special skills and knowledge to effectively overcome problems. Examples include financial planning, counseling, inventory management, etc. Your organization may, or may not, currently have this knowledge or experience. In the section below, write the special skills or knowledge needed throughout this crisis. You may not know all of these yet, so be sure you return to this section and add additional skills or knowledge as they are identified.

Particular skills or knowledge needed for the current crisis

_____

_____

_____

_____

_____

_____

Task 3 – Determine the requirements to meet your new mission

The purpose of this task is to make an honest and accurate estimate of the requirements that will be placed on your organization throughout this crisis.

Step 1 – Determine the operations your organization must provide. The purpose of this step is to identify those "core" functions that cannot stop throughout this crisis. These should be the services your organization MUST conduct to meet the urgent needs of children and families. Your natural response may be to list everything you are currently doing. During a time of crisis, not everything is critical, and resources (personnel, funding, etc.) will very likely be limited. Focus on the critical operations that MUST be conducted to support the immediate needs of your community. These critical operations must be aligned with your values, mission, and vision. To start the list, we have already listed "Financially support staff" in the first space below.

1. Financially support staff
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Step 2 – Determine the financial and personnel assets needed to fulfill your core mission requirements. The purpose of this step is to determine the total number of personnel and total financial assets needed to complete your core operational requirements.

List the core services in the *Core Service Requirements Sheet* on the following page. Use your previous operating expenses and estimate a monthly financial estimate of how much each service will cost to operate, per month. Do not include finances required to pay your personnel, this will be calculated in the next section. Place these items in the "Financial" section of the *Core Service Requirements Sheet*.

Here are some financial examples for a food bank:

1. Facility rent - $1,000 per month
2. Utilities (water, electric, telephone, etc.) - $400 per month
3. Gas for vehicle to deliver food - $150 per month

Use your previous operating data to estimate the number of people needed to complete your core requirements. You should list both paid staff and volunteers. The focus of this step is to identify personnel requirements only. Use your previous operating expenses and estimate your financial requirements for personnel. Write your information into the "Personnel" section of the *Core Service Requirements Sheet*.

Here are some personnel examples for a food bank:

1. Financially support staff – 1 person (accountant)
2. Building maintenance and cleaning – 1 paid staff, 2 volunteers
3. Deliver food – 1 paid staff, 1 volunteer
4. Kitchen help – 3 paid staff, 3 volunteers

Next, based on your assessment of special skills or knowledge needed for the current crisis, write any additional special skills or knowledge requirements in the "Special Skills" section of the *Core Service Requirements Sheet*. Estimate how much these skills will cost each month.

Consider any other requirements you believe may be needed to meet your core service requirements. List these items in the "Other" category of the *Core Service Requirements Sheet* and then estimate how much these items will cost each month.

Add up all monthly costs and place the total amount in the "Total Monthly Costs" block.

Add up all existing funding and confirmed monthly financial contributions and place this number in the "Confirmed Monthly Income" block.

Determine monthly financial excess, or deficit, by subtracting the "Total Monthly Costs" from the "Confirmed Monthly Income." Write this number in the "Monthly Excess (Deficit)" in block **4a** provided below – be sure to use parenthesis ( ) around the total, if it is a negative amount (deficit).

Core Service Requirements Sheet (Financial, Personnel, Special Skills, Other)

Financial	**Service**	**Monthly Average Cost**
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Total Financial Cost _____

Personnel	**Service Area**	**Number required**	**Monthly Average Cost**
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____

Total Personnel Cost _____

Special Skills	**Service Area**	**Monthly Average Cost**
	_____	_____
	_____	_____
	_____	_____

Total Special Skills Cost _____

Other	**Service Area**	**Monthly Average Cost**
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____
	_____	_____

Total Monthly Costs _____
Confirmed Monthly Income _____
Monthly Excess (Deficit) _____ **4a**

The current crisis will affect some of these numbers, due to increased cost of operating. You should determine, to the best of your ability, if additional financial or personnel requirements will be required due to the crisis. An example is that during a natural disaster, cellular phone systems may not work reliably. New means of communication must be obtained. Similarly, roads may not be accessible, so getting access to lower priced food may not be available. As a result, food may have to be obtained locally, and the price will very likely increase. If you believe your organization will incur any additional costs, add these items to your *Core Service Requirement Sheet*.

Task 4 – Determine shortfalls

The purpose of this task is to determine if you have the available resources to meet your Service Requirements.

Step 1 – Determine if you have the personnel necessary to fulfill your core services. The purpose of this step is to identify any areas where you might have fewer personnel than you will need throughout the crisis. List the service area, the number of personnel required, and the number of personnel available. Calculate the shortfall by subtracting the number of personnel required from the number of personnel available. If the shortfall is negative (more required than available), write the quantity in the "Shortfall" column below. If there is no shortfall, leave the "Shortfall" column empty for that Service Area. Complete this same analysis for volunteers, however, list them on a separate sheet of paper as this task is for paid staff only.

Personnel	**Service Area**	**Required**	**Available**	**Shortfall**
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

Determine the "Monthly Cost for Additional Personnel." Use previous operating expenses to determine an approximate cost for one person in that service area. For example, what is the approximate monthly cost to hire a person to work in the kitchen? In the section on the next page, list any Service Area with a "Shortfall" and then the "Monthly Cost" for that person. Multiply the Monthly Cost per person times the Shortfall to get the Total Personnel Cost for each core service area. Add up all of the Additional Personnel Costs to get a Monthly Cost for Additional Personnel. Write this number in block **4b** provided. Remember, there is no direct financial cost for volunteers, so you may want to first consider if volunteers are available to fill all, or some, of your additional personnel requirements.

Personnel Shortfall Costs

Service Area	Shortfall	Monthly Cost	Total Cost
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Monthly Cost for Additional Personnel _____4b

Step 2 – Determine additional monthly costs for Special Skills or Knowledge. The purpose of this step is to determine if the additional special skills and knowledge will add costs to your organization.

List any service areas where you have identified a requirement for special skills or knowledge. Write the "Service Area", "Required" number of personnel, and personnel that are currently "Available" in the area provided below. Calculate the shortfall for each service area, by subtracting the number required from the number available. Remember, if the shortfall is negative (more required than available), write the quantity in the "Shortfall" column below. If there is no shortfall, leave the "Shortfall" column empty for that Service Area.

Special Skills or Knowledge

Service Area	Required	Available	Shortfall
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

For any Service Area with a shortfall, write the Service Area and Shortfall in the section below. Use your previous financial expenses to determine the approximate cost for adding one additional person with these required special skills or knowledge. Multiply the shortfall and the Monthly Cost to calculate a Total Cost for Special Skills Shortfall per Service Area. Add up all of the Total Special Skill Costs by Service Area to get a "Total Monthly Cost for Special Skills Personnel." Write this number in block **4c** provided below.

Special Skill Shortfall Costs

Service Area	Shortfall	Monthly Cost	Total Cost
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Monthly Cost for Special Skills Personnel _____4c

Step 3 – Determine any additional monthly costs for "Other" item shortfalls. The purpose of this step is to determine if there are other additional monthly costs that will be incurred due to shortfalls.

List any identified "Other" items you have determined may be required, due to the crisis. Write the Service Area, the number of "Other" items "Required," and the number of items "Available." Calculate the "Shortfall" by subtracting the number required from those available. Remember, if the shortfall is negative (more required than available), write the quantity in the "Shortfall" column below. If there is no shortfall, leave the "Shortfall" column empty for that Service Area.

Other	**Service Area**	**Required**	**Available**	**Shortfall**
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

For any Service Area with an "Other" shortfall, write the Service Area and Shortfall in the section below. Use your previous financial expenses to determine the approximate cost for adding the additional "Other" items for each service area. Multiply the Shortfall times the Monthly Cost to get a Total cost per service area. Add up all of the Total Other Costs by Service Area to get a "Total Monthly Cost for Other Items." Write this number in block **4d** provided below.

Other Shortfall Costs

Service Area	**Shortfall**	**Monthly Cost**	**Total Cost**
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Total Monthly Cost for Other Items _____**4d**

Step 4 – Determine Total Monthly Expenses for Core Service Requirements. The purpose of this step is to determine how much money will be needed each month to meet your organization's financial requirements, based on your core service requirements.

Using the data you have calculated in the previous steps, complete the blocks below. Add blocks **4a** through **4d** to get the "Grand Total Monthly Cost for ALL Core Services." Write this number in block **4e**.

Total all monthly Expenses

Monthly Excess/Deficit from Core Services Requirement (page 30)	_____4a
Monthly Cost for Additional Personnel (page 32)	_____4b
Monthly Cost for Additional Special Skills (page 32)	_____4c
Monthly Cost for Additional Other Items (page 33)	_____4d
Grand Total Monthly Cost for ALL Core Services	**_____4e**

Step 5 – Determine the overall financial shortfall. The purpose of this step is to determine how the cost to provide your core services will affect your overall financial situation. Write the Grand Total Monthly Cost for All Core Services (block **4e** at the bottom of page 33) for each month in the "Monthly Cost" column below. Multiply the number in the "Month" column by the "Monthly Cost" to get the "Total Monthly Cost" value for each month. Write the Financial Total (block **4f**) from Task 1, Step 1 (page 27) in each of the blocks for "Available Funds." Determine the "End of Month Surplus (Deficit)" by subtracting the "Total Monthly Cost" from the "Available Funds," for each month. Write the total in the "End of Month Surplus (Deficit)" column.

Month	Monthly Cost	Total Monthly Cost	Available Funds	End of Month Surplus (Deficit)
1				
2				
3				
4				
5				
6				
7				
8				
9				

This table helps you determine if, or approximately when, your organization will deplete your financial resources, based on meeting your Core Service Requirements over the next nine-month period. You can determine this number by looking at the above table and identifying the months that have a negative value (deficit) in the "End of Month Surplus (Deficit)" column. The "Month" listed for the row containing the first deficit (negative number) is the number of months, from now, in which funding will be depleted should additional funding (new donations, grants, etc.) not be obtained by your organization. If there are no negative values (deficits) in the "End of Month Surplus (Deficit)" column, then your organization should have sufficient funding for your Core Service Requirements over the next nine months (assuming no increases in current or additional serve area requirements and no decreases in projected available funds).

For those organizations that have a deficit listed in the table above, in the space below, list the first month in which your organization is estimated to experience a deficit:

> Based on our financial analysis, our organization is estimated to experience a deficit in _____ months from now.

Overcoming Financial Shortfalls

If you did not identify any deficits in Step 4 above, please do not skip this section as it applies to everyone. We must always remember that circumstances can change quickly. An organization that currently has sufficient funding can experience a deficit in a very short period of time should

an event occur that immediately increases requirements or decreases income. Leadership should always be preparing for these changes to ensure there is no interruption in their mission.

You have now identified financial shortfalls your organization may potentially face while responding to the current crisis. It is now time for you to work with your leadership team to consider potential plans to overcome these shortfalls.

Your leadership team must identify ways to either reduce services, or obtain additional resources to fund existing requirements. This will be one of the most difficult challenges your team will experience during this crisis. While it is difficult to consider reducing services, leaders must always consider what will happen to the children and families they exist to serve if their organization stops operating altogether.

A word of caution. Some of you are task-oriented and may likely consider potential solutions that only involve tasks. You must give extra effort on thinking about how people are being impacted and how others can potentially assist with these difficult decisions. Conversely, some of you are people-oriented and you may likely consider potential solutions that only involve people. You must give extra effort thinking about the importance of completing assigned tasks to ensure potential solutions achieve the necessary results.

Your team must collaborate on how to address the identified shortfalls. You need each member of the team, and possibly those of other organizations, to identify potential plans to resolve existing shortfalls. As you work together, remind your team of the following:

- The importance of considering all achievable recommendations.
- Ensuring decisions are made using valid data and around the organization's values.
- The Pareto Principle. You are working to develop an "effective plan," not a "perfect plan." Time is important, so remember to focus on solutions that yield the greatest impact on mission success.
- Applicable deadlines and when the leadership team will reconvene to discuss potential solutions.

Leaders must work diligently to develop new plans. The physical and emotional health of the organization members may decline until an effective plan is developed and implemented. Therefore, developing new plans should be of the utmost importance. Limiting the time between the arrival of the crisis to an updated plan will help the organization manage the stress associated with the crisis.

Rule 6 - Leaders must quickly develop a plan to deal with the crisis.

Here are a few ways your organization may be able to overcome the current crisis.

- Focus on the things you do well. What are the most effective and impactful services your organization provides?
- Identify gaps. The needs of the children and families may likely grow during the crisis. The vulnerability of children has already increased, and as the crisis continues, we will

see an increasing number of orphaned children. Identify needs that must be filled to further increase your impact. Consider opportunities to best leverage economies of scale.

- Gather as much credible data as you can. The world is changing. Being able to gather data and analyze patterns will help you lead your organization out of the crisis.
- Stay optimistic and do not allow your team to lose hope. They need to see that you are resilient. Remain flexible and adjust plans as necessary.
- Use this time to define very clear roles and responsibilities. Everyone must contribute. Best align your team talent with existing responsibilities. This will not only help them operate more efficiently and effectively during the crisis, it will help build a stronger team for the long term.
- Allow others to grow. You have members of your organization who have been waiting for increased opportunities to be creative, to lead, and to serve. Give them the opportunity during this time. They will amaze you with their gifts and talents.
- Make changes quickly, based on data. Research shows that most people do not like change. This is especially true for those who have a slower-paced personality style. They are cautious and want to maintain the status quo or proceed slowly to ensure excellence. During times of crisis, existing plans will not work, so you must help your team adjust quickly to new plans in order to achieve success.
- Be loyal to your organization, your organization members, and to your external stakeholders. This is the time to demonstrate your qualities to be trusted.
- Develop stronger external relationships. Find ways to share with them the positive impact you are making during the crisis with your existing resources.
- Develop your leadership abilities. It should be easy to empathize with others during this time. Place yourself in the shoes of others before you make decisions that affect them. Understand what their lives are like during these times, and be prepared to serve them as necessary.
- Ask for help, when you need it. This is the perfect time to establish collaborative relationships with others.

Day 5 – Develop New Plan

You have made tremendous progress towards leading your organization through this crisis. And, you have done it in a very short period of time. Now it is time to put a plan together for your organization. Your task over the next two days is to build that plan. This is the first step of the Leadership Cycle (Plan, Prepare, Execute, & Monitor).

Task 1 – Gather potential solutions

The purpose of this task is to gather all of the ideas your leadership team has generated, and to come up with one plan to lead your organization through this crisis.

Step 1 – Gather your leadership team to discuss potential solutions. The purpose of this step is to ensure your entire leadership team is present, if possible, when discussing potential solutions. If necessary, utilize video conference options to obtain maximum participation from your leadership team. As mentioned previously, those of you who are people-oriented will focus on solutions focused on relationships, while task-oriented people will focus on things they can do or accomplish. The goal is to be balanced in working through potential solutions.

Step 2 – Rank all services based on values, mission, and vision. The purpose of this step is to ensure everyone on the leadership team knows which services are the most important, based on the organization values, mission, and vision.

- List all service areas so everyone can see them.
- Remind the leadership team of the organization's values, mission, and vision. We recommend each member has a copy of these to reference throughout the process.
- Ask the leadership team to individually rank the services based on the organizational priority (highest is 10, lowest is 1). Remind them to rank based on the organization's values, mission, and vision; not just the functional area they represent, as they might be tempted to list those as the highest.
- Ask the leadership team to share their rankings.

- Write the core services in the top row of the table on page 38 and the leadership team names in the first column. Write each of the leadership team responses in the applicable row of the table.
- Total all of the scores at the bottom to determine the rank-order, as determined by the entire leadership team.
- Write the services in order of highest ranked (first) to lowest ranked (last).

For example:

	Food Bank	Medical	Dental	Housing	Psychosocial	Staff Support
Jim	9	10	3	8	7	10
Kai	8	10	4	8	8	10
Teresa	9	10	6	7	10	10
Sebastian	10	9	4	9	8	10
Total	36	39	17	32	33	40

In this example, Staff Support is ranked 1st, Medical is ranked 2nd, Food bank would be 3rd, etc.

Service Ranking

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

Step 3 – Review shortfalls. The purpose of this step is to review the potential shortfalls with the leadership team. You have already listed your potential shortfalls in Day 4. Provide your leadership team with the following information.

- Available Resources Sheet (page 27)
- Core Services Requirements Sheet (page 30)
- Core Services Requirement Costs (page 30)
- Personnel Shortfall and Additional Costs (page 31, 32)
- Special Skills or Knowledge Shortfall and Additional Costs (page 32)
- Determine Overall Financial Shortfalls by Month (page 33)

You now have a place to start looking at potential plans, based on shortfalls, and the most important services.

Step 4 – List shortfalls based on rank of service. The purpose of this task is to prioritize the shortfalls based on the priority of the service area. Your team has already determined the priority of service areas in Step 2 of this Task. You will now develop a complete list of shortfalls using the priority of each service area.

- Review shortfalls for the highest priority service area.
- Write these shortfalls on the table below.
- Review shortfalls of the second highest priority service area and write the shortfalls on the table below.
- Continue this process until you have listed all of the shortfalls.

Shortfall	**Service Area**

Step 5 – Identify potential plans to remove shortfalls. The purpose of this step is to list potential plans that could remove shortfalls by either increasing resources or decreasing services provided. This step should be completed by looking at the highest priority shortfalls listed in the previous step. You are just trying to identify potential plans, you are not making a decision at this time.

- Ask the leadership team to identify potential plans that help reduce services provided, increase resources, or a combination of both, starting with the highest ranked shortfall.
- Write potential plans in the space on the next page.

Service Area	Potential plan to reduce requirements or increase resources
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Step 6 – Identify barriers that may make it impossible to conduct services in a specific area during this crisis. The purpose of this task is to identify those services your organization may need to stop performing during this crisis. Identifying these services now will ensure your leadership team does not spend any more time trying to come up with plans to keep providing this service, if it is not possible to provide due to the crisis. An example may be the loss of a capability based on federal or local law which requires you to stop the service. These may also be things you now lack special skills or knowledge, personnel, or other items to perform the service. Write these barriers in the area provided below.

Potential Barriers

Service Area	Barrier that might affect ability to offer service, or function
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Step 7 – Identify organizations to collaborate with. The purpose of this task is to increase resource availability by collaborating with other organizations that may be able to provide resources you require. These organizations are also going through this crisis, but may be able to help or direct you to additional resources to meet your core requirements. List the services another organization is currently providing, or might be in a position to provide or help you locate the required resources. This will help you evaluate how you can collectively work with others to ensure needed services are provided to those you exist to serve.

Potential Collaboration Resources

Service	Organization that may provide the service
_____	_____
_____	_____
_____	_____

Step 8 – Identify potential comprehensive plans to overcome shortfalls. The purpose of this step is to have your leadership team generate potential plans that would overcome all of your shortfalls, or as many as possible. These plans may involve several actions that must be completed to remove the shortfalls. Instruct you leadership team to do the following:

- Consider actions that will remove shortfalls (increase resources or decrease services).
- Consider shortfalls for the highest ranked services first.
- Consider how plans may affect other required services.
- Continue generating actions until all shortfalls are met.
- Write potential plans down so they may be further evaluated.
- Work in teams or individually to generate ideas for effective planning solutions.

Task 2 – Evaluate individual potential plans to identify a group potential plan

The purpose of this task is to combine individual plans into one group potential plan that will ensure all shortfalls are removed.

- Gather the group together and write out all proposed plans.
- Ask members to consider all proposals.
- Ask members to identify strengths and limitations of each plan.
- Ask members if any of the plans stand out as the best possible solutions.
- Ask members to make suggestions on how to combine ideas from plans, or ways to improve the plans.

Remind the leadership team that discussion should be based on values. This ensures the discussion does not become personal. Some leadership team members will feel they are personally losing if something happens to their service area. By ensuring the conversation remains centered about the organization's values allows leadership team members to make better decisions. There are no individual winners or losers – every decision must be focused on what is best for the children and families the organization exists to serve. Also remind the leadership team that it is very difficult to execute complex plans. Therefore, simplicity must always be considered when selecting a potential plan.

Ultimately, the leader is responsible for deciding the plan. If the leadership team has not come to a consensus on a single preferred plan, you can:

- Allow members to vote (preferably anonymously).
- Choose based on your consideration and evaluation of all factors involved.

Write the group's potential plan in the space below.

_____

_____

_____

_____

_____

Task 3 – Determine if group's potential plan covers all problem areas

The purpose of this task is to ensure your group did not overlook a barrier or shortfall when you identified the group's potential plan. Determine if your group's potential plan addresses all of your shortfalls (financial, personnel, special skills or knowledge, and other) and overcomes the barriers for each service area. If it does not, repeat the process for Task 2 until all shortfalls are addressed, and all potential barriers are overcome.

Calculate final projected costs, revenues, and shortfalls based on this new plan:

- List each service area and determine how the new plan will affect "Projected Costs" and "Projected Revenue" in the table below. You can evaluate this based on previous costs and all changes being made to each service.
- Calculate the "Projected Shortfall" by subtracting "Projected Cost" from "Projected Revenue" for each Service Area.
- Calculate total "Projected Costs," "Projected Revenues," and "Projected Shortfalls" by adding up each column.

Service Area	Projected Cost	Projected Revenue	Projected Shortfall
Total			

Write you complete organizational plan in the space below.

_____

_____

_____

_____

_____

Task 4 – Revise processes based upon the selected organizational plan

The purpose of this task is to determine how organizational processes need to be adjusted to align with the selected plan. This task may take several hours, and perhaps days, depending on the number of changes that need to be made.

Step 1 – Assign process redesign to members who are responsible to each service area. The purpose of this task is to identify the people from each service area who will be responsible to review and revise their processes, as required, based upon the selected organizational plan.

Step 2 – Revise processes based on selected plan. The purpose of this task is to provide the people responsible for each service area a means of systematically revising the processes needed to execute the selected plan. Ask people responsible for each service to:

- Gather the staff needed to revise their processes to align with the selected plan.
- Complete a *Service Evaluation for Selected Plan Sheet* (page 44) for each service they are responsible for.
- Consider the initial *Steps to Perform Service Evaluation Sheet* (page 22) that lists steps, barriers, and priorities.
- List new steps required to achieve the new plan while considering barriers and priorities.
- List details to describe how each step will be accomplished.
- List roles and responsibilities needed to effectively and efficiently provide the service.

It is important to note that processes must continue to be reviewed and modified over time as requirements will continue to change throughout the crisis. Be sure your team continues to evaluate these initial processes to ensure they continue to best support the plan and required services provided by your organization.

Service Evaluation for Selected Plan Sheet

Service _____

Steps

Roles and Responsibilities

Task 5 – Determine how you will measure your plan performance

The purpose of this task is to consider how your leadership team will evaluate your plan performance, once you begin to execute the plan. This means you need to determine a few key performance measures to monitor how well your plan is working. Thinking about your metrics now will help you ensure your plan is ready to execute.

At a minimum, your leadership team needs to be prepared to frequently review how your new plan is dealing with:

- Potential Financial Shortfalls
- Potential Personnel Shortfalls
- Potential Special Skill Shortfalls
- Potential Other Item Shortfalls
- Providing Services under the current crisis conditions

Step 1 – List additional metrics. The purpose of this step is to list any additional metrics you think your leadership team will need to monitor to ensure your plan is working.

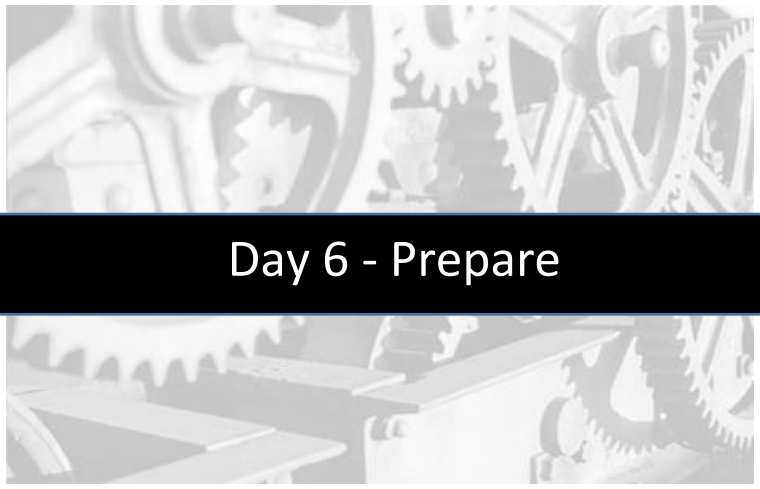
_____

_____

_____

_____

You now have a plan and a way to measure the performance of your new plan. You have made tremendous progress. You have filled your day with meaningful activities and your organization will be more impactful in serving others due to your dedicated and committed efforts!



Day 6 - Prepare

Over the past few days you have made some very important decisions that will guide your organization through this crisis. You have selected a plan and identified new processes. It is time to prepare your organization to execute this plan and these new processes. This is the second step in the Leadership Cycle (Plan, Prepare, Execute, & Monitor).

Task 1 – Inform organization members of the plan and the new processes

After developing the new plan, the leadership team must ensure the organization members are prepared and equipped to execute the new plan. This may be difficult since members are dealing with problems associated with the crisis, both at work and at home.

> *Rule 7 - Leaders must prepare organization members to execute the new plan while being empathetic to the members' other personal roles and requirements.*

Communicate the new plan with organization members and volunteers. The purpose of this step is to ensure each organization member, and volunteer, understands the organization has made a decision on how it will perform its mission throughout the crisis. In addition, members need to know processes and procedures will be changed, where necessary, to meet the new plan. Each member should be informed of the following:

- The selected plan and main decision points for selecting this plan. Remember to focus the conversation around values, mission, and vision.
- Processes and procedures may need to change to align with the new plan. The person responsible for their respective service area(s) will talk with them about these changes and when to expect those changes to occur.
- How their roles and responsibilities fit into the new plan.
- Metrics that will be collected along with how and when they will be collected.
- The importance of providing feedback when there is an opportunity to improve the processes and procedures.
- Potential barriers and actions being taken to eliminate them or lessen their impact.

Here are some things to think about when planning to address your team:

- Remain positive and encouraging – keep people focused on the mission and vision.
- Be honest and authentic – trust is absolutely essential.
- Empathize - help the team see the importance of balancing their needs and those of the children and families served.
- Empower your team – let them know you believe in them and leverage their talents.
- Build momentum – help the team see that crisis provides opportunities to serve in a more meaningful and impactful way.

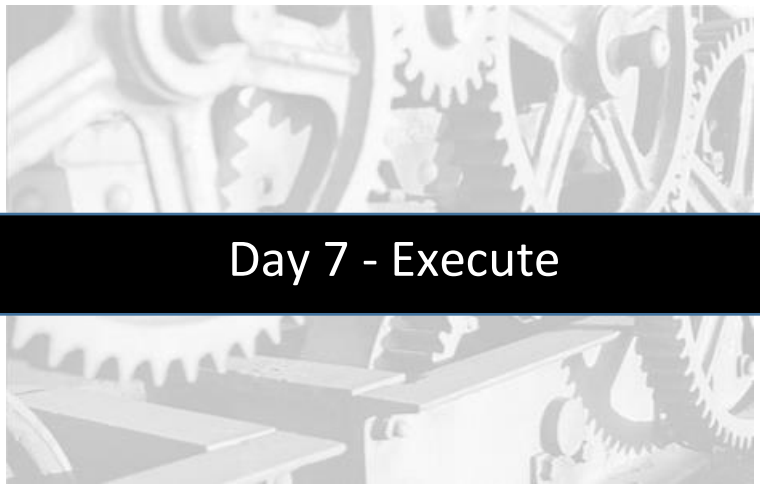
Task 2 – Train each member on how to perform their new tasks

Train members how to operate their processes in the new plan. The task of training your organization members is much easier if you can help each one of them clearly understand their roles and responsibilities. Every member should be able to state, without question, "I bring value to this organization by doing _____." You and your leadership team must help each member identify how they help the organization fulfill the mission and move towards the vision, while living up to the organization's values.

Many organization members will be performing tasks they are familiar with. However, there may be new tasks resulting from changes in roles and responsibilities. Here are some suggestions to prepare members to perform their new tasks:

- Communicate objectives of their role and empower them to best meet those objectives.
- Help your organization members see how they can best use their gifts and talents.
- Allow members to define how they can complete tasks assigned to them.
- Ask your collaborative partners for training plans they may already have that can help train your team on new processes and procedures.

You have made incredible progress working your way through the Leadership Cycle. You have effectively planned and prepared your team and you are now ready to execute your plan.



Day 7 - Execute

The time has come to execute your new plan. These are exciting times! Your team has made conscious and intentional choices about the future of your organization, based on the data available. You have probably made some changes that have needed to be changed for a while. You are equipped to lead your team well through this crisis. This is the third step in the Leadership Cycle (Plan, Prepare, Execute, & Monitor).

Your organization members have been informed of the new plan and your leadership team has prepared them well. Your leadership team has taken on new roles and responsibilities. Some of your organization members have helped define the new processes. There is a new sense of ownership in the entire process. Your people are ready.

Task 1 – Lead from the front.

The purpose of this task is to make sure you are visible to the organization members. It is very important for the leader to be available as much as possible during the first few weeks following a major change in plans. Your organization members will have questions. They need to know you are beside them on this journey. You also need to learn what is working and what is not working. You can only do this if you are serving alongside your organization members as they execute the plan.

Task 2 – Maintain your perspective.

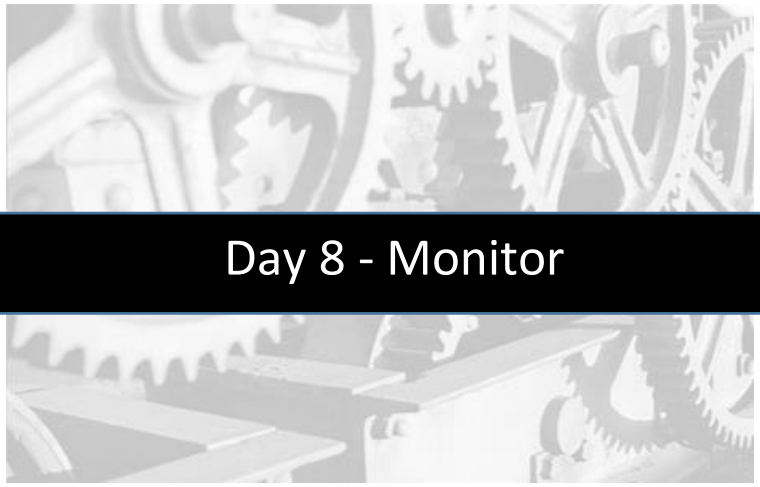
The purpose of this task is to make sure that even though you are up front with your organization, you must take time to step back in order to gain the correct perspective.

- Keep your mind on the Progress Principle and the Pareto Principle. Teach these two principles to your leadership team and have them utilize them with their team members.

- Make sure you are monitoring plans as necessary to ensure your organization members are making progress. Don't forget the Leadership Cycle – repeat the process of plan, prepare, execute, and monitor to ensure continuous improvement.
- Maintain awareness of the physical and emotional well-being of your organization members. They are by far your most important resource, so ensure you are investing in their personal and professional development on a regular basis.

Task 3 – Communicate your new plan to your external stakeholders.

The purpose of this task is to ensure your stakeholders are aware of the new plan you have chosen for the organization. Inform your external stakeholders that you are executing the new plan in order to provide the best possible services to the children, families, and communities you serve. Give them an opportunity to ask questions and let them know you will keep them updated on how the plan is progressing. Also, be sure to ask if there is anything you can do to serve them – they will appreciate that you are focused on the well-being of them and their families.



Day 8 - Monitor

Your organization is doing new things in a different world. You need to continuously monitor their performance and how the crisis continues to change the environment around you. This includes the well-being of the organization members, and the organization itself. This is the last step in the Leadership Cycle (Plan, Prepare, Execute, & Monitor).

It is highly likely that organization members will be very stressed when the crisis begins. Their stress level will decrease as the new plan is implemented, however it is likely their stress levels will increase as the duration of the crisis increases. The leadership team must be constantly listening to organization members to determine the current climate and take action as necessary to preserve their physical and emotional well-being.

> *Rule 8 - Leaders must constantly monitor the well-being of the organization and the organization members.*

Task 1 – Monitor the execution of your plan.

The purpose of this task is to make sure you are meeting the objectives of your plan. On Day 5, Task 5 (page 45) you listed metrics that you need to monitor. These metrics include:

- Potential Financial Shortfalls
- Potential Personnel Shortfalls
- Potential Special Skill Shortfalls
- Potential Other Item Shortfalls
- Providing Services under the current crisis conditions

Step 1 – Monitor financial metrics. The purpose of this task is to ensure your financial shortfalls have been properly addressed by the new plan. On Day 4, Task 4, Step 5 (page 34), you listed a monthly financial shortfall.

- Go back to the table you made from this task and transfer the last column (End of Month Surplus (Deficit)) to the column labeled "Projected End of Month Surplus (Deficit)" in the table below.
- Each month, add up your financial assets and put this value in the "Actual End of Month Surplus" column.
- Evaluate data to determine if your new plan is positively affecting the financial situation.
- Calculate the "Effect of Plan on Financials" by subtracting the "Actual End of Month Surplus" from the "Projected End of Month Surplus (Deficit)."
- If the "Effect of Plan on Financials" is positive (actual costs are less than projected costs) your plan is working well financially as you are spending less than you were expecting. If the "Effect of Plan on Financials" is negative, you need to determine why and adjust your plans as required.

Month	Projected End of Month Surplus (Deficit)	Actual End of Month Surplus (Deficit)	Effect of Plan on Financials
1			
2			
3			
4			
5			
6			
7			
8			
9			

The second financial metric you must monitor during this time is the actual expenses of your new plan, by service area. You can accomplish this by going back to Task 3 (page 42) to get your projected costs of the new plan:

- Write the "Projected Monthly Total Cost" in the first column for each month.
- Write the "Actual Monthly Total Cost" in the second column, based on your total costs at the end of the month.
- Determine if the plan is matching your projections. Subtract the "Actual Monthly Total Cost" from the "Projected Monthly Total Cost." Write this number in the "Difference" column. If the number is greater than zero, your costs are less than you were expecting. This is a good situation. If the number is less than zero (negative), your actual costs are higher than projected and you need to determine why. This situation requires immediate attention as continued financial losses will continue to constrain your ability to effectively provide services.
- Complete this process for each of your service areas to see if your estimates were correct. Since some costs are shared across multiple service areas (such as personnel working in two different services), you may have to split cost across different service areas. Several tables are provided for you to evaluate each service area.

Service area _____

Month	Projected Monthly Total Cost	Actual Monthly Total Cost	Difference
1			
2			
3			
4			
5			
6			
7			
8			
9			

Service area _____

Month	Projected Monthly Total Cost	Actual Monthly Cost	Difference
1			
2			
3			
4			
5			
6			
7			
8			
9			

Service area _____

Month	Projected Monthly Total Cost	Actual Monthly Cost	Difference
1			
2			
3			
4			
5			
6			
7			
8			
9			

Service area _____

Month	Projected Monthly Total Cost	Actual Monthly Cost	Difference
1			
2			
3			
4			
5			
6			
7			
8			
9			

Step 2 – Monitor personnel metrics. The purpose of this step is to determine if your proposed plan is requiring more people than you expected. You can accomplish this task by talking to those people responsible for each service area. Ask them:

- Do you have enough people to provide this service, using the current process?
- Can you change the process, so that you will have enough people?

You must adjust your plan, or add additional personnel, if there are personnel shortfalls

Step 3 – Monitor special skill and knowledge metrics. The purpose of this step is to determine if you have been able to acquire the special skills and knowledge you identified as a shortfall in your plan. You can accomplish this task by:

- Listing the shortfalls in Special Skills and Knowledge that were identified in your plan.
- Listing the number of people with those Special Skills and Knowledge.
- Determining if the shortfall still exists.

You must adjust your plan, or add additional special skills, if there are no means of eliminating these shortfalls

Step 4 – Monitor Other item metrics. The purpose of this step is to determine if you have been able to acquire the Other items you identified as a shortfall in your plan. You can accomplish this task by:

- Listing the shortfalls in Other items that were identified in your plan.
- Listing the number of Other items you have now.
- Determining if the shortfall still exists.

You must adjust your plan, or add additional Other items, if there are no means of eliminating these shortfalls.

Step 5 – Determine if you are meeting your Service Area requirements. The purpose of this step is to determine if your plan is still allowing you to meet each of your Service Area requirements within existing financial resources. You will have to evaluate each Service Area you are providing and then develop metrics that measure the effectiveness in meeting the needs of those children and families you exist to serve.

In addition to tracking your performance metrics, you need to continuously:

- Monitor the affects the crisis is having on your plan and make changes as necessary to ensure you continue providing the required services.
- Monitor the affects the crisis and new plan is having on your organization members and take action as necessary to ensure their continued well-being.
- Modify your plan based on the metrics, processes improvements, and new barriers that appear or may be approaching.
- Communicate with your organization and external stakeholders about the progress the organization is making and the meaningful impact their contributions are having on the children, families, and communities you serve.
- Celebrate successes.

Rule 9 - Leaders must continue to pursue the mission and vision, regardless of the circumstances.

Finally, as a leader, you must never lose hope. Never stop trying to change, to get ahead of the crisis.

"*Never give in! Never give in! Never, never, never. Never – In anything great or small, large or petty – Never give in except to convictions of honor and good sense*." – Winston Churchill

You have not given in. Instead, you have developed a plan to move your organization through this crisis. This experience has made you a stronger leader and your organization is better prepared to meet this crisis. But you cannot stop. Each crisis has a way of changing. You must continue to change with the crisis. The good news is, you know how to do that. You must use the Leadership Cycle. You must plan, prepare, execute, and monitor. You must always keep your eye on the Progress Principle and the Pareto Principle and always find ways to become a better collaborator.

You now have the tools to do all of this. Never, never, never, give in. Instead, continue to confront and rise above the challenges as you love and serve children and families better and better each and every day!