



United Way
of Greater St. Louis

MEMBER AGENCY STRATEGIC TRANSITION PLANNING SERIES

Session #5 Overview – Contingency Planning

October 11, 2018 | 9:00am – 12:00 noon | Pat Knoerle-Jordan

CONTINGENCY PLANNING: CRITICAL PRACTICES FOR ALL AGENCIES TO ADOPT

Contingency planning involves developing, communicating and implementing a range of default plans, based on perceived level of risk, gravity and impact on an agency's continuity of mission delivery. Although many agency leaders struggle with planning for potential worse case scenarios, preparing for potential change ahead of time is a critical role of leadership that can better position an agency with strategies to strengthen its resilience.

Special Instructions: Bring (initial) thoughts, implications and degree of impact you perceive current environmental changes in funding, including UW's new funding model, may have on your agency.

Target Audience: Board members, EDs and senior decision-making leaders.

Learning Objectives:

- Participants will improve understanding about the critical value of risk assessment and contingency planning.
- Participants will advance learning about contingency plan components and how to develop/refine meaningful plans.
- Participants will increase knowledge of the role leaders play in contingency planning and implementation.
- Participants will gain insight about & build comfort with tools & process for assessing risk & implementing plan.

Key Concepts:

- Contingency Planning Model.
- Risk management principles and guidelines.
- Fundamentals of Risk, Analysis, Prioritization, Strategy, Need, and Communication.
- Assessment tools, including risk, impact prioritization, strategy planning, resource restrictions, defining success, operational improvements and communications

Concept Application/Group Exercises: Participants will determine, based on anticipated impact, the degree, timing and options for addressing/minimizing risk; they will use tools to prepare for developing/refining their agency contingency plan.

Racial Equity Lens Application: Studies show that families & children of color experience worse outcomes than their white counterparts. As part of the decision-making process to reduce, realign or change, examine organizational factors, such as administrative practices, that may contribute to disparate outcomes. Identify gaps between intent & results by utilizing disaggregated data.

Major Take-Aways by Participants: (1) Specific tools to facilitate planning; multiple response evaluation; (2) framework for risk assessment; formal approach/process for contingency planning; (3) planning exercises; hearing different scenarios; (4) building team to plan & activate process; and (5) scenario formulation, assess "what ifs? from all angles.

Key Concepts in Common with Other Sessions:

Session #2 Financial Health, #4 Financial Sustainability, #6 Change Management, #7 Innovation, #8 Vision/Direction, and #11/12 Strategic Alliances

To Learn More:

International Standards (ISO) Risk Management – Principles and Guidelines

https://www.finance.gov.au/sites/default/files/COV_216905_Risk_Management_Fact_Sheet_FA3_23082010_0.pdf

Bridgespan Group: Scenario and Contingency Planning www.bridgespan.org/insights/library/nonprofit-management-tools-and-trends/scenario-and-contingency-planning

What If? Creating a Contingency Strategy <https://www.afterburner.com/contingency-strategy-plans/>

About the Presenter:

Pat Knoerle-Jordan is Partner and Nonprofit Practice Leader with Experience on Demand, a full-service management consulting practice. Pat's expertise includes capacity building, strategic development, board effectiveness & governance, and fundraising growth. She has leveraged her wealth of previous leadership experiences including CEO, Executive Director, and National Campaign Director, to help agencies work through challenges and thrive.