



United Way Agency Strategic Transition Series
Session 5: Assessing Current State/Contingency Planning
Thursday, October 11, 2018
9:00 am to 12:00 noon

Overview:

The purpose of today's workshop is to convey the critical role of contingency planning, preparing for potential change ahead of time, so that agencies are better positioned with strategies that strengthen their resilience. The workshop is designed to help agencies identify key components and use a process and tools to develop (improve) a range of default plans, based on perceived level of risk, gravity and impact on an agency's continuity of mission delivery.

Objectives of this workshop:

- Improve understanding about the critical value of risk assessment and contingency planning
- Advance learning about contingency plan components and how to develop/refine meaningful plans
- Increase knowledge of the role that leaders play in contingency planning and implementation
- Gain insight about and build comfort with tools & process for assessing risk and implementing a plan

Workshop Agenda

Time	Activity
9:00 am	<p>Welcome and brief Series & prior session Overviews- Julie Simon, Director of Agency Capacity Building Initiatives, United Way</p> <ul style="list-style-type: none"> ■ Commences session; highlights intent of Series & previous session take-aways ■ Reminds about microphone usage* ■ Describes today's session purpose and objectives ■ Introduces presenter
9:15 am	<p>Presentation on Contingency Planning – A Must for All Nonprofits! – Pat Knoerle-Jordan, Experience on Demand</p> <ul style="list-style-type: none"> ■ Participants can take notes on hard copy PP presentation included in packets ■ Questions welcome during presentation via microphones placed in the room ■ Why contingency planning, what is it, What If scenarios, planning process and tools that facilitate planning and inform decision-making <p>Break – 10 minutes (approximately 10:30am)</p> <p>Presentation continued with small group practice exercise, where participants will:</p> <ul style="list-style-type: none"> ■ Use “What If” scenarios to determine implications, likelihood, events triggering appropriate responses and impacts to various stakeholders ■ Small groups report out process and insights gained from the exercise
11:30 am	<p>Discuss highlights, take-aways and next steps of workshop experience - All</p> <ul style="list-style-type: none"> ■ Participants share greatest take-aways and next steps
11:50 am	<p>Conclusion - Julie Simon</p> <ul style="list-style-type: none"> ■ Reminder to complete and submit workshop survey before leaving ■ Briefly connects Stage One to Stage Two's first Session #6: Change Management (11/8)
12:00 noon	Adjourn

*UW requests that Series participants use microphones so that all can hear/partake in the learning experience.