

Questions to Guide a Strategic Refresh: Planning for long-term progress in the context of COVID

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“ If there is one thing history teaches us, it is that moments of shock are profoundly volatile. We either lose a whole lot of ground ... or we win progressive victories that seemed impossible a few weeks ago. This is no time to lose our nerve. The future will be determined by whoever is willing to fight harder for the ideas they have lying around.”

*Naomi Klein, Canadian author,
social activist, and filmmaker*

Purpose and when to use

- ◆ The purpose of this set of questions is to support your collective impact or other collaborative initiative to proactively **tap into the unique opportunities for long-term change** created by our societal and governmental response to COVID, without losing site of immediate crisis needs.
- ◆ It is critical that organizations committed to advancing equity and addressing social and environmental harms **do not wait until the crisis is over** to ask ourselves, “What does this new future hold for the issues we care about?” We can assume that those who prioritize other needs are already figuring out how to leverage this moment for long-term gains. So too must those of us who believe in a more just, equitable, and healthy world.
- ◆ These questions are based in a practice know as “futures thinking.” Due to the dramatic shift currently underway worldwide, they are designed help us to look not at the future 10 years from now, but the future emerging right now – the changes that we will see within 1-3 years.
- ◆ These questions are intended as a deeper dive into the issues raised by the Journey Map tool also available to help you respond to the COVID moment, available at www.policysolve.com/resources

Process and participants

- ◆ Ideally, this work is done **in partnership with stakeholders** who sit in different roles and can tap into different types of power, leverage, influence, reach, etc. Equally important is to engage stakeholders who share a set of values and commitment to driving change.
- ◆ This is the type of thinking that ideally happens not once, but over a **series of discussions and is bolstered by doing work between meetings** to answer questions about context and opportunities more fully.
- ◆ The final template (the Journey Map) is a summary of insights to help you and your stakeholders **communicate how your work is shifting and why**. To get there, there are a series of questions that can support investigation of the present and near-term future, in order to help you plan for a transformed long-term future.
- ◆ **TIP:** The questions print on 8.5x11 paper if you prefer not to work on the screen.

Understanding the Journey Map

Before COVID
(2019 and earlier)

This section is likely to be the least complex for you to fill out, as it asks you to remember what you recently prioritized (problems to tackle, strategies to try) and why (opportunities to leverage). Our futures and our past are deeply intertwined – after all, the future is only the next and emerging step in our history.

When we take the time to remember where we came from, we help create continuity, maintaining our values and commitments, even as we adapt to our current and future context.

COVID Crisis Response
(2020 and possibly through 2022)

This section is deeply urgent, and for many of us, represents a set of needs that are impossible to ignore. Our communities are suffering and we need to act (the problems to tackle). Recognizing which actions we are uniquely placed to do versus actions we need to advocate for others to take on (our opportunities) will help us prioritize our resources and direct them to the best possible actions (our strategies).

When we acknowledge and commit to addressing our shared pain today, we also open up our ability to think about tomorrow.

Moving Beyond Crisis
(2020 and beyond)

This section could easily be overlooked in our moment of crisis, but it prepares us for a world that is abruptly and dramatically changing. **Systemic shifts locally, nationally, and globally are resulting in experiments that seemed impossible a year ago.**

- Some are experiments that could help our communities not just in a moment of crisis – they could address the pains our communities have felt for a long-time (the problems to tackle).
- Other COVID actions are creating new harms (also problems to tackle).

We need to assess where to act now to transform the future, using this moment of shift proactively (our opportunities) and redeploy our work accordingly (our strategies).

When we look not only at today's needs, but also at the multiple and complex changes COVID is opening up for our future, we can actively pursue once in a decade, if not once in a lifetime, transformative opportunities.

Before COVID: Documenting where we were

The questions below will help ground you in your shared past, remembering why you made the choices you made in the past.

Priority Issues/ Problems

- ❖ How did we define the problem we wanted to help solve?
- ❖ Who did we define as having a stake in this problem, including affected groups; groups with power over the solutions; and groups with investment in the status quo?
- ❖ How did we scope the problem – e.g. which upstream drivers of the problem did we define as within our scope?

Opportunities/ Windows

- ❖ What trends or key events were we relying on to advance our work? Why were these trends critical – what did they enable or disable related to the problems we were trying to solve? Who was most affected by these trends or key events?
- ❖ What aspects of our positioning/power/reach were critical in making decisions about our strategies?
- ❖ What were the most significant barriers/challenges we faced, that caused us to reject some changes as too big or strategies as too difficult?

Solutions/ Strategies

- ❖ What did we define as the viable solutions to the problems we're trying to help solve?
- ❖ What strategies did we prioritize to advance those solutions? Why those strategies and not others?
- ❖ What “risks” were we willing to take to push the boundaries for meaningful change?
- ❖ How far into those strategies did we get? What was going to come next?

COVID Crisis Response

The questions below will help you think about what your community needs from you now. It is still grounded in your past thinking, while recognizing that today's pain needs attention before we can turn to tomorrow's vision.

Priority Issues/ Problems

- ❖ What has changed about our priority problem(s) in the context of the COVID crisis? How has it gotten worse or better? What elements of the problem and our solutions are fundamentally different now?
- ❖ What gaps/system vulnerabilities and failings relevant to our work have become apparent?
- ❖ Is the problem as we defined it still the most important thing we can be working on for our priority communities/populations/issue areas? What else might be even more critical for us to address?
- ❖ What additional data or information do we need to know to better understand this moment?
- ❖ Who has a stake in the problem as we're redefining it (affected and influential groups)?

Opportunities/ Windows

- ❖ Who else is already trying to offer immediate supports/services/solutions to our identified crisis problem? What are they not tackling that also needs to be done (complementary strategies, reach into specific populations, scale of interventions, etc.)?
- ❖ What aspects of our positioning/power/reach and the resources we can mobilize in a crisis are particularly relevant to this potential work?
- ❖ What will get in the way of us intervening right now? In what ways are we able to mobilize our capacity and shift our funding? In what ways are we constrained?
- ❖ What might we make more difficult in our future work if we deploy our resources now? Is there a middle ground that we need to find between crisis and longer-term vision?

Solutions/ Strategies

- ❖ Given all of the above, what solutions do we want to help advance to respond to the crisis moment?
- ❖ What strategies are we best positioned to deploy? How much of our resources can we put into these strategies? What will we hold back?
- ❖ What data/information do we need to help us monitor the impact and reach of our crisis response?

Moving Beyond Crisis

The questions below will help ground you in your shared past, remembering why you made the choices you made and help you make choices to transform your future.

Priority Issues/ Problems

- ❖ What opportunities do we see to move boldly forward, pushing beyond where we had previously envisioned our impact, solving problems we defined as not solvable?
- ❖ How might we redefine the problem? Have the drivers of it changed?
- ❖ Who still has a stake on the problem and who else might now have a stake including affected and influential groups?
- ❖ In what ways has our scope changed? Do we need to look at related drivers of the problem or narrow to specific aspects that are a significant overall driver right now?

Opportunities/ Windows

- ❖ What is most volatile related to the problem right now? What can we predict about the ways these factors may change over time? Where is the change coming from – politically, demographically, economically, public opinion, etc.?
- ❖ Where do we have the greatest levels of uncertainty related to the problem or potential solutions?
- ❖ How has this problem and opportunities to influence become more complex, with less ability to predict how cause will lead to effect?
- ❖ What has been tried in the context of COVID that we wish could sustain? That we need to get rid of?
- ❖ What are we best positioned to do in this messy environment? What is beyond our reach, but may be within the reach of a partner? What is not being done by anyone, but represents a key opportunity?
- ❖ What might be uniquely possible in this moment, that was not even conceivable before?

Solutions/ Strategies

- ❖ Given all of the above, which solutions do we believe are most critical to pursue?
- ❖ How can we uniquely contribute to pursuing them? Who else do we need to engage/coordinate with?
- ❖ What type of rapid learning/feedback loops do we need along the way?

Your Journey Map



Priority Problems

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Opportunities

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Solutions/Strategies

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“ We will emerge from the COVID-19 shadow into the harsh sunlight of our new reality. When that happens, we will face two basic choices. First, we can allow this new reality to shape us and define us. Our second choice is to take the reins of this unruly steed that is our civilization and make the world better, more equitable, more equal.”

*Ben Ament, Times Writers
Group, 3/20/20*

Want to go further and deeper into planning for this emerging future? Try scenario planning!

Scenario planning tools are a powerful approach to being prepared for a variety of futures. They help us to “rehearse” how we are going to respond not just to one prediction, but multiple predictions of what is to come. They help us seek opportunities for change, not just prepare for problems ahead. And perhaps most importantly, they remind us explicitly to plan to adapt instead of stay the course as the world shifts around us. Want to know more? The American Planning Association offers an excellent starting place:

<https://www.planning.org/knowledgebase/scenarioplanning/>

Feedback on this tool? Questions? Please feel free to contact:
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