



U.S. CHAMBER OF COMMERCE FOUNDATION
Institute for Organization Management

Setting Up a COVID-19 Task Force Is a Proactive and Effective Strategy

May 21, 2020

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Setting Up a COVID-19 Task Force Is a Proactive and Effective Strategy

- ▶ We are all faced with the challenge of responding to the disruption and uncertainty of a crisis.
- ▶ Nonprofit organizations can significantly benefit from setting up a task force to help respond and react to the many issues and disruptions related to the COVID-19 crisis.

Setting Up a COVID-19 Task Force Is a Proactive and Effective Strategy

- This webinar will provide implementation, guidance and strategy insights and information for establishing a crisis task force.
- We will also discuss how organizations that moved quickly to establish them have benefited and share considerations for maintaining a COVID-19 task force throughout the crisis.

Learning Objectives

1. COVID-19 Task Force Set-Up and Composition
2. Operational Parameters and Assigning Tasks
3. Smaller Organizations vs. Larger Organizations
4. What the Future May Bring
5. Transparency and Messaging

Learning Objective 1:

COVID-19 Task Force Set-Up and Composition

COVID-19 Task Force Set-up and Composition

- Include a Mix of Board Members and Non-Board Members
- Consider Resource-Based Experts:
 - Health Service Professionals
 - Regional and Local Government Officials and Staff
 - Bank Officials
 - Insurance, Safety and Risk Management Professionals

COVID-19 Task Force Set-up and Composition

- Include a Mix of Board Members and Non-Board Members (continued)
 - Consider Funders, Operations, Staff Connected Resources:
 - Grant Funders
 - Corporate Finance Professionals
 - (favorite since assessing financial impact and forecasts was a key need)
 - HR Professionals
 - (second favorite since there will be many difficult staffing issues)
 - CEO, CFO, Controller, HR Director and Appropriate Program Directors and Staff

COVID-19 Task Force Set-up and Composition

- Selection Criteria to Consider
 - CEO and Board Chair select task force members
 - Pick task force Chair – “Carefully”
 - Be Realistic
 - Who is best suited to lead and has the time and drive to perform?
 - Be Opportunistic in your Selection
 - Who brings the most recognition, experience and connections for resources?
 - Be Selfish
 - Who will meld best with your senior management team?

Learning Objective 2:

Operational Parameters and Assigning Tasks

Operational Parameters and Assigning Tasks

Roles and Duties

- Set Expectations for Roles and Duties
 - Examples:
 - Performing Research
 - Assessing Risks
 - Proposing Problem-Solving Solutions
 - Providing Professional Expertise

Operational Parameters and Assigning Tasks

Authority and Approval Functions

- Task Force Should Have No Direct Authority or Approval Functions
- Their Role is to Provide:
 - Advice
 - Information
 - Effort/Service
 - Blood, Sweat and Tears
 - Act as Extension of Your Work Force

Operational Parameters and Assigning Tasks

Reporting

- Have the Task Force Report to:
 - Primary –
 - CEO and CFO
 - Secondary –
 - Executive Committee

Operational Parameters and Assigning Tasks

Scope of Assignments

- Assign Specific Tasks and Manage Workflow Closely
 - CEO and CFO:
 - Assign Specific Tasks
 - Actively Manage Workflow
 - Report To and Keep Executive Committee and Board of Directors Informed
 - No Task Force Direct Reporting Other Than to CEO and CFO
 - *Exception – for special circumstances when determined beneficial for the board of directors or executive committee to hear from task force directly*
 - *Mostly a confidence building tactic*

Operational Parameters and Assigning Tasks

Scope of Assignments

- Design Scope of Assignments to Have Heavy Emphasis On:
 - Financial Protection
 - Financial Impact on Resources
 - Financial Impact on Cash Flow
- While Advising On: → (see next slide)

Operational Parameters and Assigning Tasks

Scope of Assignments

Key Areas to Have Task Force Advise, Research, Comment and Problem Solve Around

- Work Force Related
 - Temporary Work Force New Policies and Procedures
 - HR Impacts, Problem Resolution, Enforcement and Administration
 - Social Distancing Policies for In-Office Essential Staff
 - Remote Work Policies, Procedures, Administration
 - *See Next Slide*

Operational Parameters and Assigning Tasks

Scope of Assignments

Key Areas to Have Task Force Advise, Research, Comment and Problem Solve Around (continued)

- Remote Work Policies, Procedures, Administration
 - Work Day
 - Communications
 - Management Issues
 - Remote Work Site Considerations
 - Office Equipment, Internet, Accommodations, Allowances, etc.

Operational Parameters and Assigning Tasks

Scope of Assignments

Key Areas to Have Task Force Advise, Research, Comment and Problem Solve Around (continued)

- Notifications, Impact and Implications from Testing and Positive Tests
- Informing
 - Staff
 - Members, Attendees, etc.
 - Attendees
 - Office/Building
- Safe Work Environment (*more on this later*)

Operational Parameters and Assigning Tasks

Scope of Assignments

Key Areas to Have Task Force Advise, Research, Comment and Problem Solve Around (continued)

- Assess Vulnerability of Funding Sources
 - Retention Sensitivity Assessment
 - Rock Solid:
 - (80% to 100% Retention)
 - Vulnerable:
 - (50% to 80% Retention)
 - Shaky:
 - (0% to 50% Retention)

Operational Parameters and Assigning Tasks

Scope of Assignments

Key Areas to Have Task Force Advise, Research, Comment and Problem Solve Around (continued)

- Assess Effect on Demand
 - Increases and (Decreases)
 - Services
 - Member Program
 - Community Need
- Assess Effect on:
 - Mission Capabilities
 - Capacity
 - Priorities

Operational Parameters and Assigning Tasks

Meeting Schedule and Length of Service

- Meet Often
 - Set a Schedule (*tiered timeline*)
 - Once Per Week Meetings
 - Recommend Begin with Weekly Meetings to Start
 - Move to Bi-Weekly Meetings
 - After 4 to 6 Weeks (*based on need and initial assignments being completed*)
 - Shift to Monthly Meetings
 - As True Recovery Period Takes Hold (*light at the end of the tunnel*)

Operational Parameters and Assigning Tasks

Meeting Schedule and Length of Service

- Sunset the Task Force
 - Set a Date, or
 - Use Rolling 90-Day Periods with Extensions

Learning Objective 3:

**Smaller Organizations vs.
Larger Organizations**

Smaller Organizations vs. Larger Organizations

Whether You are a
Larger Organization or a Smaller Organization

Both will Benefit from Establishing a COVID-19 Task Force

*Generally, having a crisis task force for when the need arises,
is a good strategy*

Smaller Organizations vs. Larger Organizations

Smaller Organizations

- Tactics
 - Limit the Size and Scope of Assignments
 - Make Financial Implications and Risk Assessment the Primary Objective
 - Consider Using In-Place Committees
 - Finance Committee or Another Standing Committee
 - Supplement with a Few Additional Temporary Special Members
 - Select Members that Will Fill an Expertise and/or Capacity Need
 - Choose Members Carefully and Assign Specific New Tasks for their Expended Temporary Role

Smaller Organizations vs. Larger Organizations

Smaller Organizations *Five Added Benefits*

1. Smaller organizations will see added benefit from a crisis task force since they do not have the extra advantage of a large staff with many different skill sets.

Smaller Organizations vs. Larger Organizations

Smaller Organizations

Five Added Benefits

2. Small organizations can be more nimble and reach out to professionals, to not only bring their expertise to the table but also to be there to supplement a downsized staff with temporary staff level supported services of many different natures.

Smaller Organizations vs. Larger Organizations

Smaller Organizations *Five Added Benefits*

3. Small organizations will be under extreme budget pressure and a task force of this emphasis could be the difference in keeping capacity closer to the needs of recipients, members and the community at large.

Smaller Organizations vs. Larger Organizations

Smaller Organizations

Five Added Benefits

4. Take the approach of an in-kind contribution that the efforts of these task force members will be of a value that is most likely larger than a cash donation you individually might be able to obtain from each new task force member.

Smaller Organizations vs. Larger Organizations

Smaller Organizations *Five Added Benefits*

5. Reach-out to law firms, private interest support groups, universities for intern project support, medical professionals, financial professionals and of course people who believe in your mission.

Smaller Organizations vs. Larger Organizations

Larger Organizations

- Tactics
 - Space Out Assignments
 - Tightly Limit the Size and Scope of Assignments
 - Make Financial Implications and Risk Assessment the Primary Objective
 - Set-up As a Stand Alone Working Group
 - Select Members that Will Fill an Expertise Role vs. Capacity
 - Choose Members to Fill Current Expected Assignments and be Nimble – Exchanging Members as Assignments Evolve
 - Constantly Update Task Force Work Plan

Smaller Organizations vs. Larger Organizations

Larger Organizations *Five Key Considerations*

1. For larger organizations, the emphasis should be on finding the right team members with expertise matched to the needs and scope of your organization.

Smaller Organizations vs. Larger Organizations

Larger Organizations *Five Key Considerations*

2. Large organizations need to tightly control task force assignments so the task force works through one or two assignments at a time before new tasks are given.

Smaller Organizations vs. Larger Organizations

Larger Organizations

Five Key Considerations

3. Large organizations might consider adding a “subcommittee” structure for the task force when assignments and tasks are larger with expanded scope and time requirements.

Smaller Organizations vs. Larger Organizations

Larger Organizations

Five Key Considerations

4. Large organizations will still have their finance committees, audit committees and other committees in place – the crisis task force is not there to displace these standing committees or worse compete with them or to contradict them.

Smaller Organizations vs. Larger Organizations

Larger Organizations *Five Key Considerations*

5. Large organizations will need to pay attention to transparency and coordination – with strong inter-committee/taskforce communications, results will be better and faster.

Learning Objective 4:

What the Future May Bring

What the Future May Bring

- At this time, we cannot see a clear path on where this crisis is going.
- We know this crisis has no parallel historical reference to compare, track our progress and model/forecast for the future.
 - A crisis task force can help
“Navigate Uncharted Waters”.

What the Future May Bring

- It is not too early to put significant time and thought into planning for
 - Re-Opening
 - Recovery
 - New Normal

What the Future May Bring

- Path forward could be look like this:
 - Short-Term
 - Current Restrictions and Shelter in Place
 - Pre-Recovery
 - Staged Re-Opening
 - Be Prepared for Waves and Spikes
 - Recovery
 - Sustained Path to Normalization
 - New Normal

What the Future May Bring

- Evolving Your Crisis Task Force for the Future
 - Need Significant Time and Thought for Planning
 - Consider Adding New Task Force Members for
 - New Skill Sets
 - Expanded Workload
 - Expanded Problem Solving

“Who’d think re-opening is as, or more, challenging than closing”

What the Future May Bring

- It is not too early to start to discuss and plan for what a pre-recovery period would look like for your organization.
- This planning must include contingencies to help guard against ramping up too quickly in case there are unanticipated problems that would lead to a false recovery start.

Learning Objective 5:

Transparency and Messaging

Transparency and Messaging

Senior Management must take an important leading role in keeping confidence and trust high while helping to encourage a sense of calmness during a time of great unease.

Transparency and Messaging

- We can do this by regularly and timely communications with
 - Staff
 - Board of Directors
 - Members
 - General Public

*Impact of rapid decisions on organizational mission, capacity
financial health and continuity.*

Transparency and Messaging

A clear picture even in a time of duress and losses, will let all see where the organization is going and lessen some of the unease of over-guessing how the organization is weathering the storm.

In Conclusion

1. A crisis task force can be a tremendous resource and service to your organization.

In Conclusion

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2. The task force can be nimble and act as a partial supplement to staff during a time of great need and staffing reductions.

In Conclusion

3. The task force can act as a set of specialists, both alleviating the need to hire professionals while providing vital resource information.

In Conclusion

4. They can be your go-to consulting team, ready to tackle problems and provide solutions that staff has neither the time nor expertise to handle.