Self-assessment framework for recovery

As we think about the move from lockdown to rebooting and renewal, it can be helpful to reflect on our organisational response to the crisis, the current situation and our perceptions of the future to feel more confident about facing the next phase.

Post-pandemic, many organisations do not anticipate returning to “business as usual” but are looking beyond recovery to redesign and reform – hoping to #BuildBackBetter.

This document won’t cover all aspects of recovery thinking, and not everything will apply to every organisation. Still, we hope it helps to formulate your thoughts and capture the learning gained from the experience. We see it as a prompt for further thinking and next steps.

This document is a work in progress and will be updated, so if you are looking at areas we haven’t covered, please let us know by emailing [info@acevo.org.uk](mailto:info@acevo.org.uk)

Section 1: Response to lockdown

1. **Purpose**

* Have we still been able to deliver our purpose/mission?
* What have we been able to deliver effectively and what less effectively?
* What are the reasons for this?
* Were any parts of our purpose/mission put on hold? How was this decision made?
* Did we devote any new resources to our purpose/mission as a result of the crisis?
* Were we able to engage others in furthering our (and their?) purpose? How were we able to do this?
* Do we think our purpose needs to change as a result of the crisis? If so, what is our reasoning?

1. **Values**

* Did we consider our values in our response to the crisis?
* How did we live our values throughout the crisis?
* Do we need to adjust our values for the future? If so, for what purpose?

1. **Business continuity**

* How well did the business continuity / contingency plan (if there was one) work?
* Did what we expected to happen, happen?
* What worked well, and why?
* What didn’t work well, and why?
* What could we do better next time, and who will be responsible for making sure this happens?
* Did the risk register deliver? Was it updated/circulated to the board? How often?
* Were the right people involved at the right time in delivering business continuity?
* Who was missing?
* Did we have the right skills, autonomy and budgets to be able to make decisions?
* What innovations can we capture?
* What’s our evidence base (for all of the above?)

1. **Communications**

* How well did we communicate - internally and externally?
* How was the external stakeholder experience (beneficiaries, donors, funders, commissioners, supply chain etc)?
* Did our website stand up to the test?
* Has social media been used to broadcast information or as a two-way exchange with our audiences?
* Did our leadership team front communication with stakeholders?
* How have we involved beneficiaries in shaping our response to the crisis?
* Are there new stakeholder engagement methods that we tried that should continue?

1. **The board**

* How did we engage trustees? How did they respond?
* Has our relationship strengthened or weakened during this period? What were the reasons for this?
* Did board meetings continue? Were extraordinary meetings convened? Should they have been?
* How often did we review the risk register? Was it fit for purpose?
* Did we agree any changes in service delivery?
* Did we recruit trustees during this period? How was that experience?
* Were there any trustee resignations (and were they accepted)?
* Did we discuss the planned use of reserves? Is our reserves policy fit for purpose?
* Were our AGM plans continued/postponed?
* Are/were any special resolutions needed to ensure we can maintain good governance during a crisis?

1. **Staff**

* Did all our staff / volunteers get the support they needed:
  + to enable them to adjust to new ways of working?
  + to help them deal with questions they had or information they needed?
  + the PPE and training they needed to continue to operate in a safe manner?
  + support with increased incidence of mental health issues, family debt, domestic abuse, bereavement etc?
* How did staff morale hold up during the transition and beyond?
* What are the things we as the leadership team learned about each other and our response?
* Is there any learning regarding our engagement with the chair/board? Why is this important?

1. **Technology**

* How did our technology stand up?
  + To enable staff to increase remote working?
  + For board/trustee meetings?
  + To ensure cyber-security risks were not compromised
  + To the need for IT support during traditional non-office hours?
  + To the need to amend processes and record keeping “on the fly”?
  + Did our contracts for SIM cards / data lines / cloud hosting etc remain cost-effective in the light of the extra traffic across them?

1. **Supply chain**

* Did our supply chain work for us?
  + Did any suppliers need special help to survive the crisis?
  + Did any suppliers prove to be particularly helpful?
  + Were any suppliers belligerent or unhelpful?
  + Did we have sufficient stocks of goods and materials to counter supply chain disruption?

1. **Overall learning**
   * What three surprising things did we learn about us and/or our team during this lockdown period?

|  |  |  |  |
| --- | --- | --- | --- |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

* + With hindsight what three things do we most wish we’d had in place before this all kicked off?

|  |  |  |
| --- | --- | --- |
|  | What? | Why? |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |

Section 2: Current situation

1. **What are our constraints right now and how serious are they for us?**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Critical | Serious | Not serious | Not applicable |
| Cash/liquidity |  |  |  |  |
| Staff availability |  |  |  |  |
| Staff morale |  |  |  |  |
| Technology |  |  |  |  |
| Data |  |  |  |  |
| Supply chain constraints |  |  |  |  |
| Increasing beneficiary issues (eg domestic abuse) |  |  |  |  |
| Health and safety |  |  |  |  |
| Trustees |  |  |  |  |
| Other |  |  |  |  |
| Other |  |  |  |  |

1. **Can cashflow be maintained?**
   * Do we have a worst-case picture of our weekly cashflow to the end of the financial year?
   * Do we have contingency plans in place with funders to support us to the level that is required?
   * Do we understand what the current situation might mean in terms of layoffs, further service reduction or other aspects of our operation?
   * What is our new Plan B if reality is even worse than this worst-case picture?

Section 3: Preparing for reboot

As we come out of lockdown into recovery, what will our organisation need to look like (no more than three answers to each question)?

1. **What are the most important things to restart largely using the same approach as before?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What? | Why? | How? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **What will we keep doing that we have developed in this period** (eg what will stay online/digital; should we retain any changes in culture/approaches to work)**?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What? | Why? | Will we need to alter anything to cement this change? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **Leaving the past behind, what will we stop doing, as we have identified that it adds no value or is not core to our new operating model?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What are we going to stop? | Why? | What evidence did we use to make decision? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **What, if anything, will we start doing that is completely new?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What is new? | Why? | What evidence did we use to make decision? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |

1. **How can we #BuildBackBetter in terms of**
   * Making our organisations and the way we operate more equitable?
   * Making our organisations more environmentally sustainable?
2. **For the changes we have identified as being desired, who do we need to consult / engage / negotiate with to make them come about?**

Section 4: Next steps and priority setting/taking action

1. **Reflecting on our answers, what are the top five actions that will be taken forward in the next three months?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What? | Key lead? | When? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |

1. **What about longer-term change? Have we identified things we would like to change next – in the one to two year timescale?**

|  |  |  |  |
| --- | --- | --- | --- |
|  | What? | Why? | When? |
| 1 |  |  |  |
| 2 |  |  |  |
| 3 |  |  |  |
| 4 |  |  |  |
| 5 |  |  |  |

1. **What’s the one big idea that in five years from now we hope COVID-19 will drive us to achieve?**

|  |  |  |
| --- | --- | --- |
|  | What? | Why? |
|  |  |  |

1. **How does this experience inform future business continuity plans for our organisation?**
2. **In what ways can we use what we’ve learnt to our advantage?**
3. **What lessons are there for our sector?**

Section 5: Who can help?

* If you want to share your approach, thoughts and challenges with your peers, log into the [ACEVO Community](https://acevocommunity.force.com/online/s/).
* If you would like governance support, contact ACEVO’s [Governance Advice Line](https://www.acevo.org.uk/support/good-governance/).
* If you would like consultancy support with these issues, contact ACEVO partners [Action Planning](https://www.acevo.org.uk/services/supplier-directory/supplier/action-planning/), [Campbell Tickell](https://www.acevo.org.uk/services/supplier-directory/supplier/campbell-tickell/) or [EastSide Primetimers](https://ep-uk.org/).

Thanks to Ian Wright from [Disruptive Innovators Network](https://disruptiveinnovatorsnetwork.co.uk/) for allowing ACEVO to adapt and share this framework with members.

To feed into the next iteration of this document, please email your comments to [info@acevo.org.uk](mailto:info@acevo.org.uk).