THE NONPROFIT ASSOCIATION OF OREGON

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Planning During Change:
A Toolkit for Nonprofits

This toolkit has been developed to provide nonprofits a starting point as they consider near- and mid-term plans for their organizations amid uncertainty.

This toolkit covers:
Identifying Possible Scenarios (*30 minutes)*
Identifying Your Current Response Strategy *(60 minutes)*
Beginning to Build Your Plan on a Page (*60 minutes)*
Plus, additional tools for financial analysis and scenario planning
(See additional instructions and excel tools)

What this toolkit is:

- An opportunity to begin framing your position and response
- A launching point for conversations for board, staff and stakeholders
- A guide to developing a one-page "response plan" from which to begin

What this toolkit isn't:

- A formulaic answer to your unique situation
- A static place you must or will stay in

How to use it:

- Gather your team – include board, staff, volunteers and other stakeholders relevant to your success – and set up time to have conversations together or in teams
    - Before you start this work, identify and engage a diversity of perspectives – think about whose not at the table and invite them
- We have suggested timelines for engaging in the material, but feel free to utilize the sections that are of value to you when you need them and to revisit conversations as they become relevant again

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Identifying Possible Scenarios

Recommended Time: 30 Minutes

A helpful way to prepare for the future is to identify extreme circumstances in key areas and how those extremes might impact your organization. Below are four key variables impacted by the current crisis, and space for you to consider an additional variable. For each variable, consider first, *the best-case scenario* and describe the impact to your organization, then describe *the most difficult or* challenging scenario and the impact. Once you've completed that, outline what you believe is *the most likely scenario* to occur and the impact to your organization.

Try not to get lost in the uncertainty of the future. Instead, use this as a time to consider the range of impacts your organization may face. This will be helpful as you continue planning your path and response. Remember, you can revisit your assumptions at any time based on new information you gain. The situation is dynamic, you need to be as well!

Economic Conditions	
Best Scenario: Economic impact is short-lasting and growth/stability resumes by the end of 2020.	**Difficult Scenario:** Economic Impact is long-lasting and large impacts are felt well into 2021 or longer.
Impact to Your Organization:	**Impact to Your Organization:**
Most Likely Scenario:	
Impact to Your Organization:	

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Public Health Conditions	
Best Scenario: Health reports show COVID-19 case rates reach their peak, continue to subside.	**Difficult Scenario:** COVID-19 case rates and severity increase as social distancing guidelines are loosened and continue to surge or come in waves.
Impact to Your Organization:	**Impact to Your Organization:**
Most Likely Scenario:	
Impact to Your Organization:	

Workplace/Facility Conditions	
Best Scenario: Workplaces and places of service reopen in phases and stay open without a surge in new cases. Social distancing requirements are loosened without negative effects to public health.	**Difficult Scenario:** Workplaces and places of service stay closed or are required to close again due to surging virus cases. In this scenario plan on closures lasting through the year.
Impact to Your Organization:	**Impact to Your Organization:**
Most Likely Scenario:	
Impact to Your Organization:	

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Travel Conditions	
Best Scenario: Travel restrictions are lifted and travel resumes without negative effects to public health through 2020.	**Difficult Scenario:** Travel restrictions for all but local travel stays in place throughout 2021.
Impact to Your Organization:	**Impact to Your Organization:**
Most Likely Scenario:	
Impact to Your Organization:	

Additional Variable	
Best Scenario: Is there a specific additional variable you should take into account in your best-case scenario? Note them here.	**Difficult Scenario:** Are there other specific additional variables you should take into account in your most difficult scenario? Note them here.
Impact to Your Organization:	**Impact to Your Organization:**
Most Likely Scenario:	
Impact to Your Organization:	

Distill your most likely scenarios and impacts into a short situation statement of three to four sentences:

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Identifying Your Current Response Strategy

Recommended Time: 60 Minutes

1. **Briefly describe the immediate needs of the communities, causes, or people you serve.**

2. **Which best describes the current needs of those you serve?**
   a. Increased Need – And we worry we cannot meet it
   b. Increased Need – But we have been able to keep up
   c. No Change in Need
   d. Decreased Need
   e. Decreased Need Now, then Anticipated Increased Need – We are planning for an increased need of our services, products, and work in the future

3. **Reflect on the needs for your services and list two challenges and two opportunities related to the needs of those you serve.**

Two Challenges:	Two Opportunities:
1.	1.
2.	2.

4. **Briefly describe your current ability to meet the need. Consider your operational, staff, budgetary, leadership, and technical capacities.**

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5. **Which best describes your situation?**
    a. **Reduced Capacity** – We are unable to meet our current needs, due to a shortage of personnel, equipment (including PPE), communication, technology, and/or funding. We may lack a clear course of direction or leadership. Our team feels worried for our future.
    b. **Maintained Capacity** – We have been adapting to the changes and mostly have a handle on personnel, equipment (including PPE), communication, technology, and/or our current budget. Our path seems reasonably clear and funding is identified, if not stable. Though not everything is perfect, our team is weathering the storm.
    c. **Increased Capacity** – We are functioning at full speed. We have successfully adapted to changing work conditions, have access to equipment, communication, technology, equipment (including PPE), funding, and our leadership team is fully engaged. We have been exceeding our goals, and everyone is working hard, which puts burdens on our team.
    d. **Unsure of Our Capacity** – We have not had time to check in on our team or communication efforts, we are not sure where our budget is right now, and we feel like we are putting out fires. We are not yet sure which capacities we excel in or lack.

6. **Reflect on the capacity of your organization and list two challenges and two opportunities you face (e.g. staffing, a funding source, social distancing orders).**

Two Challenges:	Two Opportunities:
1.	1.
2.	2.

Where does this put you right now? Take stock of your current response strategy.

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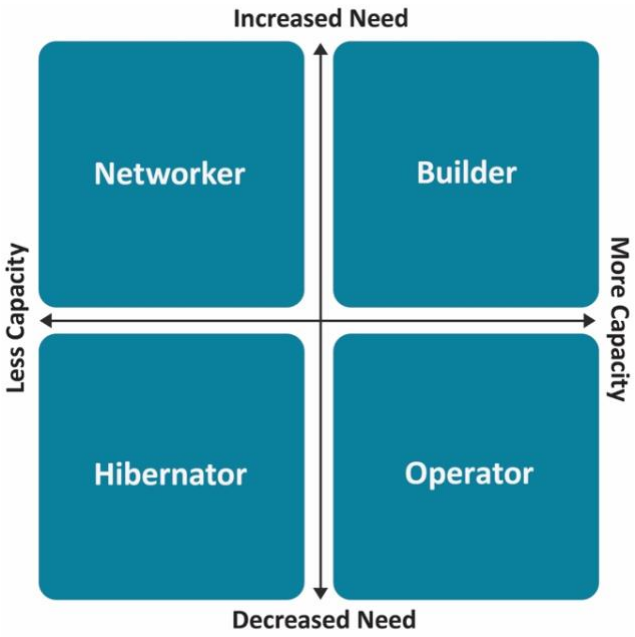
Different organizational responses and strategies we are seeing across the state are represented here on a spectrum of capacity and demand. The purpose of this is to help gauge where you are now and inform where you want to go next.



Look at Question #2. If you answered

- **A** or **B,** place yourself in the top quadrants
- **C**, **D, E** place yourself in the bottom quadrants

Look at Question #5. If you answered

- **A** or **D**, place yourself in the left-hand quadrant
- **B** or **C**, place yourself in the quadrant on the right-hand side

Keep in mind, this list is not comprehensive nor exclusive. No position is better than another and most organizations will cycle through some of these roles over the upcoming months or longer. But if you can identify your current response strategy, it will help guide your conversations as you develop your plan.

Networker: Networkers are operating in response to increased need *without* a corresponding influx of resources or capacity. In a time of crisis, they are finding new ways to partner with mission-parallel organizations. They may be organizations that must prioritize attracting external resources or building up their internal capacity to meet the growing demand. They often have strong relationships already in place.

Builder: Builders are able to function with some of the least operational constraints (i.e.: a nonprofit whose services were always done virtually) and are experiencing increased demand, as well as an influx of resources and capacity. Though all nonprofits are feeling some level of disruptions, *Builders* are ramping up their services and may even be expanding. This is usually supported by a strong operational foundation. Many builders may be direct-service providers, delivering immediate relief to those in need.

Hibernator: Hibernators are intentionally or by circumstance operating at the lowest possible level. This could be due to continued restrictions (i.e.: an overnight youth camp or a choral group), lack of funding, or operational capacity, or because their primary services or missions were put on hold during shelter-in-place orders. Hibernators may have decided (or be required) to hunker down and wait out the restrictions. Either way, programming and operations are at a significantly reduced level. This also has the effect of reducing the appeal for charitable contributions. (i.e.: no programs, no donations)

Operator: Operators are continuing with business as (mostly) normal. They have made adjustments to program delivery that are in sync with their operational capacity, and their teams are able to function in a new operating environment as needed. Though demand for their services has not notably increased or decreased, they are able to deliver on their missions with some modifications.

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Response Strategy Discussion Questions

The discussion questions below are designed to help further the conversation and clarify your current position. Read and respond to each of the questions related to the quadrant you fit into. Because you may be cycling through different responses over time, read all questions and answer any that feel applicable.

Hibernator	• What (else) can we stop doing entirely? What costs can we shed? • How do we take care of our people? Who can we not afford to lose? • What long-term projects can we continue (safely) during this hibernation? • How will we maintain our organization and our relationships virtually? • How long can we hibernate without losing ground? • What plans do we need to make to restart normal operations? • What can we do to prepare now for any increased need that might arise later?
Networker	• What are the highest needs in our community right now? • Who in our community have we worked with before? • What organizations or partners exist that provide parallel services or programs to ours? • How can we flex our programs, delivery methods, and operations to bolster efforts? • How long can we continue collaborating without prioritizing our core mission? • What are the largest drivers impacting our capacity?
Builder	• Is the increased need we are experiencing short-term or long-term? • How can we grow and deliver our services safely? How can we make sure our staff and clients are protected and healthy? • What do we need to stop doing to focus on our highest priorities? • What increased management, staff, or operational capacity do we need to deliver our programs and services? • What additional funding or resources do we need to continue operating at a high level? • How long can we sustain this level of activity? • What plans do we need to make to return to normal operations?
Operator	• How will we safely continue to operate? • How do we shift or continue to shift our delivery model? • How do we make mid/long-term decisions on events, return to work, and gathering? • How long can we sustain our operations in a changing landscape? • What might help us attract additional resources to become a Builder?

Notes:

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Beginning to Build Your Plan on a Page

Recommended Time: 30 Minutes

1. **Which quadrant did your organization fit into? In what ways does it feel accurate to your current situation? In what ways might you be currently occupying a different quadrant?**

2. **Given the current environment and the need for your services, how will you need to pivot your programming or delivery to meet the needs of those you serve? Refer back to Question 3 on Page 4 for guidance. Then, prioritize three strategies and associated actions that need to take place to implement them. Consider short- and mid-term strategies in response to current issues.**

Three Need Strategies	Three Activities:
1.	1.
2.	2.
3.	3.

3. **Given your current state and the capacity of your organization, what will you need to do internally to help meet operational goals? Refer back to Question 6 on Page 5 for guidance. Then, prioritize three strategies and associated actions that need to take place to implement them. Consider short-term and mid-term strategies in response to current issues.**

Three Capacity Strategies	Three Activities:
1.	1.
2.	2.
3.	3.

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Plan on a Page

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Organization's Mission Statement:

Scenario and Impact Statement: *(from Page 4)*

Strategies Related to Need:	Activities:	Outcomes/Goals:	Responsible Party:	Timeline:
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•

Resources Needed to Implement Activities:

Strategies Related to Capacity:	Activities:	Outcomes/Goals:	Responsible Party:	Timeline:
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•
	1.	1.	•	•
	2.	2.	•	•
	3.	3.	•	•

Resources Needed to Implement Activities:

Next step recommendation: Use the budgeting tools to plan resource scenarios around your goals!

What's Next?

The next step is to take this work and begin incorporating your actions and reflections into an operational picture. On the following page, we've included a template for a Plan on a Page. Utilize your responses from the exercises in this workbook to draft your Plan on a Page. Remember, your plan will reflect your current situation and therefore is represents a snapshot in time. Your organization might cycle through strategies as the landscape of your current situation changes. If that occurs, refer back you your plan and revise any strategies or activities based on what you know now.

Finally, because much of your current situation is likely tied to your finances, we are also providing scenario planning tools to help you map out different budget scenarios and the implications they will have for your organization.

If you need further support, we can help! Contact NAO to learn about additional tools and resources available to you.

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Resources and Further Reading

- NAO On-line Learning Recorded Webinars
- Eight Steps for Managing Through Tough Times | The Bridgespan Group
- The Sustainability Mindset | Nonprofit Sustainability
- Survive and Thrive: Financial Strategies & Scenario Planning for Nonprofits and Social Enterprises | Scale Collaborative
- Tough Times Call for Tough Action: A Decision Framework for Nonprofit Leaders and Boards | Seachange

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