



# Rapid Planning for Nonprofits: A Toolkit for Sense-making in a Changing World

**Developed April 2020, Updated June 2020 and February 2021**

This toolkit has been developed to provide nonprofits a starting point as they consider mid and long-term plans for their mission and their organization. It has been informed by resources from across the sector and is built to help nonprofits start important conversations as they begin building and wading through their new normal.

**This toolkit covers:**

- Where we have been? *(60 minutes)*
- Where are we now? *(60 minutes)*
- Where are we going? *(30 minutes)*

**What this tool is:**

- A launching point for conversations
- Sense-making for operations and programs in light of changing external conditions
- A compliment to your operations and strategic plan, or a guide to revise them

**What this tool isn't:**

- A formulaic answer to your situation
- A static box you must or will stay in
- A full operational or strategic plan

**How to use it:**

- Gather your team – include board, staff, leadership, and other stakeholders – and set up time to have conversations with each group over the upcoming weeks
  - Do your best to identify and engage a diversity of perspectives as you start this work
- 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 feel free to revisit conversations as they become relevant again
- This is part of an ongoing response and will include further tools to help you run budget scenarios and continue planning

## Forming the Team

A key component of success in this process is gathering the right mix of roles and voices to engage in this process. Ensure that every participating member of the team is there for a purpose, and that the size of team allows for diversity without becoming too large to effectively manage and find consensus. In addition to ensuring that all major aspects of your organization are represented, consider inviting participants who provide differing viewpoints, perspectives, leadership styles, and approaches to collaboration.

If you have limited staff/board members, considering asking volunteers to engage in the process who understand your mission and organization and who can provide a compliment to your understanding and style. Don't do it alone!

### Team Leader:

Name	Title	Role

### Team Members:

Name	Title	Role

## Planning the Process

Like being purposeful with selecting team members, it is important to set expectations and intended deliverables for each meeting that your team gathers to work through this toolkit. In establishing the schedule, ensure that you are also allowing for extra time to devote to specific topics that may require additional conversation and analysis.

### Building Your Next Normal Meeting Schedule:

Meeting	Date/Time	Time Allotted	Intended Deliverable
1			
2			
3			
4			
5			

# 1: WHERE HAVE WE BEEN?

## Taking Inventory of the Past Year

*Recommended Time: 60 Minutes*

### Measuring Capacity

1. What are the most significant **operational changes** you've made to your mission/services over the past year? How have these changes impacted your **organizational capacity** (ability to meet the demand)? Consider staffing, service delivery, processes, and technology. Seek input from your staff, board, and leadership team. *Describe these briefly:*
  
2. How does your organization measure your organization's capacity to meet the needs of the communities, causes, or people you serve? (Examples may include clients served, staff in service, operational funding, contracts awarded, or client surveys). *Describe these briefly. Compared to one year ago, has your capacity increased or decreased?*

	One Year Ago	Today	
Metric: _____			Increase Decrease No Change
Metric: _____			Increase Decrease No Change
Metric: _____			Increase Decrease No Change

3. In what ways have the events of the past year illuminated disproportionate impacts upon underrepresented or vulnerable populations amongst your stakeholders (clients, staff, volunteers, donors)? How has your capacity to serve (if clients) or equip (if staff/volunteers) these groups changed over the past year? *Describe these briefly:*

***Consider the final months of 2020 to your current state:***

4. Which **generally** best describes the capacity of your organization over the past year?
- Reduced Capacity** – We were unable to meet the needs of our community, due to operational limitations and/or a shortage of equipment, communication, technology, personnel, funding, and/or we struggled to find clear direction or leadership.
  - Average Capacity** – We adapted to changes and mostly had a handle on how to operate throughout 2020 environment and utilize equipment, communication, technology, personnel, funding, and/or our current budget. Our leadership was present, and we had sufficient funding to make it through the year. Though not everything is perfect, our team adapted to a challenging year.
  - Increased Capacity** – We successfully adapted to changing circumstances, had access to equipment, communication, technology, personnel, funding, and our leadership team is fully engaged. We often exceeded our goals throughout 2020, even though some days were hard for our team.
  - Unsure of Our Capacity** – We still 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 in some combination of the capacities above.

**Measuring Demand**

5. What have been the **immediate needs** of the communities, causes, or people you serve? What are they looking to you to provide/solve for them? Seek input from your board, staff, leadership team, and partners. *Describe these briefly:*

6. Over the past year, what are the most significant changes to the needs of the communities, causes, or people you serve? Today, what are they looking to you to provide/solve for them? Consider not just tangible benefits, but intangible as well (e.g. emotional support, concerns around inequity, technical assistance, relationship). Seek input from your board, staff, leadership team, and partners. *Describe these briefly:*

7. How does your organization measure demand for your mission in the communities, causes, or people you serve? (Examples may include waitlist for services, economic or societal data, or client surveys). *Describe these briefly. Compared to one year ago, have these metrics increased or decreased?*

	One Year Ago	Today	
Metric: _____			Increase Decrease No Change
Metric: _____			Increase Decrease No Change
Metric: _____			Increase Decrease No Change

***Consider the final months of 2020 to your current state:***

3. Which **generally** best describes your current situation, relative to one year ago?
  - a. **Increased Demand** – And we worry we cannot meet it
  - b. **Increased Demand** – But we have been able to keep up
  - c. **No Change in Demand**
  - d. **Decreased Demand**
  - e. **Decreased Demand Now, then Anticipated Increased Demand**- We are planning for an increased need of our services, products, and work in the future

## Mapping Your Past Response Strategy

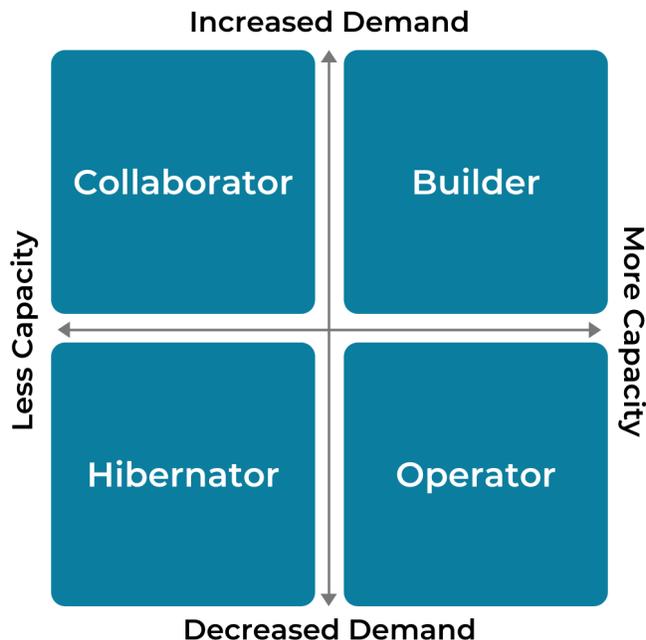
Based on your conversations and answers above, you can map your response strategy from the prior year and current starting point below:

Look at Question #4. If you answered

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

Look at Question #8. If you answered

- **A or D**, place yourself in the quadrant to the left that correlates with your first answer.
- **B or C**, place yourself in the right hand quadrant that correlates with your first answer.



**Collaborator:** Collaborators operated in response to increased demand without a corresponding influx of resources or capacity. Perhaps they were supporting organizations that were in direct service or finding ways to partner with mission parallel organizations. They may be capacity builders by nature or finding ways to help their community craft a response to the most pressing needs. Or, they may be organizations that must prioritize building up their internal capacity in order to meet the growing demand they have faced.

**Builder:** Builders experienced increased demand as well as an influx of resources and capacity. Though no waters have been untroubled, builders ramped up their services, supported by a strong operational foundation. Many (though not all) builders may be in direct-service sub-sectors, providing immediate relief to those who need it most.

**Hibernator:** Hibernators intentionally or by circumstance operated at lower-than-average service levels. This could be due to a lack of funding, support, or operational capacity, or because their primary services or mission were put on hold due to external factors outside their control (e.g. shelter in place orders). Hibernators may have decided to hunker down and outwait the diminishment of service provision or they may be there without choice. Either way, programming and operations were at reduced level.

**Operator:** Operators continued with business as (mostly) normal. They made adjustments to program delivery that were in sync with their operational capacity, and their team was able to function in a new operating environment as needed. Though demand for their services did not notably increase or decrease, they were able to deliver on their mission with some modifications.

## Questions to Consider

**Keep in mind:** This is a spectrum, and very few (if any) organizations or programs will fit squarely in one box. Yet, understanding the arc of where you have been can help you plan for where you are going. For now, consider the following questions, based on your past response strategy:

<b>Hibernator</b>	<ul style="list-style-type: none"> <li>• Have circumstances changed enough that we can resume operations or programming?</li> <li>• Have we adapted to be able to deliver things differently?</li> <li>• How much have we been able to resume operations?</li> <li>• What adjustments do we need to make to our external deliverables or strategic plan to accurately reflect our current position?</li> <li>• Are there partners we need to reach out to right now?</li> <li>• Is our business model still viable?</li> </ul>
<b>Collaborator</b>	<ul style="list-style-type: none"> <li>• Have we leveled out in demand, or do expect it to continue rising?</li> <li>• Have we adjusted our capacity to meet current needs, or are we still unable to staff or resource our team appropriately?</li> <li>• Have the partnerships we made last year served our organization and mission well? Do we want to continue them in the upcoming year?</li> <li>• What are the highest needs in our community right now? What are the needs around diversity, equity, and inclusion we may not have noticed before?</li> <li>• Do we need to adjust our business model for the upcoming year to add in partnerships that proved successful?</li> </ul>
<b>Builder</b>	<ul style="list-style-type: none"> <li>• Have we leveled out in demand, or do expect it to continue rising?</li> <li>• Can we maintain our increased capacity to meet current needs, or do we need to consider cutting back on staffing or resources?</li> <li>• Are there other organizations in our community or subsector we should consider partnering with in the coming year?</li> <li>• What are the highest needs in our community right now? What are the needs around diversity, equity, and inclusion we may not have noticed before?</li> <li>• Do we need to adjust our business model for the upcoming year to account for increased demand or revenue driving services?</li> </ul>
<b>Operator</b>	<ul style="list-style-type: none"> <li>• Have we experienced any additional shifts in demand for our services?</li> <li>• Do we need to make any adjustments to our staffing or resource structure?</li> <li>• Are there other organizations in our community or subsector we should consider partnering with in the coming year?</li> <li>• What are the highest needs in our community right now? What are the needs around diversity, equity, and inclusion we may not have noticed before?</li> <li>• Do we need to adjust our business model in the coming year?</li> </ul>

## Impact on Your Deliverables and Strategic Plan

Additional questions to consider, regardless of response strategy:

### Did you have deliverables promised to funders in the past year that you were unable to meet?

If so, have you incorporated these into your current year programming?

- Yes**, entirely, and we feel confident we can meet them
- Yes**, for the most part, and our funders understand the shifts we needed to make
- Somewhat
- Not really**, we aren't sure when we will be able to meet those deliverables again
- Not at all**, we have had to cancel or dramatically shift those programs

Given your answer above, what are your next steps?

### Did you have a strategic plan in place for the past year?

If so, have you gone through and adjusted for changes?

- Yes**, entirely, and we feel confident we can resume our trajectory on our strategic plan
- Yes**, for the most part, though we needed to make a few adjustments
- Somewhat**, or, it's on our list of things to do
- Not really**, we aren't sure when we will be able to meet stated goals
- Not at all**, we have had to cancel or dramatically shift our programming so much we anticipate redoing our plan from the ground up

Given your answer above, what are your next steps?:

# 2: WHERE ARE WE NOW?

## External Environment: 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, knowing that actual circumstances will most undoubtedly fall somewhere between the two extremes discussed. Below are four key variables that are likely to impact your organization, and space for you to consider an additional variable. For each variable, consider the “extreme” conditions and the impacts of those conditions upon your organization.

*Consider conditions and impacts for the time period of 12 months or less. Try not to get lost in the uncertainty of the future, rather use this as a time to consider, as a team, the range of impacts your organization may face. This will be helpful as you continue planning your path and response to the unknown.*

### Political Conditions (e.g. funding, regulations, stability)

**One Extreme:**

**Other Extreme:**

***Impact to Your Organization:***

***Impact to Your Organization:***

### Economic Conditions (e.g. employment, growth)

**One Extreme:**

**Other Extreme:**

**Impact to Your Organization:**

**Impact to Your Organization:**

**Societal Conditions** (e.g. health, demographics, beliefs)

**One Extreme:**

**Other Extreme:**

*Impact to Your Organization:*

*Impact to Your Organization:*

**Technological Conditions** (e.g. access, affinity)

**One Extreme:**

**Other Extreme:**

*Impact to Your Organization:*

*Impact to Your Organization:*

**Additional Variable:**

**One Extreme:**

**Other Extreme:**

*Impact to Your Organization:*

*Impact to Your Organization:*

# Internal Operations: Identifying Changing Activities

*Resources Adapted from [Creating a Post-Covid Business Plan](#), Harvard Business Review, January 8, 2021*

In a tumultuous world such as ours in 2021, most individuals are asking the same questions: What's going to happen next? What of our current pandemic-era behaviors are going to last and what will revert back to a pre-pandemic "normal"? While its impossible to pinpoint exactly how the future will play out, we are far enough into (and out of) this global pandemic to do some constructive analysis about what behaviors are going to stay with us. In doing so, its important to categorize behaviors and processes into one of three categories:

1. **Will Return to Form:** These are activities and behaviors that are likely to return to their pre-crisis condition mostly unchanged. An example of this might be in-home gatherings of family and friends – this has been discouraged and reduced currently, but no one anticipates family and friends to stay away from in-person gatherings forever.
2. **Will be Transformed:** These are activities and behaviors that are likely to return after the crisis, but with significant fundamental changes. An example of his might be dining out in a restaurant. We are likely to see increases in the number of people visiting restaurants, but enhanced health and safety protocols, like table cleaning, are likely to continue.
3. **Will Go Away or Be Replaced:** These are activities that are likely to cease altogether or be replaced by alternatives. An example of this might be certain in-person business meetings and business travel. With the efficiency and convenience of Zoom and other video conference technology, we are likely to see non-essential business meetings continue to be conducted remotely.

How do we determine which behaviors are most likely to fit within each category? Four factors can help to evaluate this:

1. **Mechanics:** Is the activity a habit or has the routine been disrupted? The more routine the activity, the more likely it is to sustain.
2. **Motivators:** Does continuing the activity provide significant psychological or financial benefit? The more intrinsic or extrinsic benefits provided, the more likely to sustain.
3. **Pressures:** Is the activity altered due to significant political or societal pressures? The more pressure to change, the more likely change will occur.
4. **Alternatives:** Are there viable alternatives to the activity? The more alternatives and the more viability of those alternatives, the more likely change is to occur.

Much of our operations and processes have changed over the past 12 months – see part 1, question 2 for your operational changes. Consider your operations on three levels – staff/board management, donor/volunteer management, and client/community management.

For each of these management aspects, identify 3-5 key activities or behaviors critical to success that have been adapted over the last year. For each activity, categorize the importance of that activity to the ongoing impact and sustainability of the organization and decide whether that activity is likely to return to form, be transformed, or go away/be replaced based on the four evaluation categories listed above.

## Staff/Board Management

<u>Activity/Behavior</u>	<u>Description</u>	<u>Importance</u>	<u>Category</u>
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced

## Donor/Volunteer Management

<u>Activity/Behavior</u>	<u>Description</u>	<u>Importance</u>	<u>Category</u>
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced

## Client/Community Management

<u>Activity/Behavior</u>	<u>Description</u>	<u>Importance</u>	<u>Category</u>
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced

## Other

<u>Activity/Behavior</u>	<u>Description</u>	<u>Importance</u>	<u>Category</u>
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced
		Low Medium High	Return to Form Be Transformed Go Away/Be Replaced

# 3: WHERE ARE WE GOING NEXT?

## Moving Boldly into the Future

*Recommended Time: 30 Minutes*

What do you want the future to look like for those communities, causes, or people you serve?

**Describe:**

What do you want the future to look like for your organization? **Describe:**

Given your response strategy(ies) over the past year and anticipated internal and external conditions impacting your capacity, what will you need to do internally to help meet those future goals you shared above? Prioritize three changes or actions:

- 1.
- 2.
- 3.

Given the current environment and operating conditions, what do you need to monitor to ensure you proactively identify changes to maximize service delivery and mission impact?

**Prioritize three changes or actions:**

1.

2.

3.

Have the past year's events highlighted any areas of your mission or operations that are inequitable or unjust to your clients, community, staff, volunteers, or donors? If so, what steps can you take to build diversity, equity, inclusion, and justice into your mission? [Who do you need to include in your conversations](#) or leadership to ensure you are meeting the needs of oppressed, marginalized or underserved demographics? **Prioritize three changes or actions:**

1.

2.

3.

What changes need to be made to your organization's strategic plan to reflect current and projected future realities of capacity, demand, and operating conditions? **Prioritize three changes or actions.**

1.

2.

3.

## Learn More.

### Resources and Further Reading

- [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
- [Understanding the Racial Gap in Nonprofit Leadership](#) | Race to Lead
- [Engaging Constituents in Social Change](#) | Building Movement
- [Crisis as a Catalyst for Race Equity and Inclusive Leadership](#) | Pro Inspire

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