Building Your New Normal:
A Toolkit for Nonprofits

Developed April 2020 by Montana Nonprofit Association

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 their new normal.

> **This toolkit covers:**
> Identifying Possible Scenarios (*30 minutes*)
> Identifying Your Current Response Strategy *(60 minutes)*
> Beginning to Build Your New Normal (*30 minutes*)

What this tool is:
- An opportunity to begin framing your position and response
- A launching point for conversations

What this tool isn't:
- A formulaic answer to your situation
- A static box you must or will stay in
- An operational 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

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 the "extreme" impact and then describe the impact to your organization.

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.

Economic Conditions

One Extreme:
Economic Impact is short-lasting and growth/stability resumes quickly.

Impact to Your Organization:

Other Extreme:
Economic Impact is long-lasting and large impacts are felt for the rest of 2020 and beyond.

Impact to Your Organization:

Public Health Conditions

One Extreme:
COVID-19 case rates have reached their peak, continue to subside, and do not have a future surge.

Impact to Your Organization:

Other Extreme:
COVID-19 case rates and disease severity increase dramatically as social distancing guidelines are loosened and continue to surge throughout the year.

Impact to Your Organization:

Workplace/Facility Conditions

One Extreme:
Workplaces and places of service re-open in measured phases and stay opened without a surge in cases, and social distancing requirements are loosened over time without negative effects to public health.

Impact to Your Organization:

Other Extreme:
Workplaces and places of service stay closed throughout the year due to surging virus cases.

Impact to Your Organization:

Travel Conditions

One Extreme:
Travel restrictions are lifted in phases without negative effects to public health and travel resumes as normal.

Impact to Your Organization:

Other Extreme:
Travel restrictions for all but local travel stays in place throughout the year.

Impact to Your Organization:

Additional Variable:

One Extreme:

Other Extreme:

Impact to Your Organization:

Impact to Your Organization:

Identifying Your Current Response Strategy

Recommended Time: 60 Minutes

1. What are the immediate needs of the communities, causes, or people you serve? <u>Seek input from your board, staff, leadership team, and partners.</u> *Describe these briefly:*

2. Which best describes your situation?
   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. What are the two or three most impactful drivers that influence the need for your organization's mission and services?

   1.

   2.

   3.

4. What is your current organizational capacity (ability to meet the need)? Consider your operational, staff, budgetary, leadership, and technical capacities. <u>Seek input from your staff, board, and leadership team.</u> *Describe these briefly:*

5. Which best describes your situation?

    a. **Reduced Capacity** – We are unable to meet our current needs, due to a shortage of equipment, communication, technology, personal protective equipment, funding, and we lack clear direction or leadership. Our team feels worried and scattered.

    b. **Average Capacity** – We have been adapting to changes and mostly have a handle on equipment, communication, technology, personal protective equipment, funding, and/or our current budget. Our leadership is present 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, personal protective equipment, funding, and our leadership team is fully engaged. We have been exceeding our goals, even though some days are hard for 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 in some combination of the capacities above.

---

6. What are the two or three most impactful drivers that influence your organization's capacity to meet the need (e.g. staffing, a funding source, social distancing orders).

    1.

    2.

    3.

Where does this put you right now? Here are some different organizational responses and strategies we are seeing across the state. This list is not comprehensive or exclusive. And no position is better than another – each exists on a spectrum of capacity and demand – and most organizations will cycle through some of these roles over the upcoming months. The purpose of this is to help gauge where you are now, and how that will inform where you want to go next:
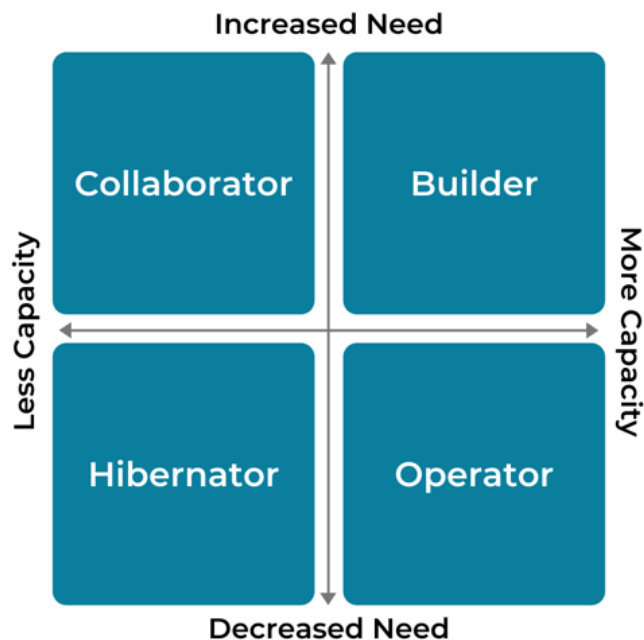
Let's gauge your current response strategy.

Look at Question #2. If you answered

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

Look at Question #5. If you answered

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

Increased Need

Collaborator	Builder
Hibernator	Operator

Less Capacity / More Capacity

Decreased Need

Collaborator: Collaborators are operating in response to increased need without a corresponding influx of resources or capacity. Perhaps they are supporting organizations that are in direct service or finding ways to partner with mission parallel organization. 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 are facing.

Builder: Builders are experiencing increased demand as well as an influx of resources and capacity. Though no waters right now are untroubled, builders are ramping up their services and this is 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 are intentionally or by circumstance operating at the lowest possible level. This could be due to a lack of funding, support, or operational capacity, or because their primary services or mission was put on hold during shelter-in-place orders. Hibernators may have decided to hunker down and outwait the restrictions, or may have been forced there. Either way, programming and operations are at reduced level.

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 team is 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 mission with some modifications.

Keep in mind: This is a spectrum, and very few (if any) organizations or programs will fit squarely in one box. But if you can identify a mostly accurate current response strategy, it will help guide your conversations over the coming weeks.

Below are clarifying questions for your role right now. **Reflect with your team on these questions, given your role and goals above:**

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 complete (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?
Collaborator	• 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 ongoing efforts? • How long can we continue collaborating without prioritizing our core mission?
Builder	• 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 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?

Beginning to Build Your New Normal

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 current state and the largest drivers 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 the largest drivers impacting your mission needs, how will you need to pivot your programming or delivery to meet the needs of those you serve? **Prioritize three changes or actions:**

1.
2.
3.

What's Next?

The next step is to take this and begin incorporating your actions and reflections into an operational picture. Much of that will be tied to your financial situation. MNA's next recommended toolkit is a scenario planning tool to help you map out different budget scenarios and the implications they will have for your organization.
This will be released no later than April 30th, 2020.

Most importantly, we encourage you to continue making time for these conversations when you are able, to better prepare your team and those you serve for an uncertain future.

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

Visit mtnonprofit.org to learn more

M·N·A

Montana **N**onprofit **A**ssociation

mna@mtnonprofit.org   406-449-3717   mtnonprofit.org