

Hi, everyone. Thank you so much for joining. We'll get started at the bottom of the hour.

As you see on the screen, if you would like, please introduce yourself. So share your name, your location.

And if desired, one word that describes how you're feeling about the future.

And we'll start in just a couple of minutes. Thanks for joining.

For everyone who just joined, thanks so much for joining. We're going to get started at the bottom of the hour in just a few minutes.

Feel free to pop in the chat. Your name, location, and one word that describes how you're feeling about the future.

Just a note on the chat, there are two options. You can chat just the hosts and panelists, or you can chat everyone.

So just make sure that you select everyone so that your chat goes out to the full group.

Thanks so much and we'll get started soon.

For everyone who just joined, welcome, welcome. We're going to get started in just a minute. We're putting in the chat name, location, and one word that describes how you're feeling about the future.

Hello, everyone. Thank you so much for joining. My name is Lucinda Vakura. I use she, her pronouns.

I'm the Vice President of Business Development and Marketing with Alford Group For a visual description, I have short brown hair, dark rimmed glasses. I'm wearing a black top.

Against the background with a plant and a bookcase. We're so glad you're here. The title of today's presentation is ABC Scenario Planning.

Strengthening resilience in uncertain times. And if you haven't already, if you're just jumping on, we invite you to pop in the chat Your name, location, and one word that describes how you're feeling about the future.

The chat has two options. You can chat just hosts and panelists, or you can chat everyone. So please make sure to chat everyone so everyone can see.

Your chat out. Before we dive in, I want to tell you a little bit about Alford Group and walk you through some webinar logistics So I realize most of you, many of you are familiar with Alford Group. But for those of you who may not be.

Alford Group is a national full-service consultancy serving the nonprofit community.

We offer six flagship services, which are all listed here on your screen.

We are a proud member and partner of AFP, the Association of Fundraising Professionals.

We are a certified women's business enterprise and a proud member of the Giving Institute.

For more information about us, you can check us out at elfearn.com.

I do want to take a minute to acknowledge the land on which we reside.

I realize you all are calling in from all over the country.

However, I'm going to acknowledge Chicago, Illinois, which is Alford Group's headquarters.

Chicago is located on the traditional unceded homelands of the Council of the Three Fires.

The Ojibwe, Ottawa, and Pottawatomie nations. Many other tribes, such as the Miami, Ho-Chunk, Menominee, SAC, and Fox also called this area home.

The region has long been a center for Indigenous people to gather, trade, and maintain kinship ties.

A few webinar logistics. This webinar today is being recorded. And you will receive an email from Ulford Group within 24 hours with the recording of the webinar.

The slides from today's presentation As well as a worksheet around scenario planning. So everything we're going through today, we're going to send to you in worksheet form.

And hopefully that will be a very helpful resource for you.

At the end of today's presentation, you'll be prompted to complete a very short survey. We hope that you take a couple minutes to do so. It will give us a lot of really good feedback in terms of how you're doing, how you're feeling, and what topics will be

Useful for you for us to continue to do these free live events.

Everyone is in listen-only mode for the duration of the webinar. However, the chat is open, as you all have found. So thank you for your participation already.

And I just want to flag if you have a specific question for the panelists.

Today, instead of using the chat. There's a Q&A function. So if you mouse over the bottom of your screen, your navigation bar.

There's a Q&A icon. It'll open a window and there you can chat a question that goes directly to the speakers.

And we'll be monitoring that throughout the presentation and we'll answer as many questions as we can at the end of today's presentation.

So with that, I would like to invite the presenters to come on camera.

Thank you so much for being here, Brenda, Sierra, and Sharon To talk about this timely topic. And Sharon, I'll hand it over to you to kick us off.

Hello, everyone. I'm Sharon Tickness. I serve as the Chief Client Experience Officer for Alpha Group and have been with our consultancy for 13 years.

I am a white woman with short brown hair wearing a striped top. My pronouns are she, her, and I'm excited to get to know you all better and navigate this world together. Sierra.

Hello, everyone. My name is Sierra Clarity. My pronouns are she, her, and I am so excited to be here with you. I'm a consultant at Alfred Group and I'm really grateful to be part of this conversation.

So thanks for having me. And I'm going to pass it to Brenda.

Thank you so much. And hello, everyone. I'm Brenda Asari. President and CEO of Alfred Group. My pronouns are she, her. I'm an African-American woman wearing black rimmed glasses with my hair pulled back and wearing a black dress.

With a beige wall and bookshelf behind me. Welcome again to our webinar. We're so thrilled that you're here today to explore how scenario planning can empower your organization to navigate the challenges and opportunities ahead.

Let's be honest, the nonprofit world is facing some strong headwinds right now.

Trastic federal funding cuts and new executive orders impacting fundraising have created a climate of uncertainty.

Many of you are likely feeling the pressure. And that's why you've joined us today.

But here's the good news. Uncertainty does not have to equal paralysis.

Scenario planning is our secret weapon in meeting this moment. It's a powerful tool that helps us to move beyond simply reacting to change and instead proactively shaping our future.

Think of it as strategic foresight. Not fortune telling.

During this webinar, we will equip you with the framework for effective scenario planning.

We'll walk you through a six-step process from identifying key uncertainties to developing diverse scenarios and actionable strategies. We will also be sharing a case templates and resources to help you implement scenario planning within your own organization And remember, you don't have to travel this journey alone. Alpha Group is here if you need a partner.

We want you to leave the webinar with a renewed sense of confidence and purpose for navigating

uncertainty mitigating risk and seizing new opportunities for growth and impact.

We're not just here to survive these challenges. We're here to emerge stronger.

More resilient and more effective in fulfilling our mission. So let's roll up our sleeves.

Engage in some strategic thinking and chart a course toward a brighter future for our organizations and the communities we serve I love quotes. In this moment, one of my favorite quotes is, when nothing is sure.

Everything is possible. By Margaret Drabble, an English novelist who was known for making good trouble In the face of social injustice in her day.

Again, welcome. And I'll pass it over to Sierra.

Great. Thanks, Brenda. So we asked you at the beginning, what's one word that describes what you're feeling right now? So I was just tracking in the chat what the sentiments are overall and I think there's a pretty resounding obvious part of this where many of us are feeling worried, anxious.

Terrified, concerned. There's a lot of emotions that are rising up from this.

Someone had said gritting teeth as well, just feeling a little bit disheartened. And others are feeling determined and activated, conscious, fired up, energized.

I think it just goes to show that there's a lot of different emotions that are showing up in all of this. And our goal here today is to really meet you where you are and hopefully you'll walk away from this session feeling a little bit more supported in your process wherever you are right now.

Mm-hmm.

We also asked on LinkedIn, and before we dive into the discussion, we really do want to start with you. And so because this conversation is about real challenges nonprofits are facing right now.

Over the past two weeks, we ran a LinkedIn poll and we asked nonprofit leaders, we asked you, what's keeping you up at night? And so some of the questions that we asked are how immediately do you anticipate potential policy shifts In this new administration will impact your organization. And 88% said this is immediately urgent. So we know that this is a topic that we're really thinking about, that folks are really engaged in.

And then 13% over the next year. And so we know that this is uncertain times and there's a lot to this conversation. But I think these polls really just show us that there's a lot of uncertainty right now. And the next question is in this new area of uncertainty.

Yeah.

What issue is top of mind for you in your nonprofit? And 57% said it impact fundraising efforts. And so

we're really going to focus a lot of our scenario planning on that topic specifically today. And then 19% said planning for unknown changes, 14, accurate and timely policy information, and then 10% communicating to donors and staff, which

We are also going to cover today. So thank you for those who participated in our poll So let's be real. Uncertainty isn't going away anytime soon. But instead of feeling stuck, we can create a plan, as Brenda had mentioned.

That lets us pivot and not pause. So that's where ABC scenario planning really comes in.

And it's about being ready for whatever happens. So what we're going to do and what we do with scenario planning is we map out three possible situations.

So we map out the best case scenario. So that's when things improve and we have the resources to grow, we map out baseline scenario. So if things stay steady and we maintain operations.

And then we also map out worst case scenario. So this is, for example, if we lose funding.

Or if we face big policy shifts. And we have to make tough decisions. And so the key here is that we don't want to wait to react. We anticipate and we prepare.

And there's a difference between scenario planning and paradigm planning. So scenario planning is about the immediate next steps and what to do if funding is cut in the next month, for example. And that's really where we're going to focus a lot of our energy today.

Paradigm planning, it really looks at the long term. How do we adapt if the whole nonprofit sector shifts in the next three to five years, for example. So we're really wanting to focus on that immediate action next steps now so that you can walk away from this having an action plan that you can take to your organization.

So by thinking ahead, we don't just survive uncertainty, we really stay in control. So that's our goal for today.

And before we dive into each step of scenario planning, we want to take a big look at the process. So this is the checklist that gives us a clear structured way to plan for uncertainty. So we're making intentional decisions

Instead of scrambling when challenges arise. So first we identify the risks and what we can control. So what funding sources are at risk, what policy changes could impact us?

And most importantly, where do we have the power to adapt And then next we map out that ABC scenario. So we plan for the best case.

The baseline and the worst case so that no matter what happens.

We already know our next move. Then we strengthen our financial game plan. So that means that we

budget for each of those different scenarios diversifying revenue streams, setting trigger points to adjust spending.

And then step four is about adjusting programs and operations without losing your impact.

Not every program is equal, so we want to prioritize what is truly essential and maybe what is non-urgent or flexible so that we can see where we have opportunities to scale up or down if necessary.

And then, of course, we need to communicate with confidence. So whether that's with donors or board members or staff.

People trust organizations that are proactive, not reactive. And then finally, we monitor, adapt, and keep learning. So scenario planning is not a one and done. The best organizations truly revisit these steps regularly.

And refine their approach with the lessons that they've learned. So this roadmap really keeps us agile, prepared, and in control. So let's break it down step by step. I'm going to pass it over to Brenda to walk us through step one.

Thank you so much, Sierra. As we look at step one, again, we're looking at identifying the risk And what you can control.

So to effectively manage your organization, you need to understand both the risk And also what you can control. This step is crucial for building resilience and ensuring long-term success In essence, risk identification, as you see here, transforms scenario planning from an abstract

Exercise into a practical tool for navigating uncertainty. It allows you to anticipate potential problems.

Develop effective solutions and ultimately increases your chances of success. So as you can see right now, what's impacting our sector, everything from funding policy Economic trends, community needs, and even our internal readiness to deal with these challenges.

So what do you do now? So once you've identified those risks and threats, we would advise that you assign what we are calling a risk watch team. Even if it's just you and a board member who's keeping an eye on these shifts, now more than ever, we're encouraging you to engage your board

As partners, they are stewards of your mission and champions for your success.

The next step to do now is create an early warning signal system. Please go back. A simple checklist of indicators that signal when things are changing or getting off track. So again, the things that you may be looking for relative to fundraising.

Slower grant disbursements, major funders pulling back. New policy proposals. So those are the kinds of triggers you would be looking for.

And then lastly, the key insight. The sooner you spot potential shifts, the more time you have to adjust. So

again, you don't want to be behind the eight ball.

Step two. Map out ABC scenarios. Now that you've identified your key risk.

Use them to construct these three distinct scenarios. A sierra touched on already this is your thriving and best case.

B would be you're holding steady baseline or in some cases, you may need to plot out what is the most likely case and then c is moving into crisis and worst case scenario. And what you see here you can look at this once you've identified your scenarios

Then you start thinking through what is currently happening. So again, those indicators and then How do we respond?

So what to do now. So number one, defining your trigger point. So again, the indicators What specific events would push you to move from scenario A to be and then from being to see. So what are you looking for is triggers?

Assign responsibilities. Who on your team is watching each scenario and recommending next steps? So again.

High alert. The key insight here, this isn't just about guessing. It's about preparing.

To pivot fast when conditions change. So again, as you think about steps one and two, we're thinking assess Adapt, adopt.

So now let's take a look at a case study to further bring scenario planning to life.

Well, Brenda, one of the things that I love about this ABC scenario is it ties right to my favorite quote by Lewis Carroll.

Sharon.

If you don't know where you're going, any road will get you there. And in this session, we hope that you identify three ways to get there so that you can continue to maintain your course to having the greatest impact in serving your community and key constituents.

Yeah.

So let's look at the Food Bank of Alphordia. Of course, Alfred has Alphordia in our world in a way of finding a wonderful place for us to think about the clients we serve and all of you. So the Food Bank of Alphordia has been a lifeline for families, providing food assistance for nearly 5,000 people each month

So let's look at how they came to their best case baseline and worst case scenarios. So in their best case scenario, they've doubled down in finding new partnerships and building up their strength and looking to corporate partnerships, foundation grants, and really looking to ensure that they're prepared for any loss

of federal funding.

And the way that they've done that is to expand their partnerships with grocery retailers, local farms and other retailers that help to supply in-kind support. They've increased their fundraising efforts and really focused on major individual and institutional donors, and they've invested in infrastructure for long-term sustainability.

In their baseline scenario, they've lost 20% of, they have made up for all the funding except for 20% and they're trying to sort out now how they'll address that gap. So they're really looking at how to reduce their food distribution footprint, perhaps reducing days, but maintaining emergency services, which we know are so important in this time of great shift.

They have implemented budget cuts for non-essential areas such as events or marketing spend and really look to bolster their community partnerships to ensure that they can continue to serve their community.

Organization. Let's move on to step three to strengthen your financial game plan And you'll see here, this is a very dense slide, but we will send this to you so you will have these resources to look more deeply at. But building financial resilience is something that hopefully we all build a muscle around with the pandemic and understand the importance of having financial capacity to weather storms, although

Many organizations are finding really hard realities to adjust to. But we see that obviously we need to budget for each scenario. We need to continue to advocate for public funding and perhaps be even stronger in the way that you approach that by bringing your board and volunteer staff leaders together.

Again, diversity in revenue streams, corporations have had really strong years. Go to them and ask them to dig deeper, to be more engaged in your work.

Continuing to seek grants as well as looking to find ways to tap into donor advised funds and see if there's earned income possibilities. Is there untapped potential in your revenue stack?

Building financial reserves, again, going back to the pandemic is something that we all understood in real time. Best practice is to have at least three to six months of operating costs at your disposal. Use that as a talking point of how you need to maintain that while you draw from it.

And identifying cost cutting measures in advance. So if you're in the A scenario right now, be prepared to what, you know, identifying what those B or C cuts might be that will be possible to do without hurting your impact in the most important ways. So what did Food Bank of Alphordia do? Well, they created an if-then budget chart, you know, looking at a 25% funding drop

Where they might reduce there and mounted a major advocacy campaign. I'll just share with you that Congress will be in recess March 13th through the 21st and the Senate March 17th through the 21st. Make an appointment now to get in front of them. Take your board members. Be in front of them and advocate and tell your story.

Tell the story of one and how that's multiplied by hundreds and thousands of people who you serve in your community and the quality of life that you bring to your community.

And be upfront with your donors. Engage your donors now. You may not be in scenario B or C, but you want to be prepared for that. Let them know that you have a plan in place. Make them part of your team.

To withstand this moment and let them know how you are bringing your best thinking and flexibility and being prepared to move. So the key insight here is that financially strong nonprofits aren't just good at raising money.

They're good at planning how to use it wisely. And this is certainly a time for your donors to experience that.

So moving on to step four, how we adjust our programs and operations without losing impact. You'll see here that Every nonprofit has three types of programs, those that are mission critical that you must do and must be protected at all costs. Those where you have some flexibility and you can scale up or down depending not only on funding, but how you are managing your scenario planning. And then those that are less urgent or have a lower priority.

Those perhaps can be paused or merged or phased out. So what would Food Bank of Alphordia do? Well, map out your programs and priorities. What's non-negotiable? What's adaptable?

What's your North Star you must hold on to? Plan for staffing adjustments. If needed, you just might have to think about reducing hours instead of layoffs, trying to protect and keep your team whole and your culture healthy is so important.

And continue that transparency around how you're thinking about staffing adjustments.

Now more than ever, partnerships are critical to our ability, not just to manage your organization well, but to be a part of a collective that is serving in the mission critical ways to your community. So not every program is equal. And just remember that the best nonprofits focus on what's most impactful, not just what's nice to have.

Thanks, Sharon. So now that we've mapped out our financial strategies and the program The next critical step is how we communicate those changes. So we can all probably recall a time when we were craving information waiting for an update, unsure of what was happening, only to be met with silence. And that lack of communication

Sierra, take us to step five.

Doesn't just create confusion, it can also create fear and distrust. And so in times of uncertainty.

People don't expect all of the answers, right? But they do expect transparency and leadership.

And studies that we've seen show that organizations that communicate openly during a crisis actually see higher engagement. They start to see stronger donor retention and a greater trust from their communities because they see you really leaning in and sharing transparently what you do know when you know it.

And change management isn't just about making internal decisions. It's about bringing donors and staff

and stakeholders along with us on the journey that builds trust and confidence. So let's talk about this a little bit.

Because of times of uncertainty, the way we communicate is just as important as the decisions that we make. And so each audience has different concerns. So our communication should really meet them where they are.

So with donors and funders, they want to know their investment is secure. So your message to them may be something like your support ensures our mission thrives no matter what's ahead. And for board members.

They really need reassurance that there's a solid plan. So to them, we might say, here's how we're keeping operations steady and resilient.

For staff and volunteers, they're really on the front lines. So they need to feel prepared. And a way we can communicate with them, for example, would be we're planning for all scenarios to continue serving our community and just letting them know that maybe the plan isn't fully baked yet, but it's in the works.

For community members, for clients, they want to hear stability. So something like, we're committed to staying strong for you.

And then when it comes to public officials, they typically like data-driven advocacy. Our work directly improves quality of life in this community by XYZ, and we need your partnership to sustain it. So those are just some examples of communication tactics and ways that you might just start thinking about how you want to inspire each of these stakeholder groups.

So what would the Food Bank of Alphoria do right now when it comes to communication?

You know, they would create a scenario messaging guide. So pre-drafting emails.

Donor updates and talking points so that they're ready in advance and having that communication strategy ready to go so that they can activate it as needed.

They also would designate a lead communicator. So having one person or one central source or hub that's responsible for external messaging so that the information is consistent and that it's clear. And a key takeaway here is that people follow organizations that exude stability and leadership. And so even

When we don't have all the answers, we can always communicate with confidence, even if it's just sharing, we're working on a plan. We'll share more updates as we have them.

Step six, so this is monitor, adapt, and keep learning. So we've built a plan. We've adjusted our messaging.

We've prepared for different scenarios, but scenario planning isn't a set it up and forget it process like we mentioned. And the real power really comes from continuously monitoring, adapting, and improving on the plan.

And the reality is things will change, right? So new funding opportunities may open up, policies may shift again, donor behavior could evolve. And that's why the most resilient organizations aren't just the ones with a plan, they're the ones that actively track key indicators

Reassess their approach and they stay flexible. So it's not about getting everything right the first time. It's about staying responsive.

Making informed adjustments as new information comes in. So let's talk about how we can put a system in place to monitor changes adopt our strategy and just really keep learning along the way.

All right, so here for step six, we really want to ensure that we're in learning mode. So tracking what's working, spotting challenges early, making strategic adjustments rather than reacting to crisis.

So how do we make sure that we're staying proactive? First, we can schedule quarterly reviews, for example. So setting a dedicated time to assess funding, policy shifts, and donor behavior. So are grants being delayed, our donor engagement levels shifting? What external changes might impact us next?

And then also tracking key indicators, as Brenda had mentioned. So keeping an eye on cash flow, on donor retention, on service demand. So these numbers help us catch some warning signs early.

And then also documenting lessons learned. So what worked, what didn't work? And every scenario gives us insight that can help us refine our strategy moving forward.

What's also helpful in terms of next steps are assigning ownership. So who in your organization is tracking and updating this plan? And this is really where a RACI and DACI framework can help. So RACI is responsible, accountable, consulted, and informed. It's a tool that we often use at Alfred Group in all of our projects.

And it really ensures that everyone knows who's responsible for what. So responsible for tracking and updating the plan for a scenario plan is really critical.

And then Daisy is driver, approver, contributor, and informed. And that helps with decision making. So when a shift is needed, it's really clear who makes that call when those trigger points get activated.

And then creating a timeline. So when are we going to review and make these adjustments? What is our timeline for that?

And then also establishing check-ins. So how are we going to measure progress and flag potential risks?

So some key takeaways, if something isn't working, adjust. It's okay. We can be flexible. And if something is working, double down on that. Organizations that really commit to monitoring, adapting, and learning will always stay ahead of uncertainty.

So the Food Bank of Alphoria story can be a really powerful example and inspiration for how scenario planning can turn uncertainty into strategic action.

So instead of reacting and being in panic mode, they made intentional decisions that allowed them to stay in control and stay ahead.

So for one, they acted quickly, not reactively. So rather than scrambling when federal funding was cut, they mapped out the three possible outcomes that Sharon walked through and they adjusted those accordingly.

Having a plan in place meant that they could pivot fast without making rush decisions because they had already thoughtfully considered what that plan would be.

They also diversified their funding. So losing a federal grant exposed a major risk and too much resilience on one funding source. So this crisis pushed them to develop new corporate and foundation partnerships.

So strengthening actually their long-term sustainability They also strengthen their messaging. So instead of framing this funding gap as a crisis.

They positioned it as an opportunity for donors to step up and lean in and be engaged.

And that shift in messaging increased community support and donor engagement, which was one of their long-term goals anyways.

And they prioritized mission critical services. So scenario B and C really forced them to make tough decisions But they ensured that food assistance programs remained intact for those who needed them most.

So what's our key takeaway here? It's that the Food Bank of Alphoria didn't just survive. They actually came out more resilient.

And by applying these same principles, any nonprofit can be better prepared for truly whatever comes next.

So we have covered a lot why scenario planning matters, how it helped Food Bank of Alphoria navigate a funding crisis.

And some key lessons learned. But now comes to the most important part. How do you actually apply this to your organization?

Because having a great plan is one thing, but really putting it into action is what makes the difference. So whether you're a small nonprofit or a large organization, the steps really remain the same. You need a structured approach that fits for your team and your mission and your unique challenges. So let's shift gears a little bit and talk about exactly how you can implement scenario planning today.

And what tools you need, who should be involved, and how to make sure your organization stays ahead of uncertainty. So if you're comfortable, we'd love to hear from you how your organization might implement this.

All right. And then, so again, we've covered a lot today. So let's just take a moment to revisit the next steps or the key steps in scenario planning process.

Put it in the chat.

So again, this is the checklist. You can consider this your roadmap of sorts, and it really ensures that no matter what challenges arise.

You have a plan in place to respond strategically and not reactively. So first, again, is identifying the risks and what you can control.

Every nonprofit faces uncertainty. Many of us have been through this before during the pandemic, but the key is knowing where you have the power to adapt and where you need contingency plans.

And then as Brenda talked about mapping out those ABC scenarios, don't wait for the funding cuts or policy changes to catch you off guard.

Plan for the best case, plan for baseline and the worst case scenarios so that you can adjust quickly when needed.

Strengthening your financial game plan as Sharon walked us through, diversifying funding, tracking financial triggers.

Preparing different budget scenarios to ensure financial resilience. And then Sharon also walked us through adjusting those programs and operations without losing impact. So prioritizing the mission critical services and identifying what you can scale up or down and finding creative ways to stretch resources.

We then talked about communicating with confidence and being proactive and not reactive and how much that can build trust.

And then monitoring, adapting, and learning. And so it's not a one and done. We want to continue to stay ahead of uncertainty.

So this isn't just a checklist, really. It's a mindset shift, I think. So the more prepared you are, the more in control you are over your organization's future.

And scenario planning is only as effective as the process you build around it. So to make it truly valuable, there are a few key factors to consider when implementing it in your organization. So first is Identify the right participants. And we want to emphasize that this isn't just an executive level exercise.

You want to have a diverse mix of decision makers, including leadership, maybe program managers, finance staff, fundraisers.

Maybe even some frontline team members who see daily operational challenges because the more perspectives that you can bring in, the stronger your scenarios will be.

Also set clear objectives and outcomes. So what are you trying to achieve? Are you focused on preparing for funding shifts or policy changes or operational risks?

Be really clear on what success looks like so that your plan doesn't feel theoretical, that it feels like it's driving real decisions.

And then also create a safe space for honest discussion. So our teams, people want to feel comfortable discussing those worst case scenarios without fear. So encourage open, candid conversations about vulnerabilities, potential And even uncomfortable financial realities, because the more honest the conversation, the better prepared your organization will be.

And then next, balance structure with flexibility. So have a framework in place, but don't let it become rigid, right? So scenarios evolve as new information emerges.

And we really want to emphasize that you can allow this space to adjust plans based on real world development. So it's kind of a living system.

And also ensure follow through and accountability. So the best scenario plans don't just sit on a folder collecting dust. We assign clear owners with the RACI for monitoring risks and tracking key indicators and also ensuring that decisions align with the plan. So thank you so much.

We have one other drop in the chat here now that we've talked through the process. Let's bring it back to action. So my question for you, what is one action that you will take in the next week to begin implementing ABC scenario planning in your organization.

So maybe it's scheduling a leadership meeting to identify risks Maybe it's drafting your first ABC scenario. Maybe it's simply starting the conversation with your team about what scenario planning is. So feel free to drop in Take a moment to think about it and then we're going to open the floor up for Q&A.

You know, Sierra and Sharon, thank you so much for your involvement and participation in today's webinar. I just have a quick question as we go through all of the questions.

Where do you see most organizations feeling challenged relative to just getting scenario planning underway?

Yeah, I think my first thought, Brenda, is just with time and resource. You know, everybody already has their day job and most folks already have a really full plate.

Well, I'll start or CR, go ahead, please.

Yeah.

Just executing day-to-day operations. And so this can often feel a little bit overwhelming because it almost feels like another full-time job for folks to take the time But really, we find that by taking this intentional time, it really can help prevent so much

Mm-hmm.

Mm-hmm.

Extra work in the long run. And it's also a really helpful tool When you do take that time and investment with your team, because it helps everyone get in that strategic mindset that's also a really great core capability for your organization overall. So I think that's the biggest thing that we're hearing is, well, how do we find the time to prioritize this right now in this moment?

Yeah, and I would just add that the uncertainty and the unknown makes it difficult to scenario plan. However, as we've shared with you, start somewhere, you know, start with Things improving, things staying the same. And worst case scenario where there's a dramatic shift in your resources or your ability

Yeah.

Mm-hmm.

To deliver on your mission and how you're going to manage that. With the, well, Lucinda, you're joining us and we're eager to jump into other questions. But yeah, just that start, go, Leo.

Just start. Yeah. And I know we oftentimes wait for that perfect And I think the perfect moment is when we start noticing the shifts. And even if you don't see the shifts, but you can anticipate that at this point, there's a ripple effect in terms of what's going on in the philanthropic marketplace and what's happening as

Let's go.

A result of what's coming down through executive orders and other impacts that's rippling across not only the country, but also across our sector.

So again, I would certainly encourage all of us to be bright eyed and open and alert to really thinking about what are we going to do in the what if category, because I think that's a real conversation starter that should be had at every level of organizations right now.

That's great. Thank you. Thank you all for the presentation and walking us through all of that.

As we look at what's ahead.

We do have some questions. And if you have a question, please feel free to add it into the Q&A text box and we will answer as many questions as we can now with the time remaining.

I did want to highlight a couple of comments in the chat.

Around communications. So the communications piece of scenario planning is so critical.

And so one is we're creating a donor outreach campaign to keep donors up to date on the information

about the potential cuts to services.

So, right, just communicating. No one has all the answers. We don't have the answers, but just making sure that you're communicating out to donors In particular. And another comment I wanted to highlight about internal communications.

Riley writes, in tight times, development can talk to the whole organization.

About bright spots and successes to show how others see value in the organization.

So again, that thread of communications is so key.

So a question based on communications For you all.

If you could hone in a little bit further, specifically around donor communications, how do we use or how can we use scenario planning to prepare donor communications that reassure funders during this time of uncertainty.

Yeah, I can jump in here. I think the biggest thing, you know, you might not want to share every single detail of that scenario, but allowing them to know that you are putting that plan in place and emphasizing that you're thinking strategically and thinking ahead can be helpful.

But also with each of the scenarios, depending on what your organization is processing and what you're planning and preparing for, thinking through kind of putting yourself in their shoes and really bringing that human element of going.

Kind of doing that empathy mapping of sorts to say, you know, what might their concerns be? And maybe they're sharing those with you in advance and thinking through how you might want to address those strategically.

12 months, for example. But Sharon, Brenda, I'd love to hear what your thoughts are on this one.

Yeah, I just want to call out, hi, Marta. Hi, Cherise and love your comments.

In the chat, because you're right on in terms of as we're having these donor conversations, the natural tendency is to go with our handout talking about, you know, we need emergency funding. And certainly in some cases that may need to be the conversation.

We also want to emphasize the opportunity to engage our funders and our donors as partners in this work, right? So there could be other aspects that we could be asking for relative to partnerships. We could be asking for their advice.

We could be asking for other supports. One of the things that we're seeing with corporations, and we saw this during the pandemic with in-kind support or expertise, that they might be able to provide that you wouldn't otherwise be able to afford in this moment. So again, I think thinking through what are the menu of opportunities of ways for your donors and funders and board members to support you that goal.

Even beyond just the financial piece of it.

And maybe I'll jump in by tying it to what Kelly wrote earlier before she had to step away around advocacy and what you can do both as an organization, I mean, directly to your elected officials, but also engaging their staff. She gave a lot of great ideas around that. And I'll just add that

March 13th is the budget vote. And as we learn more about what will end up being in the budget approved budget will understand pretty quickly what the impact of that will be.

There was a question posed about the continuation of HR 6408, and we certainly understand that that Internal Revenue Code, which is set to terminate the tax status of terrorists supporting organizations, as well as another code related to tax deductible are two that we have eyes wide open about. And it's likely that in this budget that will be approved that there will be substantial clarity around that. So be thinking about March 13th as a date that not only will you know more, but you'll

Want to be communicating how you're responding to to whatever the final budget presentation is and how that will impact your organization. The communicating with donors and your communication plan, regardless of the constituency, whether it's donors or volunteers.

Or staff or clients, be transparent. Share share your confidence and your questions and your intentionality around having a plan in place to ensure that you can have the greatest possible impact through this time of transition.

Thank you. That's a really great addition, Sharon, and really important.

Another question for you all. This goes back to um Well, you all were talking about in terms of ABC and looking at programs and priorities. So the question is.

Do you have recommended tools or approaches or advice about assessing programs and priorities to help determine the difference between mission critical and flexible and lower priority. So those three levels that we set out.

What's a good thought process to go around determining how do you fit into those buckets?

Mm-hmm.

I'll jump in here. You know, stakeholder engagement is something that we value a lot at Alfred Group.

Some of the tools that we'll leverage is actually going to the community and having opportunity to ask this from them, whether that's through focus groups or different touch points to really hear from them. And this is actually a really cool opportunity to ensure that your mission and your programs are actually resonating. Another thing that we use at Alfred Group is a SOAR survey.

Soar is an acronym. It's a strength-based assessment that we use It stands for strengths, opportunities, aspirations, and Results.

And so sometimes we'll plug in the different mission or the different programs of an organization's strategic plan and we'll pulse check that out with different stakeholders and get that information back so that we can say, okay, yes, we know what our mission critical programs are, we know that this is resonating with the community, with our teams, with our donors or funders or whoever that survey is sent out to.

So I think those are just some ideas of really, you know, instead of feeling like you have to have all the answers behind closed doors.

This is a great space to open those doors, open all the windows and go out and do some outreach and stakeholder engagement to really do that pulse check so that you have it validated.

Love you just said, open all the doors and windows. We all need to remember to breathe, right? Every once in a while, take a cleansing breath, an energizing breath.

Yeah. Yes.

An energizing stretch along with a SOAR survey or exercise that you can do as a group or offer to your team, you know, invite them to share what they see as the greatest threat or what they see as mission critical. Utilizing data to inform our decisions is such a smart thing to do and no reason not to engage you know

Family, whoever is in your inner circle to help provide that insight to you.

That's great. Thank you. And we mentioned boards throughout the presentation.

And sort of what role they play. And so the next question is around VATS.

What role should board members play in scenario planning? And how can they support the organization in helping to navigate the financial and policy uncertainty.

Yeah, I think the first thing where we need to start with boards is number one, educate them about the impacts.

So if, yeah, go ahead.

You know, they're living their day to day and they're seeing the headlines like everyone else.

And sometimes they don't really have enough information to really understand what the impact is on the organization for which they serve. And so number one is educate your board around the realities of the impacts and the risks and the threats. And I'm on a couple of boards and I have just been so impressed with how my fellow board members have really leaned into really trying to understand what the situation is

And then for staff to be very clear about how as board members So again, having them be involved as a part of here's what we're thinking, let's have some reaction even at the board level to, again, just making

sure that staff

That they're not missing any key concepts. And again, they're bringing diverse ideas. They're bringing input from the worlds within. They operate within day you know day to day. So again, engage your board, not only in understanding what the issues and the risks are, but also engage them as a part of the solution.

So what are the networks and introductions that they can open doors and windows to on your behalf? Where else can they play a role as ambassadors and champions in helping you to tell your story in the right places and making sure that they're at the table and really understanding

Appearance.

How they can really be in true partnership with the organization at this time through certainly their time, their talent.

Their expertise as well as their dollars at this moment. So don't leave your board out because they're willing and they want to help.

And I have just found that they just need to understand the full implications to the impact of the mission and the role that they can play in helping to either close gaps or elevate the opportunity for others.

Yeah, I'll just add to that. You can give them talking points. Make sure their elevator pitch is in place, that it's easy for them to say, this is what I, you know, I, You're somebody who I know, respect, care, care for, love. I want you to understand some things that are important to me and my support of this organization that I serve on and have that elevator pitch

Wonderful.

Mm-hmm.

Really clear about the importance of your work. And then I'm going to put in the chat some data points about the resiliency and the essential nature of the nonprofit sector. We employ over 12 million people, which is 10% of the workforce.

One in 10 people work for nonprofit organizations. We drive economic growth. Over 1.5 trillion in GDP. That isn't just good work. It's just a major economic factor. And every dollar that a nonprofit accepts and utilizes through its budget is not only supporting employment, it's also fueling local economies through purchasing goods and services. Again, I'll put these points into the chat but

Be sure to talk about the essential nature and the resiliency and the connectivity of nonprofit organizations in the fabric of our country and in our communities.

Thank you. We have time for just a couple more questions.

Shay, hi Shay, puts in the chat, how should organizations implement scenario planning While navigating staffing challenges and transitions.

So the timing is never great for these things to happen.

And just any advice around if you're already dealing with a staffing transition or a challenge.

Yeah.

Yeah, I think with any change when it comes at a staffing level, it can be challenging, right? Because if you're thinking strategically and you only have a few people in that conversation and there's shifts in who's in that room.

How do you integrate that into your scenario planning?

And things aren't documented and there isn't a racy assignment, that can be really challenging because a lot of those ideas and the plans can get lost. And so I think that What this highlights for me is ensuring that there is a clear racy and most of the time you have one person who's accountable and there may be a few people who are responsible and consulted and informed.

And so I think having a larger group maybe for some of those other factors just to ensure that people are engaged and they do understand But also heavy documentation. So ensuring that the plan is well documented. It's not just conversational. I think that can also mitigate a lot of the challenge that just comes with transition.

And if possible, if you already have insight about some of those shifts and changes.

Having multiple people, you know, if there is a backup plan or a contingency plan for who's going to be taking the responsibility of those roles.

Having those people in conversations early and often can be really helpful.

So that's what comes to mind for me in that challenging situation.

Yeah, great. Thank you. And of course, top of mind, I think for everyone is how to diversify your revenue streams.

So as you write, we're all doing this thinking about your portfolio and where it's coming from and there's the obvious need to change, diversify, to think about other sources.

So any advice or thoughts around or approach to dealing with diversifying revenue?

I just want to shout out planned giving. Hopefully a strong plan giving program that you already have in place.

But if you and and with some some known playing gifts, it's possible that they might consider accelerating funds from their either through their investment funds or other provisions that they had intended to make at the time of their passing. So don't leave out your individuals who have indicated they've made an estate provision

For your organization from those that you want to be in touch with. And secondly, use this moment to double down on the importance of organizations having a healthy reserve and And ask now for future estate commitments that will help your organization to continue to be resilient. So don't lose out on that opportunity now.

Yeah, and there's just a reality i mean Those of us in the room, we're all fundraisers or we have been fundraisers or we fundraise for organizations.

This isn't an overnight situation, right? If we don't currently have a relationship, we know that there is a long tail from the first hello to securing guests. One of the things that we continue to be encouraged by is what we're seeing in the philanthropic marketplace in terms of donors, just like during COVID where donors leaned into their existing organizations, they were also open to new opportunities to support new organizations.

And we understand that there are some donors really sitting on the sidelines right now waiting to see What else is going to happen and looking at where the greatest needs will be. So again, be intentional. So again, over a third of our sector

Relies on government funding. That's a very high percentage. And the two sectors that are intertwined are health and human services.

So we know that those two sectors will certainly be greatly impact.

By what is happening right now. So now is the time to have those conversations, accelerated conversations with your existing supporters because they're going to go deeper and that's what we're asking them to do. This is also the time to start building new relationships, looking at your lapsed donors, bringing those donors back. They've been supporters in the past.

As well as working with your board to do relationship mapping. Whom else can they introduce you to for initial gifts and start building those relationships?

But again, just knowing that this is not going to be a short-term light switch in terms of raising and replacing millions of dollars in the event of losing some of these federal funding opportunities, but you have to get started

Absolutely. And I think that's a really nice wrap up, Brenda.

Thank you. I think that's a really good reminder and note for us to end on.

I do have a couple of wrap-up items. Speaking of tools and how next steps and how to get started. So one, it's been shared in the chat that there is a link to a worksheet that is going to walk you through all six steps that we covered today. So it's meant for all of you to be able to use and go back to your organizations

And you'll be able to implement the scenario planning pieces that we talked about today.

We also have a resource hub on our website. And I just popped the link in the chat.

We are keeping that up to date. So please think of that as a place to go for up-to-date information. And we will get as much information out to you as we can.

Again, this has been recorded. So I just want to emphasize that. So you'll receive an email from us within 24 hours.

You'll receive the recording to this webinar for your reference, but also to share as needed.

You'll receive the tool that I just mentioned, the worksheet, the step-by-step worksheet.

You'll also receive a survey from us. Which we really hope you take the time to complete the survey. It gives us really great feedback and we will be doing more of these live free events.

And so one of the questions is what topics most are most important to you?

So we want to know what you're thinking about these days so that we can provide that content and information.

And then finally, if you didn't have your question answered or if you have another question that comes up.

We are your partner and we want to continue the conversation. So you can always reach us.

The best way to reach us is via email. Our email is info at alford.com.

And we would love to pick up the conversation there. And also you can contact us, of course, through our website.

So thank you so much. There's a lot of information out there. We hope that we're providing you with information, tools, and resources, and we want to stay in touch. We appreciate your time and participation.

In the chat, and this has been a really great conversation. Thank you to Sharon, Brenda, and Sierra.

Yeah. Yeah. And we just say keep going, everyone. Keep going.

For your presentation and facilitation.

Keep going. Here, here. Take good care. Yes.

Thank you so much.

Keep going. All right. Thank you so much. Take care.

Take care. Until next time. All right. Bye-bye.