



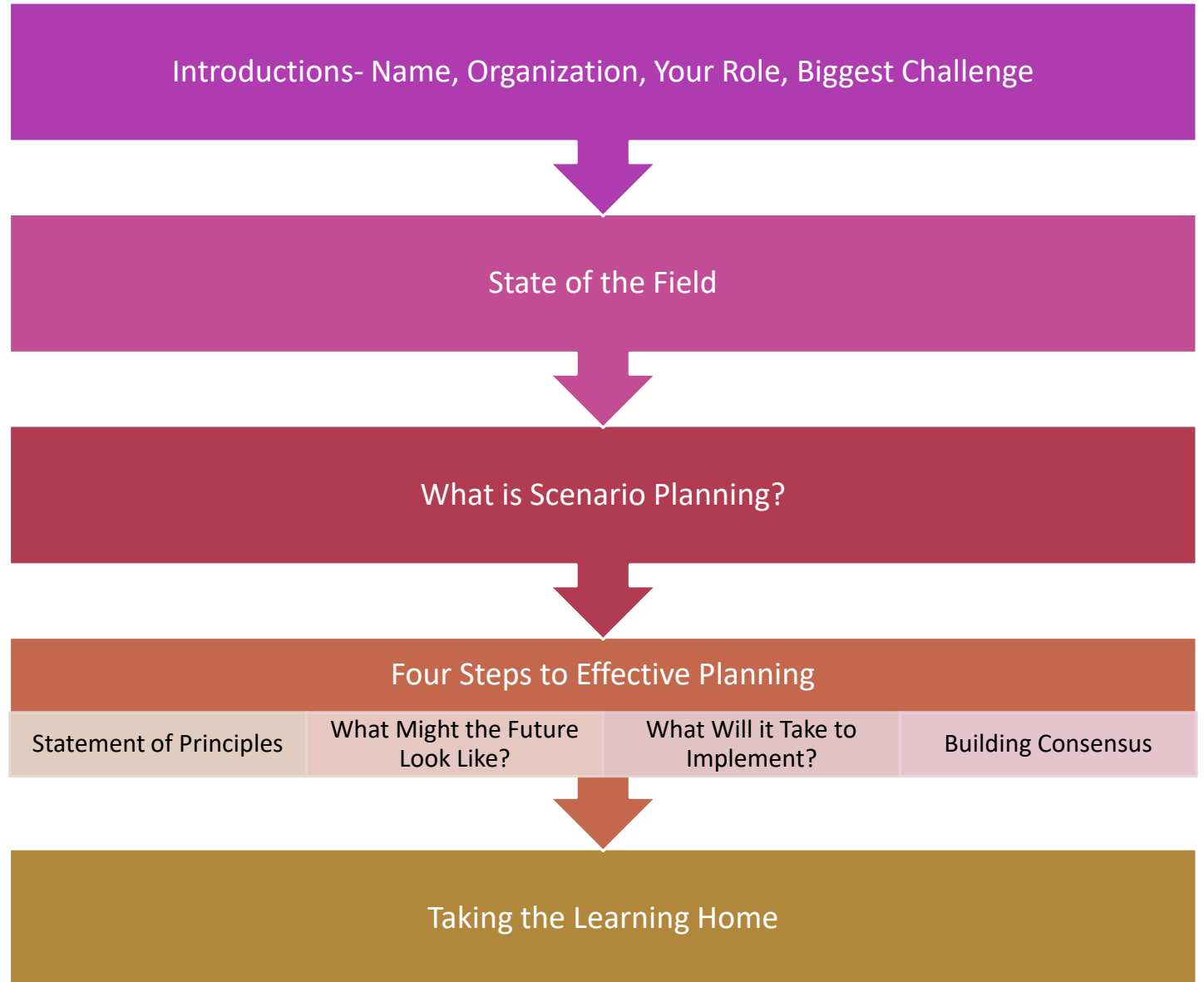
Navigating Uncertainty

AMY KATZ, MSW CPOCC

OU WOMEN'S INITIATIVE VIRTUAL SUMMIT 2020

JUNE 14, 2020

Agenda



State of the Field

Source: E Jewish Philanthropy

Funding

Possibility of lay-offs and furloughs

Balancing physical and mental safety of staff

Re-imagining the summer and beyond

Fatigue among professionals

Boards needing support

Fear of making decisions

Organizational fragility

It takes the non-profit sector 1.5 times longer than the profit sector to recover from a recession.

SOURCE: NON-PROFIT FINANCE FUND

*THE THINGS THEY
CARRIED*

TIM O'BRIAN

Frame by frame, [our
hope is that] the
world would take on
the old logic.

What Is Scenario Planning?

It's making assumptions about what the future is going to be, how your organizational situation might change, and how you will be able to deliver on your mission under new and unknown circumstances.

The best way
to predict the
future is to
create it.

PETER DRUCKER,
MANAGEMENT
GURU, AUTHOR

Scenario
Planning
Step #1:
Statement of
Principles

Reaffirms your mission
and purpose

Defines what is most
essential

Guides your
imagination

Consensus is KEY

PUT TOGETHER A
TEAM OF
PROFESSIONAL,
VOLUNTEER AND
COMMUNITY
MEMBERS TO DO
THIS WORK

Statement of Principles

Maintaining the **culture of our organization** is critical. The five tenets of our Culture of Excellence should continue to guide all decision making: innovation, outcome oriented, communication, communal leadership and inclusivity.

Our most **valuable asset is our professional team**. In the event of staff cuts, we should prioritize cutting back hours versus elimination of positions unless it is deemed a position that is no longer needed for our operation during normal times.

All levels of personnel should be part of any salary adjustments or changes in benefits

The **wellness of the team** is paramount....we aim to maintain health coverage for all team members at the highest level that we can afford.

During this time, **our core mission** will be XYZ. We must be careful to prevent mission drift.

Be **fiscally prudent** and make financial decisions that have the lowest level of impact on the team as possible. We will do what we can to **conserve our cash reserves**.

Continue our culture of being **fully transparent with leadership and funders**. Our board needs to be in the loop on all high-level decisions.

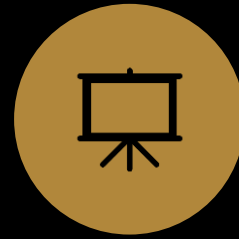
We **will make mistakes** along the way. We need to learn from mistakes without being overly critical and continue to move forward. We are a strong team. We believe in being **hard on ideas and soft on people**

Have fun and remember we are doing important, holy and impactful work, regardless of the current situation.

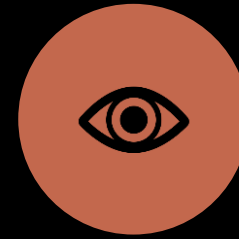
All models are wrong,
but some are useful.
We cannot predict
exactly what's going to
happen, but modeling
helps.

GEORGE BOX,
STATISTICIAN

Scenario Planning Step #2: What Might the Future Look Like?



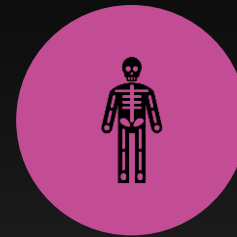
CREATE THREE-FOUR
SCENARIOS



ASK YOURSELF:
WHAT DOES SUCCESS
LOOK LIKE?



DON'T ASSUME THE
FUTURE WILL LOOK
LIKE THE PAST



COMBAT EXCESSIVE
OPTIMISM AND
OVERCONFIDENCE



ENCOURAGE OPEN
DISCUSSION

Scenario
Planning Step
#3: Model
Each Scenario

Budget

Program

Personnel

Operations/Facility

Communication

Board Approval

Evaluation

Scenario
Planning Step
#4:
Build Broad
Consensus



Bringing the Learning Home

WHAT IS THE MOST IMPORTANT THING YOU
LEARNED TODAY?

Thank you!

Amy Katz

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