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Transcript of November 2020 Planning in Times of Uncertainty Webinar

Caroline: Hi, everyone, my name is Caroline and I'm with Boardable. If you haven't heard Boardable before, we are your central location for everything that your nonprofit board needs to do, whether it's [voting](#), [document sharing](#), [planning meetings](#), and we've even launched in Beta, a video meeting feature that you're definitely going to want to check out. So you can sign up for a free trial, no credit card, nothing at [boardable.com](#). But today, I'm super excited to have you at our webinar, we have Meg Liffick here from [SmallBox](#). And she's going to talk to us about strategic planning during such uncertain times and reimagining mission delivery. Thank you for coming Meg, welcome.

Meg: Thank you so much. I'm excited to be here and happy to get going whenever you're ready.

Caroline: Okay, everybody, we wanted to say, hello. But we're gonna turn our video off now so that our sound quality is extra good. But we will go ahead and get started. Take it away, Meg.

Meg: Well, thanks so much. I'm so happy to have been invited by Boardable and to be here with you to provide a resource, which we at SmallBox hope will give you hope in this moment of great anxiety and uncertainty. For the next 35, 40 minutes or so I'm going to be walking you through a framework for finding strategic direction during this time of disruption. And then after I'm done, we'll open it up for questions and answers. But again, please feel free to chat questions along the way, and we'll get to them at the end. This conversation is intended to give you as leaders the tools to go back to your own organization so that you can have real conversations about your future and generate actionable plans to get you there.

This is essentially a process to help you survive in the present and bridge you into the future. Let me say, it's not a replacement for a strategic plan but instead, it's a way to transition between a plan that probably is no longer as relevant as it was when you

wrote it to a plan in the future that you can write when the world is much more stable and predictable. And let's all hope that's coming sooner than later. So, together, we're gonna walk through a three-part framework for creating an actionable plan for resiliency, we're going to set the foundation, we'll reimagine mission delivery, and we'll assess resources. We're going to talk about who should be in the room as you create your plan and we're going to discuss the tools needed to facilitate the conversation. Finally, we're going to discuss how to lead the conversations.

So before we jump in, let me go ahead and introduce myself a little bit. I'm Meg Liffick, I'm the CEO of SmallBox. And this super, smiley, optimistic photo of me was taken here at the end of February. I started at SmallBox on February 17, we took this photo about a week later, and about a week after that everything changed due to the pandemic. So, as you can imagine, it's been quite the adventure but my smile and optimism of stage because I'm incredibly lucky to be surrounded by extraordinarily thoughtful and supportive teammates. Before SmallBox, I spent six years at Butler University, where among other responsibilities, I oversaw the universities on-site and online brand experiences. And then prior to Butler, I was the Director of Public Affairs at the Indianapolis Museum of Art, where I oversaw marketing, communications, and audience engagement.

As you can see, I've spent the first 20 years of my career entirely in the nonprofit and higher ed sectors. And I care deeply about helping purpose-driven organizations, which is why I'm so grateful to be here with you today and with Boardable. So, let me tell you just a little bit about SmallBox. We're an Indianapolis based creative agency focused on strategy, web, and brand experiences for mission-driven organizations. Everything we do is informed by you and your audience. Our people-centered approach and passion for community drive solutions that amplify the impact of your work. We design brands, but we also build websites, we generate communication toolkits, we facilitate community engagements, we lead strategic planning, and maybe more importantly, we help organizations find clarity and direction in times of challenge.

Our process is based in the practice of human-centered design or design thinking, which puts people and audiences at the center of our work. Rooted in empathy, we seek to find solution they have long-term value for all and not just short-term impact.

Okay, so we're getting ready to hop into the framework, we've got a lot to cover in a very short amount of time. So I'm going to be moving fairly quickly through the process. Since March, I've been doing a lot of yoga, to keep myself calm and centered. And so like all of my yoga sessions that are in the middle of my living room, let's just go ahead and start with a deep cleansing breath, and have a collective moment of Zen. So, as we speak about Zen, I just want to pull the quote out as a way to launch into this process, "The only way to make sense out of the change is to plunge into it, move with it, and join the dance."

If you don't know, Alan Watts was a writer and philosopher who popularized Buddhism in the West and in the United States, in particular, during the 20th century. He believed that the concept of Zen isn't about quiet contemplation, but instead, it was a conscious effort to leave behind emotion, and preconceived ideas, and to move toward opening ourselves up to the forces of the universe. So, today's workshop is all about learning to join that dance, we're going to go step by step through a very focused framework on how you and your team can recognize the disruptive outside forces, and respond to them in an open-minded and creative way. We're going to use creativity, we're going to use courage, and we're going to use empathy to move from this moment of uncertainty about the future to a moment of hope, and ultimately a time for action.

So, let's just state the obvious so we can move on, 2020 has been a doozy and disruption is everywhere. This is an actual picture of me as I opened up "The Washington Post" this morning. Without any real build-up to the moment, we have all been drawn into a world we are wholly unprepared for, COVID-19, social unrest grounded in systemic racism, and political tensions have challenged every single person in our country. There are few parts of our lives that haven't been affected by these external forces. And as situations continue to evolve, and uncertainty has become pervasive, many of us, and I'm including myself here, have adopted crisis mindsets as our daily way of operating.

So, I'm sure you all know this by now, but in a crisis mindset, our brains can get tangled tackling the most urgent challenges without considering the greater picture. Triage becomes critical and everything else is secondary. And the problem is that everything seems important and all at once. We fall into the trap of every problem

becoming a fire to fight this instance and we lose track of the long-term impact of our decisions, as we have to focus on getting from one day to the next and one week to the next. And believe me, this has become even more of a challenge as the year has closed out, I thought it was going to get easier, and it's actually gotten harder. But if we stay in this mindset long enough, we lose focus on our mission, our values, and our vision.

So, while a crisis mindset was essential in the early parts of 2020, we have to move from survival mode to striving for change and adaptation, and ultimately, to succeeding and a new future. It's time to set priorities so that we stop overloading our brains with options. Resiliency isn't just about returning to the world before, it's about considering the things we need to do to be active during this period of time as we reinvent for our future. What are we learning in this moment that will lead to a new way of delivering our mission in the future? So, why should you use this framework? Well, we built it to help you get untangled from the crisis mindset and to provide a moment of pause for you and your team so that you can infuse certainty and clarity at a time when we're all short on both.

Okay, so let's dig in. Maybe take another deep breath before we get going and move from a why to the how you can implement this framework in your organization. From now until the end, you'll be learning the really practical steps you'll need to create your plan with your team. Okay, so let's start with the basics. Who should be included in this exercise? We suggest gathering a diverse selection of stakeholders together in a group that is small enough to manage but large enough to present multiple diverse perspectives. Depending on the size and makeup of your organization, these select stakeholders can include your audience members, or those who you serve, maybe some valued volunteers, employees, donors, your executive team, or your board of directors. The exercise we've developed will...excuse me, ask you to put yourself in the shoes of those who you serve. So we really recommend having representatives of that group in the conversation if at all possible.

And too many times we've seen organizations do planning like this with just the executive team or just the board of directors. And this is really an opportunity to be inclusive, and to bring your audience in as for post its and Sharpies. And of course, of course, of course, if you're joining us in person, please follow the CDC guidelines and

wear your masks. If you choose to do this digitally, which it's really easy to do digitally, and we've done this with others digitally, you'll need collaborative software tools, SmallBox's favorite is Mural but you can also just use Google Docs for the collaboration parts of the framework. And then, of course, you'll need video conference software.

So what else should you consider? Make sure everyone understands the desired outcomes and purpose of the exercise, spend some time underscoring the value of what you are doing, create ground rules, and set expectations as a team. This could be as basic as agreeing on the length of snap breaks, or as complex as deciding how the paddles without gravity, all right? Respect one another's ideas and this may seem basic, but often during these types of exercises, we can become dismissive of others, especially if we pull in folks from the outside. Encourage positivity, I know it's hard right now, but optimism is essential to this exercise. Allow space for personal reflection, give the team time to let their thoughts settle, and formulate ideas independently. And then understand that some discomfort is to be expected, we're dealing with big changes during a really stressful moment in history, be prepared for tension, for tears and other big emotions.

Okay, so now that you have the rules of engagement, you've determined your people and tools, let's move into part one of the framework each in conversation with each other about why the mission, vision, and values were chosen and why they are critical. This is an opportunity really to reaffirm your organization's understanding of purpose and inspire passion for the work at hand. These three elements will be your North Star on the next part of your journey, and if you do nothing else from this framework, this is the most critical part, in my opinion, during this moment of crisis. So just so we're all on the same page, mission asks the question of what we do, for whom do we do it? And what is the impact of the work? This is your core reason for existing. Vision asks, what is the future you want to create?

This is the outcome of your existence. And then values are what your organization stands for, and the governing principles of mission delivery. Use this framework and actually have your team right in the areas provided as you work through the questions. If you are doing this digitally, you can set up similar fields in a shared Google Doc or on the MURAL platform that I talked about earlier. Okay, so let's get

grounded. Let's chat through how you and your team can deep dive into mission, values, and vision.

Okay, to begin, read your mission out loud or write it down so that everyone can see it. This is something that people don't always have access to, especially those in the community that you're serving. Give the people in this team the opportunity to reflect privately on your mission statement, and then have them write down responses to the question, why is this essential to the audiences that we serve? After everyone has had time independently to reflect have a conversation about the responses in order to reach a better understanding of individual's perspectives and priorities, and then your organization's perspectives and protection around it. If your organization doesn't have written values and a lot, don't, just simply ask your team, what do you think are the three or four values that are core to our organization? And how are they reflected in what we do? You can have a large conversation around all of this and then record your thoughts and kind of narrow it down to a list of three or four.

So if your organization does not have a vision, statement, and some don't ask your team, what does the world look like if we achieve our mission and give them time to reflect privately. If you do have a vision statement, just go back to what we did for the mission and ask the team, what does this mean if we actually accomplish this? Okay? Once you've had time to have a really good, meaningful conversation with your team around the mission, values, and vision, everyone should have a strong sense of foundation. These conversations will really help to gel group and lead to stronger collaboration as you move forward your journey together. You may not know your routes, you may not know your exact destination, but you should now all be facing in the same direction as you take your first steps into your future.

Okay, so now that you have your foundation set, it's time to dig in and get creative. Again, here's the worksheet that you and your team will be filling out during the stage of planning. This sheet will help you through the heaviest lift in the steps two, three, and four, you'll work left to right, you're going to first identify your audiences, then you're going to identify your pivots or opportunities, and then you're going to imagine new futures. So let's talk more about the far left part of the worksheet and really kind of dig into your audiences. At SmallBox, we are all about people. Most processes we go through put audiences and stakeholders at the center of our decision making. By

using empathy as a guiding force for decision making, outcomes are created with people, not for people. We believe this form of inclusivity ultimately defines the best long-term solutions and encourages ownership and equity for all who benefit from your mission.

So it's time to identify your people or key audiences. First, have the members of your team reflect individually on who they think are the four most critical stakeholder groups. After everyone has had a chance to write down their list, then as a team through conversation agree on the top four stakeholder groups that you want to focus on during this process. Are they your annual donors? Are they your volunteers? Are they individuals who receive your services? Are they your partners? And then spend time as a group discussing the changes that each stakeholder group is facing, and consider ways that disruption has occurred in their lives. And disruption we often think of as being a negative term, but it can be both good and bad. And really exploring some of the ways that it can be good, people now may have more free time because they're not commuting to work on a daily basis. People have a greater desire for human connection at this moment, because we're sure are lacking it in real life, they have a greater desire to help others because they're seeing the value and the power of that. A greater awareness of racial and equity is really a critical thing to consider during this moment.

Some examples of bad, and I think these are more obvious. So I'm just going to go very quickly through it, could be the economic uncertainty or job loss, social distancing, and then lack of childcare. So you're going to map these stakeholder experiences, and you're going to put those into the framework on the worksheet. And then it's time for step 2, identifying new opportunities. So before we get into that, I do want to talk a little bit about the concept of time because it feels very wonky right now. This step of the worksheet asks you to identify short-term opportunities versus long-term opportunities, but who the heck knows what short-term and long-term are anymore, times gotten a little bit squishy.

For many of us over the last few months, short-term has meant by the end of the day, or at the very least by the end of the week, long-term has been some gray fuzzy zone in the future we couldn't even bring ourselves to consider. For the purpose of this conversation and the framework, let's set parameters, so the concept of time isn't so

intimidating. I think it's fair to state for planning purposes, that short-term can be in this moment. While there's still a great deal of uncertainty about COVID and the economy and even the presidential election, which we can presume will be you know, for the next 12 months or so, we're going to be in this time of instability. And long-term can be when there's more stability, when there's a vaccine when we're in the next presidential term, and we're seeing more certainty and how the future is going to come together. Let's hope that that's 2022.

So, once you've understood short-term and long-term, it's time to get creative and challenge your organization to identify new opportunities, and explore ways to change. The whole purpose of this is not just to solve the challenges for your audience in this moment, but more importantly, it's to consider how these shifts may improve your mission delivery well, after 2020 is over. Our goal here is not to return to how things used to be, it's to take the lessons of this moment, and to become better when the world has more stability. So to do this, you're going to want to ask your team to consider the following questions. What changes might we make to address disruption and uncertainty? How do we see that we can add to our mission delivery long-term? And what can we pause? What can we try? And what can we shift? Have them write their answers down individually or, even better, break into small workgroups to address each audience group.

And then once your pivots have been identified by individuals, either your teams, then discuss as a group and iterate on the ideas. So as you do this exercise, excuse me, keep these things in mind. Don't get caught in the details, don't talk about money or staff yet, keep this high level, keep this again, operating in a world without gravity to some degree. The time for discussion of resources is going to come later in this process. And then encourage creative, innovative thinking, don't let folks get tangled up in how things currently work, tell them to dream big. Finally, don't let fear or doubt stand in the way of this exercise of identifying your short and long-term pivots. Because this is probably the most challenging time your organization has faced yet and it's a moment to be bold, for many of you the only viable future. And I hate saying this, but it's true for a lot of nonprofits, the only viable future may come from the courage to make big perhaps even radical changes.

So while you're doing this, don't get caught in the details, again, encourage others to be creative. Now, let's talk about examples of places that have found creativity and courage. CraftJam is a nonprofit that operates out of New York City and one of the interesting things that they've done, they used to have this in-person sort of craft parties, where everybody would come together and get all the supplies. Now, they do this in an online setting. So one way that they've pivoted and they saw that their audience obviously wasn't willing to get together in-person. So they are mailing packages around the country and organizing CraftJams through online videos. And in doing this, they have expanded their reach tremendously. It has gone well beyond New York City, and they've been able to really bring crafts into people's homes around the country.

Another example of a pivot is a local organization here in Indianapolis called Childcare Answers. Before COVID, they would host events for parents and for daycare facilities in person, and they would get maybe a dozen people to those. They had to do this as it was part of state regulation to have people in-person, the state loosened up those regulations because of COVID, and they were able to host a lot more of those events and online platforms thus expanding their reach because it was much more accessible to their audiences, and being able to affect more change and educate more people as a result.

Another example of an organization that is pivoted this year is a group called New Story out of Atlanta, New Story was developed to really fight homelessness on a global level. But when COVID started and the economy started to collapse, they saw a real opportunity to bring the idea of homelessness to a very local level. And so they created a platform where people could donate to local residents, rents that they could no longer pay, thus having a direct impact on homelessness in this moment.

And then finally, another example of a pivot that we have seen as an organization again, based here in Indianapolis called Eleven Fifty Academy, and Eleven Fifty Academy is a nonprofit that teaches coding for students of all ages. And what they saw most recently was that there's going to be a gap for universities between Thanksgiving in February, right? Because they've changed the academic year. And so what they decided to do was really utilize that gap to partner with universities and to create a curriculum to help college students who may not have time otherwise, take

their courses and to learn coding over this larger break than they would have had otherwise. So those are just a few examples of pivots that are really shaping these organizations and impacting them, as they develop over time, and will, they'll be brought into their strategic planning long-term.

Okay, so at this point in the process, you will identify those pivots, the hardest part of this framework is over. And you've done the huge lift of being creative and identifying opportunities. It asks your team to dream big, to think radically and to really consider bold change for your organization, I know that can be challenging at times. In order to solidify the process, we encourage you and your team during the next step to dream about the new future that you are moving toward, this is going to help you really kind of imagine what your organization can look like, three years from now, five years from now, it will help you shape your thinking even more and give you a better understanding of the benefits that these changes can make on your organization, on those who you serve, and then on the community and world at large.

So, as you're doing this, ask the group as a whole, "If we implement these changes, what outcome do we expect? And how will this affect our audience?" Again, remember that not get the details and to be sure to put yourself in the audience's shoes, it would be super helpful. And this part of the process if you have your stakeholders as part of the conversation, as it makes it that much easier to understand what the future might hold for them. Okay, you've made it through reimagining mission delivery, you've identified your audience's, you've discovered your pivots, and you've considered what the future may look like with all of these changes. I really hope that at this point, your team is feeling pretty energized and hopeful about the opportunities at hand. So, you're going to take that positive energy and shift as a team to digging into the details to assessing your resources and decreasing actionable strategies.

This is the final worksheet. This is worksheet three, and it asks you to bring five of those pivots or opportunities that you developed in the last worksheet over. You may have determined a dozen and I hope that you've determined more than a dozen opportunities and pivots. I hope you really got a huge list going. But we're only going to bring five over right now so that you can stay really focused on action planning. So which five do you choose? Well, you'll need to figure that out as a team. There's no

magic to this but you can use these criteria, as you consider it. Does the pivot align with your mission, vision, and values as they currently stand? What is the level of positive impact on your audience? Is it equitable, and just to those who you serve, and competition, which we don't really talk a lot about nonprofit but as you're reimagining how you're going to do mission delivery, it's critical to think, if somebody's already doing this, and are they doing it better than we can and if they are, you might not want to enter that space.

Okay, so the far left, you've brought the five over into the worksheet, it's now filled out, it's time to finally start to consider resources. In this stage of the framework, you're going to move from big ideas to actionable plans, and you'll leave with a roadmap to your reimagined future. This is where the rubber really meets the road. You'll consider the actions, what work will be required to make your ideas successful. The capabilities and partnerships, what are you as an organization capable of doing? What can't you do that you might need to partner with somebody else on? You're going to consider responsibilities? Who are the actual people responsible for doing the work within your organization? You're going to talk about funding, where might we obtain the money to make this happen? Is it internal is it going to come from pausing something else in order to make this successful? Is an external? Are there grants out there? Are there donors out there that can help underwrite this?

And then finally, you're going to talk about gaps, what's outside of your control? And how can you address that? Okay, so as you go through these considerations, we recommend a few different ways of doing it depending on the team that you've assembled and the time that you've allocated. You can divide into five groups and have each group tackle one opportunity at a time, then give the group's time to rotate to the next opportunity so that this becomes a really iterative approach and process for each team, as they add to the work of the team before them. After the exercise, you'll discuss the final outcomes as a group. Another way to do this is to tackle this step by assigning an opportunity to an individual, have them independently determined the resources needed, maybe this homework, and then come back to the team for discussion.

And then finally, another way to do it is to have everyone tackle everything over a set period of time, again, maybe his homework, and then come back to the team to

discuss. Ideally, you'd be able to accomplish this entire framework, all three parts of this framework in a single day, as a workshop that would last you know, four or five hours, maybe a half-day to a full day. But I'm a realist and I know that that time is precious for nonprofits in particular, and even more so during this time. So if you can't do all of this framework in a day, the idea that homework can be really helpful, and you can do this kind of as an ongoing process over a week or two weeks, or even three weeks. Do what you need to do to be thoughtful, to be expedient, and ultimately to create a plan that your organization feels inspired to implement. Once you've done this part, once you've identified your resources and moved through this part of the worksheet, you are done, you've determined how you're going to move into that future and you've put real actionable steps in place.

So our hope is that this framework gives you the direction, the destination, and the roadmap for your journey. It may not feel like it now, but with a little bit of focused planning, again, just a half-day retreat might get you there, and some help from some external forces, you're going to be on your way to a brighter future. I really, really appreciate the opportunity to discuss this framework with you all, we can't wait to share those worksheets with you, so you can really start digging in. And I'm hopeful that this will spring you into a bright future that you couldn't have even imagined when all of this started in March of this year. So as we close, I wanted to share this quote by Jonas Salk, the inventor of the polio vaccine, who kind of seems like the perfect guy to turn to in this moment. "Hope lies in dreams, in imagination, and in the courage of those who dare to make dreams into a reality." Okay, so let's reimagine together, go out there, and make these dreams reality.

Caroline: Love it. I love that quote, too. I'm looking at the questions in the chat area. Everyone, go ahead and enter any other questions you have for Meg here as we get started. We did see a good one here from Sally, "What's a reasonable timeframe for the process? You'd said just now, like, half-day or so. But what if you're brand new, or you only have three directors, a small team?"

Meg: So I think really and truly the lift will be for a small organization that is new or has a very small team is finding the right players and being very thoughtful and who you bring into the process. And again, as I mentioned earlier on, ideally, you'd bring in those who your mission directly impacts and into the conversation. So identifying who

those people might be, donors, people from your community that may be involved as partners, putting together the right team is maybe going to be the biggest lift and then if you can get them all together over the course of a day, you can do it in a couple of chunks of time and dig into the framework and move it through or you can do it over time and break it into each part of the worksheets. So, there's three worksheets you can do an hour and a half or two for the first worksheet, an hour and a half or two for the second worksheet, and an hour and a half or two for the third worksheet, and really kind of break it apart that way as well.

Caroline: Love it. Okay. And then Sherry asks a good question. "Let's say you're an all-volunteer board, who's a good person to champion this kind of a process with the board?"

Meg: Well find a board member that's passionate about the future, right? Find a board member that you feel has the ability to... And really, truly, I think board members would be great facilitators of this exercise, so if you've got a board member who can lead this discussion and bring out people's thoughts and opinions in a really lovely way, lean into that and bring them along.

Caroline: Okay. And Dana has a great question about sort of a humanitarian nonprofit, "Who would be the stakeholders in that situation? If you're saying advocacy group for human rights, would it be like the people who are donating and volunteering?" And what about the population you're trying to support for, as an example, the Rohingya minority groups and sort of oppressed people, would they be a good stakeholder to include in this process, or?

Meg: Ideally, those who receive your mission and the benefits of your mission, if you can bring them into the conversation that is ideal. Now, that is not always going to be the case, obviously, and we understand that. So in those cases, it's bringing in those who work most directly with those populations, who may have a deep understanding of those who you serve. And that could be those within your own organization, it could be partner organizations that work within that same population, it could be donors who are passionate. Really, the outcome is more based, and if you can't bring them into the conversation, if you can find people who are empathetic to their struggles

and the world that they're living in this moment, then bring those folks into the conversation.

Caroline: Sure. So we want to get some representation outside of just the board members.

Meg: Yep. Exactly.

Caroline: And anyone else have some questions to enter in the chat area? I do apologize again, for the sound issues. I'm not sure what happened there. Looking at using a different platform next time, but you will get the replay with the entire recording tomorrow. I have another question here from Sally, "What if the team leader or chair is not a planner or open for this type of thing?" [inaudible 00:37:20] enter that before.

Caroline: So if the team leader isn't a planner, or open and isn't very, you know, open to the idea of operating. And I have to say that the saying that to operate in a world without gravity to be innovative and bold, is easier said than done, right? But if you can create an atmosphere, if you can build excitement about leapfrogging into the future, right? Because that's what this opportunity is that we are at a point in history where we are faced with decisions that could get us to where we need to be 5 years from now, 10 years from now, we can pause and say, what great change can we make in this moment that will help us get to the future? And for those who aren't huge planners, that's going to be a challenge. But I will say, now, more than ever, deciding your path as an organization is going to be critical to your success as we proceed, right? A lot of nonprofits are going to fail during this moment. And so we've got to build excitement around the thought process of planning for a future of being better at the end of this, and of not returning to where we once were.

Caroline: So that leadership's either going to need to step up or the organization will seriously suffer potentially.

Meg: And I will say this as an organization that comes in and consults and leads these sorts of conversations. Sometimes you have to bring in outside voices to do that,

right? Sometimes you have to bring in somebody externally to infuse that spirit in your leadership.

Caroline: Yeah, that makes sense. Unfortunately, sometimes people need to hear things from, even if it's the same thing, third-party that they can have a little less bias with maybe.

Meg: Yeah.

Caroline: Here's a great question. "How do you engage with the rest of the organization and rolling out the plan?" How do you address the objectors? I was gonna say the haters but we don't have anything versus the nonprofit world, right? The objectors.

Meg: So, as you roll out the plan just with every other sort of if you've ever been through a strategic planning process, I think one really critical part is to be transparent and how it came together, right? To be very communicative about these are the steps that we took, this is how we got there, this is who participated and be very transparent in that. And even to the degree of if you want to show all the different pivots to internal stakeholders, or to even some of your external stakeholders on like we had all of these ideas, but this is kind of where we got to, that can be really powerful.

Addressing the objectors, and this is something that's challenging, especially when you've got to make radical changes is that it's about survival, so a lot of organizations right now, right? And making the case for that. And sometimes that comes from data, if you've got kind of some data that you can show of your organization in decline, whether it's from fundraising efforts, or whether it's from mission delivery, and then say, "We had to pivot. And so this is how we strategize around that. And these are the people that we brought into that conversation," but I think sometimes underscoring and we hate doing this because we work in the nonprofit sector, and we like to be optimists and idealist, but sometimes painting the picture of dire need for change can help you make the case for the objectors.

Caroline: And then a question I have that's sort of related to that. Is it possible to have too many people involved in this process? Or what are your guidelines on it?

Meg: Yes, yeah, I think being thoughtful and the numbers that you bring in and how you address, but it's always you want a diverse group. So you want a group that reflects, your internal stakeholders and your external stakeholders. And that sometimes means that you're going to get a dozen or more people involved in the conversation, I think, then you really need to have a very good facilitator that you find that can help in that conversation, in that dialogue. In particular, if you're going to have people who are from different levels of your organization, if you've got a senior leader and maybe a junior person involved in the conversation, then I think you've got to have a facilitator that isn't that senior-level person, right? That's going to give equal voice to all.

Caroline: I like that sort of have a very inclusive group that doesn't feel like it's coming all top-down.

Meg: Right, right.

Caroline: Chris asks, "How does this process differ from strategic planning?"

Meg: So first, strategic planning, really, and truly, this is a bridge to get you through, I think strategic planning is a broader, more time-consuming process. And so, you know, I would really hope that you would take more time in that to bring in stakeholder voices to explore your different tactics and strategies, and to really build out a long-term process of collecting your community in your planning, whether that's your community, being those who you serve, or even your broader community of your city, your state, those who are connected to your organization. Strategic planning takes a broader view, this process is really looking at disruption, and how to address disruption, strategic planning would address things that aren't necessarily, disruptive that just need to be done, right? So this, this kind of layers in on top of a strategic plan, it also can help you bridge from a strategic plan, again, that doesn't take into account disruption to your next strategic plan that would consider all these changes that have occurred in the world in the last 10 months.

Caroline: Yeah, so this is almost not necessarily an SOS process, but definitely something we hope not to need every [inaudible 00:44:14] a strategic.

Meg: Exactly. Exactly.

Caroline: In a similar vein, Carl was agreeing I think with your assessment that sometimes this is necessary just for survival. He's saying that that's the situation there and looking at a 50% cut to operational funds in the next fiscal year. So definitely one of those situations where there's maybe not a lot of choice involved in pivoting.

Meg: Yeah, and this will help you refine what your mission is, if you've got to cut 50% of your operational budget, then you've got to really refine what you're doing and how you're doing it.

Caroline: Absolutely. That reminds me too, do you have any tips for sort of creating that positivity in this process, or how to put a good spin on, you know, when things are looking a little dire in terms of coming up with solutions?

Meg: You know, and it's kind of inherent in the process, to be perfectly frank, is to take control over the unknown, to take control over the disruption. And so this process really gives you the opportunity to do that, to say, "There's chaos, we see chaos, we see these changes that are happening in the world, and we're going to put our hands around it, and we're going to decide how we're going to deal with it. And we're going to become resilient as a result. And we're going to put real resources and actions to dealing with this change that we're facing." And I think when you can really think of it that way as taking control over a world that we don't feel much control over, there's inherent hope in that, and I think that leads to positivity.

Caroline: Yeah, it's empowering to sort of face the music rather than, "La, la, la, la."

Meg: Exactly. Exactly. And to get out of the everything's on fire, right? Everything feels like it's on fire right now. And that's both within our organizations and then externally in the world. And so if you can help mend the fire, put out the fire within your own organization by thinking about the future a little bit more strategically, then it will help everybody find a little bit more footing and balance with the things externally as well.

Caroline: I love that. Well, if there aren't any more questions, I haven't seen any come in for another minute, I'd like to thank you again for joining us, Meg, and going through this framework with us. And as we've said, in the chat throughout, we will be sending you the PDF of this framework for you to use with your team as well as the replay and slide deck here. Any last words, Meg?

Meg: No, I wish everybody the best of luck during the transition time that we're in and I hope that we all find more hope as we move towards 2021.

Caroline: Thanks, everyone. We'll see you soon.

Meg: Thanks.