



ABC Nonprofit COVID Scenario Development / SWOT Worksheet

[Date of Virtual Retreat]

Created by Fair Chance (version of April 6, 2020)





Worksheet Objectives

Day One: Board Retreat (Date) - Scenario Development

1. Agree on internal and external data to monitor
2. Develop five realistic scenarios and identify one to three scenarios to plan for
3. Share hopes, fears, & take aways

Day Two: Board-Staff Retreat (Date) - SWOT/Action Planning

1. Complete SWOT exercise using one to three scenarios as context
2. Develop action plan based on SWOT
3. Share hopes, fears, & take aways



How to Use Worksheet

- **Why:** If you are already doing some of this planning, this worksheet can be used to gather/document analysis and decisions in one place, so they can be revisited.
- **Who:** with board and/or staff depending on your organization's culture, structure, etc.
- **When:** Use in virtual retreat (2 days, 2-4 hours each). Use as soon as practical and helpful, and periodically over time to revisit/revise as the situation changes.
- **How:** Adapt as needed.
 - **Facilitation:** think through facilitation carefully, including who will do what part, who will take notes, who will keep time. Designate someone in advance to summarize the proceedings including action steps and links for all relevant documents, to distribute ASAP after the retreat.
 - **Safe Space:** If board and staff do not know each other or have not worked much together, be sure to include get-to-know you activities in the virtual retreat(s) to help ensure a safe space, as there can be a power dynamic between board and staff. Also consider co-creating ground rules at the start of the activity, to help ensure everyone has shared expectations of each other.
 - **Decision-Making/Values:** Explore using a decision-making model like [RAPID](#) or [MOCHA](#), and revisit your organizational values to support decision making.



Process

Scenario Development
[Date]

- Step 1. Data.** Identify internal and external data that must be monitored.
- Step 2. Scenarios.** Develop four potential scenarios for organization
- Step 3. Analysis.** Analyze scenarios and select one to work with until further notice
- Step 4. Sharing.** Share hopes, fears & take aways

SWOT/Action Planning
[Date]

- Step 6.** Identify organizational areas to include in SWOT
- Step 7.** Complete SWOT with one or more scenarios as context.
- Step 8:** Action Steps for Selected Scenario(s)
- Step. 9.** Establish roles for monitoring & decision making
- Step 10.** Establish process for building out plans/next steps for additional scenarios
- Step 11.** Share hopes, fears & take aways

Scenario Development



Step 1: External and Internal Data to Monitor

Straw proposal:

1. **COVID Status:** Level of risk
2. **Government:** Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.
3. **Program Participants:** Safety & engagement
4. **Board & Staff:** Safety & engagement
5. **Funders/Banks:** policy/grant/contract decisions
6. Other



Step 2: Scenario Development

- Together we will create five scenarios on the next five slides.
- Scenarios are defined based on five **Partner/Program Milestones** based on duration of DCPS closures AND ABC nonprofit's program dates:
 - **Now - April 24** – current DCPS closure period
 - **April 27-June 19** – DCPS closed through end of year
 - **June 22- Aug 7** - DCPS closed through part/all of summer; ABC summer program dates
 - **Aug 31- Sept. 30** – DCPS closed part/all of early fall
 - **Oct 1-Dec. 22** – DCPS closed through part/all of 2020/dates of ABC fall programming
- One or more of the scenarios will serve as context for the SWOT/Action Planning on [date]

Alternate Scenario Structures

- **Financial Milestones**

- Key payroll/solvency dates;
 - With current resources
 - With recovery funds
 - With line of credit

- **Published Scenarios**

- Atlantic Monthly article, [Four Timelines](#) (epidemiology).
- McKinsey article: [Implications for Business](#)
- Others (please share helpful scenarios on e-forum)



Scenario 1:

Now - April 24 – current DCPS closure period

COVID Status: Risk Level	Key Indicators	Data Sources	Decision Points
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.			
Program Participants: Safety & engagement			
Board & Staff: Safety & engagement			
Funders/Banks: policy/grant/contract decisions			
Other			

Scenario 2:

April 27-June 19 – DCPS closed through end of year

COVID Status: Risk Level	Key Indicators	Data Sources	Decision Points
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.			
Program Participants: Safety & engagement			
Board & Staff: Safety & engagement			
Funders/Banks: policy/grant/contract decisions			
Other			

Scenario 3:

June 22- Aug 7 - DCPS closed through part/all of summer; ABC summer program dates

COVID Status: Risk Level	Key Indicators	Data Sources	Decision Points
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.			
Program Participants: Safety & engagement			
Board & Staff: Safety & engagement			
Funders/Banks: policy/grant/contract decisions			
Other			

Scenario 4:

Aug 31- Sept. 30 – DCPS closed part/all of early fall

COVID Status: Risk Level	Key Indicators	Data Sources	Decision Points
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.			
Program Participants: Safety & engagement			
Board & Staff: Safety & engagement			
Funders/Banks: policy/grant/contract decisions			
Other			

Scenario 5:

Oct 1-Dec. 22 – DCPS closed through part/all of 2020/dates of ABC fall programming

COVID Status: Risk Level	Key Indicators	Data Sources	Decision Points
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.			
Program Participants: Safety & engagement			
Board & Staff: Safety & engagement			
Funders/Banks: policy/grant/contract decisions			
Other			



Step 4: Scenario Analysis & Selection of Scenario(s) to Plan For

Rank 1= most likely 5 = least likely	Scenario Name	Rationale	Planning Priority A= current planning scenario D = lowest priority to plan for
1			
2			
3			
4			
5			



Step 5: Share Hopes, Fears, & Take Aways

Participant	Hopes	Fears	Take Aways

SWOT/Action Planning



Step 6: Identify Organizational Areas

Straw proposal:

1. Safety
2. Programming (including Innovations/Adaptations/Opportunities)
3. Revenue
4. Communications
5. Staffing/Operations/Technology
6. Facilities
7. Legalities/Liabilities
8. Governance



Step 7.1: SWOT for Safety

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
1. Safety				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.2: SWOT for Programming

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
2. Programming (including innovations/ adaptations/ opportunities)				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.3: SWOT Revenue

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
3. Revenue				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.4: SWOT for Communications

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
4. Communications				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.5: SWOT for Staffing/ Operations/Technology

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
5. Staffing/ Operations/ Technology				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.6: SWOT Facilities

Organizational Area	Internal		External	
	Strengths	Weaknesses	Opportunities	Threats
6. Staffing/ Operations/ Technology/Facilities				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.7: SWOT for Legalities/Liabilities

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
7. Legalities/Liabilities				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 7.8: Governance

	Internal		External	
Organizational Area	Strengths	Weaknesses	Opportunities	Threats
8. Governance				

Strategy: How to address weaknesses and threats with strengths and opportunities:



Step 8: Action Steps for Selected Scenario(s) (based on SWOT)

Action Step	Goal	By Whom	By When	Resources

Step 9: Roles & Processes for Monitoring & Decision Making

COVID Status: Level of risk	Key Indicators	Data Sources	Decision Points	Roles/Processes
Government: Federal and District government decisions including school closings, changes in law, relief opportunities, decisions to lock down, availability of testing, etc.				
Program Participants: Safety & engagement				
Board & Staff: Safety & engagement				
Funders: policy/grant/contract decisions				
Other				



Step 10: Process for Planning for Additional Scenarios

Rank 1= most likely 5 = least likely	Scenario Name	Rationale	Planning Priority A= current planning scenario D = lowest priority to plan for	Roles/ Process (who, how, when)	Resources Required
1					
2					
3					
4					
5					



Step 11: Share Hopes, Fears, & Take Aways

Participant	Hopes	Fears	Take Aways