**Here and Now: A Triage Tool for Nonprofits and Their Boards**

As part of the Big Reset Series, here’s a relatively quick way to identify and prioritize action items in times of crisis and change without adding to your already-heavy burden. If you remember the TV series *M\*A\*S\*H* (1972-1983), consider playing the role of Hawkeye (without the snark). As a new batch of soldiers was carried into Hawkeye’s field hospital, he did a quick scan to judge the severity of each person’s injuries, which to take on, how, and in what order.

Bring together a small group of the best thinkers among your team, board, and other key stakeholders. Pick people with diverse backgrounds and lived experiences who are truth tellers and calm under pressure. Agree on what issues to include, and don’t spend more than a half day. Use SWAGs—strategic wild ass guesses—rather than trying to assemble perfect information. By the end of your session, you’ll have a better idea of where immediate attention is needed, where you need to dig further to know what to do, and where you might even find new opportunities.

In addition to helping you prioritize immediate actions, using this approach can serve as a “fire starter” for discussions that engage your team, board, and/or funders. It will also give you guidance on where more data, constituent feedback, and/or planning are needed.

Or you can forgo the group approach and use the tool to help you frame your own areas of concern. Doing so may help organize your thinking as you prepare to engage your management, board, staff, funders, and others.

On the next page, you’ll find a set of 27 “here and now” issues that can be tailored to your organization’s needs. Use the following color codes to indicate the severity level of each issue. And then give thought to the positive possibilities that emerge from this process.

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| **Emergency** | **Priority** | **Non-Urgent** | **No Action** |
| **Requires immediate corrective action** | **May be a problem and needs digging deeper to understand severity** | **May be a problem, but follow-up action can wait** | **Stable and doesn’t require action** |

*Note: You can access all of The Big Reset resources at* [*https://leapofreason.org/the-big-reset-home*](https://leapofreason.org/the-big-reset-home)*.*

| **“Here and Now” Issues** | **Severity**

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| **MISSION** |  |
| Is our organization deemed essential by stakeholders and network? |  |
| Can our organization survive the impact of COVID-19 and economic downturn? |  |
| Does our organization truly value diversity, equity, and inclusion (e.g., race, gender, age, sexual orientation) across our board, management, and staff? |  |
| Is our business model viable with these changed conditions? |  |
| **LEADERSHIP** |  |
| Are our board and executive management the right people in right roles at right time? |  |
| Is our board open, responsive, adaptive, and nimble enough to manage the organization through the difficult times that lie ahead? |  |
| Can our leadership offer credible hope during difficult times to our board, management, staff, volunteers, clients, funders, and partners? |  |
| **MANAGEMENT AND OPERATIONS** |  |
| Does our management and staff have the mindset and resilience to cope with unpredictable or abrupt changes (e.g., unexpected shortages, soaring demand, loss of staff, or other disruptions)? |  |
| Do we have the overall capacity to be responsive, adaptive, and resourceful enough to sustain operations? |  |
| Do we have the advocacy capacity to respond to policy threats and opportunities at the local, state, or federal levels which could harm or help our mission? |  |
| Can we respond to operational disruptions (e.g., backup players and recovery plans in place in case key members are unable to work for extended periods)?  |  |
| Can we protect staff, volunteers, and clients from COVID-19 infection (e.g., necessary screening, testing, PPE, disinfectant cleaning, safe spacing, air filtration)? |  |
| Can we change to operate more effectively in a virtual/digital environment (e.g., management, fundraising, remote staff, and/or program/services delivery)? |  |
| Do we have all of our expense reduction options on the table (e.g., in operations; facility costs; personnel via temporary furloughs, reduced hours, cuts in pay and benefits, and/or layoffs)? |  |
| Can we outsource and/or share functions (e.g., back-office operations, marketing, program components) to defer and/or reduce cost? |  |
| **FINANCIAL HEALTH AND SUSTAINBILITY** |  |
| Do we have the unrestricted cash on hand to sustain operations for at least three months? |  |
| Will our projected cash flow cover 6 to 12 months of operations? |  |
| Are we incurring or anticipating adverse changes in expenses (e.g., operational changes, increased technology, more space usage, needed COVID-19 protection)? |  |
| Are we incurring or anticipating adverse changes in revenue (e.g., reduced fees for services, cuts in public funding, drop in charitable gifts)? |  |
| Are we incurring or anticipating major donor default or loss (e.g., partial or full de-commitments, extended payment schedules, added requirements)? |  |
| Are we incurring or anticipating changes in available financing (e.g., lines of credit, bank clawbacks, missed loan covenants)? |  |
| **PROGRAMS AND SERVICES** |  |
| Are our programs and services (all or core) deemed essential to stakeholders? |  |
| Has our organization taken meaningful action to correct longstanding inequities and disparities in programs and services? |  |
| Are costs for our programs and services still affordable for our target population and funders? |  |
| Have we adapted our models and delivery for programs and services to respond to and comply with COVID-19 requirements? |  |
| Do we have the organizational capacity to scale programs and services to match increased or decreased demand? |  |
| Are we incurring or anticipating adverse changes to partnerships and collaborations? |  |

**POSITIVE POSSIBILITIES**

With change comes opportunity. So consider ways to serve your constituents more effectively; find savings and other efficiencies; look for collaborations; and consider new types of program partners. Here are some examples to spark your thinking:

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| **POSITIVE POSSIBILITIES – Use a numeric range to rate the potential value (0-5) for these possibilities,** **with 0 being no value, to 5 being high value** | **Value** **(0-5)** |
| Innovations to products or services (e.g., new use of technology) |  |
| Savings/efficiencies (e.g., need for less physical space, reduced rent, sale of owned property) |  |
| Collaborations and/or consolidations for survival or better results (e.g., greater continuity of care/support, additional skills, increased diversity) |  |
| Prospects for new or new types of program partners/sponsors  |  |
| Other: |  |