

RECESSION TOOL KIT

Empowering nonprofit leaders to navigate effectively in the new economy



RTK SERVICES

The current recession offers both threats and opportunities to nonprofits and the people that they serve. The need for high quality services to our communities is at an all time high. Many human service organizations are experiencing an increased demand because of increased unemployment and poverty.

While the need for services in most parts of our sector is dramatically increasing, resources for this work are stretched thin -- due to decreasing revenue of some stalwart funders of our work.

Here are some highlights of the news for our sector in the coming years:

- ▶ At every turn, we all hear the news that foundation portfolios are down 30-50% and therefore their giving will be curtailed in 2009 and 2010.
- ▶ A survey of nonprofits in the Washington D.C. area indicates that about 40% predict that they will have to cut programs and staff; a third of respondents had no reserve funds with which to weather the downturn.
- ▶ The American Recovery and Reinvestment Act of 2009 provides a myriad of opportunities for nonprofits in housing development, environmental, public education and other targeted service areas.
- ▶ Meanwhile, other government funds, which financially support some of our sector's services, are being cut at the national, statewide and local levels.

One thing is certain -- nonprofit leaders need to adapt to an ever changing landscape by focusing on core programming and demonstrating impressive results, motivating the team around them, and communicating regularly with key stakeholders.

Even more true than in the past, the most effective leaders will be situational and entrepreneurial.

We have developed a **Recession Tool Kit** to create a focused process that will result in clarity on the recession's impact on your organization and to help you plan realistically for the future.

SUMMARY OF THE PROCESS & TOOLS IN THE KIT

The Recession Tool Kit approach is a 6-10 week assessment and planning process. We believe that the work needs to be done quickly -- so that you can quickly mitigate the affects of the recession on your nonprofit.

Our Tool Kit is based on 5 key steps that will help you be anchored in a steady foundation – despite the stormy external environment.

Toolkit's 5 Steps

1. **Get Grounded** - Revisit your mission, vision and values -- so that they are the compasses by which the board and staff will make strategic decisions.
2. **Collecting Data for Strong Decision Making** - Assess the recession's impact on Income, Expenses, and Program. Focus on internal & external environment.
3. **Analyze the Data and Trends** to identify the most critical issues.
4. **Shape up your organization** by considering ways to conserve your limited resources and make them go further. Explore ways to strategically restructure.
5. **Adopt an Action Plan** and move forward with confidence.

Facilitating Your Team through Streamlined Recession Planning

Here is how our facilitation and tools can make your planning process efficient and effective:

- ▶ We provide **detailed instructions, meeting agendas, and worksheet templates** to make the data collection efforts and decision-making processes streamlined and effective.
- ▶ The second step of this process is **to analyze the data** and determine how this information can lead to more strategic next steps for your organization.
- ▶ We also provide our clients with the **most up-to-date research on how the recession is affecting nonprofits** – including capacity building organizations, websites, and the best studies and articles in this area.
- ▶ Ultimately, the Recession Tool Kit process results in an **action plan for your team** – a typical plan would include these components:
 - a. Statements tying your mission and values to program outcomes during the recession.

- b. How the recession will affect your income, expenses, and programs.
- c. Decisions about key programmatic elements that must be preserved, diminished, increased, eliminated or postponed until after the economic crisis has lessened.
- d. Strategic decisions that need to be made by board and staff to move forward.

RTK CONSULTANT SERVICES

We know that you are very busy and need to watch how you spend every dollar during this economic downturn. Our aim is to provide the best-quality services in formats that are both cost and time effective.

Group Coaching/Training for an Association/ Group of Peer Organizations:

Group training has several advantages for your organization: you learn from your peers; it keeps the consulting costs down for each organization; and we can help more nonprofits in a shorter amount of time.

Group Coaching

- ▶ Series of 4 two-hour sessions to guide a group of 6-8 executive staff through RTK process
- ▶ Services include email coaching and materials that can be modified
- ▶ Clients would lead the work within their organization
- ▶ Individualized coaching between sessions

Workshops sponsored by your association to help your members weather the recession successfully.

- ▶ Three-hour workshop providing an overview of the Recession Tool Kit process
- ▶ Your association would be involved in the planning of the workshop
- ▶ Coaching to the association itself

Consulting One-on-One with your Nonprofit:

Some nonprofits are poised to do use our consulting services to work with their own team. To this end, we offer these services:

Full Engagement: Recession Tool Kit process facilitated by a team of two consultants over a three-month process, with most of the work happening in 6-10 weeks.

- ▶ Determine your recession planning needs and create process to meet them
- ▶ Consultants guide the process from soup to nuts
- ▶ Facilitate the meetings
- ▶ Keep you and your staff on task, and
- ▶ Summarize the results of the planning sessions
- ▶ Write and edit a Recession Tool Kit Action Plan—summarizing process & next steps

Coaching – For organizations to facilitate the Recession Tool Kit process on their own, with coaching by an RTK consultant.

- ▶ Consultants would provide assessment of the client’s recession planning needs
- ▶ Introductory session on the toolkit with the organization’s team,
- ▶ Coaching through the process with several meetings facilitated by consultants
- ▶ Email and phone coaching.

Informational Sessions to help your organization or association learn more about the Recession Tool Kit

Introductory Hour and a Half Workshop – to summarize the components and potential of the Recession Tool Kit. This workshop will help your organization’s ability to do efficient planning and data collection.

OUR EXPERIENCE TO HELP YOU

Each of us has more than 25 years of experience as a non-profit leader.

✚ **Julia Pierson** is a consultant who uses a solutions-focused approach to empower nonprofit organizations in management, planning and program development. Julia is the former executive director of GEDCO and lead developer of Stadium Place, and has firsthand experience building and operating human service, affordable housing and community development programs. Through her consulting practice and her participation in the Maryland Asset Building Community Development Network, she is active in addressing the recession’s impacts on Baltimore’s nonprofits.

✚ **Kathy Shulman** is a nonprofit consultant whose mission is to inspire, organize and sustain social justice causes and the people who energize them. Kathy offers her clients the following services: board development, fundraising, executive coaching & transition, and project planning. Previously, Kathy was Executive Director of the Public Justice Center, a non-profit legal advocacy organization, and the Governor’s Office on Service and Volunteerism. Kathy volunteers with the Creative Alliance and the Baltimore Shambhala Meditation Center.

To set up an Introductory Meeting with us, please contact us:

Julia Pierson

juliapierson@verizon.net | 410-258-8878

Kathy Shulman

kathyshulman@comcast.net | 410-435-0201