



Nonprofit Scenario Planning Webinar

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Question & Answers

Presenters:

Debra Hertz, PhD, Managing Director, The Strategy Group

Bobby Walker, Jr., CEO, Boys and Girls Club of Greenwich

Q - What is the major difference between scenario planning and strategic planning, and, what should you do if you are scheduled to review your strategic plan at this time?

A - Debra Hertz - The major difference is that you dive deep into all the scenarios, whereas in strategic planning you tend to choose one scenario early on that you are going to focus on. Scenario planning is broader, and you need to do more work than strategic planning. If you are scheduled to review your strategic plan, you can use your strategic plan as a baseline from which to morph out. Your strategic plan is very relevant, but you need to choose more.

Bobby Walker, Jr. - We are still in the throes of implementing our strategic plan. We actually are using some of the goals that we set forth, particularly those that are mission-based, to really guide our thinking about summer camp and fundraising efforts. We are shifting fundraising and looking at having specific areas of fundraising for areas that we have been looking at strategically to make sure that we are here to serve our town. Those strategic initiatives that we thought would be implemented one way, but actually play quite perfectly in a different way, are the same goals. We are just implementing our strategic goals in a different way. This goes to Debra's point about being flexible.

Q - Is scenario planning an on-going process, like a PDSA (Plan, Do, Study, Act) cycle?

A - Debra Hertz - You do scenario planning and you choose a scenario and you move forward with that scenario unless things change. But like strategic planning, scenario planning needs to be a living document and you need to be open to change, but you can't change all the time. This is the path that you are committed to going on.

Q - What is the best way to select the scenario planning team, and what should you not do in this selection process?

A - Debra Hertz - I think that what you need is a team that really comes from different angles. You don't want a team of all social workers - they are not necessarily going to look at the financial angles, and you don't want a team of all financial people. You want a team that can bring different lenses to the process. In terms of the selection process, you might be wary if you have somebody who is going to hold up the process - then you might not want them in.

Bobby Walker, Jr. - Though we had a team of five, there were meetings taking place, as each team member was meeting with others. Though it was a team of five, there were a lot of voices that were there and that was really important to represent as many as possible. Not too small of a group where we go down one single path, and not too many to get bogged down in discussion.

Q - Is it advisable to have an outside consultant or facilitator assist an organization with the scenario planning process to make sure that the process doesn't become myopic, but brings in a variety of perspectives?

A - Debra Hertz - I would say to you maybe, that it might not be necessary. Where I sometimes see it being helpful is that many organizations get into a cycle of conversation and never get off the wheel and I think a consultant can help you focus and move down the path. It may sound self-serving to say that because I do not think that you always do need one.

Bobby Walker, Jr. - When you are sitting with a group of people you know, and you know that there are multiple details that you have to go through, part of the reason that we needed another voice is that we were going down rabbit holes. There were these big issues that we needed to discuss, and we needed to come up with answers. Because we

know this place so well, we found ourselves talking about certain staff members or certain parents or things. It is not that those things don't matter, but they were not getting this scenario planned. One of the things that I loved working with Debra is that she kept us going on the big picture. We know this place so well, so having an outside voice constantly ask questions or redirect us or even better saying or asking us for more detail, it really kept us focused on the big things we needed to do.

Q - Would you include board members or key donors in discussion or in structured interviews that inform team discussion?

A - *Debra Hertz* - Yes. I think that board members oftentimes are on scenario planning teams, and I think with the Club's board they had had a lot of conversations and had set out a framework in terms of the financial expectations and others, so they were not included on the team. But definitely there is a role for the board to be involved and informed and I don't know that all of them need to be involved on the team but certainly keep them involved.

Q - What do you tell the organizational leaders when they tell you this is not the time to do scenario planning?

A - *Bobby Walker, Jr.* - To be very honest, we had many people who were a little nervous, even on our board, but there is a start date to summer camp, and that this is not a time where we have the luxury of saying "Oh, we will do this in two weeks". We have been doing this for a little over three weeks now and the time commitment is tremendous, and I want to be very clear that this is real work and takes an inordinate amount of time. We are still doing virtual programming. We are still helping a local organization with delivering food. We are still providing food for our families on weekends. We are doing this on top of all those other things. We had a decision to make, and that decision has to go public, and then we have to vet what happens when it goes public in order to make a final decision. We convinced our board that time did not permit us to continue to wait - the time was now. We had enough guidance from the state and from the OEC. We had conversations with other organizations, and the time was now, and we simply couldn't wait any more.

Debra Hertz - It takes a lot of commitment to do scenario planning. You might need to do a little more education before you can actually do the planning.

Q - Is there ever an "after action" analysis to reflect on whether the "right" decision was made?

A - *Debra Hertz* - The answer is yes with one caveat. It's not necessarily the "right" decision; it's the decision that you choose. You have to do an analysis of how it worked.

Q - Can Bobby speak to the financial modeling of the three scenarios the BGCG is considering for camp? And in particular, if a loss of revenue for 2020 is a reality, how did that factor in?

A - *Bobby Walker, Jr.* - We did financial modeling, and we have a cost per camper model we are currently using. We usually have 350 campers and we know that the state is going to cap us right now at 180 campers this year. We were able to use that model and determine how many staff we would need to have at camp and look at the costs. We also took past cleaning budgets (from the crew and the supplies) and tripled these costs. We built a model from that. We also looked at the costs to keep the building running and maintain our grounds. We have been blessed to not let anyone go. One of our models was not opening any camp. We actually show a loss in every single scenario. Our board felt that providing summer camp for kids in town who really need it, whose parents need to return to work, was so important that they were willing to risk absorbing that loss as much as we can. We had committed ourselves to greater fundraising efforts. We are coming up with a fundraising plan for how we possibly raise funds for kids in town who really need it to go to summer camp. The loss in all three scenarios is very real.

Q - Do the campers rely on bus transportation to get themselves to the summer camp? If so, how are you handling the transportation issue, given the stringent OEC guidelines?

A - *Bobby Walker, Jr.* - Yes, they do. In the past we have had a mixture. Most parents bring their kids to camp, but field trips and things have been a significant part of our summer camp particularly for our teens. We have it in writing that there will be no bus transportation provided this summer. Some of those very hard discussions that you have about what is permissible and what is not, and it's not for any financial reasons, it's just that based on the current guidelines our bus could have two people per bus along with the driver. Parents are going to have to bring their kids, and any field trips that we do are going to be somewhere we can walk and is outdoors. This is a summer unlike any other, and we are preparing our families for that.

Q - Are you asking families and staff to sign additional waivers associated to COVID-19? (Hold harmless, for example)?

A - Bobby Walker, Jr. - Yes. Every single person. We will not admit any kids to summer camp without having a waiver signed. That is the beauty of being connected to a larger national organization that has been vetted with a national lawyer, and we are doing the same with our staff. Before we reopen, everyone has to go through that process. We are coming up with what happens if a particular staff member feels uncomfortable signing it. I know at least in one other organization that I am familiar with, three of their full-time staff members refuse to sign it. Where we are working on that right now with a local lawyer. Everyone has to sign something before they enter the building.

Q - Do you have any tips for organizations that might be resistant to change, or reluctant to consider alternatives to the status quo?

A - Bobby Walker, Jr. - There is no status quo anymore. If we tried to do business as usual, we would have to close our doors, simply put. I still remember in our last staff meeting on March 12, we talked about the realization that there is a new normal, and that things at the club are going to have to change. Some people are resistant, as they liked what they had done before. We just simply put facts in front of those people that it is absolutely impossible to do business as we did. We can't have as many kids, we can't have parents in our building, etc. and those are hallmarks of everything this club has done for 110 years. People realized that in the end we got down to our basic mission statement to serve the community's kids no matter what, and so we realized that we could do part one if we could change part two – the no matter what. It's not easy at all. When people talk about how things used to be, we put facts in front of them and they realized that we have to do something different.

Q - Part of the process includes answering the question about who benefits most and least - the hard decisions. In your scenarios, who benefitted the least, who will be left behind, and how are you reconciling that?

A - Bobby Walker, Jr. - We struggled with this. I will tell you that we almost got completely bogged down with answering that as a staff. The club has always been able to accept any child that has wanted to attend either one of our camps for as long as we remember, and we know this goes to the status quo. We had to come up with a ranking-who are the people who need the summer camp, as opposed to those who want the summer camp experience. We have decided to tell our community that we are here to

serve the kids who need us most. Our priority will be given to those kids whose parents are essential workers, and now there is no school to occupy them. We have parents who for financial reasons desperately need to go back to work, which is a significant portion of our Club parents. I ran into a Club parent at the store and she asked, "Do you think you'll be running the summer camp? I'm a housecleaner. Right now, my clients are just starting to ask me to come back, but I don't know what to do with my son. I'm waiting until you guys decide on summer camp before I give them an answer." She's the type of parent that we would try to help out. We also work with a number of local agencies that provide funding for those families that can't typically afford the summer camp, and we work with them to make sure those kids have a place to go, unlike in the past those kids who would get priority. All of the remaining spots out of the 180 would then go towards those kids whose families simply would like them to have a fun, safe, enjoyable summer. It's very different- it's not a message that we typically give to people, but we also know that it's the right thing to do. And Debra uses a great term, that I hope everyone knows the difference. She wasn't talking about treating clients equally, she talked about really focusing on equity. There are people who simply need this in order to maintain some semblance of a normal life and we want to be there for those folks first.