Agenda

1. INTRO / ABOUT SCENARIO PLANNING
   - 15 min. Presentation, w/ Chat

2. OVERVIEW OF COVID-19 SCENARIOS
   - 15 min. Presentation, w/ Chat Q&A

3. TOOLKIT GOALS AND WALKTHROUGH
   - 10 min. Presentation, w/ Chat Q&A

4. PRACTICE EXERCISE AND KEY CONCEPTS
   - 40 min. Presentation, w/ Chat Q&A

5. QUESTIONS AND WRAP-UP
   - 10 min. Live Q&A
About Scenario Planning
The New York Times

Opinion

Covid-19, Confusion and Uncertainty

It will be a difficult road back to any kind of normal living.
The perils of prediction

IMF World Real GDP Growth Forecast, 2010–2020

Percent Change, Year-over-Year

Actual Growth

Forecast Sep-2011
Forecast Oct-2012
Forecast Oct-2013
Forecast Oct-2014
Forecast Jan-2016
Forecast Oct-2015

Source: International Monetary Fund (IMF).
Scenarios map the plausible range of stories
Scenarios map the plausible range of stories

External conditions

Multiple hypotheses / acknowledge uncertainties

Imaginative, but plausible

Holistic
Example scenario framework

- **EXILE**: Economic transformation for some, few choices for others
- **MANNA**: Public health breakthroughs provide a path to recovery, for now
- **PLAGUES**: Lingering struggle to survive in a highly fractured society
- **TRIBES**: Small, collective risk taking to navigate an inconsistent world
We get there by thinking outside-in

CONTEXTUAL ENVIRONMENT
- Social change
- Technology advances
- Economic shifts
- Environmental trends
- Political developments

COMMUNAL DYNAMICS
- Constituent needs / financial status
- Donor capacity and interests
- Partner developments
- Relevant policies
- Enabling capabilities

ORGANIZATION
- Services and programs
- Assets and capabilities
- Leadership
- Relationships
- Reputation
- Operations and infrastructure
Reply in Chat: Questions about scenarios?
Where scenarios fit in creating strategy

- External conditions / scenarios
- Capabilities and assets
- Vision and values
Where scenarios fit in creating strategy

External conditions / scenarios
- Not so much in your control

Capabilities and assets
- Mostly in your control

Vision and values
- Very much in your control

Strategy
Where scenarios fit in creating strategy

- Who do we serve?
- What do we offer?
- How do we do it uniquely? (i.e. why us?)
- What do we need to be really good at?
- In what ways do we organize and operate to do this best?
Rehearsing the future

Given our vision and values, and given our capabilities and assets, what might we....
A portfolio of bets against the future
A portfolio of bets against the future

Create a contingency plan (“playbook”)
Identify partner(s) to share the load/risk
Keep a program/initiative, but break into smaller commitments
Start something new your self, in a small way
You will choose how best to adapt

**ACT IN ANTICIPATION**
Early Indicators

**RESPOND QUICKLY**
Clear Evidence / Event
You will choose how best to adapt

**ACT IN ANTICIPATION**
Early Indicators

**RESPOND QUICKLY**
Clear Evidence / Event

Most individual orgs
Reply in Chat:

Questions about planning for multiple futures?
COVID-19 Scenarios
How we got to our scenarios

Focus

• “24 months”

• Some operational, but more strategic questions
  
    o Less of “How do we re-open for high holidays?”
    
    o More of “What else can we do with our buildings?”

    “Do we need to do more outside the building”

• Other JFNA efforts address near-term planning
How we got to our scenarios

Focus

- “24 months”
- Some operational, but more strategic questions
  - Less of “How do we re-open for high holidays?”
  - More of “What else can we do with our buildings?”
    “Do we need to do more outside the building”

- Other JFNA efforts address near-term planning

What might the lives of our stakeholders look and feel like in the next 24 months?

In order to help us think about...

What could organized Jewish life look like in the next 24 months, given each scenario?

Given values and vision, capabilities and assets, what should we be doing over the next 24 months (and how)?
How we got to our scenarios

- Review of other COVID-19 scenario work and analysis
- Mass interview: ~500 people across 3 webinars
- Input from prominent sociologists
- 5 sessions with small working group across JFNA and broader Jewish network
- Review with Federation planners
How we got to our scenarios

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The scenarios

- Financial stability: Mostly doesn't return
- Civic and social gathering: Maintains or improves
- Worsens
- Partly or mostly returns
The scenarios

- Financial Stability
  - Maintains or improves
  - Partly or mostly returns

- Civic and social gathering
  - Mostly doesn’t return
  - Worsens

- PLAGUES
  - Lingering struggle to survive in a highly fractured society
The scenarios

Maintains or improves

PLAUGUES
Lingering struggle to survive in a highly fractured society

Financial Stability

TRIBES
Small, collective risk taking to navigate an inconsistent world

Civic and social gathering

Partly or mostly returns

Mostly doesn’t return

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MANNA
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**Maintains or improves**

- Financial Stability
- Civic and social gathering

**Mostly doesn’t return**

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**Partly or mostly returns**

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The scenarios

Questions?
Toolkit
The Toolkit (v1.5)

Download it now!
Toolkit Process

1. Analyze
2. Rehearse Each Future and Generate Options
3. Evaluate and Prioritize
4. Plan

Understand our organization today
Explore Future Possibilities
Narrow the list
Define our organization tomorrow
Toolkit Process

1. Analyze
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Step 2:
Rehearsing the future
Toolkit Process

1. Analyze
   Understand our organization **today**

2. Rehearse Each Future and Generate Options
   Explore Future Possibilities

3. Evaluate and Prioritize
   Narrow the list

4. Plan
   Define our organization **tomorrow**

Subjective Incomplete Imperfect Hard
Step 3:
Creating a portfolio of bets
Step 3: Creating a portfolio of bets

- Clear, primary focus
- With a forward view
- “Not” list
Step 3: Creating a portfolio of bets

Do yourself, now

Partner, now

Think about, but hold for now
Toolkit Process

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Understand our organization today
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   - Narrow the list

4. Plan
   - Define our organization tomorrow

Goal: Structured, strategic conversation
Quick Walkthrough
Practice
Exile

This is a world in which...

Funding for collaboration, social networking, telehealth, and other relevant technology platforms accelerates, leading to a new digital lifestyle for those who can afford it. New employment opportunities open to those with the required skills and/or education, including otherwise unemployed youth, and this revitalizes key economic and social prospects for a good portion of the middle class, especially the upper-middle class. For those groups, physical distancing becomes much more bearable and, in some cases, is preferred.

The demand for new ways of living and working remotely is partly driven by the desire of certain families to flee unhealthy environments and is partly due to a societal shift from centralized, physical offices to an increasingly distributed (rural and ex-urban) and remote workforce. This not only changes the demographic makeup of many places but also leads to a massive split in the quality of life between different types of workforces and populations (e.g., creative/tech/office workers, shared economy workers, and essential workers). Two-thirds of the population is left behind because they cannot afford the transition to an expensive digital-first lifestyle, lack the training and personal networks needed to participate, or are in the wrong job at the wrong time.

See additional details as included in the scenarios themselves, published separately.
### Assume we’re living in Exile. What would be the impact to...?

<table>
<thead>
<tr>
<th>Impact Area</th>
<th>Potential Challenges/Opportunities</th>
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<tbody>
<tr>
<td>The lives of the people we serve (members, donors, vulnerable populations, students)</td>
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### Exile

**Customize the scenario**

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Here are the biggest...

- **Challenges** to who we are, what we do, and how we do it
- **Opportunities** we might have

Send 1-2 ideas via chat now
Assume we’re living in Exile. What would be the impact to...?

The lives of the people we serve (members, donors, vulnerable populations, students)

What people are looking for in Jewish life (community, support, education, engagement, worship)

Our resources (staff, access to infrastructure, funding)

Related organizations and communities to ours (other Jewish non-profits, Israel, Jewish/interfaith organizations, community)

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## Exile

### Generate possible options

Given the conditions described on the previous page, identify the things you might stop, continue, or start doing in this scenario. Consider this for the **people you serve, the work you do, how you operate, and the partnerships you might have or form.** Keep the focus on an organizational level, rather than a programmatic level.

Examples: “accelerate senior work,” “stop partnerships with X foundations,” “offer more digital education and less in person.”

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Stop or Pause

Continue or Amplify

Start or Create
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Getting to core/side bets

1. Align on likely emerging scenario(s)

2. Define core bet

3. Identify and prioritize side bets
Poll:
Current Assumptions

Which scenario do you think is most likely to reflect the world around you 1 year from now?

1. Manna
2. Tribes
3. Plagues
4. Exile
Poll: Current Assumptions

Which scenario do you think is most likely to reflect the world around you 2 years from now?

1. Manna
2. Tribes
3. Plagues
4. Exile
Core Bet

EXILE
Economic transformation for some, few choices for others

MANNA
Public health breakthroughs provide a path to recovery, for now

PLAGUES
Lingering struggle to survive in a highly fractured society

TRIBES
Small, collective risk taking to navigate an inconsistent world
3 Core bet fill-in-the-blank

Describe the core bet
Given the most likely emerging scenario you picked, revisit your top 1-3 ideas from that scenario in Step 2. You’ll use these ideas to further develop your core bet using the fill-in-the-blank below.

Example: “Our core bet is to be 100% focused on emotional support and will focus on vulnerable populations with mental health support. We’re the right ones to do this because unlike others we have the full range of needed services enabled by our connections with city services to make it happen.”

Our core bet is _______________________________ (few words about what it is) and will focus on _______________________________ (people / group we’re serving) with _______________________________ (problem they have / need).

We’re the right ones to do this because unlike others, we have the _______________________________ (what makes us unique) enabled by our _______________________________ (capabilities, skills, systems, partnerships, etc) to make it happen.
Different Levels of Decision Making

Programming/operating
- What we offer
- How it is designed/delivered
- How we staff
- What it costs
- Who pays

“Fitness center with COVID safeguards, limited capacity…”

“Small events only…”

“Outdoor classes and 1-1 learning only…”

“75% virtual…”
Different Levels of Decision Making

**Organizational strategy**
- Who we are
- What we do
- How we do it well
- Funding mix

“Promote and provide wellness for kids and their families across the country, based on expertise and tailored facilities...”

“Focus on seniors, with multiple forms of care and support, based on deep relationships and knowledge of this population...”

“Safe place for local Jewish community to gather, for any type of activity, evolving over time...”

**Programming/operating**
- What we offer
- How it is designed/delivered
- How we staff
- What it costs
- Who pays
## Evaluate and refine the core bet

### Stress test the core bet against the other scenarios

- What parts of the core bet are still reusable and relevant in the other scenarios (in case those emerge instead)?

<table>
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<th>Plagues</th>
<th>Tribes</th>
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- What does the core bet **not** address in the other scenarios?

- How might you modify your core bet in ways that would make it more relevant across all the scenarios?

- Refine the core bet fill-in-the-blank from page 31, to make sure it still fits with your long-term vision and capabilities.
3 Revenue implications for the core bet

Consider financial viability
Start thinking about the revenue implications for the core bet to make sure you have at least a reason to believe it might be viable. You’ll likely need to revisit this later in more detail.

What revenue sources would you rely less on?

What new sources of revenue would you need to explore?
Individual Exercise: Uniqueness

1 or 2 things you do uniquely, or can offer that others do not?

Should be something that you could build a core bet around, or would justify core bet.
Strategy Frameworks / Concepts

Jim Collins, *Good to Great*

Roger Martin and A.G. Laffley, *Playing to Win*

Beth Cousens, *What Do We Say No To?*
Adapting to change

Initial bets

- Emergent scenario(s)
- Impact on mission
- Fit with our unique capabilities
- Flexibility/re-usability
- Response time needed
Adapting to change

Initial bets

- Emergent scenario(s)
- Impact on mission
- Fit with our unique capabilities
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New bets

Time and information

JewishTogether.org
Now that you have your core bet, move to your side bets. Revisit the top 2-6 ideas of options from the other scenarios you identified as likely emerging and evaluate them against the following questions.

<table>
<thead>
<tr>
<th>Side bet:</th>
<th>How would this add value to our stakeholders in a unique way?</th>
<th>What capabilities do we have to do this well, and even better than others?</th>
<th>In which other scenarios might this also be relevant, in some way?</th>
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3 Side bets prioritization

First, refine and prioritize the side bets from the previous page. Any side bets that aren’t urgent given the likely emerging scenarios or might be easy to execute when needed, put in the box on the right.

Priority side bets (refined) to plan for now

Important side bets to set aside for now and activate if scenario direction changes

Second, categorize the side bets above based on how you will accomplish them.

Do ourselves

Look for partners
Must do’s across all the scenarios

Look for areas of organizational improvement

Hopefully, through this process you’ve seen the need for greater organizational flexibility and other areas of general improvement required in the future. Before planning further, take a moment to identify changes required to be a more responsive organization overall.

With any future we face...

1. What costs can we reduce to preserve cash while still keeping our options open?

2. What core capabilities do we need to lean into more and/or develop further (such as a particular expertise, set of relationships, systems, etc)?

3. What organizational or process changes can we make to operate more effectively?

4. How might we adjust our planning for shorter cycles while maintaining our long-term vision?
Next Steps
Questions

Use the “raise hand” feature to let us know who you are.
Or continue to post in Chat.
Next Steps

- Let us know how it goes
- Look for updates to toolkit and example strategies
- For further help: scenarioplanning@jewishtogether.org
Exit Poll

How likely are you to use this toolkit?

1. Very likely
2. Likely
3. Unlikely
4. Not sure
Thank You