

Nonprofit stability planning

Finding firm ground in a chaotic context

Sector Support Series – October 2025



**People
Centered
Change**



Hi, I'm **Julia**

I support **people-centered transformation** and **participatory strategy development** for nonprofits and foundations.



People Centered Change

julia@peoplecenteredchange.com

Today's purpose & intended outcomes

Why are we here, and what do we hope to accomplish?

Purpose

To offer an **alternative to traditional strategic planning** that can help drive stability (and even optimism!) in your nonprofit even amidst our chaotic context.

Intended outcomes

In service of this purpose, together we will...

- Define what stability planning means in contrast to other kinds of nonprofit strategic planning;
- Discuss the key areas of focus in a stability planning process; and
- Walk through how to lead a stability planning process in your own organization.

Share out loud or in the chat:

What does stability enable for us...

- As people?
- As nonprofits?

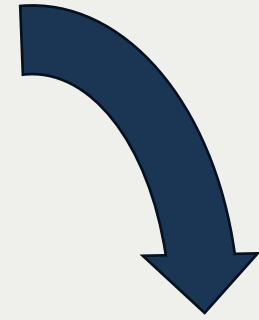


Why do we plan?

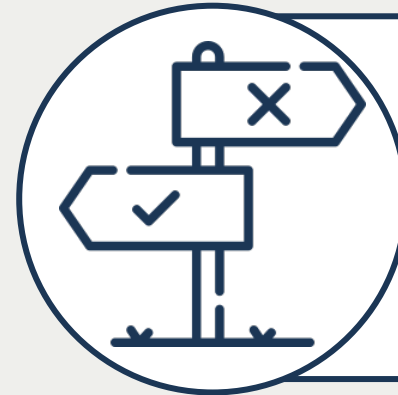
Why do we plan?



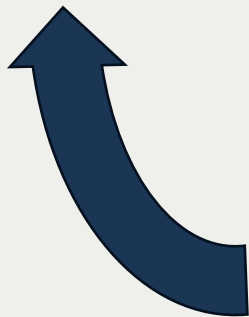
To **create alignment** around what is most important, what we need to achieve our goals, and what roles we play.



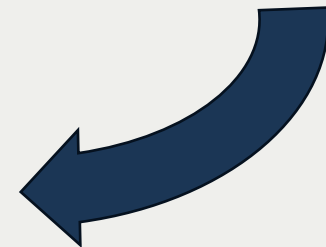
To enable us to **prepare** for the steps required to achieve our goals.



To drive clarity in **making choices** about what we will do, what we won't do, and to inform trade-offs.



To ensure that **resources are allocated** in ways that align with our goals and priorities.



"Plans are **nothing**, planning is **everything**."

Dwight Eisenhower



Plans **start to become irrelevant** as soon as the ink dries because our context changes so rapidly (especially today).

The **act of aligning** on what is important is **the most valuable outcome** of planning. Once you have that shared vision, you can adjust and respond to changes more nimbly and with greater shared ownership and commitment.

An aside: Planning, alignment, and people

A process like this can help to create emotional stability and even optimism for your team—both critically important drivers of individual and organizational resilience.



Our brains do not like uncertainty! If we can't predict what's going to happen, we can't plan for the future and keep ourselves safe. Existence in a state of perpetual uncertainty drains our energy, drags down moral, and creates anxiety.

Solution: Have a plan! Communicate when that plan changes!



Our brains do like control! When we have real, meaningful agency in our work, not only do we feel safer, we are being shown that we and our work matter and are valued. This is always important – especially when we are under so much pressure.

Solution: Involve people in a meaningful way in the planning process!

So in the context of stability planning...

In this context, stability planning is anchored in the process of alignment around three key areas:



**What work
is at our
core?**



**What does
stability
mean to us?**



**What
threatens
our stability?**

Stages of stability planning

Acknowledging the possibility of tension between stability and growth



In our sector, we are pushed toward **MORE** – new programs, greater reach, increased impact.

Funders often drive this by prioritizing new programming vs. sustaining existing programming or requiring increases in outcomes for new funding.

Nonprofits often drive this ourselves, because we are committed to our mission and vision. We want to put ourselves out of work.

There are some moments where doing more and driving stability might be at odds – this might be one of them.

Process principles



No trading long-term sustainability for short-term stability.



Decisions should be data-, community-, & values-driven.



Get comfortable with good enough.



Stay flexible & adaptive.



1

Get clear on
your **core**.

What is the work you
need to be protecting
right now?

2

Define
stability.

What does it look like
from different vantage
points?

4

Set achievable
priorities.

What can you do within
your control to move
toward stability?

3

Identify critical
risks & threats

What might get in the
way of you creating
stability?

STEP

1

Get clear on your core.

Build alignment around the work that your stabilization efforts should be centering.



Unprecedented uncertainty and resource scarcity means it's time to **be focused in your work** and clear on what you say yes and no to.

This step in the process should help you get clear on what you are prioritizing. The flip side is that you are **identifying what you might pause, sunset, or decide not to pursue**.

Building this clarity together means you'll be able to **move quickly** in response to opportunities that align with your priorities.

Adapted from Jim Collins, "Good to Great"

STEP

1

Get clear on your core.

Build alignment around the work that your stabilization efforts should be centering.

Questions to drive alignment

- What is the work that we are **most effective** at?
- What work creates the **most impact** toward our mission?
- What is our **most unique** work – that if we didn't do it, nobody would? On the other hand, what do other groups also do well?
- What work is **most needed** in this moment?
- What work do we have the **capacity** to do, right now?
- What work can we **get funding** to do and sustain over time?

Review data

Look at data related to your current performance—outcomes, impact, participation, whatever you have.

Consult constituents

How can you center their voices here?

- Review existing data from feedback or engagement activities
- Conduct focus groups, town halls, or a survey

Leverage staff wisdom

You can't make this decision alone – for it to be effective, you need diverse perspectives. Use the questions and data sources outlined here to...

- Ask different teams to reflect on what work feels most critical,
- Hold a staff retreat focused on prioritization, or
- Create a cross-organizational committee to engage in these discussions.

STEP

2

Define stability.

What does it look like from different vantage points?

Stability will mean different things to different parts of your organization –
and what you need right now is a holistic definition.

For your **finance team**, stability might be as simple as balance between cash in and cash out, and access to a line of credit for emergencies.

For **folks delivering programs and services**, it might mean maintaining the number of people you support through your work, or maintaining a stable presence in key communities.

For **HR**, it might mean investing in your culture to reduce decision bottlenecks so you can respond more quickly to changes in your environment.

Part of our goal here is to answer the question:
Stability for who? For what?

Staff experience?
Constituent outcomes?
Operational effectiveness?
All of the above?

STEP

2

Define stability.

What does it look like from different vantage points?

Questions to build a shared definition of stability

- What does stability mean from the perspective of the work you are closest to?
- What about sustainability? What might be different between the two?
- If we prioritize stability over growth, what would that change about your priorities?
- What aspects of stability do we have the most control over internally?
- What resources and supports would be required to create this kind of stability?

Harvest functional perspectives

The whole point here is creating a definition that reflects different aspects of your organization and its functional areas. So consider...

- Having individual teams discuss key prompt questions and identify key insights from a team vantage point
- Holding one-on-one conversations with leaders from each of your teams
- Sending an all-staff survey with a handful of targeted questions from the list to the left.

Co-create a shared perspective

Bring together the data from your functional conversations and put it together.

Consider a cross-organizational working group or all-staff session to do this sensemaking.

STEP

3

Identify critical risks and threats.

What might get in the way of creating stability?

Risks and threats to stability are both important to identify. Aligning on what is important helps you prepare, and to **get clear on where you have more and less control** over outcomes.



A risk is the potential of **something we are doing not succeeding.**

There is a risk that this project won't succeed, we are testing too many new approaches.



A threat is the result of an **external event or actor** impacting us.

One threat is that this funder may decide not to prioritize this kind of work in the future.

STEP

3

Identify critical risks and threats.

What might get in the way of creating stability?

Questions to build a shared definition of stability

- What do you see as current risks or threats to stability within the work you are part of?
- What do you see as emerging risks or threats to stability within the work you lead?
- What do you see as the most critical opportunity to mitigate risks and protect ourselves from external threats?
- Are there programs or activities we conduct today that you think may have a real negative impact on stability for us?

You can embed these questions into the actions you plan for Stage 2.

So you'll be asking and sensemaking these things together:

- What does stability mean from different functional perspectives?
- What risks and threats do we need to be paying attention to and preparing for?

STEP

4

Set achievable priorities.

What can you do within your control to move toward stability?

At this point in the process, you'll have answered the following questions:

- What is the work we should be doing right now?
- What does stability mean for our staff, our constituents, and our operations?
- What do we see as risks or threats to stability?

Now your work is to bring the information you've gathered together and prioritize.

Choose **achievable priorities** – this probably isn't the time to set blue-sky goals. What's possible? What might be within your control?

Remember, **"plans are nothing"**. With such a rapidly changing external environment, it's risky to get too attached to any one thing – keep reminding yourself of this.

This is where **"good enough" matters**. With the challenges we are all facing, striving for perfection runs the risk of getting in the way of creating solid impact.

STEP
4

Set achievable priorities.

What can you do within your control to move toward stability?

Start
here



**What work
are we
prioritizing?**

- Where are we doubling down on our efforts?
- What are we stepping away from – and what are we doing with those activities (e.g., pausing, sunseting, leaning into partnerships)
- What does success look like in the context of prioritizing stability?
- How does that impact internal resource allocation?
- How are we accounting for risks and threats?

**What internal
investments are
we making?**

- What underlying operational policies, processes, and systems will help drive stability for our work and our team?
- What supports do our staff need in this operating context?

**What
resources
do we need?**

- What does this mean for how we allocate and manage financial resources?
- What resources are we redirecting?
- What does this mean for how we raise funds / generate revenue?

STEP

4

Set achievable priorities.

What can you do within your control to move toward stability?

Prioritization considerations:

You can use these questions as a rubric to help inform how you balance trade-offs and set priorities.

- **Stability vs. sustainability:** What choices help create stability in the short term without sacrificing long-term sustainability?
- **Managing risks & threats:** Where do we have the most internal control around mitigating risks and weathering threats?
- **Data-driven decision making:** Where do we have the strongest data backing our priorities and decisions?
- **Values-driven:** What decisions or priorities help us uphold our values, even under pressure?
- **Flexibility:** What choices help us stay flexible? Which choices might lock us into commitments or investments that we couldn't back out of?

Putting these steps together

Examples of what different process approaches could look like

First...a word on decision making

As with any participatory process, **it's critical to make sure you are clear about decision-making**. Specifically:

- How decisions are being made,
- Who has decision-making authority,
- What information will inform key decisions, and
- How decisional outcomes will be communicated.

Scenario: The one-day planning retreat



Duration: A few weeks total to plan and execute.



Resources: Minimal – one or two people to plan and capture outputs, one full day from all staff.

Prepare ahead

- **Gather relevant data** – program effectiveness and impact, existing community feedback or engagement themes
- Use the outline here and the questions throughout this deck to **define a tight focus on the day** – what questions do you want to answer together?
- **Conduct a quick participant survey** to gather initial reactions to key questions so your time together is spent sensemaking vs. brainstorming.

Session structure

Morning

Get clear on our core

Work together to review and make sense of programmatic and constituent data to identify priority areas. Consider a mix of plenary & breakout work depending on team size.

Define stability, risks, & threats

- Start in functional teams to unpack questions in Step 2 and Step 3. If you've done a pre-survey, have that data ready for functional teams to discuss.
- Have functional teams report out in plenary.
- Synthesize across functional teams – what's coming to the surface?

Afternoon

Set achievable priorities

- Use the rubric under Step 4 to sift through the outcomes of the morning and identify key programmatic, financial, and operational priorities.
- Once high-level priorities are set, break into groups to refine priorities and set reasonable goals.

Scenario: The working group sprint



Duration: Two to three months total.



Resources: Larger investment from working group members helps the rest of the organization participate and engage in a more targeted way.

1

Define a diverse cross-functional working group

When considering participants, consider diversity as it relates to: identity & lived experience, tenure, functional area, level of power in the organization.

2

Clarify core work

Gather constituent input via existing feedback or through focus groups, town halls, and/or surveys.

As a working group, define core areas using prompts from Step 1. Validate through engagement with teams or other key voices in the organization.

3

Define stability, identify risks & threats

Harvest knowledge from functional teams either via joining team meetings, surveys, or both.

Harvest knowledge from functional teams either via joining team meetings, surveys, or both.

4

Validate & prioritize with staff

Design and facilitate a one-day session to engage staff more deeply and ensure meaningful alignment.

Focus the day on refining and finalizing a definition of stability, and then using that to set shared priorities.

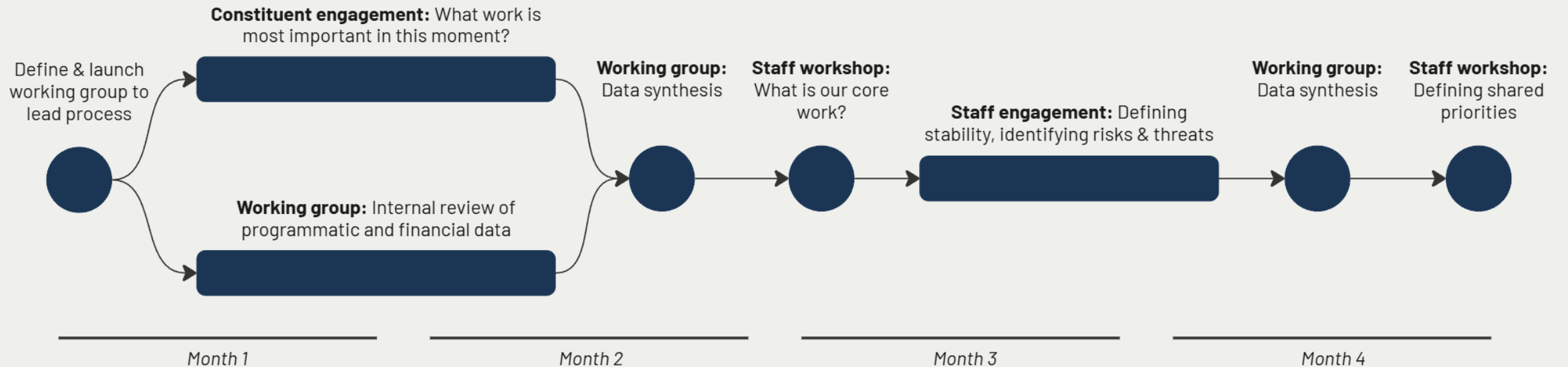
Scenario: The robust process



Duration: Four to six months of activity – could extend as long as nine months depending on the level of constituent engagement you want to include.



Resources: Substantial investment from the working group leading the process, multiple opportunities for meaningful staff engagement means greater investment of staff time. You would also want to consider compensation for constituents in a more robust engagement process.



Thank you!

It was such a pleasure to be here with you today!!



I would love your feedback on this workshop and future topics you'd find valuable – use the QR code to get started!



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