

COVID-19 SCENARIOS COMPANION TOOLKIT

July 2020 / Tammuz 5780 | v1.5

[JewishTogether.org](https://www.jewishtogether.org)

WELCOME!

This toolkit accompanies scenarios developed through the JewishTogether.org scenario planning initiative to respond to the question,

“What might the lives of Jewish communal stakeholders look and feel like over the next 24 months?”

This toolkit aims to help organizational leaders explore:

1. Within each individual scenario, what *could* organized Jewish life look like (or need to look like) in the next 24 months?
2. Given our values and vision for our organization/community, and the capabilities and assets at our disposal, what *should* we be doing over the next 24 months, and how should we be doing it?

TIPS FOR USING THE COMPANION TOOLKIT

- To use this toolkit, make a copy and save it to your Google drive or download it to your computer.
- Decide who will own this process and who will participate along the way.
- You may need to do this exercise in multiple rounds with different groups.
- Someone participating needs to have a high level understanding of what your organization does, your key programs, and your most significant expenses.
- We hope you’ll share this work with your colleagues and partners in other organizations. Email scenarioplanning@jewishtgether.org to connect with others engaged in this process.

The activities ask you to consider your organizational direction on a strategic level rather than on a strictly programmatic or tactical level. This means asking fundamental questions about assumptions you have regarding who you serve and what you offer. The activities are meant to be done in a workshop style, with small groups over a couple hours at a time.

The scenarios themselves are shared briefly in these materials, and are published in full in a separate document. The full set of JFNA’s scenario planning resources can be found at <https://www.jewishtgether.org/scenarioplanningresources>. We strongly encourage facilitators to watch the video of the [Scenario Planning Workshop](#) (from May 2020) as an introduction to this work and to assign it as context prior to using these materials.

Use this toolkit to

1 Understand how possible futures relate to what you do and how you do it (Steps 1-2)

2 Converge on core bets and side bets to remain resilient and flexible amongst possible futures (Steps 2-3)

3 Plan next steps to begin to turn the core bets and side bets into actions (Step 4)

Toolkit Process

1

Analyze your
current state

2

Rehearse each
future and
generate options

3

Evaluate and
prioritize core
and side bets

4

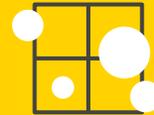
Plan next steps



Understand our
organization today



Explore future
possibilities



Narrow
the list



Define our organization
tomorrow



STEP 1

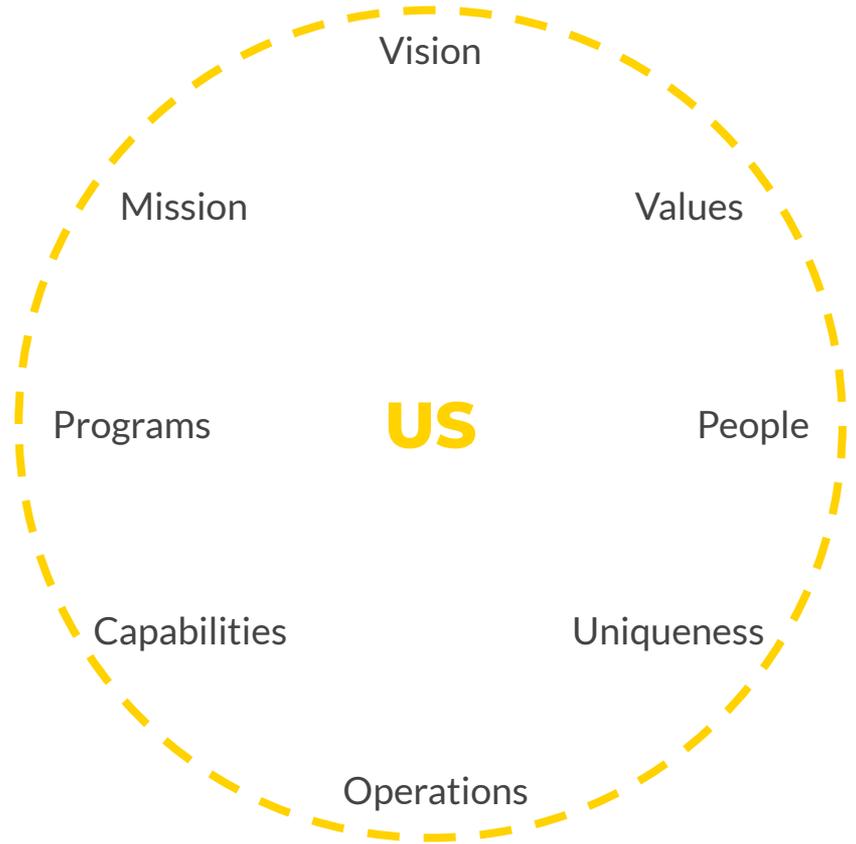
Analyze your current state

Analyze your current state



Reflect on where you are today, so that you can prepare for the future. Take a few minutes to review the most important aspects of your organization before preparing to move forward.

As you move through this, make sure you have insight into your pre-crisis strategic direction as well as the motivation, time, and resources to do this work. The environment we're operating in, and therefore this process, will challenge your definition of your vision, mission, and purpose. The clearer you are about these when starting this process, the more value you'll get out of it.



1 Vision, Mission, Values



Reflect on your organization's reason for being, prior to the crisis and today. If you have these written formally, feel free to reference them.

1. What is our vision?

2. What is our mission?

3. What are our values?

1 Organizational assumptions questionnaire



Now consider, pre-crisis, how your vision, mission, and values drove your assumptions and your work. Think from a holistic view, rather than details about each department or program. As we move through the scenario planning process, our goal will be to see how these assumptions might (or might not) change.

Given our vision, mission, and values...

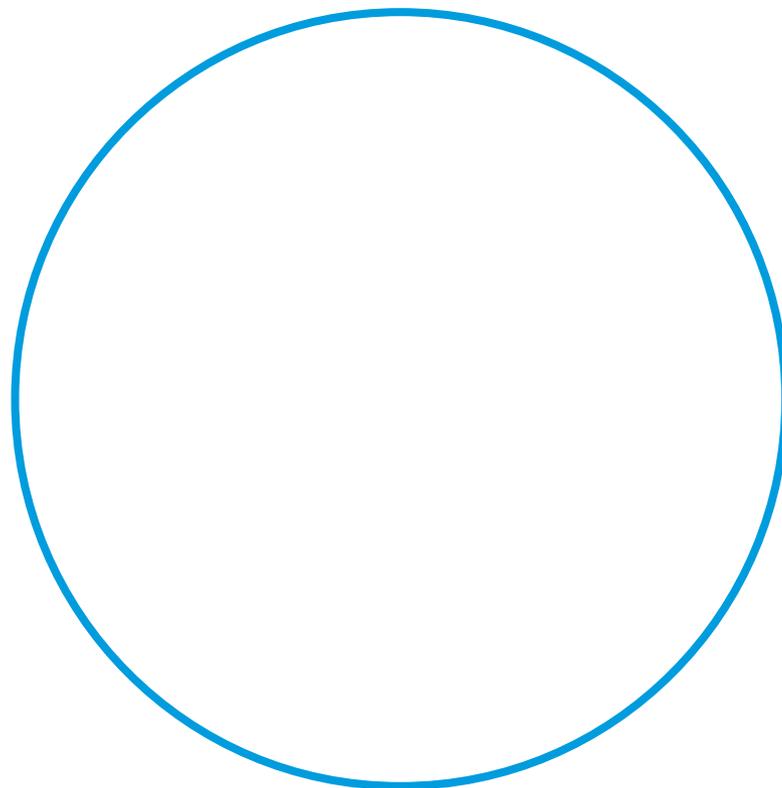
1. Who did we serve?
2. What did we offer to the people we serve?
3. How were we uniquely good at what we offer?
4. What capabilities did we need to do it well?
5. How did we organize and implement our programs and services?

1

Funding/budgeting allocation assessment



Think about your programs today and how your funding or budget is split across the top programs. Using general percentages, fill in the pie for how the budget is split across the top 5 programs. If there are more than 5, use an "other" section. Aim to show general percentages, no need to dive deep into your financials.



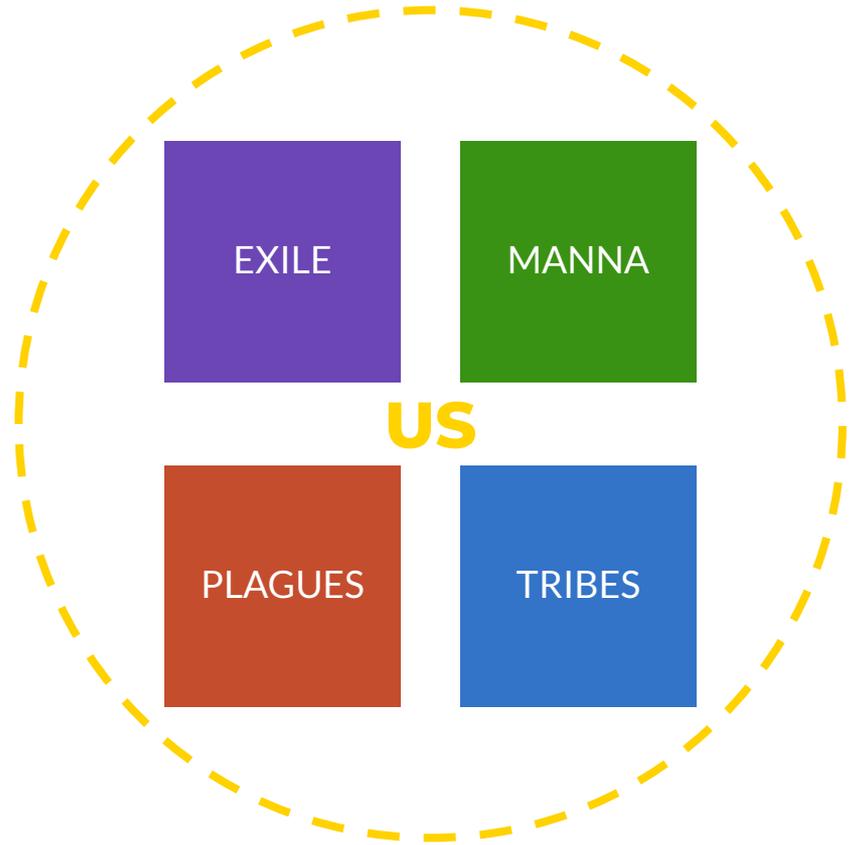
STEP 2

Rehearse each future
and generate options

Rehearse each future and generate options

The four scenarios are based on external conditions that might happen outside your organization. They look at higher level factors such as the economic state and the extent to which physical gathering can or can't happen.

Now, customize the scenarios to the people you serve, the work you do, the ways you operate, and the partnerships you have, as well as challenges and opportunities the scenario might bring. By the end of this step, you'll begin to generate options for how you might shift your organization's strategic direction to remain resilient for possible futures.



2

Plagues

This is a world in which...

The response to the health and economic crises becomes further politicized, leading to intentional misinformation and poor coordination in efforts to understand and contain the virus. Continued lockdowns stall reopening efforts. They are met with compliance in some places and resistance in others, while fear and uncertainty increase everywhere. Growing tensions reignite unresolved social issues, including racial injustices and economic disparity. Trust is harder to find, and the perceived risk of physical gatherings remains high not just for health-related reasons but also due to violence and crime.

Market systems strain to adjust as the economy's ability to function disappears with continued limits on physical gathering domestically and trade disruption globally. Access to food and other basic household needs is intermittent, and income insecurity proliferates as jobs continue to be lost (except among the very wealthy or self-reliant). Personal health is a priority, and individuals do whatever it takes to look out for themselves and their immediate family, including avoiding any gathering deemed nonessential.

See additional details as included in the scenarios themselves, published separately.



2 Plagues

Customize the scenario



Assume we're living in Plagues. 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)

Here are the biggest...

Challenges to who we are, what we do, and how we do it

Opportunities we might have

2 Plagues



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.”

Stop or Pause

Continue or Amplify

Start or Create

2

Tribes

This is a world in which...

In the face of continued economic decline and social isolation, people are restless and anxious to get back to work and the other important aspects of their lives. Individuals willingly take certain types of risks to gather. Meanwhile, the lack of a coordinated national effort leads to different regions, states, and cities experimenting with different rules for containing virus transmission.

Given a patchwork of safety guidelines, and without clear and consistent legal precedents, organizations are mostly left to their own devices in implementing health and safety measures and assuming liability. Most physical gathering is highly resource intensive and capacity limited. As a result of continued health uncertainty and financial insecurity, people are exclusive and selective in the types of groups and people they spend time (and money) with, and they seek out trusted options that meet their personal standards of care.

See additional details as included in the scenarios themselves, published separately.



2 Tribes

Customize the scenario



Assume we're living in Tribes. 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)

Here are the biggest...

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Stop or Pause

Continue or Amplify

Start or Create

2

Manna

This is a world in which...

There is a coordinated, highly technical approach to reopening. Global efforts drive health breakthroughs with a greater understanding of the virus, treatments that reduce effects, and standard containment guidelines. Governments shoulder the costs of testing and tracing services. A new public service corps helps manage the distribution and implementation of public health initiatives. Organizations still make changes to physical spaces, but the bar is lower given the reduced risks to individuals and organizations' ability to leverage the public health system.

At first, people cautiously gather but then gain confidence to broaden their movements. Individuals generally accept the new rules around personal tracking, mandatory quarantining, or shelter in place when necessary. However, for many, choices about where they spend time and with whom have been permanently altered due to recent traumatic experiences.

As economic activity recovers, many feel they are on stable ground. However, not everyone is back doing the same job as before, and some jobs do not return at all. Portions of the middle class in every community continue to slide into financial hardship. Even as life seems to be getting back to a semblance of the pre-virus normal, unintended consequences emerge, including rising stigma against the vulnerable or those who were sick, and debates ramp up over data surveillance and privacy.

See additional details as included in the scenarios themselves, published separately.



2 Manna

Customize the scenario



Assume we're living in Manna. 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)

Here are the biggest...

Challenges to who we are, what we do, and how we do it

Opportunities we might have

2 Manna



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.”

Stop or Pause

Continue or Amplify

Start or Create

2

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.

2 Exile

Customize the scenario



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)

Here are the biggest...

Challenges to who we are, what we do, and how we do it

Opportunities we might have

2 Exile



Generate possible options

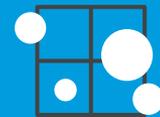
Given the conditions described on the previous page, identify the things you might stop, continue, or start doing in this scenario. Consider this for the **people you serve, the work you do, how you operate, and the partnerships you might have or form**. Keep the focus on an organizational level, rather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

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

Stop or Pause

Continue or Amplify

Start or Create



STEP 3

Evaluate and
prioritize core
and side bets

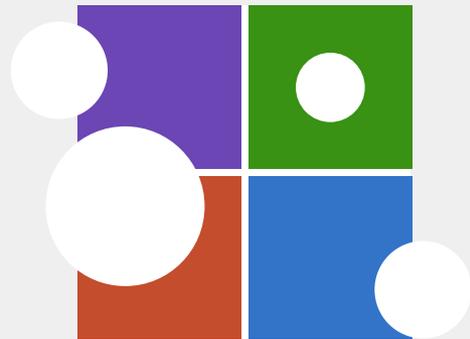
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Evaluate, prioritize core and side bets

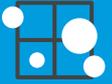
Each scenario opens up multiple options, or bets, for shifting your organization's direction to remain resilient for the future. But which direction should you go? It's highly resource and time intensive to plan equally for all scenarios at once.

Step 3 will help you evaluate and prioritize core and side bets. Core bets are where most of your efforts will go. Side bets are either opportunities to keep in the mix or contingency plans you need to have ready in case we end up in one of the other scenarios. Your strategy will be a portfolio of these bets.

For smaller resourced organizations, thinking about side bets will give you a playbook to start executing against quickly in response to changing conditions. Some organizations may also choose to resource the side bets in anticipation of change.



3 Core and side bet comparison



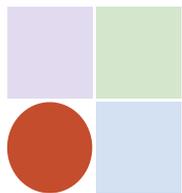
	Core bet	Side bet
Organizational alignment	Fits with your vision, mission, values, and capabilities	Fits with your vision, mission, values, and capabilities
Investment level	Involves investment of resources and/or R&D expenses	Could exist simply as a contingency plan or playbook until needed (not necessarily money being spent); OR a minimally resourced effort, potentially through partners
Future relevance	Assumption that 50-75% of bet will still be relevant 5-10 years from now Parts are reusable even if different scenarios are likely emerging	Might be reusable to different scenarios, might be specific and not needed until that scenario is likely emerging (could be never)

3

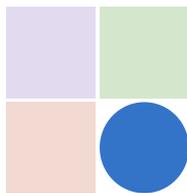
Pick the likely emerging scenario

The first thing to do is pick a scenario that's likely emerging to primarily focus on for your core bet. The emerging scenario doesn't necessarily mean it's the preferred scenario, although it could be. Rather, it's the one that's unfolding, based on triggers or signals you're seeing. For example, a trigger for the Manna scenario could be an effective and coordinated rollout of public contact tracing programs.

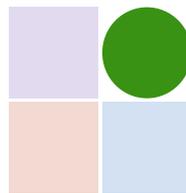
Note that whatever core and side bets you choose today, you should expect to adjust these decisions as triggers suggest new scenarios are likely emerging.



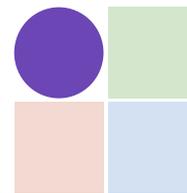
Plagues



Tribes



Manna



Exile

3 Scenario chips bet



Pick the likely emerging scenario

You're going to have to take a bet on what is the likely emerging scenario. To help you choose, let's say you have 100 chips in year 1 and 100 in year 2. Bet the chips by spreading them amongst the 4 scenarios by year. Put the most chips on the scenario you think is most likely emerging for each year, and the least chips on the least likely.

		Plagues	Tribes	Manna	Exile
Chips (total for each year should equal 100)	Year 1 (2021)				
	Year 2 (2022)				

Why did you bet your chips where you did? What triggers do you see for the most likely emerging scenario in each year?

Is there a difference between year 1 and 2? If so, what does this suggest about your need to adjust to changing conditions?

3

Evaluate and prioritize the core bet

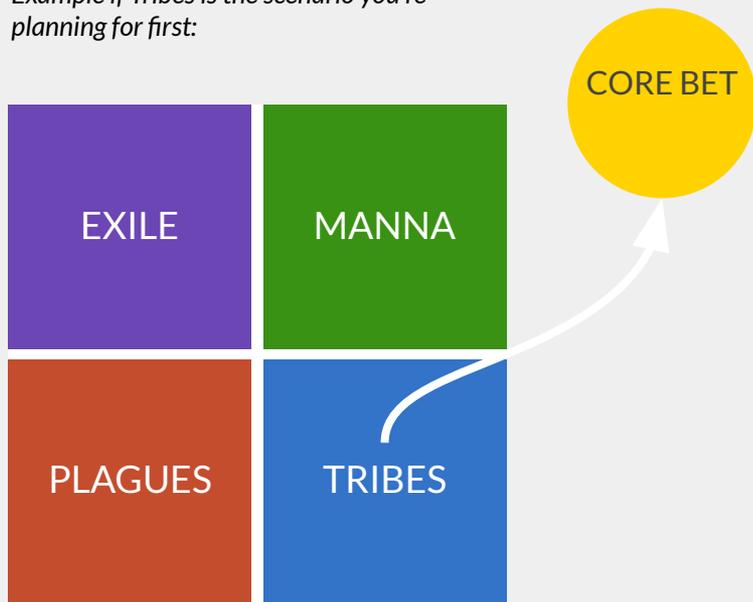
Once you pick the most likely scenario to focus on first, you'll form a first draft of your **core bet**.

A **core bet** is the primary strategic path you'll take. This is where you'll devote the majority of your resources, such as people and funding. A core bet:

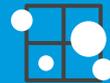
- Maps to a likely scenario
- Impacts your mission in a significant way
- Builds off of your unique position or capabilities

If the most likely scenarios are different in year 1 and 2, start with year 2 and use this as the basis of your core bet. The scenario receiving most votes in year 1 will be the basis of at least one important side bet, along with other scenarios.

Example if Tribes is the scenario you're planning for first:



3 Core bet fill-in-the-blank



Describe the core bet

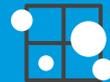
Given the most likely emerging scenario you picked for year 2, revisit your top 1-3 ideas of options from that scenario in Step 2. You'll use these ideas to further develop your core bet using the fill-in-the-blank below.

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.

3 Evaluate and refine the core bet



Stress test the core bet against the other scenarios

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

Plagues	Tribes	Manna	Exile

2. What does the core bet *not* address in the other scenarios?

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

4. 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?

3

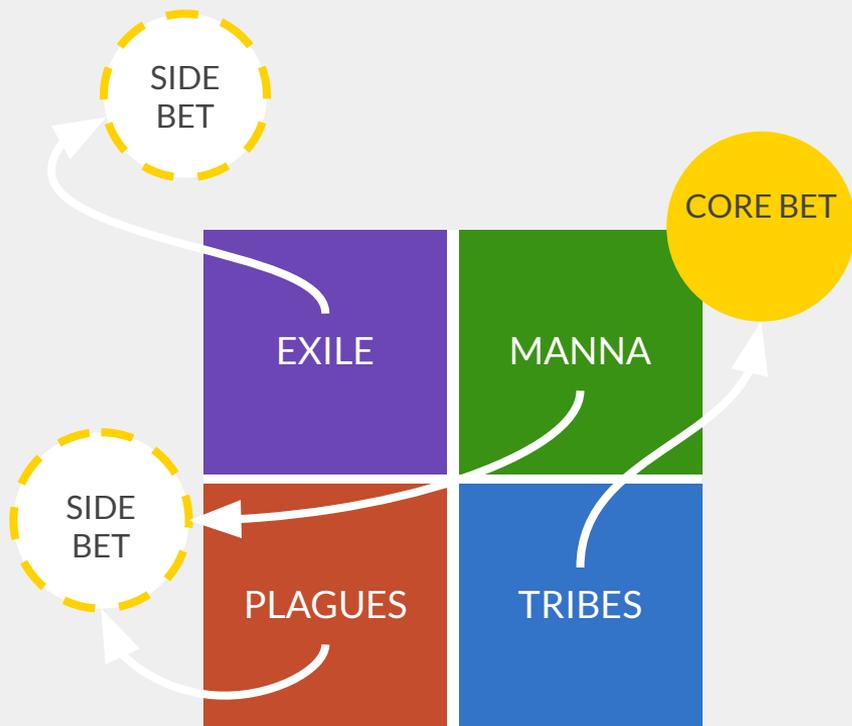
Evaluate and prioritize side bets

Now that you have your core bet, turn your attention to **side bets**.

Side bets are other options you keep on the table to remain flexible. These are areas with smaller resource and time allocations, ready to go if needed. This might be a contingency to deal with a challenge or an opportunity to expand your portfolio if one of the other scenarios emerges. Side bets could either be simply a plan that you can pull of the shelf quickly when needed or an initiative with allocated funds.

Side bets:

- Are flexible or reusable if/when alternative scenarios emerge
- Can get up and running relatively quickly
- Might be something you are doing now that you can reduce in size for the time being
- Might be done in partnership with other organizations



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

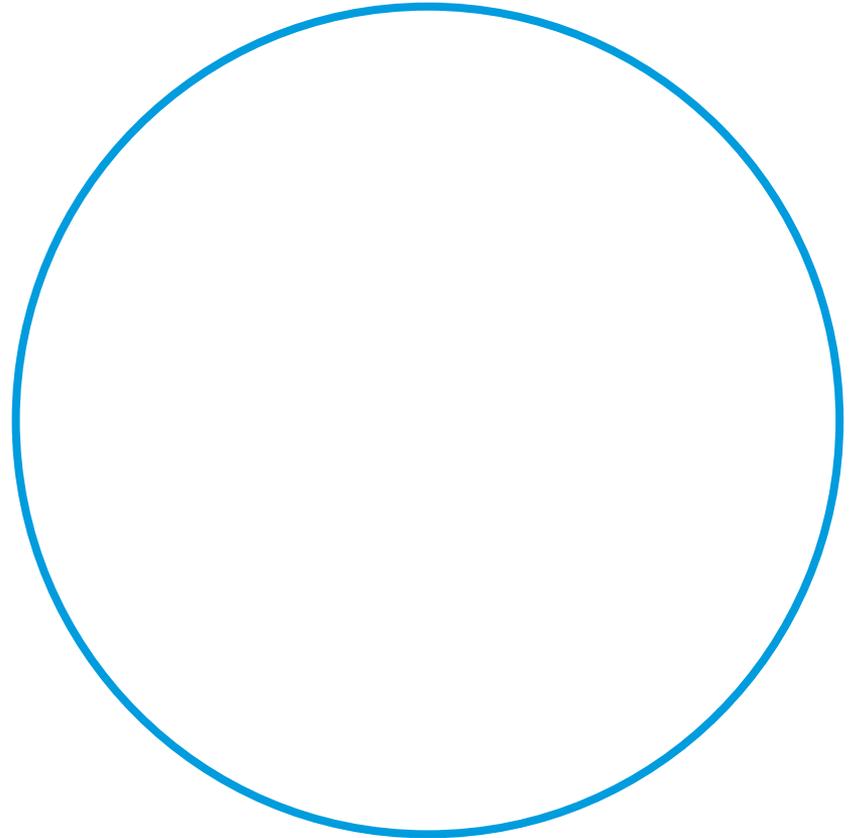
Look for partners

3 Stress test funding/budgeting allocation with bets portfolio

How might your top 5 largest funding program areas or budget allocations change with your makeup of core and side bets, compared to the chart on page 9? Fill in the pie, using approximate percentages. Aim to show the general magnitude rather than diving deep into your financials.

Main reasons for changes

Additional info needed





STEP 4

Plan next steps

4 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?

4

Taking it forward

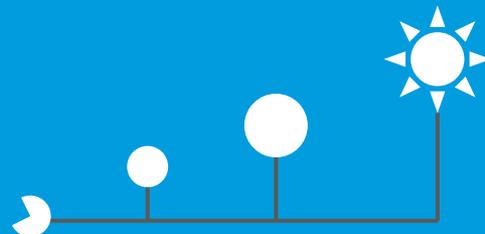
Congratulations on making it to the end of the toolkit! This work isn't easy.

Hopefully this has proven to be a valuable resource to help you navigate the tremendous uncertainty all our organizations are facing.

Remember that this is an iterative process. As future unknowns become knows, you'll need to revisit much of this work and its implications.

Here are some tips for taking this work forward:

- Consider what a good outcome of this effort would be for your organization. What do you hope to achieve in 1, 3, and 6 months?
- Think about the top priorities that need to happen immediately to start planning your core and side bets. What would you start doing tomorrow?
- Assign a person and/or committee who is responsible for making the core and side bets a reality. Ask them to give you a timeline of when things will happen.
- Track trigger points for how the various scenarios are emerging to continue to assess and prioritize decisions, including your core and side bets. Trigger points can be external or closer to home. For example, for Plagues: "2nd virus wave hits hard" or "sickness of top people in our organization severely slows us down."



Acknowledgements

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Jack, Joseph and Morton Mandel Foundation



MATT RANEN
SCENARIO PLANNING & STRATEGY

JewishTogether.org