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# Staying Ready vs. Getting Ready: Building Resilient Nonprofits

May 7, 2026



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# Creating Opportunities for Our Clients

Updated January 2026

**14,800+**

Nonprofit organizations served

**7,700+**

Clients engaged in global capabilities

**4,400+**

Government organizations served

**5,600+**

Clients engaging employee benefit plan capabilities

**690+**

Higher education organizations served

**27,900+**

Clients engaging outsourcing capabilities

**255,700+**

Active clients

**6,900+**

Financial institutions served

**7,900+**

Clients engaging wealth advisory capabilities

**131,200+**

Private households served

**77,800+**

Private businesses served

**10,700+**

Health care organizations served

# Upcoming Webinars



June 18, 2026

Strategies All Board Members and  
Nonprofit Leaders Should Know:  
CLA

July 9, 2026

Donor-Advised Funds: What Data  
Reveals: CLA



# *Session CPE Requirements*

- You need to attend 50 minutes to receive the full 1 CPE credit.
- There will be 4 polling questions throughout the presentation. You must respond to a minimum of 3 to receive the full 1 CPE credit.
- **\*\*Both requirements must be met to receive CPE credit.\*\***



# *Learning Objectives*

- Identify how scenario planning and the use of leading indicators can help nonprofits anticipate change and handle uncertainty
- Recall governance and strategic planning practices that enable nonprofits to adapt without disrupting core operations
- Discuss practical strategies to regularly refresh long-range plans, so they remain relevant, flexible, and aligned with the mission



# *Agenda*

- Opening and welcome
- Governance and organizational readiness
- The finance leader's mindset shift
- Tools and techniques
- Wrap up





# Governance and Organizational Readiness: Setting the Foundation



# Polling Question

How are you currently supporting a nonprofit organization?

- Board member
- CFO or finance staff
- Organization leader
- Volunteer
- Professional services firm
- Other



# Why Long-Range Planning Fails



Boards treat plans as static documents or checkbox exercises



Plans are approved but never truly operationalized



The cost of misalignment compounds during periods of rapid change

# The Various Roles in a "Stay Ready" Organization



- Delineate between oversight vs. management responsibilities
- What boards should be asking:
  - Scenarios, not just budget targets
  - Risks, assumptions, and decision triggers
- What management should be asking:
  - Focus on KPIs and benchmarks
  - Aligning financial goals with mission and risk tolerance



# Balancing Flexibility and Accountability

- Guardrails vs. rigidity — policies that enable adaptability
- Reserves, delegation authority, and threshold policies
- Maintaining transparency and fiscal discipline
- Setting up the organization to act decisively without panic



*Governance sets expectations —  
finance leaders operationalize readiness.*



# Polling Question

## How would you rate your organization's readiness?

- **Fantastic** — “We are substantially complete, pending a few reconciliations with reality.”
- **Good** — “We’re ready—no last-minute heroics scheduled.”
- **Fair** — “We are one coffee away from full readiness.”
- **Concerned** — “We’re not scrambling... we’re strategically repositioning.”





SECTION 2

# From 'Getting Ready' to 'Staying Ready': The Finance Leader's Mindset Shift



# Why "Getting Ready" Is a Risk Strategy

## Reactive planning behaviors:

- Long-range plans driven only by the budget
- Last-minute scrambling
- Decision-making under pressure



## How this shows up in nonprofits:

- Funding volatility
- Unable to handle short- and long-term economic pressures
- Program pivots – new programs to chase \$
- Leadership transitions



# What It Means to Truly "Stay Ready"

A proactive financial and management philosophy

1. Static vs. dynamic planning
2. Precision vs. preparedness
3. Reframing uncertainty



The CFO/finance leader serves as a strategic advisor

1. Shift leadership conversation
2. Translate uncertainty into choices
3. Focus resources without constraints
4. Connect strategy, finance and execution



*Once the mindset shifts,  
tools and techniques make readiness actionable.*



# Polling Question

Which of the following accurately describes a core characteristic of a nonprofit organization that is successfully “staying ready”?

- It relies primarily on its annual budget and historical results to guide decisions.
- It updates its long-range plan only when a major disruption occurs.
- It uses scenario planning and leading indicators to anticipate change and inform decisions.
- It avoids adjusting plans mid-year to maintain consistency.





# Tools and Techniques: Making Long-Range Planning Dynamic and Usable



# Scenario Planning



## Anticipate: What is coming around the corner

- Prepare for multiple *plausible* futures, not predicting one
  - Plausible versus possible – there is a difference
- Disruption is not a matter of "if", but "when"
- The proactive mind is always on the watch

## Types of scenarios to build:

- Revenue disruption (donor loss, fee-for-service changes, grant cuts, new funding)
- Cost shifts (inflation, staffing changes, minimum wage adjustments)
- Regulatory or funding-environment changes

## Forecasts vs. scenarios — why both matter



# Indicators: Lead versus Lag

Lagging indicators - what happened

Leading indicators - what is coming

Examples of leading indicators:

- Enrollment trends, waitlists, and demand signals
- Staffing capacity — turnover rates, vacancy trends, overtime
- Donor concentration and pledge pipeline trends

Dashboards and early warning signals that drive proactive decisions

- Cash flow modeling
- Capital planning
- Labor ratios



# Keep the Plan Alive



Reviews vs. rewrites



Modular planning —  
update components  
independently as  
conditions change



Make planning  
decision-relevant, not  
ceremonial



*Staying ready is not a one-time exercise —  
it is a leadership habit embedded in how  
nonprofits plan and govern.*



# Key Takeaways

## For *financial leaders*:

- Shift from reporting history to shaping choices. Build scenarios, track leading indicators, and keep plans alive. Think, "where are we going and how can this information help us get there?"

## For *executives*:

- Embed readiness into organizational culture. Encourage dynamic planning and empower teams to act on pre-built strategies. Empower individuals to identify areas of improvement or opportunities.

## For *boards*:

- Ask for scenarios and options, not just budgets and reports. Govern with forward-looking questions and clear guardrails. Guard the vision and mission like a captain protecting his ship.

*"Staying ready is a leadership habit — not a one-time exercise."*



# Polling Question

I would like someone from CLA to contact me to discuss the following service(s):

- Accounting and advisory
- Financial statement audit
- Tax return preparation
- Managing investments
- Nothing at this time



*Thank you!*

Jackie Dodson  
CAAS Chief Financial Officer  
[jackie.dodson@CLAconnect.com](mailto:jackie.dodson@CLAconnect.com)

John Hughes  
Principal  
[john.hughes@CLAconnect.com](mailto:john.hughes@CLAconnect.com)

Vincent Shih  
CAAS Chief Financial Officer  
[vincent.shih@CLAconnect.com](mailto:vincent.shih@CLAconnect.com)



CLAconnect.com



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