



2020 Executive Forum

August 20, 2020

Scenario Planning and Strategy:
Facing our Future Together

**Presenter: David Kaplan, Founder
and CEO of Panoramic Strategy**

Agenda

20 min.
Presentation, w/ Chat

1

INTRO / ABOUT SCENARIO PLANNING

15 min.
Presentation, w/ Chat, Q&A

2

COVID-19 SCENARIOS

20 min.
Presentation, w/ Chat,
Q&A

3

PRACTICE, INPUT AND KEY CONCEPTS

15 min.
Presentation, w/Chat Q&A

4

TOOLKIT GOALS AND WALKTHROUGH

10 min.
Live Q&A

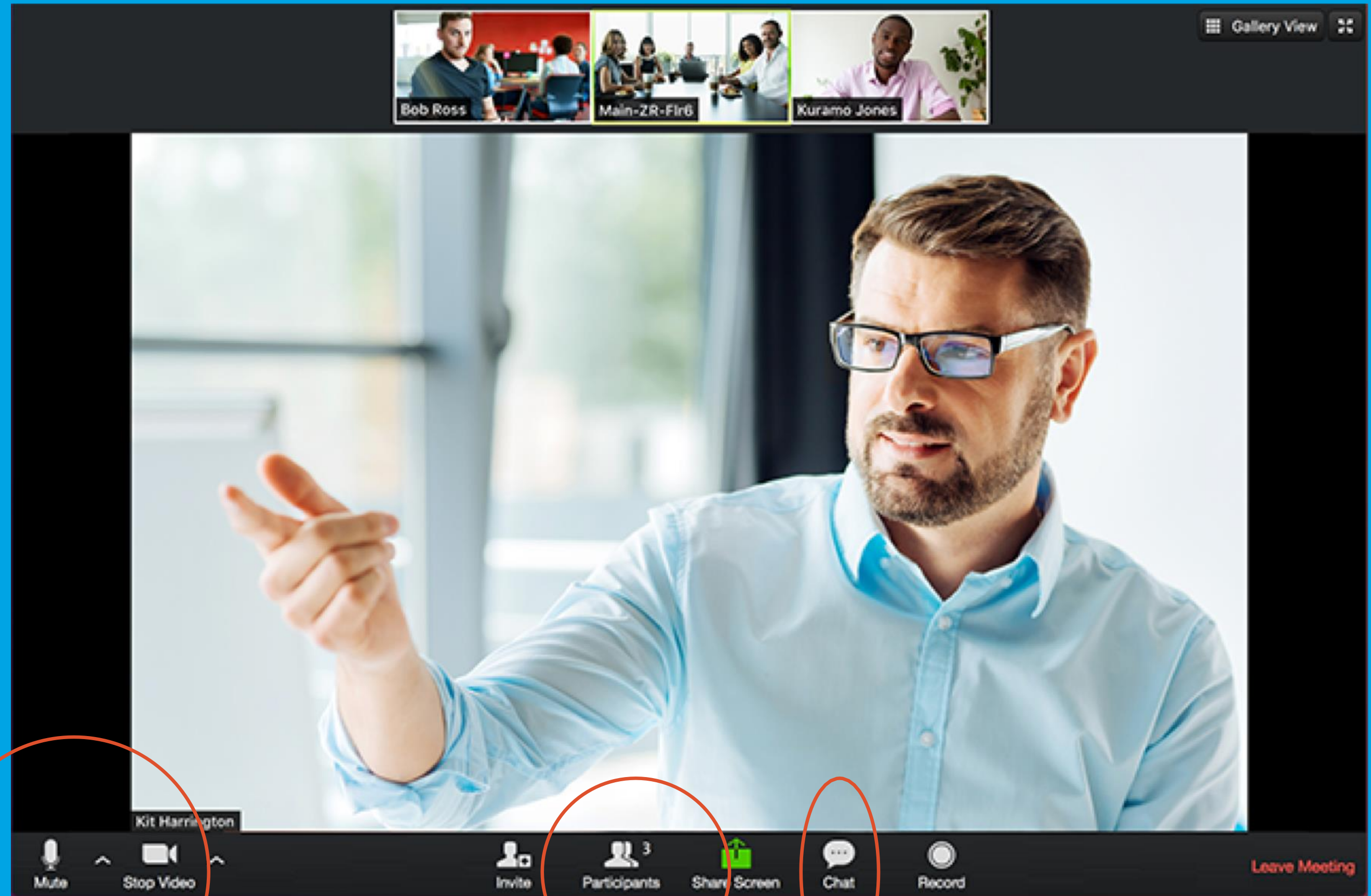
5

QUESTIONS AND WRAP-UP

Housekeeping

– Using Zoom

*Best to use speaker view,
not gallery view*



Audio/
Video

Raise Hand

Chat

About Scenario Planning

The New York Times

Opinion

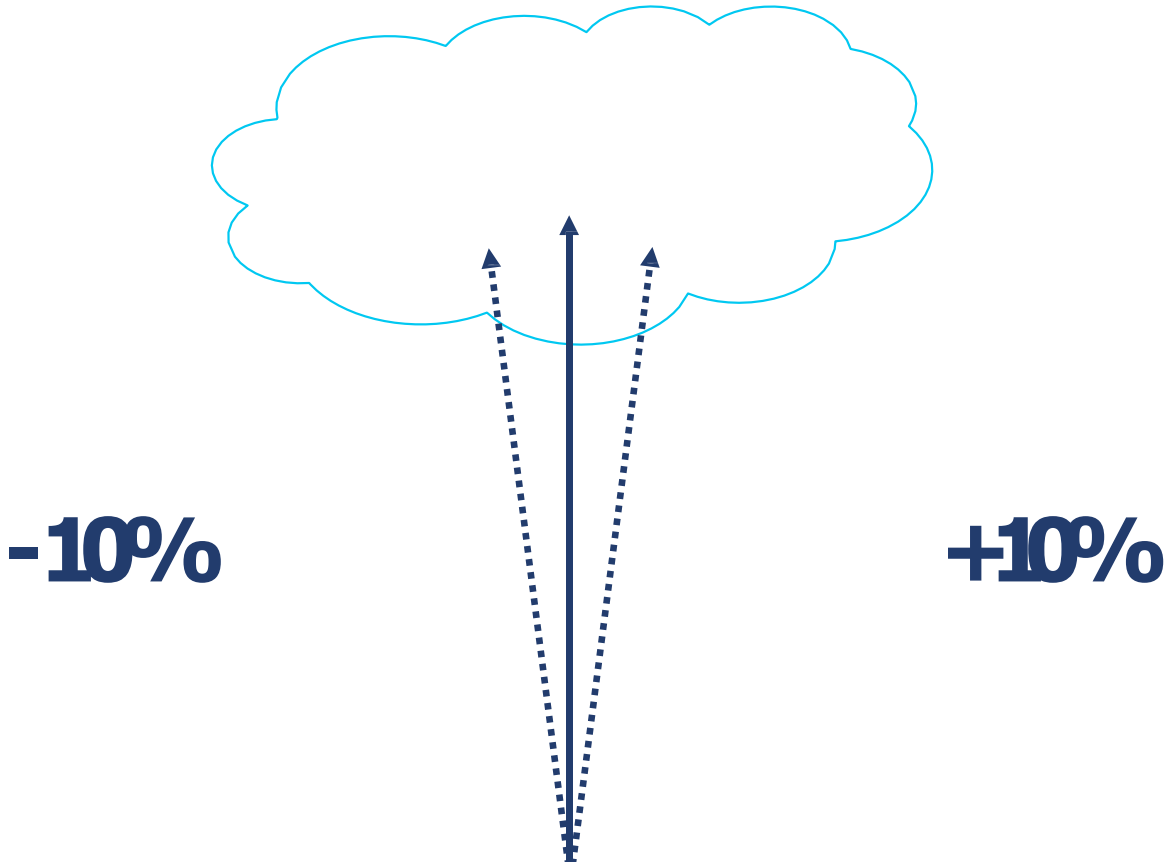
Covid-19, Confusion and Uncertainty

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

Scenarios acknowledge a wider uncertainty... about what business you will need to be in

FORECAST PLANNING

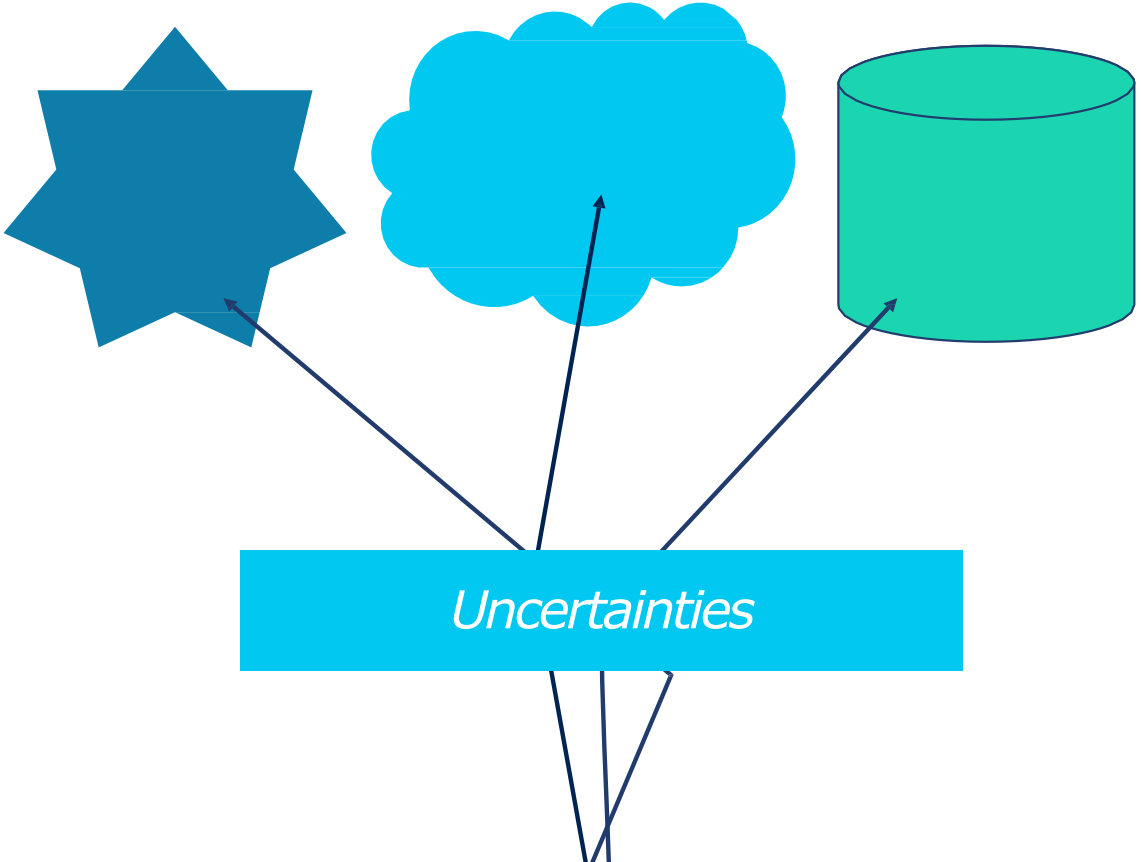
Extrapolating from the Recent Past



WHAT WE KNOW TODAY

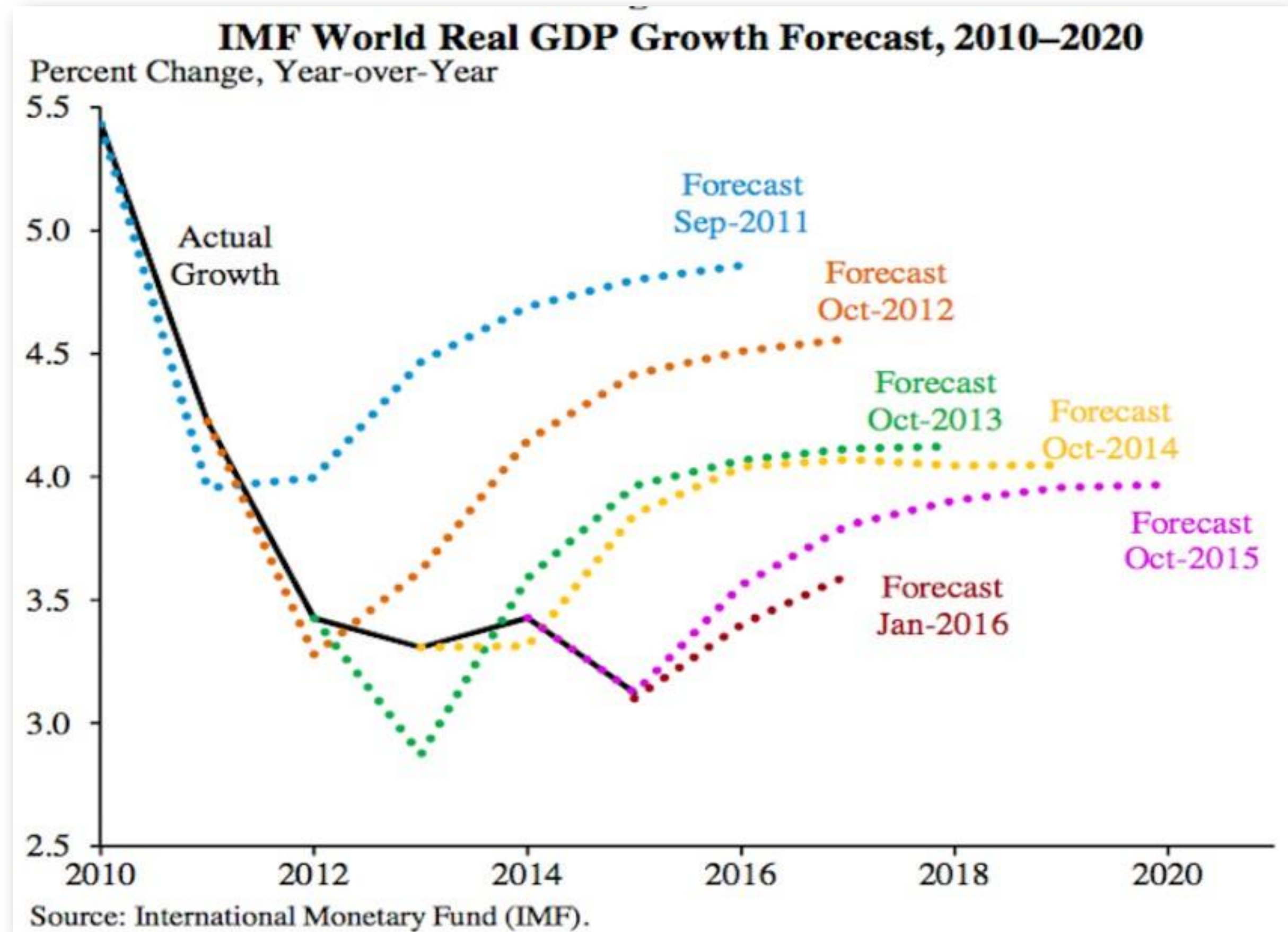
SCENARIO PLANNING

Envisioning Multiple Futures

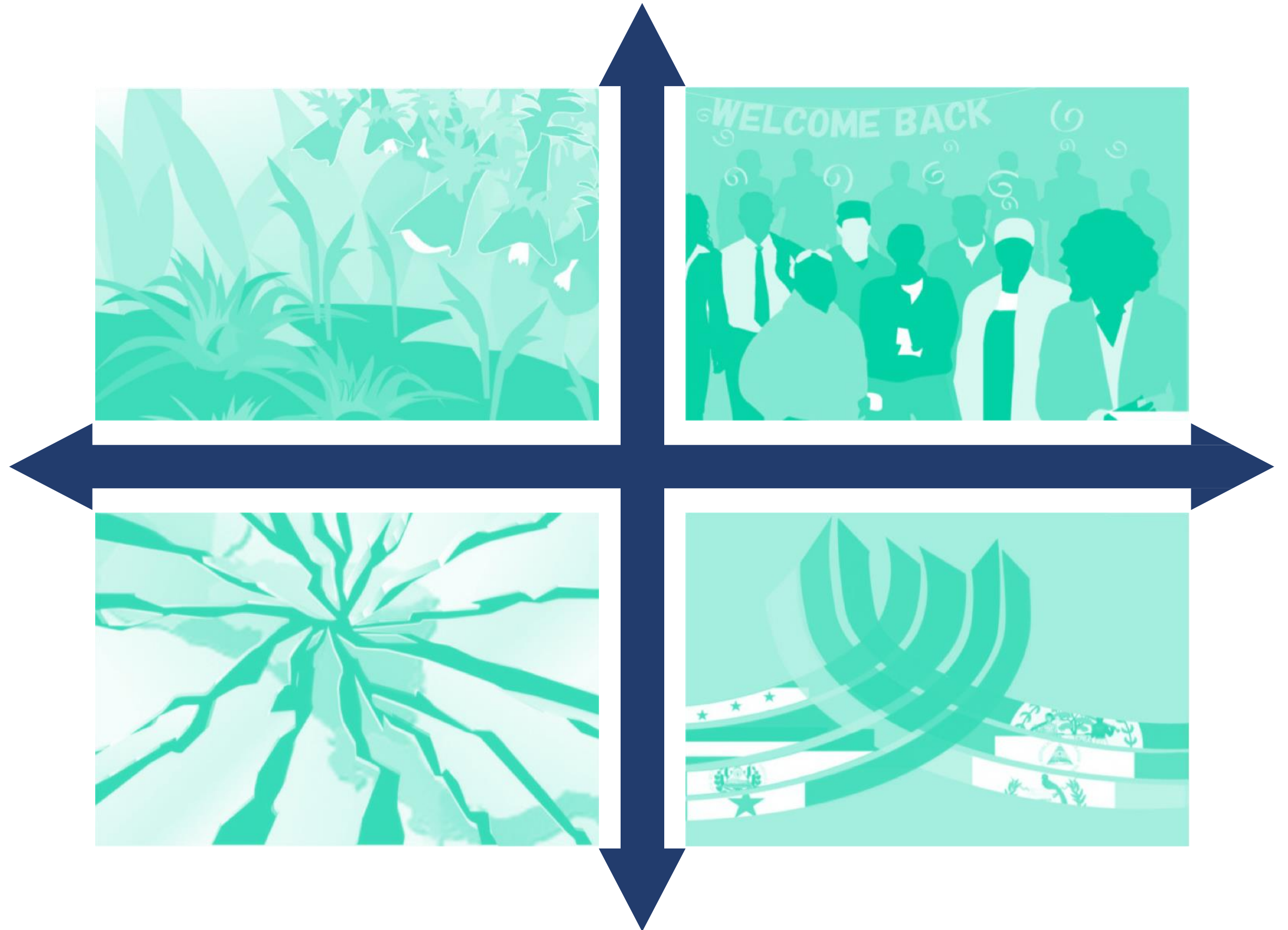


WHAT WE KNOW TODAY

The perils of prediction



Scenarios map
the plausible
range of stories



Scenarios map the plausible range of stories

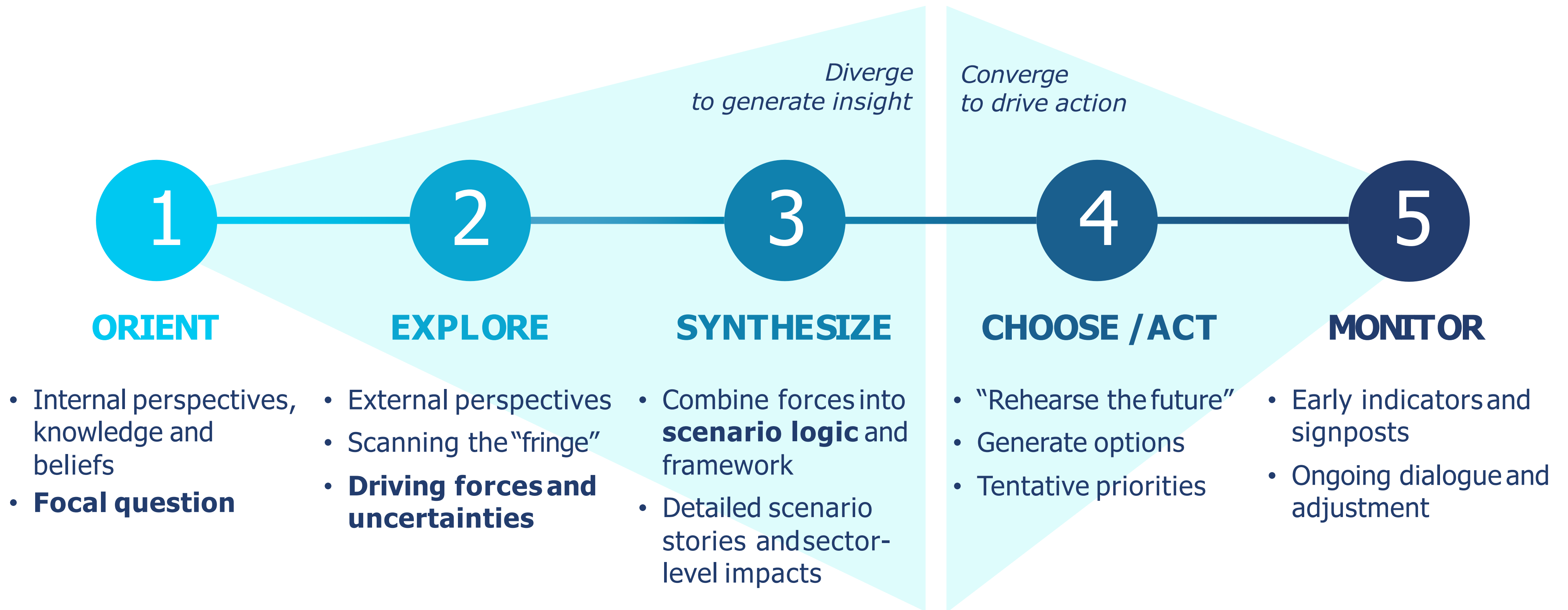
External conditions

Multiple hypotheses /
acknowledge uncertainties

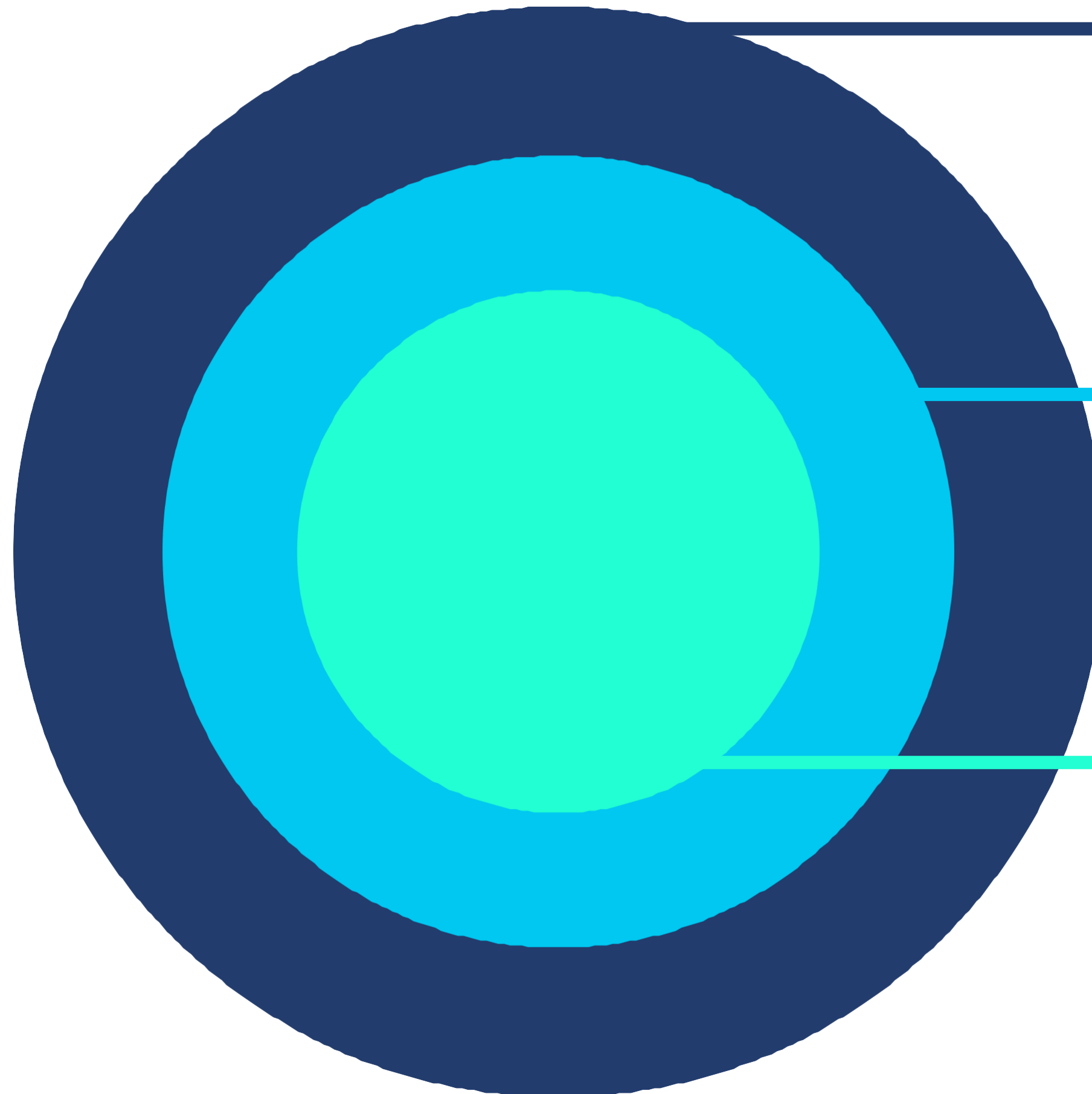
Imaginative, but plausible

Holistic





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

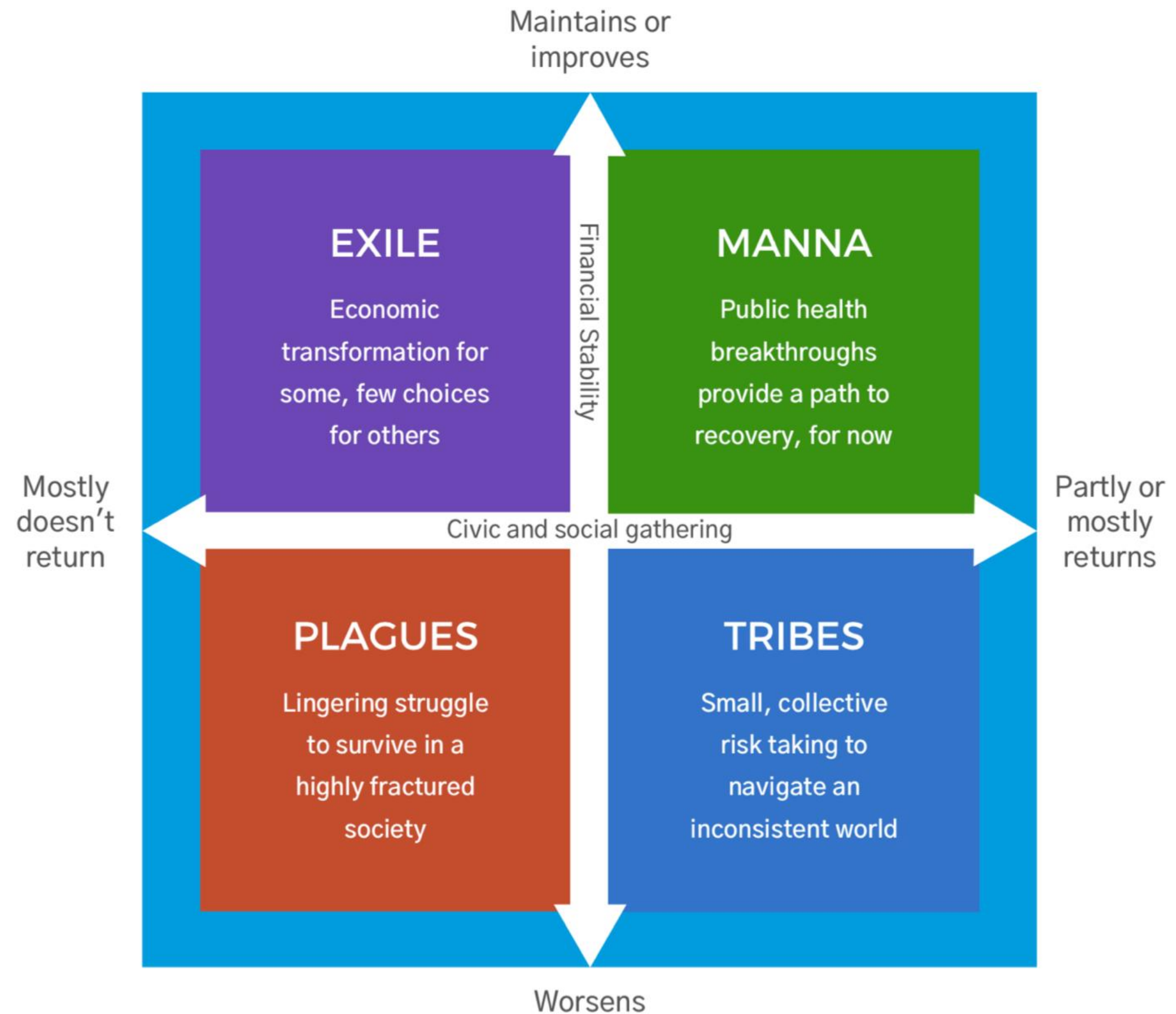
- Services and programs
- Assets and capabilities
- Leadership
- Relationships
- Reputation
- Operations and infrastructure

Key building blocks for diverse scenarios: **Critical Uncertainties**

Aspect of a force of change (i.e. STEEP), or a *response* to a force of change, that

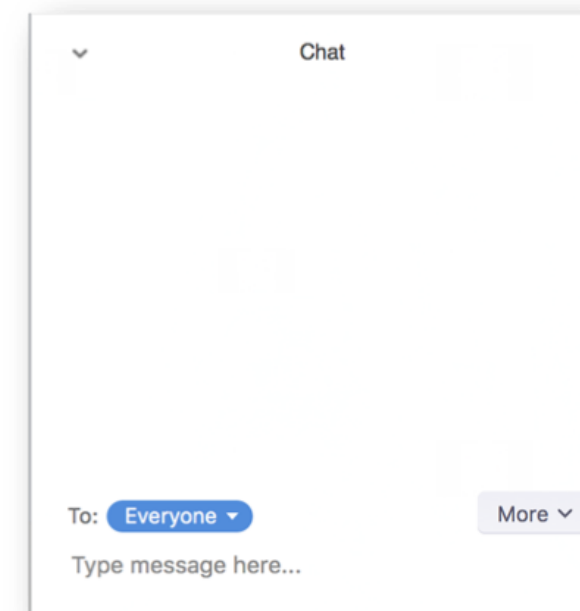
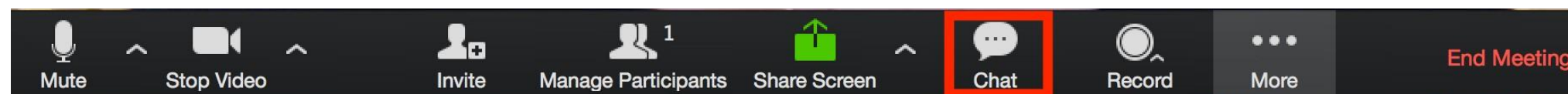
1. Has the potential to move in *multiple directions* (i.e. uncertain)
2. Has an *unusually high, distinct* impact on future conditions (i.e. important)

Example scenario framework



Reply in Chat:

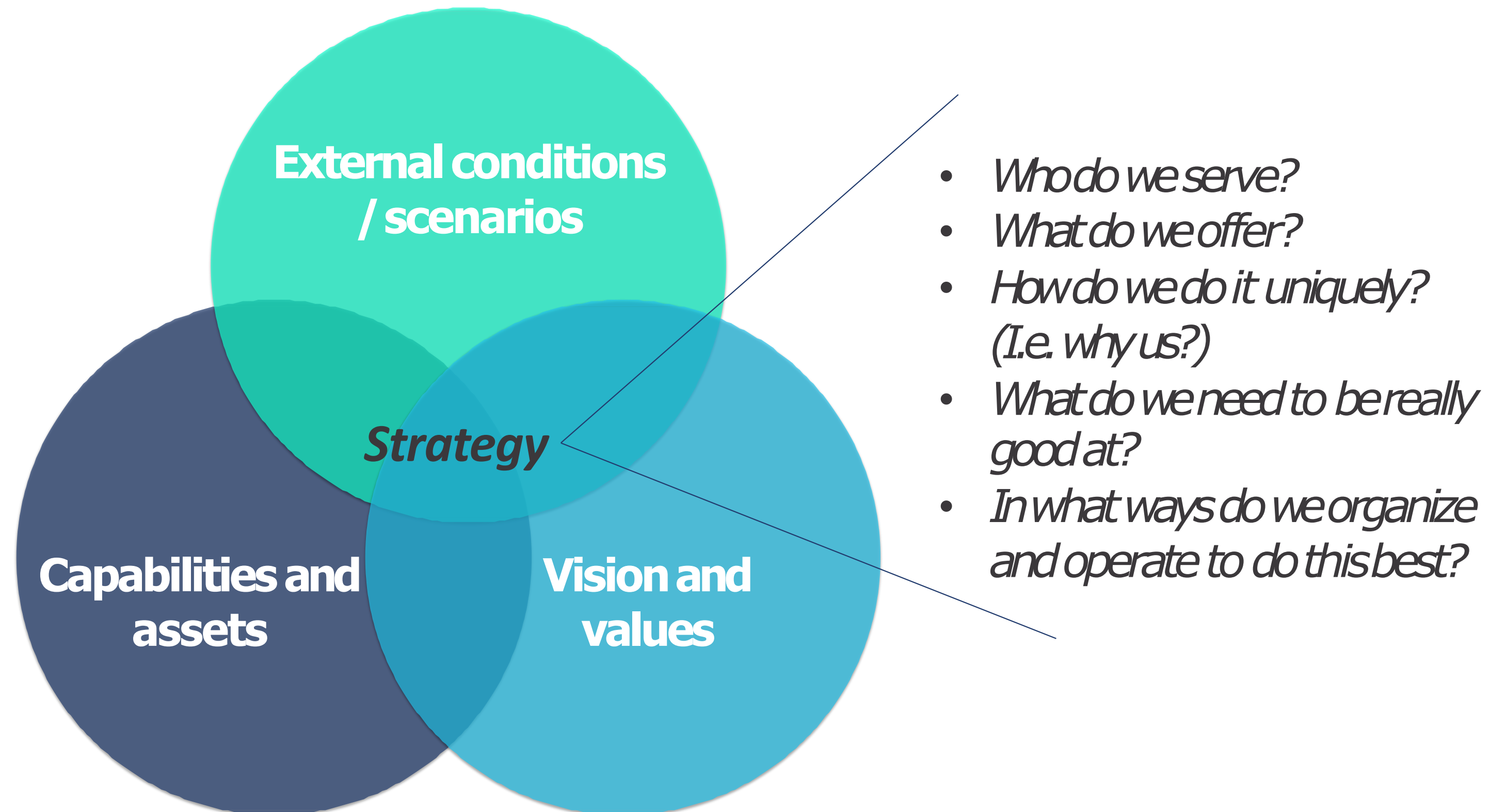
Questions about scenarios in general?



Where scenarios fit in creating strategy

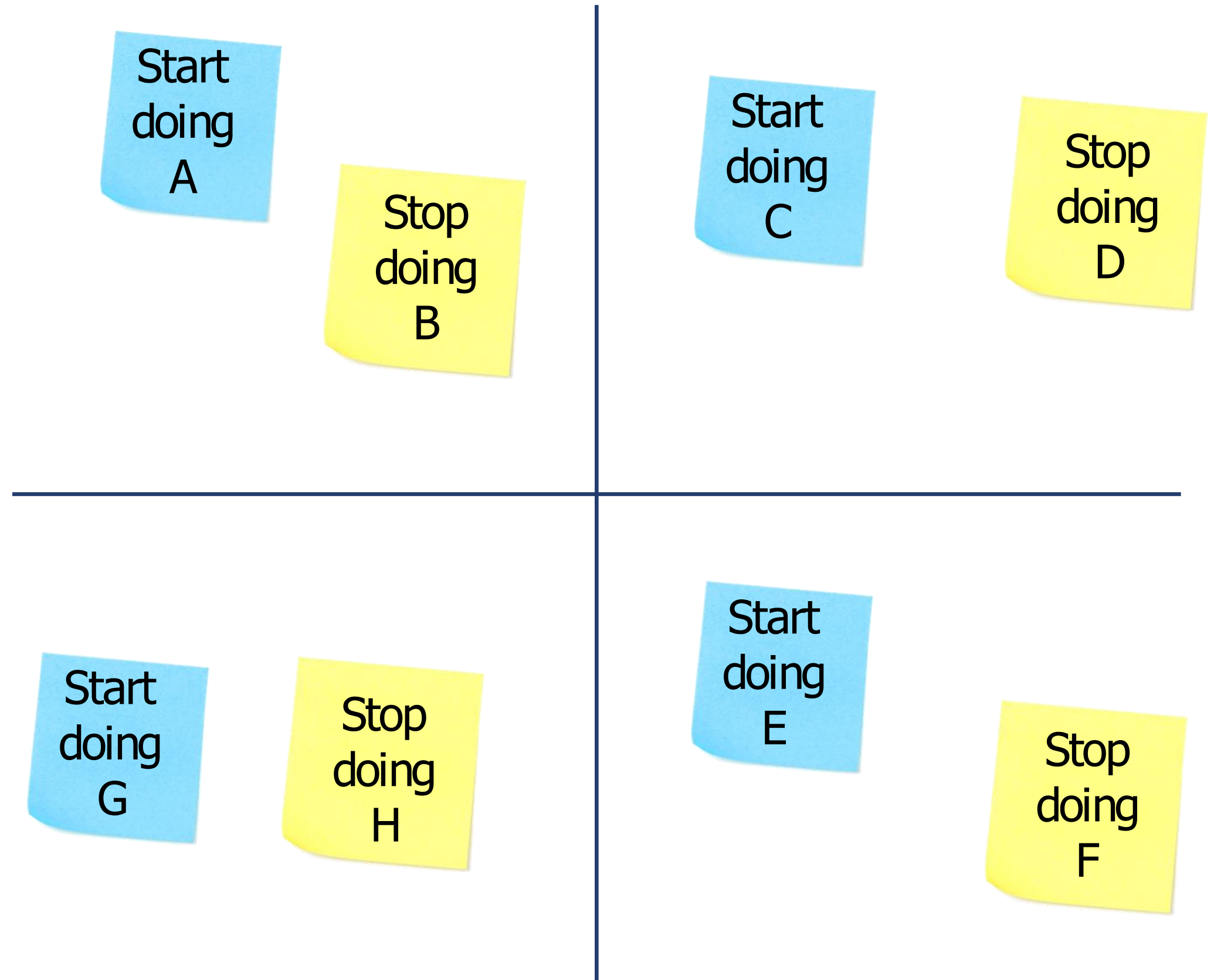


Where scenarios fit in creating strategy

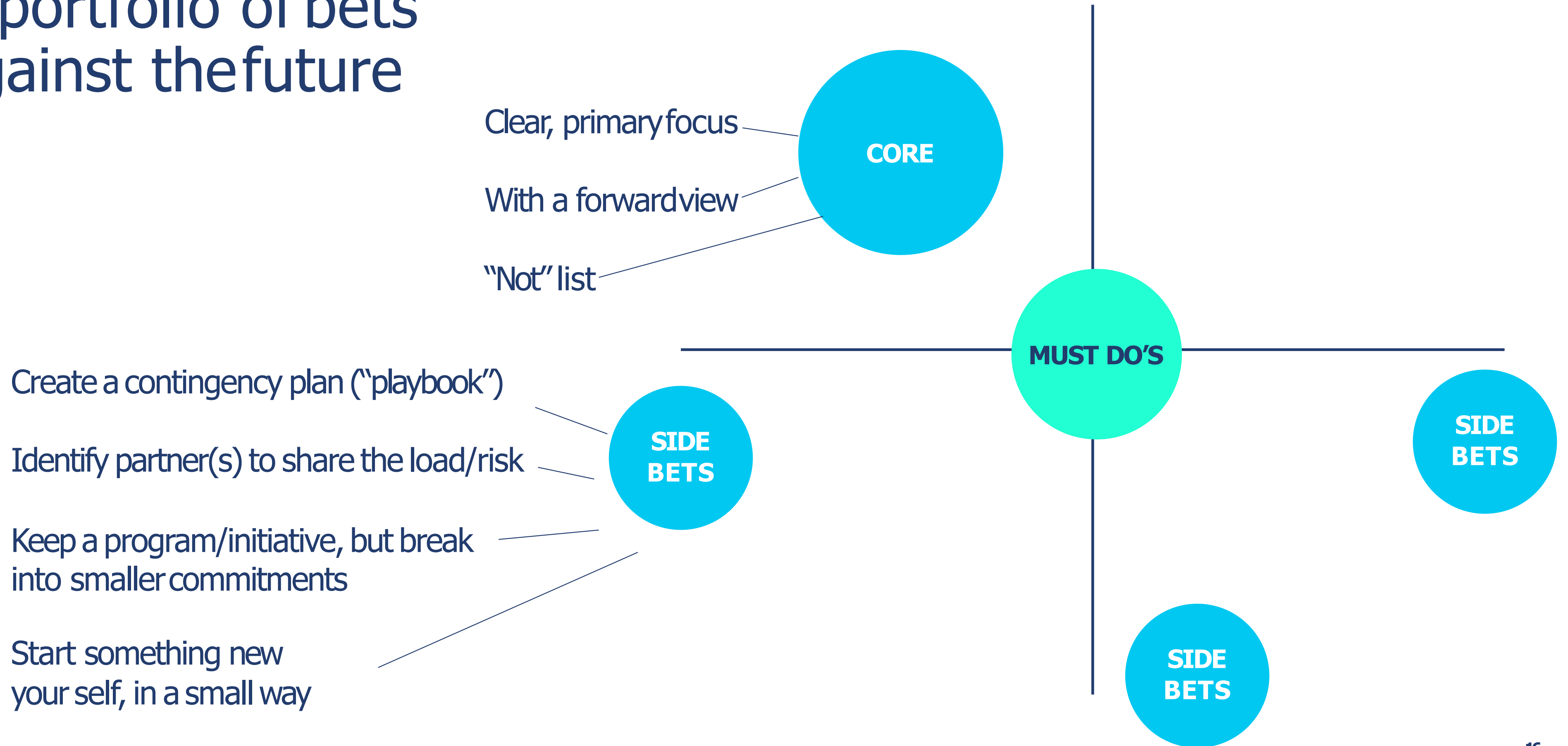


Rehearsing the future

Given our vision and values,
and given our capabilities and assets,
what might we....



A portfolio of bets against the future



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



Most individual orgs

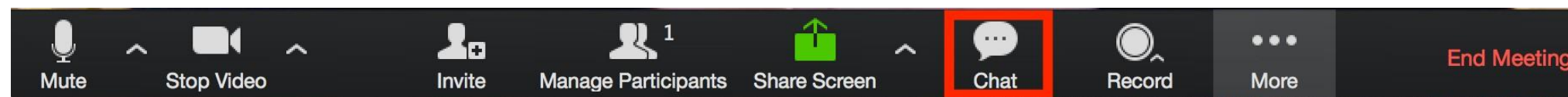
RESPOND QUICKLY

Clear Evidence / Event



Reply in Chat:

Questions about planning for multiple futures?



COVID-19 Scenarios

How we got to our scenarios

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

- “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?*”

How we got to our scenarios

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

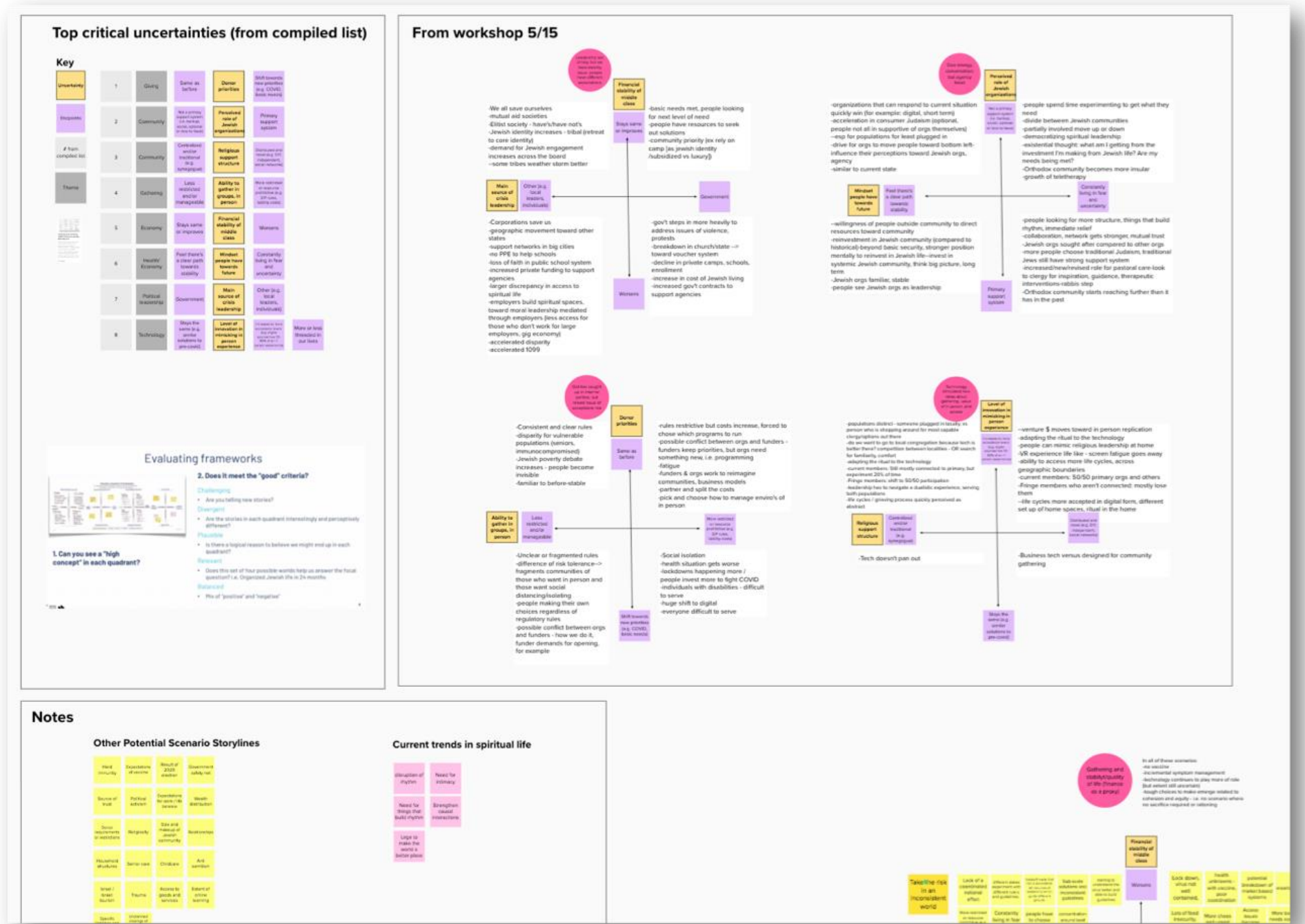
In order to help us think about...

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

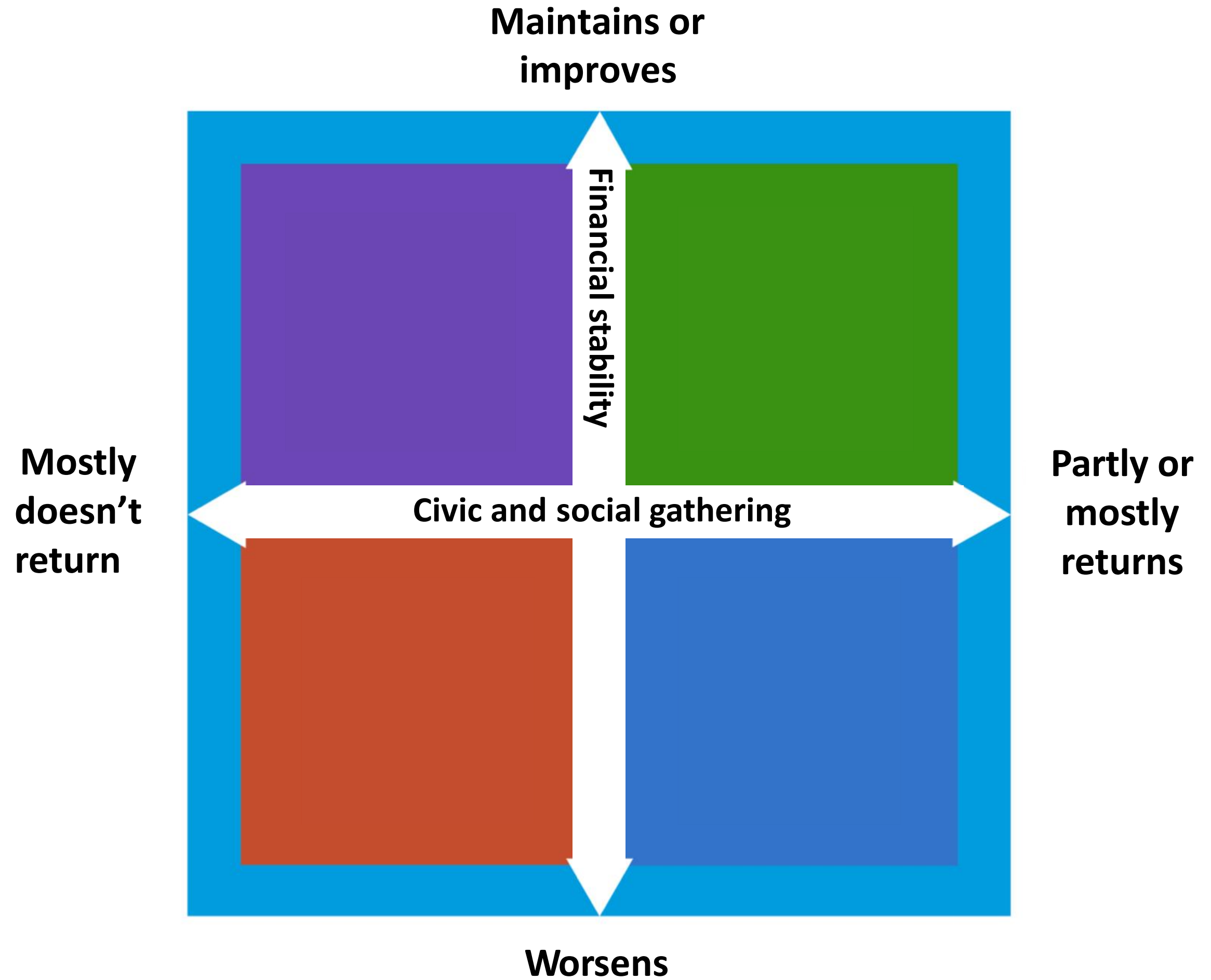
Given values and vision, capabilities and assets, what should we be doing over the next 24 months (and how)?

How we got to our scenarios

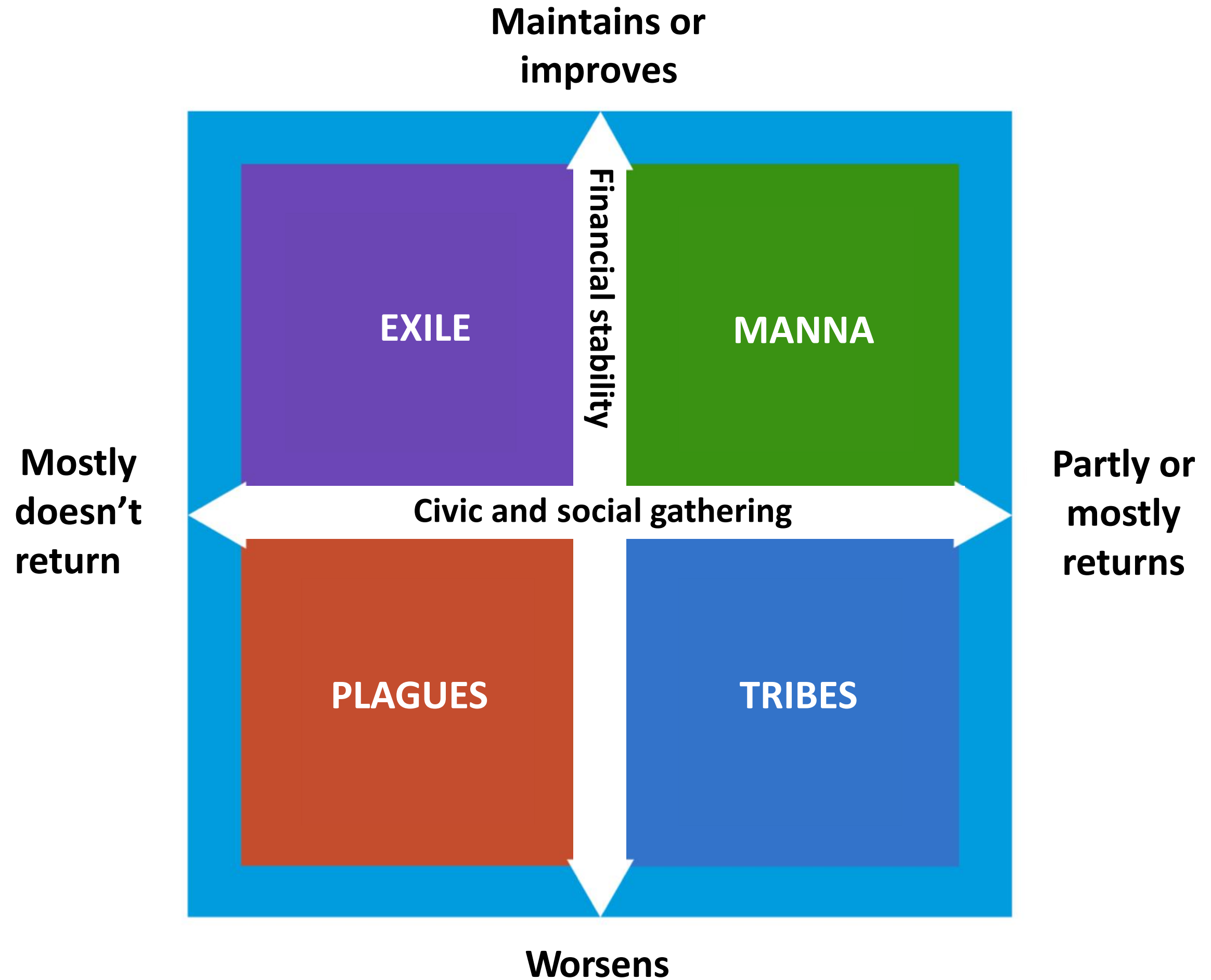
- Review of other COVID-19 scenario work
- Mass interview: ~500 people across 3 webinars
- Input from prominent sociologists
- 5 sessions with small working group across JFNA and broader Jewish network
- Review with Federation planners



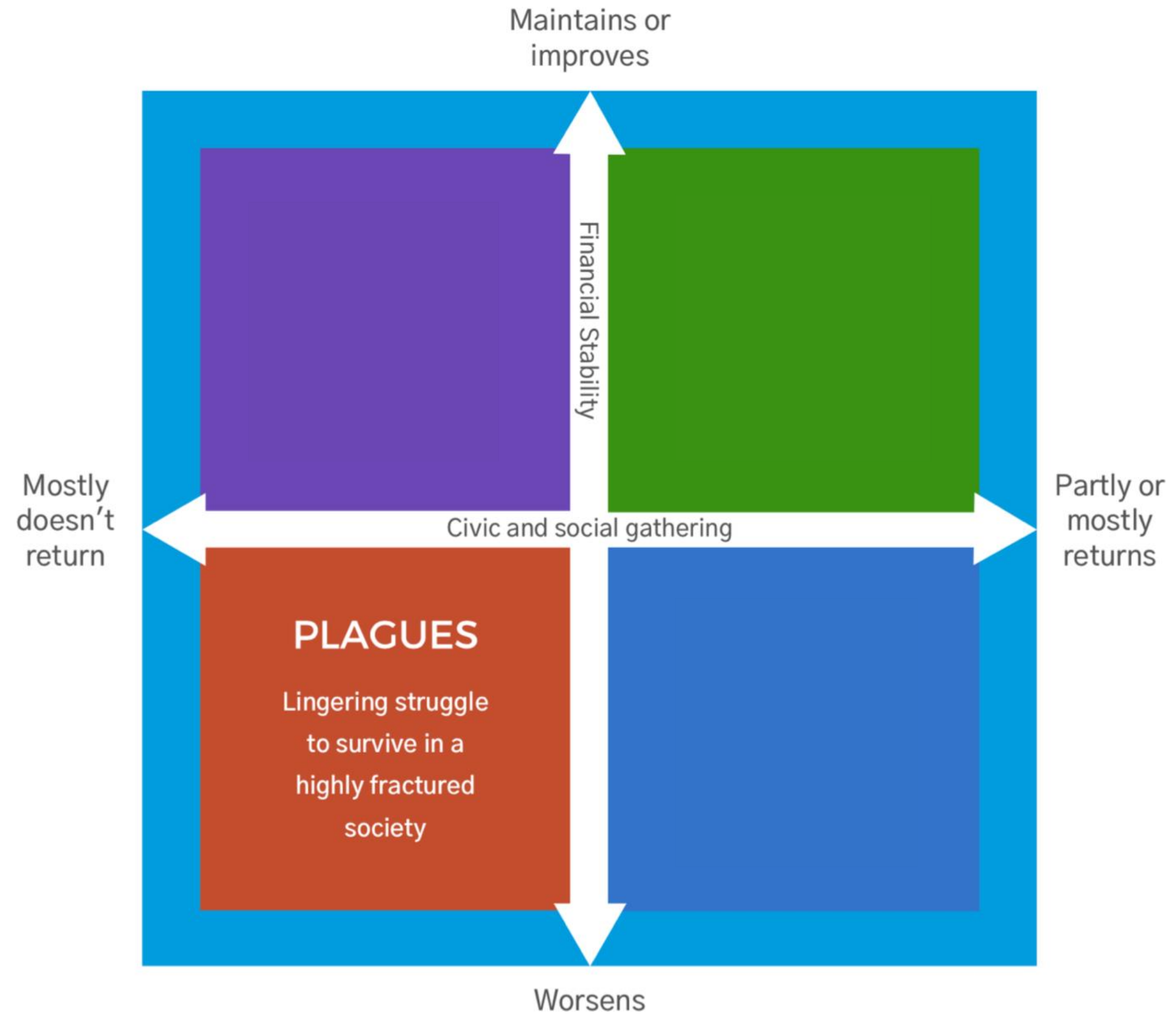
The scenarios



The scenarios



The scenarios

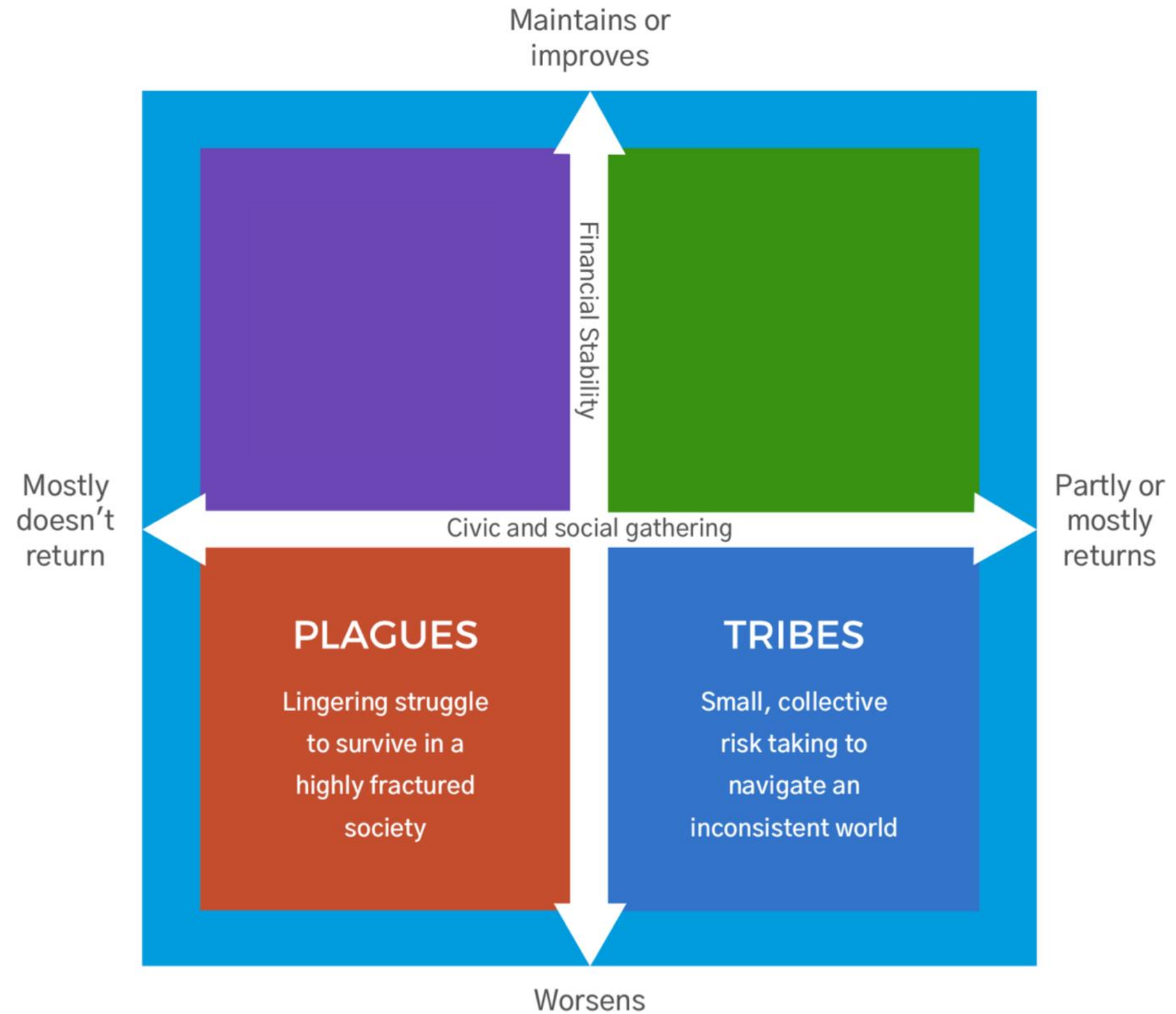


PLAGUES

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 increases 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.

The scenarios

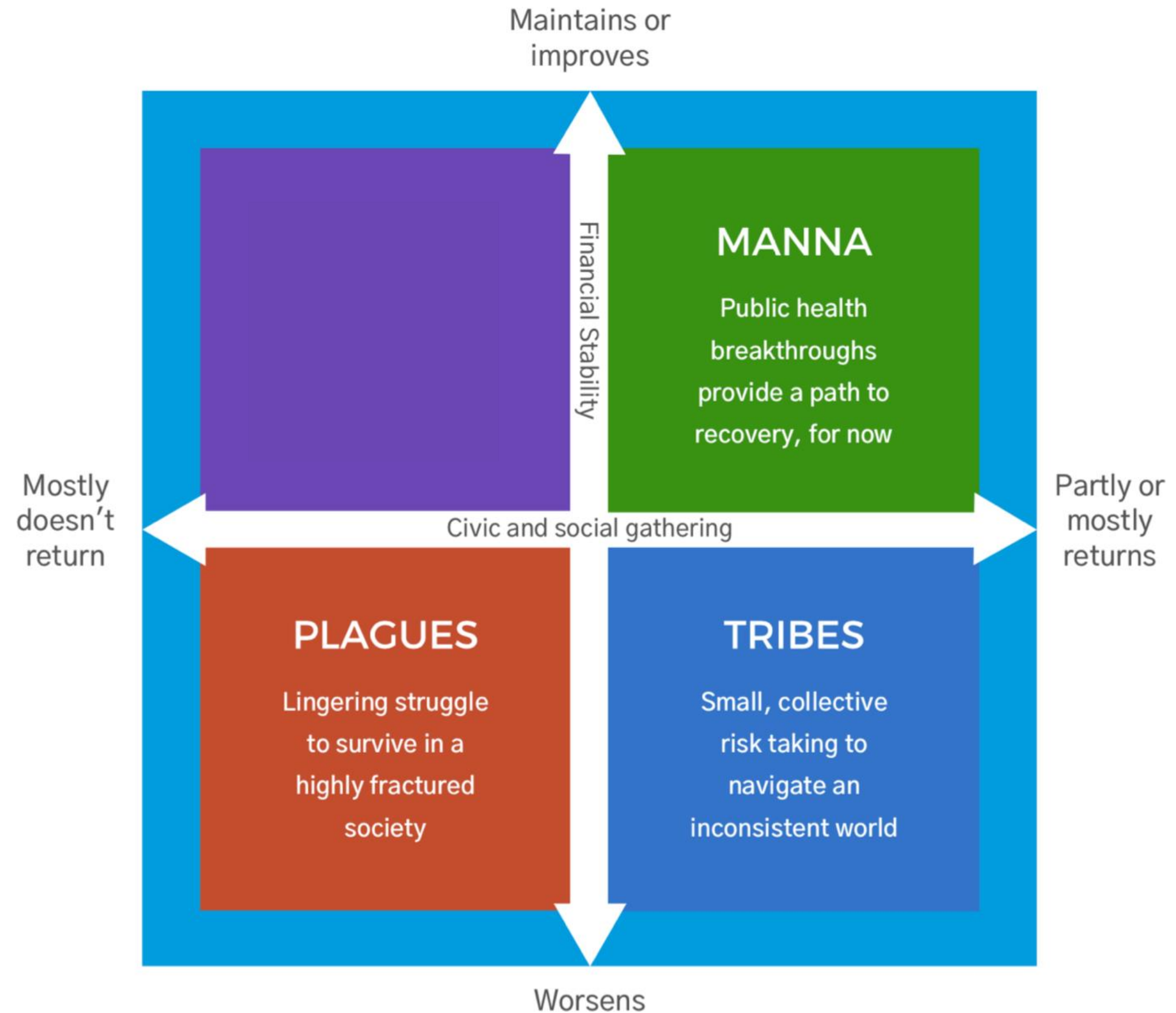


TRIBES

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.

The scenarios



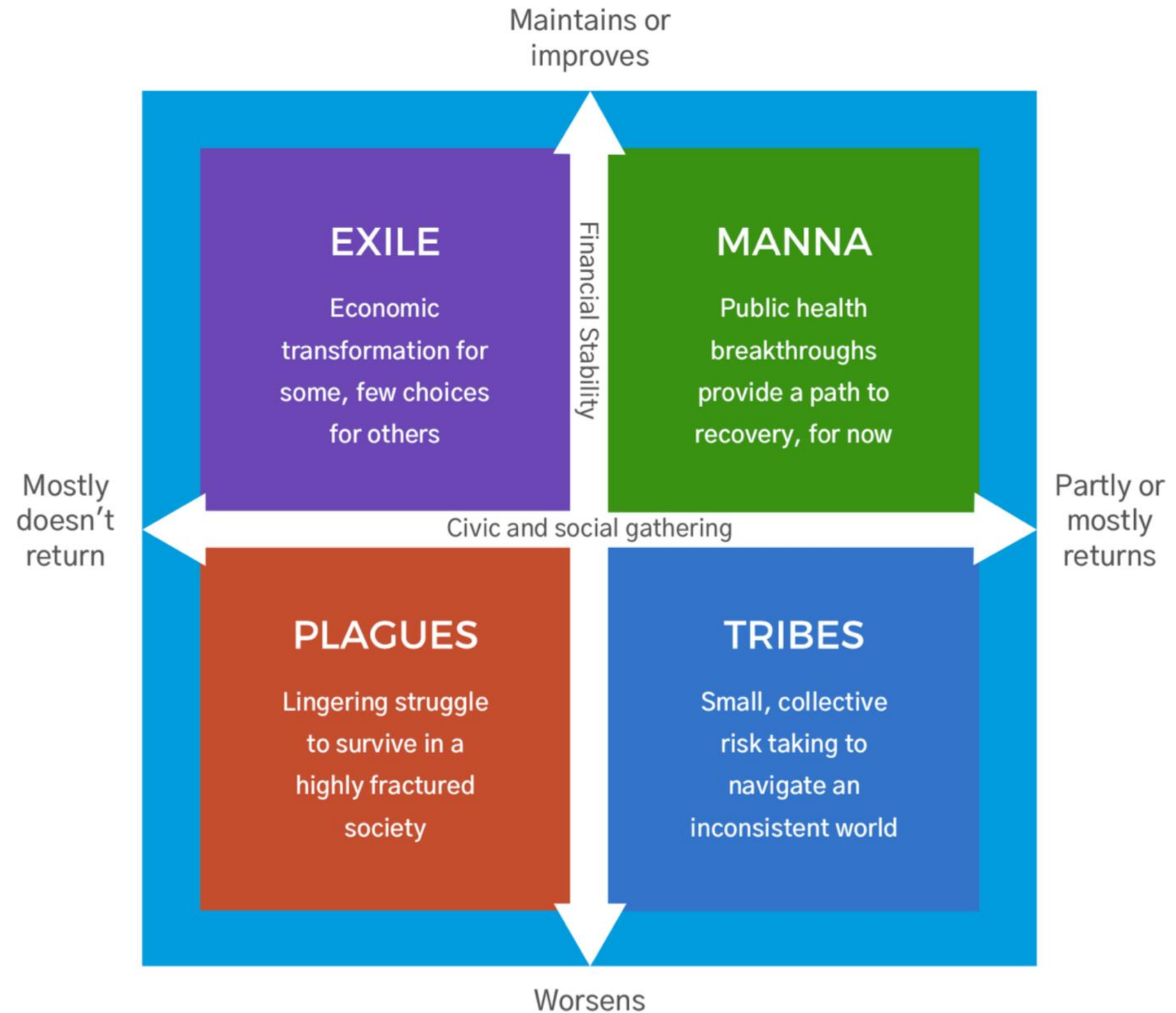
MANNA

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 experience.

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 stigmas against the vulnerable of those who were sick, and debates ramp up over data surveillance and privacy.

The scenarios



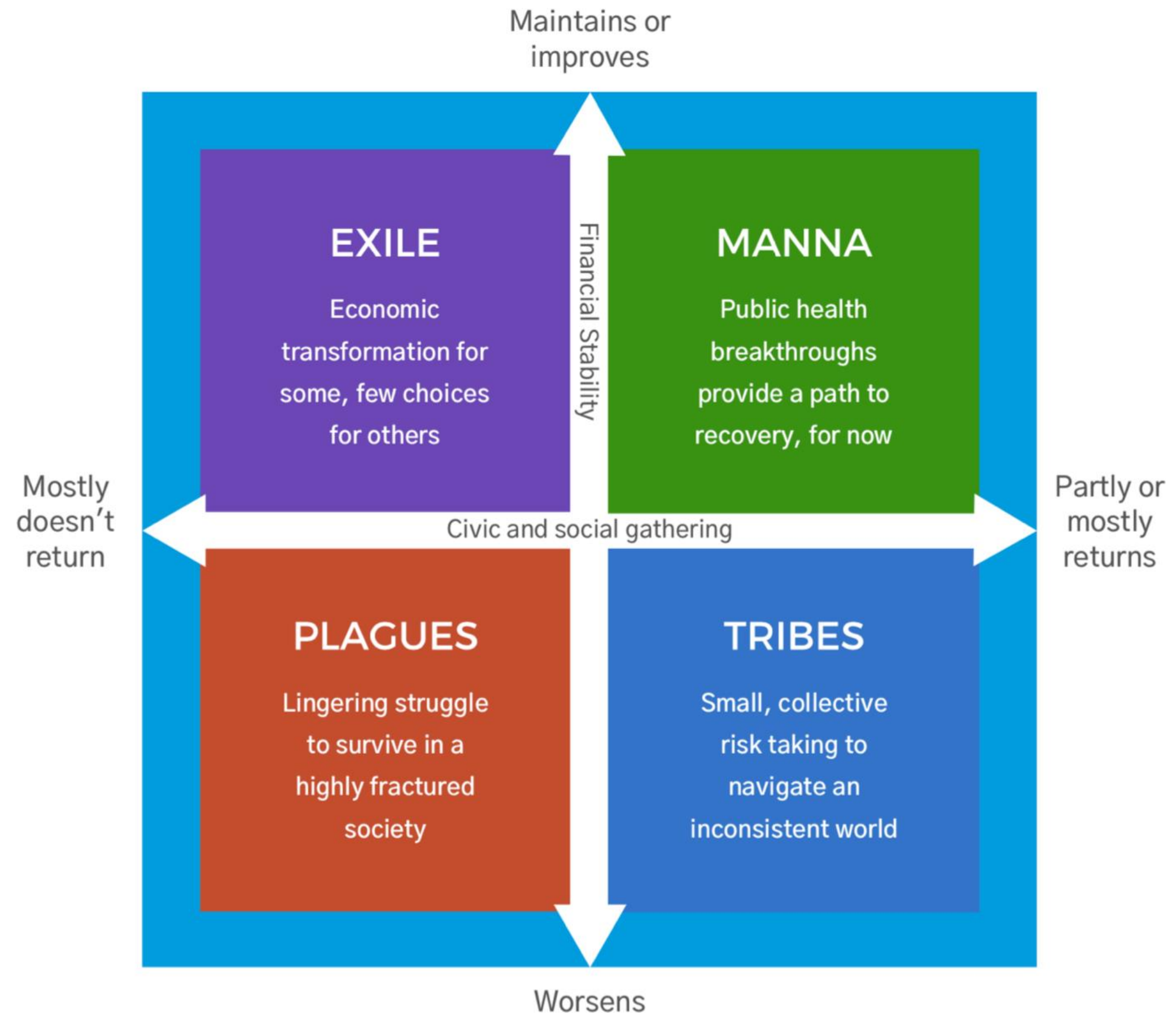
EXILE

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 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.

The scenarios

Questions?



Getting to core/side bets

1. Align on likely emerging scenario(s)

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?

2. Define corebet

3 Evaluate and prioritize the core bet

Once you pick the most likely scenario to focus on first, you'll form 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
- Fits with your capabilities

If the most likely scenarios are different in year 1 and 2, year 1 becomes the core bet and year 2 becomes a side bet (you'll learn more about this side bets in a few pages).

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, 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.

3. Identify and prioritize side bets

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 in allocated funds now or simply a plan that you can pull off the shelf quickly when needed.

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 critical questions

Determine side bets
Now that you have your core bet, move to your side bets. Revisit your top 1-3 ideas from the other scenarios you identified as likely emerging and answer the questions to determine the best side bets.

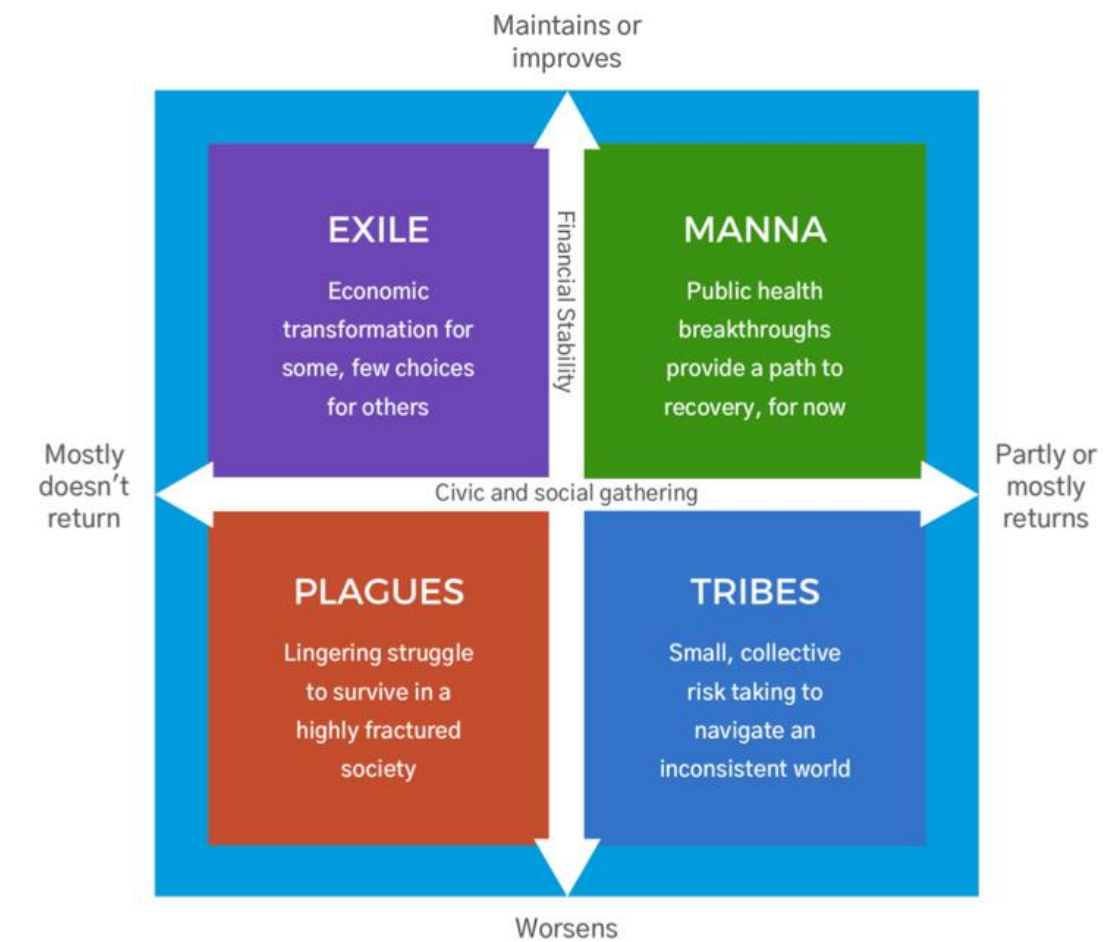
Our side bet: _____

1. Will this help us achieve our purpose in a meaningful way?
2. Do we have the capabilities to do this well, and even better than others?
3. Can this be easily repurposed to other scenarios, if conditions change?
4. Can we accomplish or establish this quickly?
5. Do we have the funding to make this happen?
6. Is this something we can do in partnership with another organization?
7. Could someone be assigned to develop a plan for this that can be activated later if needed?

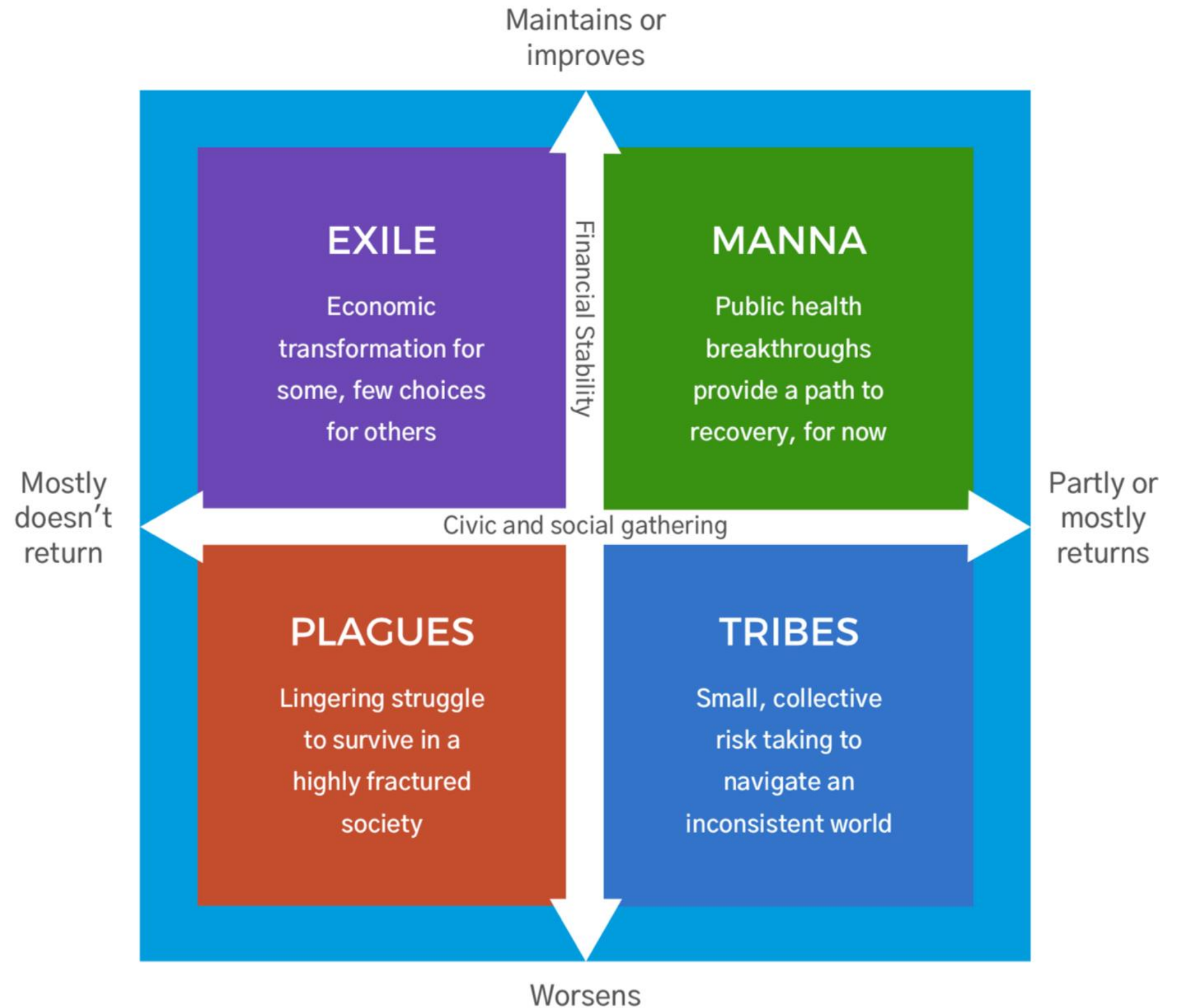
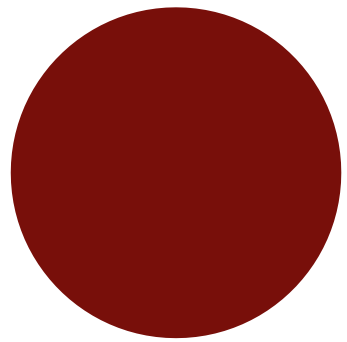
Poll: Current Assumptions

3 questions surrounding the possible scenarios

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



Core Bet



PLAGUES

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Individual Exercise: Question 1

Under the most likely scenario identified.....

What might the lives of those Human Service Agencies serve look and feel like in the next 24 months?

Use the chat box to let us know some of your insights... They will be used as we get into scenario planning with NJHSA!

Individual Exercise: Question 1

Under the most likely scenario identified.....

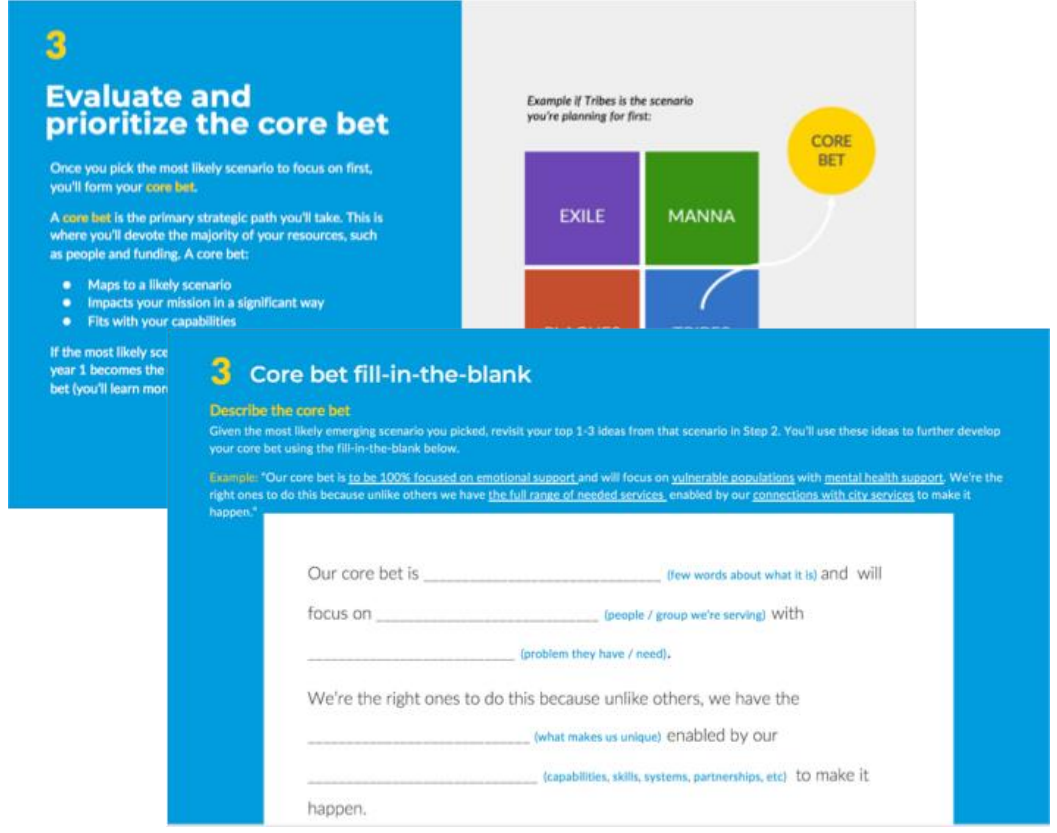
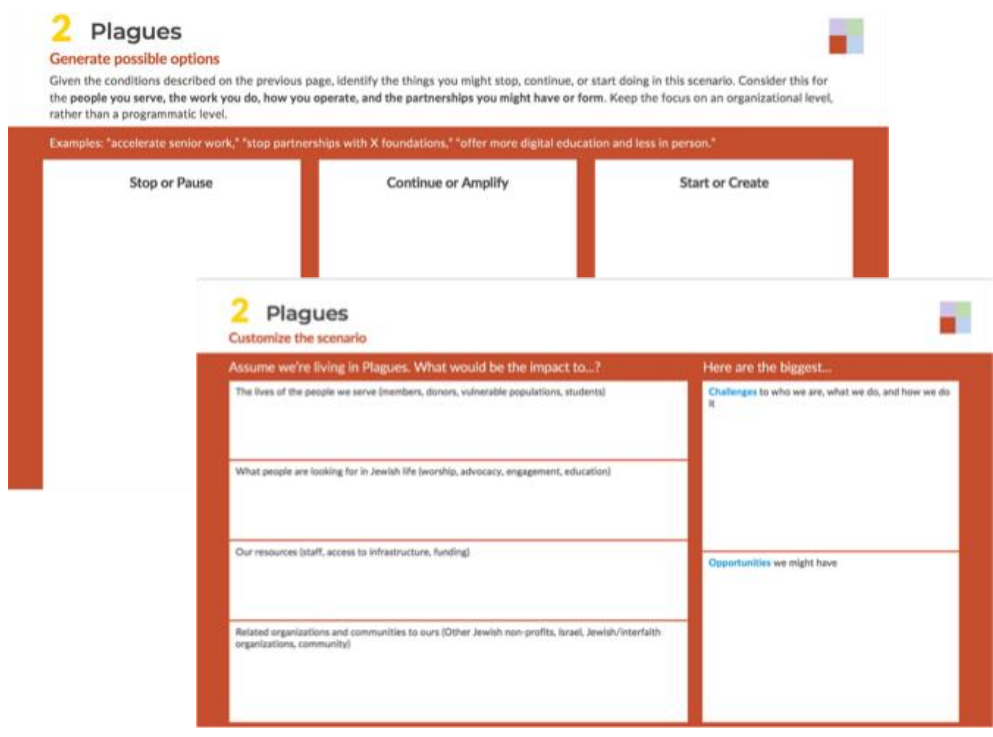
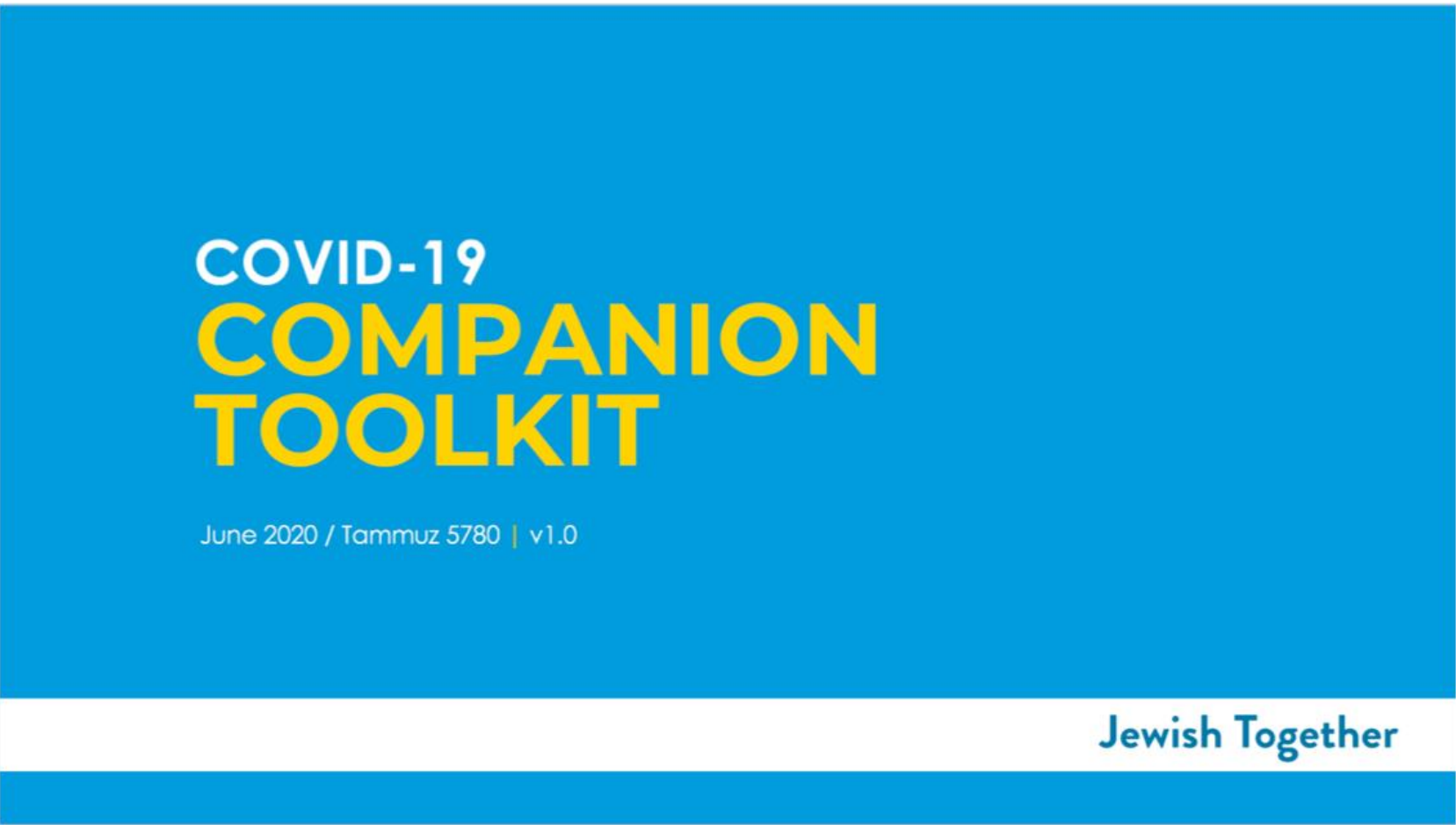
What 1 or 2 core capabilities of Human Service Agencies will be most critical under this scenario?

Use the chat box to let us know some of your insights... They will be used as we get into scenario planning with NJHSA!

You Can Do It Too!
Toolkit for Individual
Organizations

The Toolkit (v1.5)

Download it now!



Toolkit Process

1

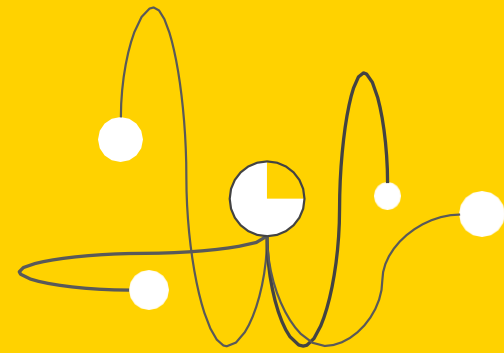
Analyze



Understand our organization **today**

2

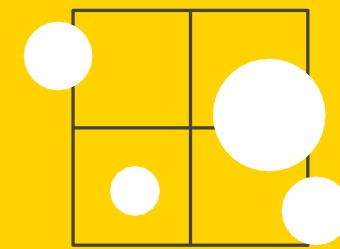
Rehearse Each
Future and
Generate Options



Explore **Future Possibilities**

3

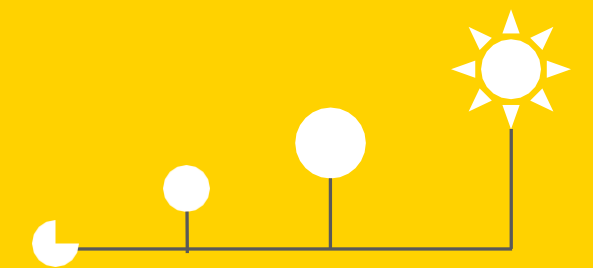
Evaluate and
Prioritize



Narrow the **list**

4

Plan



Define our organization **tomorrow**

Toolkit Proc

1

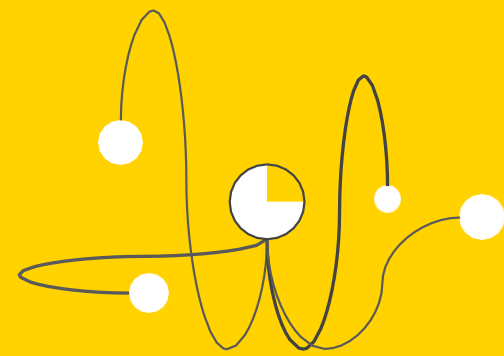
Analyze



Understand our organization **today**

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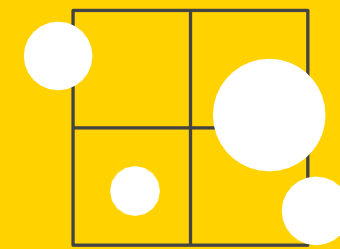
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Explore **Future Possibilities**

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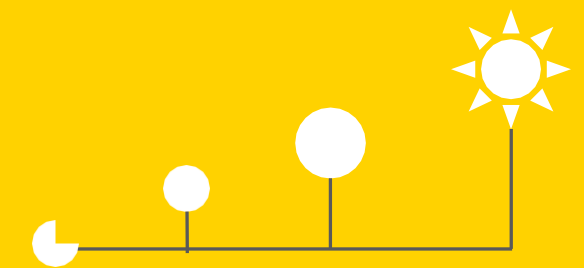
Evaluate and
Prioritize



Narrow the **list**

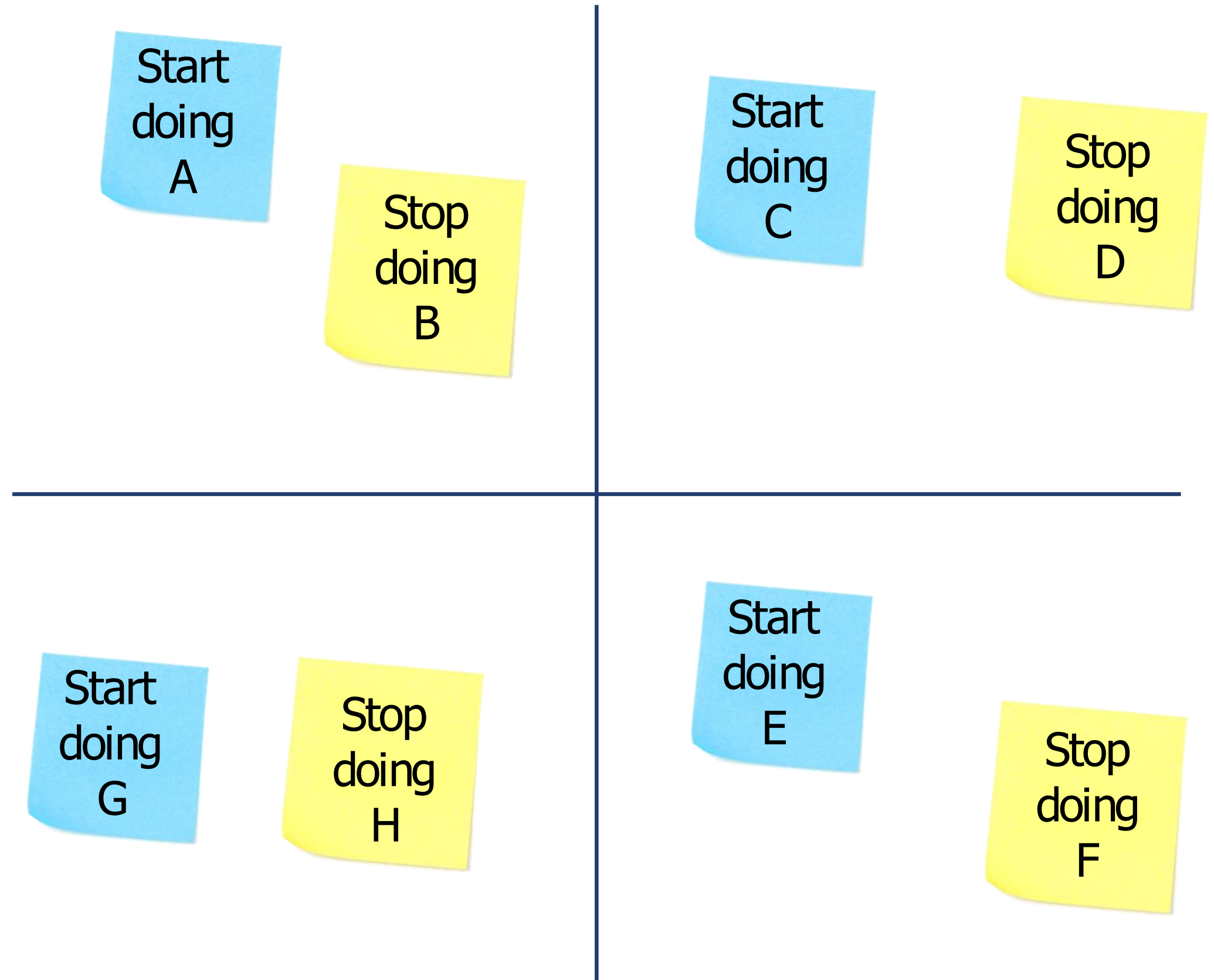
4

Plan



Define our organization **tomorrow**

Step 2: Rehearsing the future



Toolkit Process

Subjective
Incomplete
Imperfect
Hard

1

Analyze

2

Rehearse Each
Future and
Generate Options

3

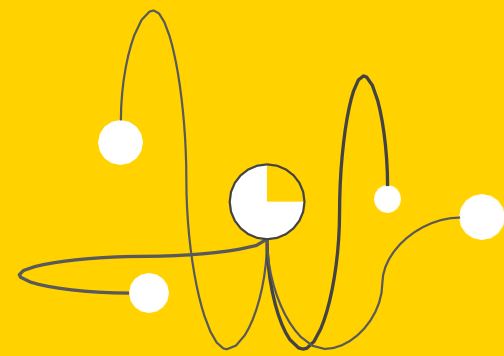
Evaluate and
Prioritize

4

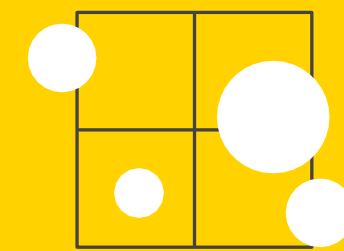
Plan



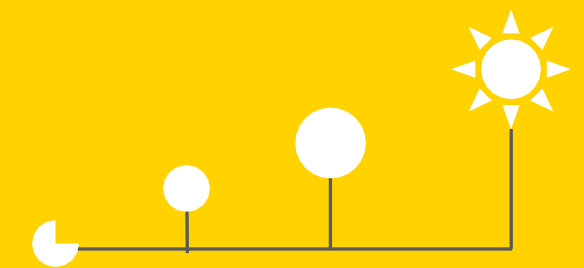
Understand our
organization **today**



Explore **Future
Possibilities**

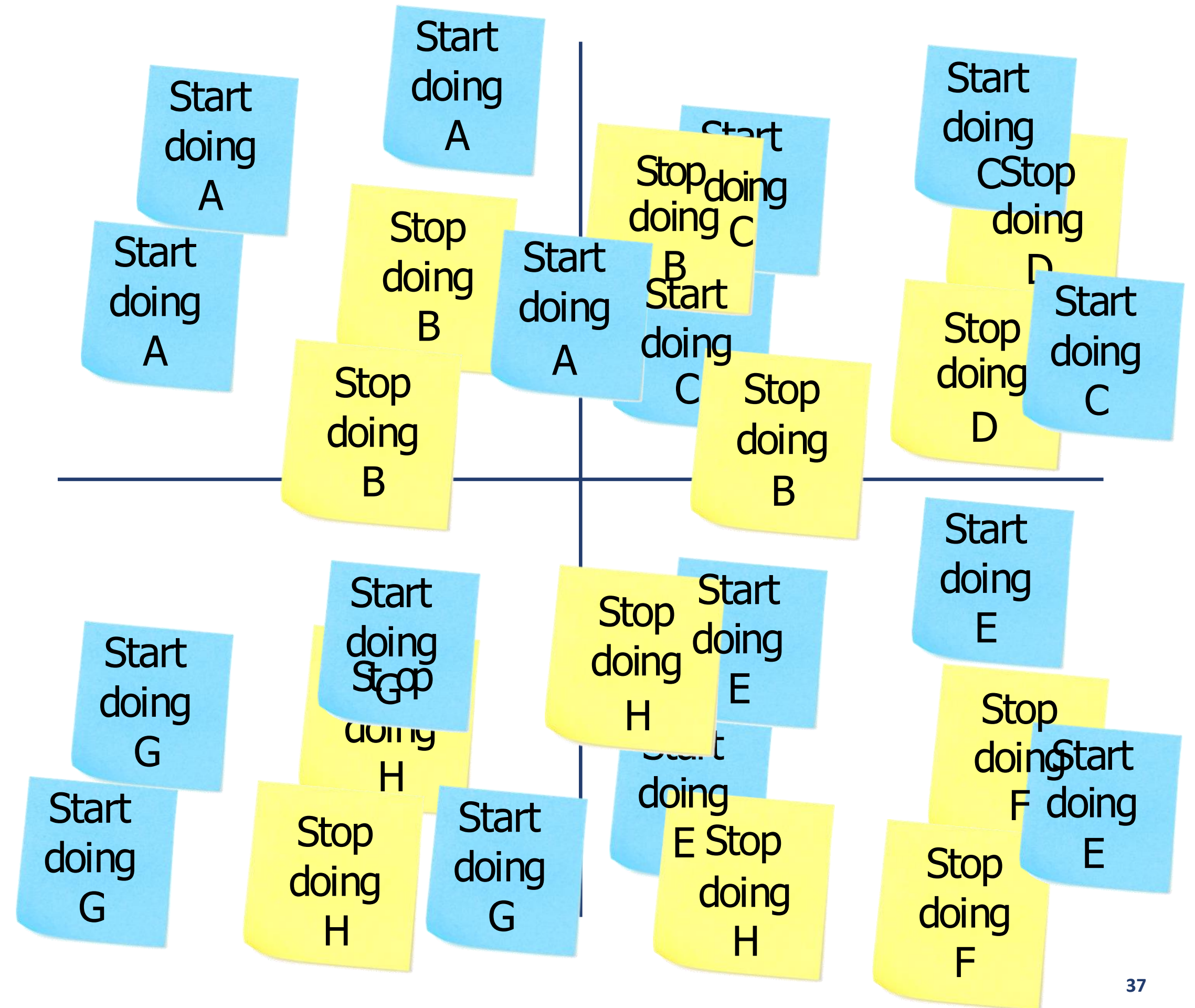


Narrow
the **list**



Define our
organization **tomorrow**

Step 3: Creating a portfolio of bets

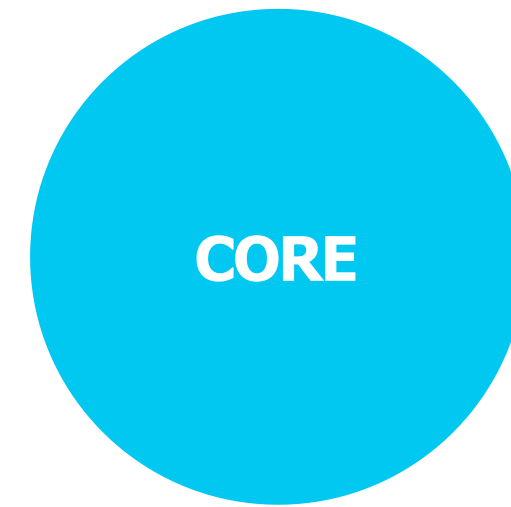


Step 3: Creating a portfolio of bets

Clear, primary focus

With a forward view

“Not” list



3 Core bet fill-in-the-blank

Describe the core bet

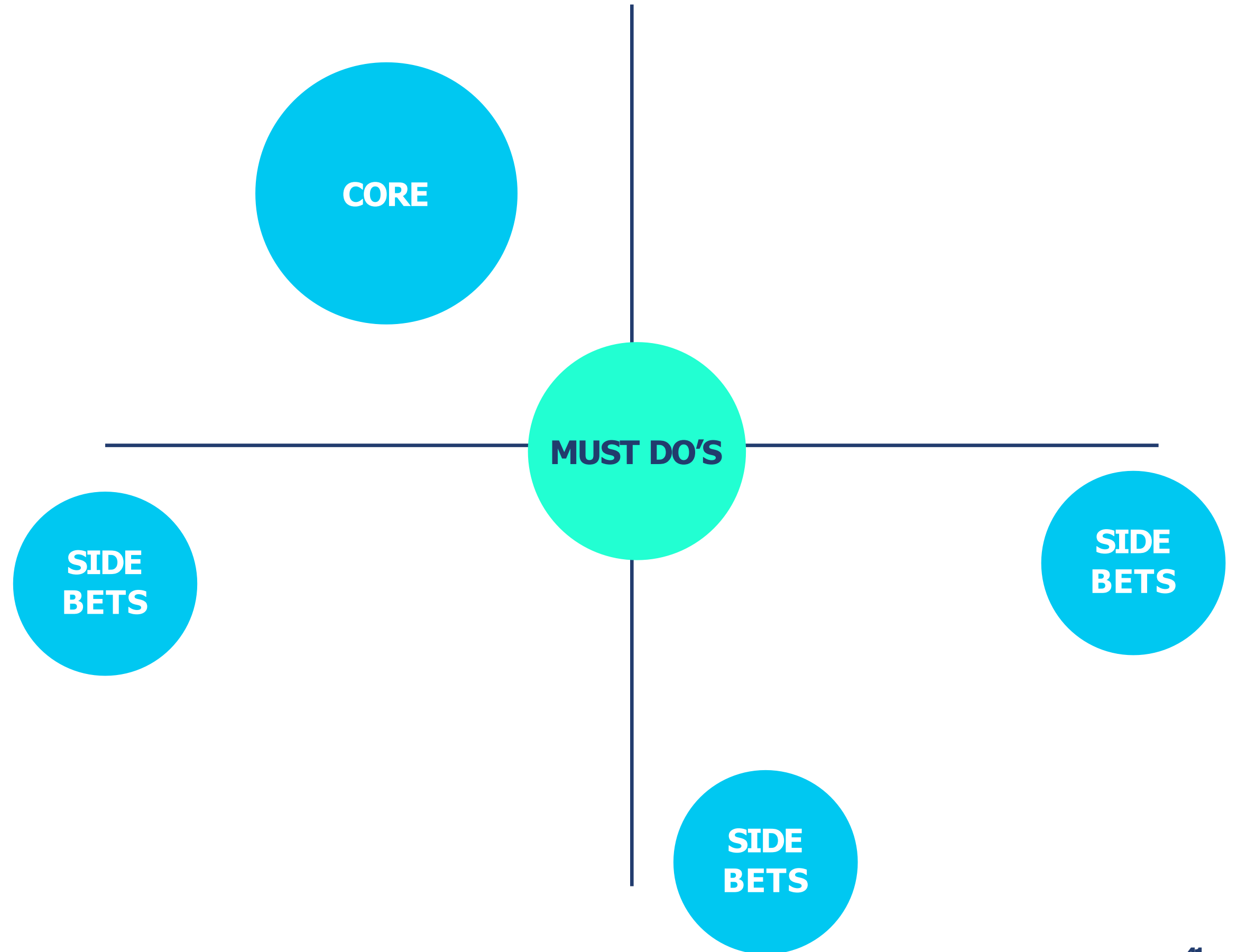
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We're the right ones to do this because unlike others, we have the
_____ (what makes us unique) enabled by our
_____ (capabilities, skills, systems, partnerships, etc) to make it
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Step 3: Creating a portfolio of bets



Toolkit Process

1

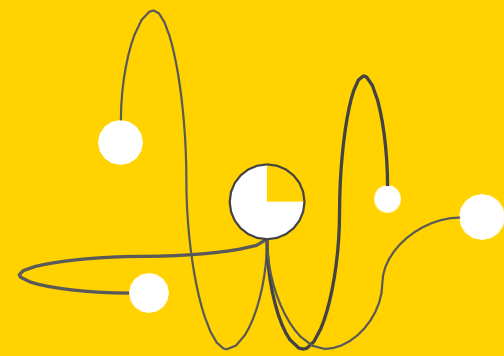
Analyze



Understand our organization **today**

2

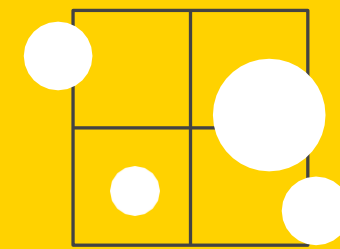
Rehearse Each
Future and
Generate Options



Explore **Future Possibilities**

3

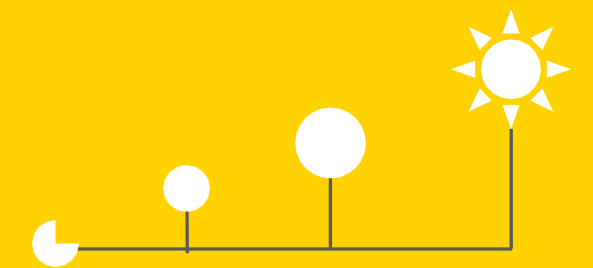
Evaluate and
Prioritize



Narrow the **list**

4

Plan



Define our organization **tomorrow**



Toolkit Process

Goal: Structured,
strategic conversation

1

Analyze

2

Rehearse Each
Future and
Generate Options

3

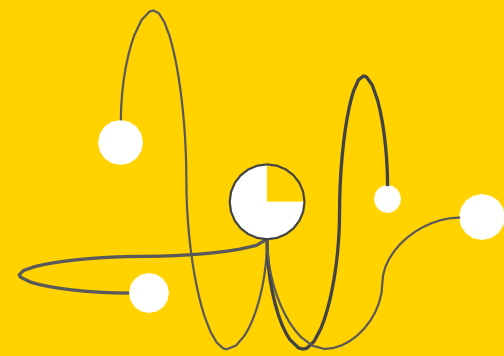
Evaluate and
Prioritize

4

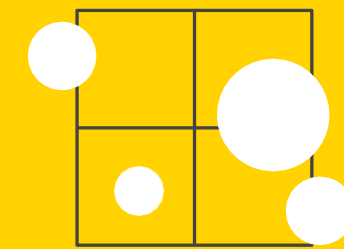
Plan



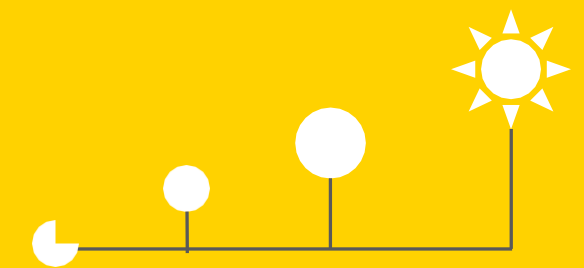
Understand our
organization **today**



Explore **Future
Possibilities**

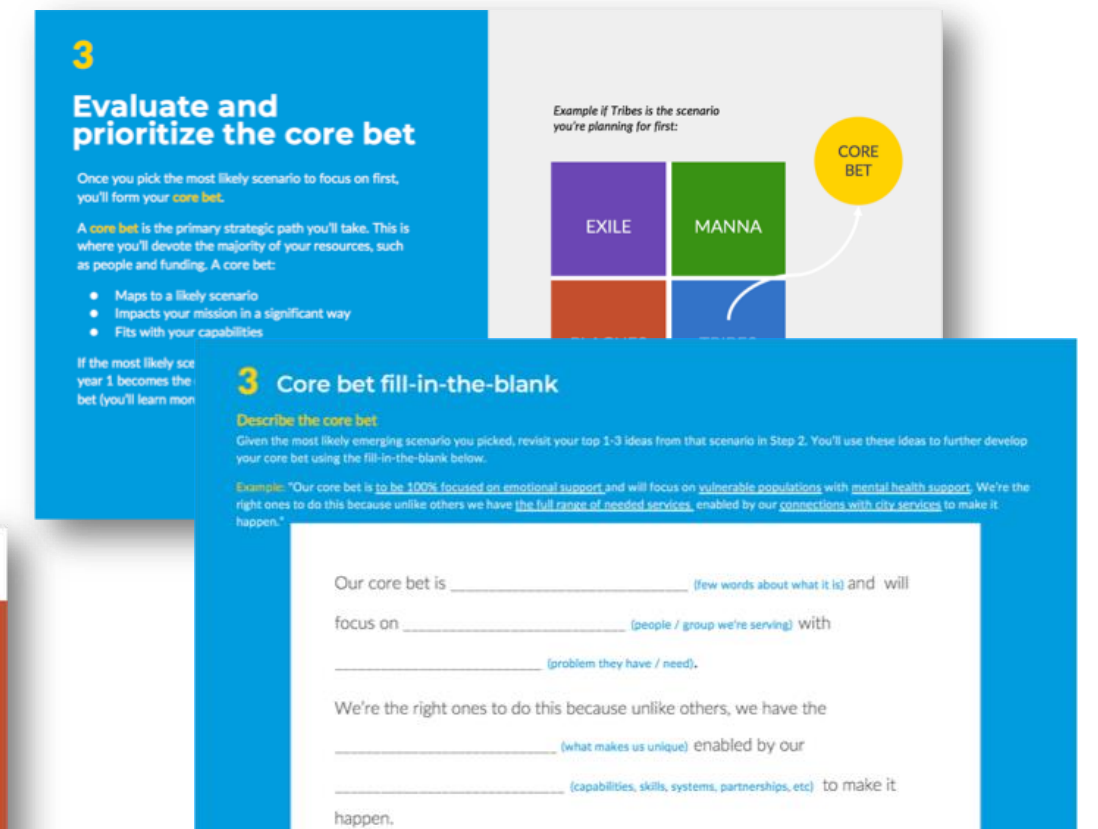
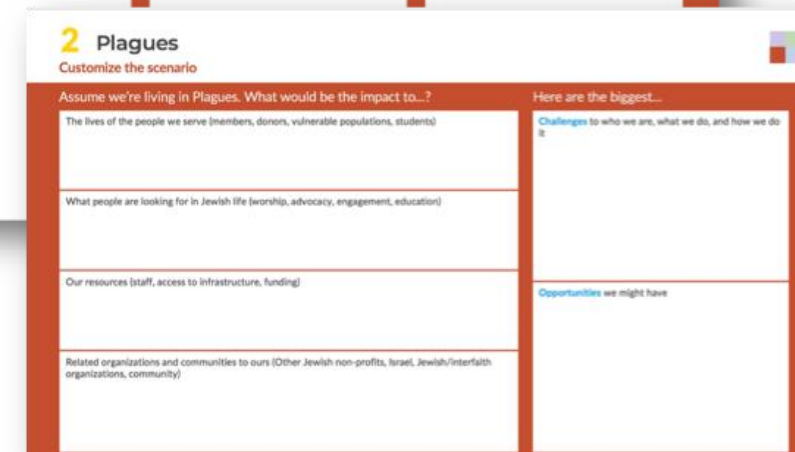
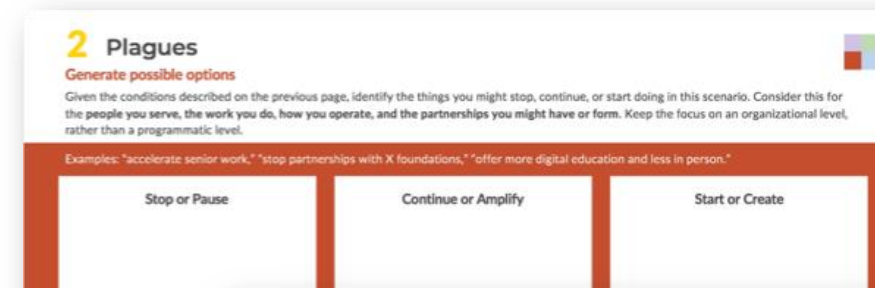


Narrow
the **list**



Define our
organization **tomorrow**

Quick Walkthrough



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

Programming/operating

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

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

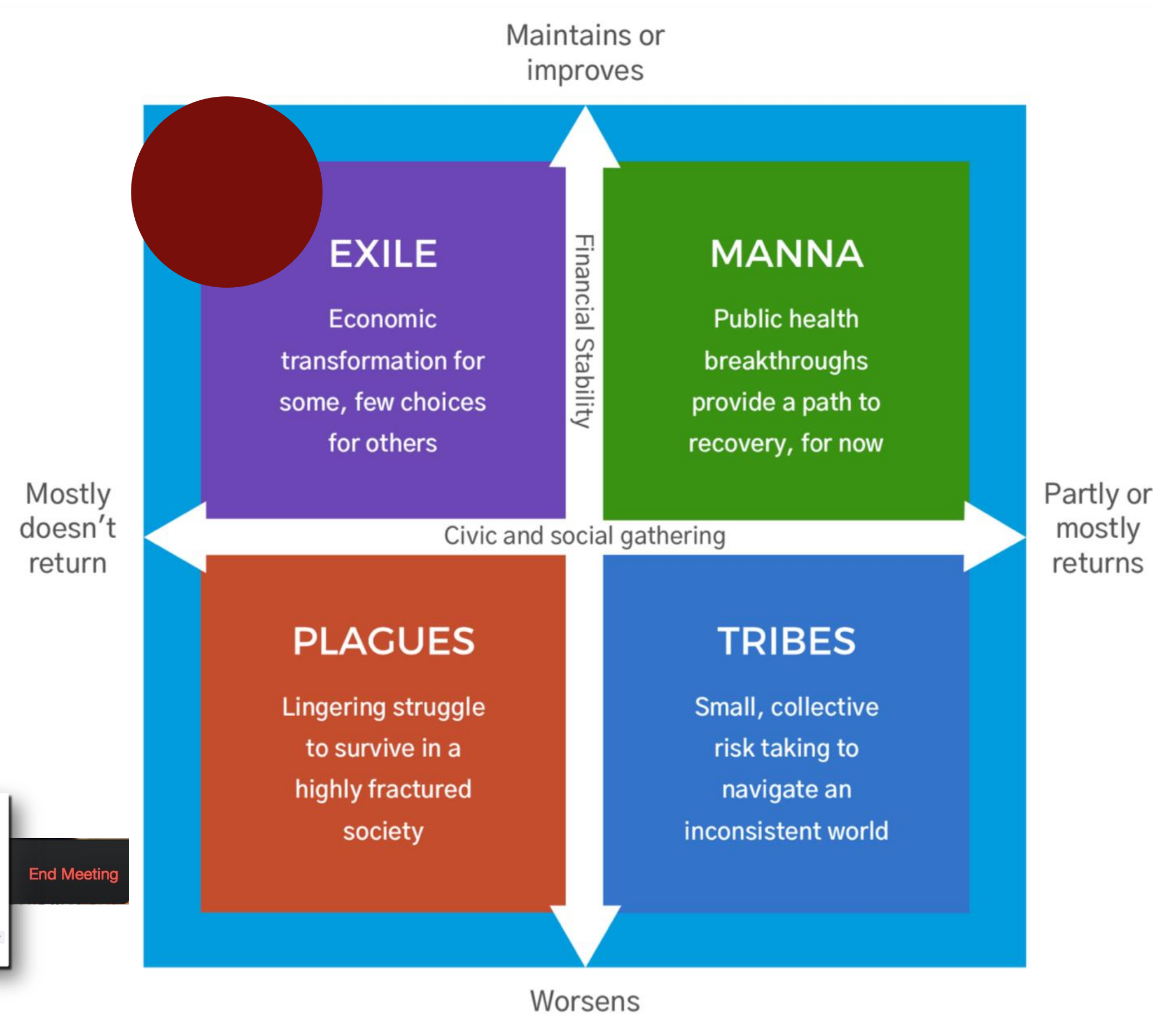
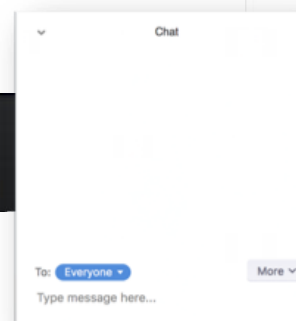
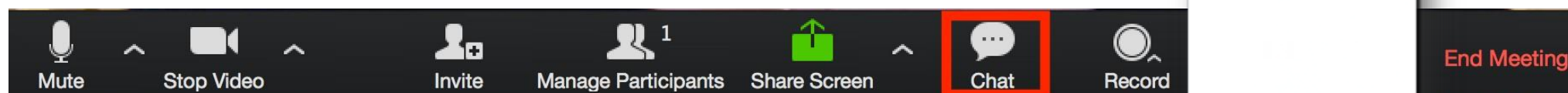
"Focus on seniors, with multiple forms of care and support, based on deep relationships and knowledge of this population..."

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

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

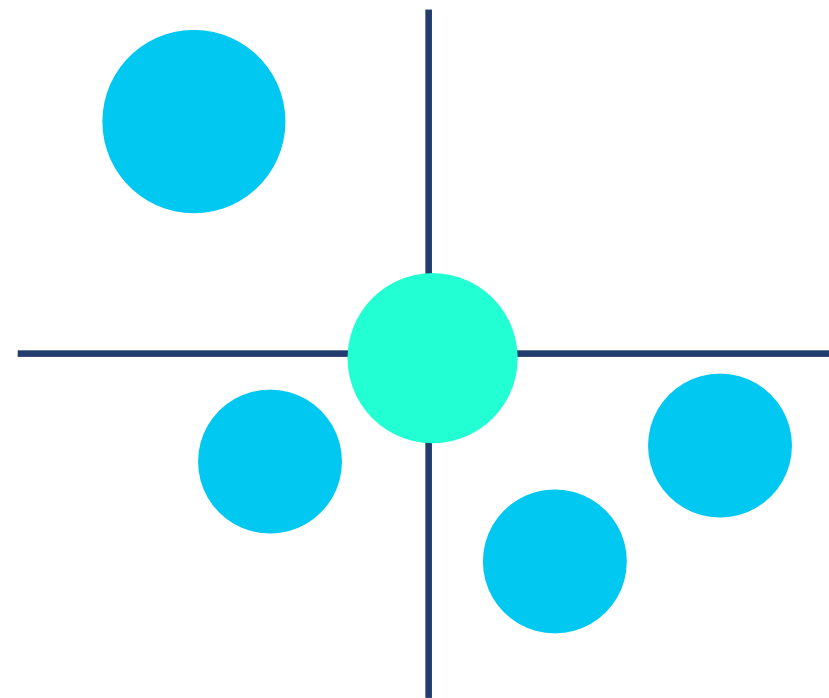
Jim Collins, *Good to Great*

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

Beth Cousens, *What Do We Say No To?*

Adapting to change

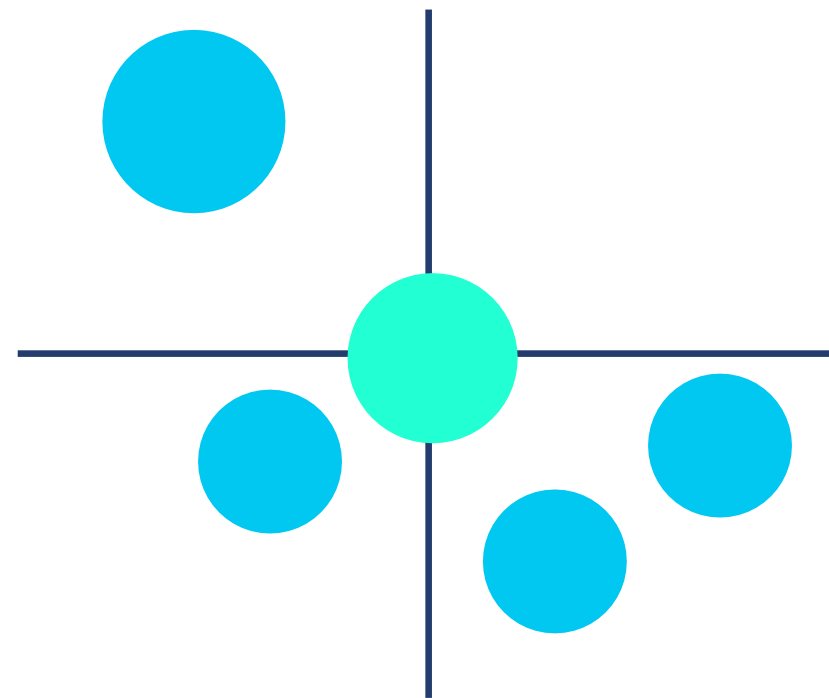
Initial bets



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

Adapting to change

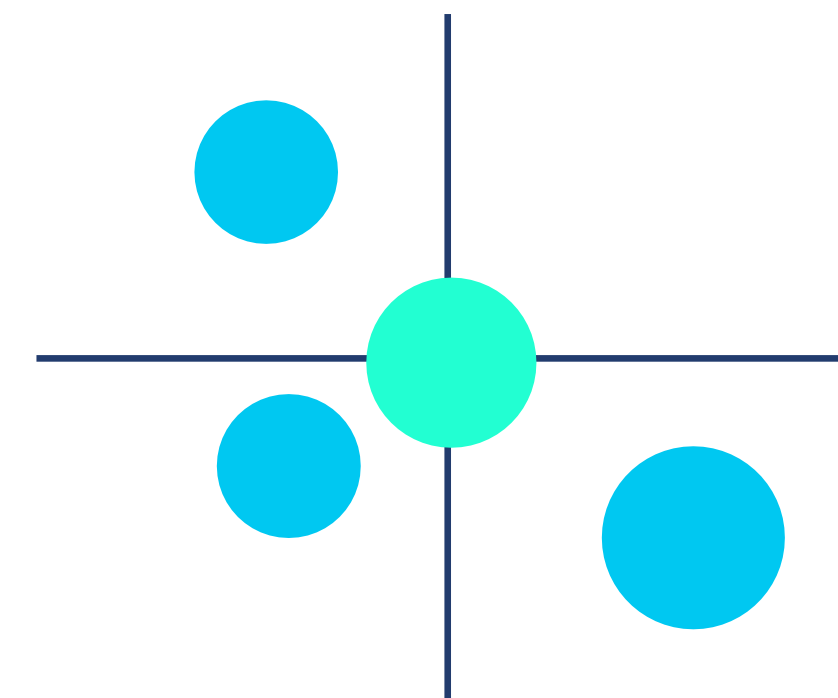
Initial bets



Time and information

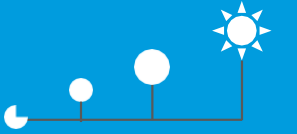


New bets



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

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?
1. What **core capabilities do we need to lean into more** and/or develop further (such as a particular expertise, set of relationships, systems, etc)?
1. What **organizational or process changes** can we make to operate more effectively?
1. How might we **adjust our planning** for shorter cycles while maintaining our long-term vision?

Questions

Use the “Q&A” feature to ask questions. We’ll do our best to address your questions!



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Next Steps

Thank You



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DAVID KAPLAN
STRATEGY AND CFO SERVICES

216.650.0710

DAVID@PANORAMICSTRATEGY.COM

PANORAMICSTRATEGY.COM

2020 Executive Forum

October 28 @ 1 p.m. ET– Final Webinar

Taking action and highlighting critical opportunities to build on the collective strength of our Human Service Agencies, especially in uncertain times, is the most important outcome of our scenario planning process.

The culmination of this process is in fact the beginning of another:

How we will all make change in our organizations to continue serving our communities as Jewish Human Service Agencies.



For other upcoming offerings and the link to the final Executive Forum webinar, please visit the Members Only section of our website www.networkjhsa.org.