



NALCAB'S Organizational Preparedness Guide

This is a checklist that was developed to help you proactively assess and prepare your organization to adjust during times of changing federal priorities. However, it can be adapted to prepare your organization as you face any unexpected circumstances brought on by situations such as natural disasters, economic downturns, or other external shocks.

Users can run through the various areas of analysis outlined here to assess the state of their respective organizations at any time. We encourage the NALCAB network to engage in this practice routinely—including during times of relative stability—to evaluate and ensure the health and sustainability of their operations.

Finance & Resource Development

Conduct a financial assessment of your current financial position

• **Assess current financial health:**

- How much unrestricted cash do you have on hand?
- How many days of working capital do you have on hand?
- What upcoming payments (e.g., loan payments, contractor payments, fixed expenses like rent) are due soon?
- What cash do you have tied up that could be liquidated? (For example, do you have investments that could be moved into an accessible account or real estate that could be sold?)
- What fixed expenses need to be covered monthly?
- What variable expenses are recurring but not necessarily required for maintaining core operations?
- What funding sources (funders, lenders, investors) are available to my organization for additional financial support?

• **Identify federal programs at risk:**

- What federal programs do you currently operate that could trigger non-compliance with administration orders or priorities?
- Have you received any formal stop orders for any federally funded work?
- If you are receiving federal funds, we encourage you to contact your grant administrators to ensure the arrival of any pending disbursements and to inquire whether or not you can receive payment on any outstanding grants that have yet to be processed.

• **Brainstorm and ask internal questions around financial actions that you could take to prepare for unpredictable funding cycles. For example:**

- Using the list of resources (funders, lenders, investors) above, reach out to your contacts to secure contingent funding such as a line of credit to cover unexpected and unpredictable funding freezes.
- List out what variable expenses could be cut if needed and make determinations on what you can cut immediately and/or in the short-term, long-term, etc.

- Determine which contractors are due for payment in the next 30, 60, or 90 days. Out of those, would it be possible to negotiate an extension on any of those payment terms with individual contractors or firms?
- Determine if you could put a hold on hiring until there is greater clarity on availability of funds
- Consider implementing cost saving measures such as:
 - Postponing travel or other discretionary expenses
 - Postponing non-mandatory (or even originally mandatory) organizational events to generate savings
 - Converting in-person gatherings (meetings, events) to virtual to save on the associated costs of an in-person meeting
 - Explore reducing office space and increasing flexibility for remote work to cut down utilities and facility expenses.
- **Engage your funders, lenders, and investors with transparency**
 - **Communicate funding risks with clarity:**
 - Provide data-driven impact statements that show the urgency of financial support and illustrate the concrete impacts that federal funding cuts or holds will have for your organization.
 - Example Statements:
 - *“If federal funds are withheld, our organization has three weeks of operating expenses on reserve but will not be able to continue providing services beyond that without supplemental funding.”*
 - *“Our organization requires \$20,000 per month to keep providing services and we are requesting a minimum of six months of operational support to weather this funding freeze while we identify additional private sources of funding to keep our organization afloat.”*
 - **Strengthen funder relations:**
 - Keep your funders informed of potential programmatic disruptions.
 - Identify potential new funding sources, such as grants, emergency relief funding, or other funding that could potentially replace at-risk revenue sources.

Communications & Risk Mitigation

- **Call a board of directors meeting to discuss your current organizational risks and your proposed strategy for navigating and maintaining operations during this time:**
 - Provide a clear risk assessment, outlining any preliminary findings on how policy changes could impact operations, funding, staffing, and compliance.
 - Align on strategic actions the organization may need to take, including financial planning and messaging adjustments. Once leadership (CEO, leadership team, and Board) are aligned on the path forward, gather staff to communicate the strategy as well as any immediate adjustments to the operation and communications that they will need to adopt moving forward.

- **Identify potential areas of risk exposure:**

- Conduct an internal review to determine if any programs, services, or public statements may attract undue attention to an observer seeking to identify non-compliance with administration orders or priorities.
- Review talking points and response strategies that defend your mission and need for continued services with new guidance in mind.
- If needed, develop alternative messaging approaches that still communicate impact while mitigating risk of scrutiny.

- **Review and align external-facing communications for compliance & risk management:**

- Conduct an audit of all public facing collateral to ensure the language is not flagged for non-compliance concerns and update as needed (see Appendix A for a list of words). This could include:
 - Website content: review language for potentially risky or identifiable information on clients or the communities you serve.
 - Social media posts: review for potentially sensitive wording or statements. It is advisable to review content from the previous two weeks and make necessary adjustments.
 - Press releases & public statements: ensure consistency in framing or reframing your messaging.
 - Speaking engagements: ensure consistency in framing organizational priorities and follow a centralized media protocol (see more below).
 - Webinars, conferences, and other external facing events (e.g. galas, summits, forums etc.). Carefully review external events, attendance lists, and assess potential risk before confirming participation.
 - Email and mailing lists: review distribution lists to ensure recipients align with your risk management strategy. Ensure that any new sign-ups/recipients are reviewed. Remove outdated or high-risk contacts as needed.

- **Establish a centralized media/communications response protocol:**

- Designate a single communications lead responsible for managing all public statements and media interactions (ideally, your lead Communications staffer).
- Implement a clear protocol requiring all press inquiries received by staff or Board members to be immediately routed to the communications lead.
- The communications lead will review the inquiry and determine if the organization will participate. If so, they will choose the most suitable spokesperson and prepare them for the interview.
- Ensure message consistency across all platforms and audiences, this will help to reinforce your key messages, organizational position, and priorities. Keep communications consistent no matter who the audience is.

- **Mitigate risk in social media interactions:**

- If exercising extreme caution, organizations may ask individual staffers who wish to express their personal opinions freely on social media to remove their organizational affiliation from their profiles (e.g. Facebook, Instagram, LinkedIn, X, or other social media).
- This will help prevent personal statements from being misinterpreted as official organizational positions, reducing the risk of being flagged as non-compliant with new federal regulations or funding requirements.

- **Facilitate clear internal communication:**

- Hold an all-staff meeting to communicate that leadership is assessing the impact of incoming information and policy changes.
- Reassure staff that regular updates will be provided as needed, to ensure transparency.
- Encourage staff to please raise any questions or concerns directly with their supervisor and/or leadership, rather than making assumptions or discussing policy changes publicly without guidance.

- **Review and manage participation in external events:**

- Carefully review attendance lists for external events such as webinars, conferences, and public forums.
- Identify potential risks related to public affiliations, ensuring that any staff participation aligns with the organization's priorities and risk management approach.
- Provide staff attending events on behalf of the organization with talking points or guidelines to maintain messaging consistency.

- **Monitor the news for impact on your organizations:**

- While limiting external communications, flag any news stories and the outlets/reporters covering them for possible future outreach.
- If a member of the media contacts you directly, remember that everything is on the record, even "background" conversations. Exercise caution and consult your communications team before speaking to any journalists.
- Keep in mind that ALL media interactions are considered on-the-record.

Staffing

- **Create contingency staffing plans:**

- Evaluate which existing positions will be at risk if federal funding is frozen or cut. Determine how said staff can be reassigned to other programs or tasks within the organization.

- Include details on at-risk programming and staff in your engagement with funders, lenders, and investors to explicitly request additional funding and resources to keep your important programs running.
 - Enact a hiring pause (temporary) or freeze (longer-term), if needed.
- **Remind staff to please take care of themselves and utilize PTO and sick time for needed mental and physical rest and health.**

Advocacy

- **Stay informed:** Lean on membership organizations that review and summarize federal legislation and actions so that you can understand how federal government activity may impact your organization.
- **Engage and educate:** Maintain regular contact with your congressional representatives and arm them with concrete examples of how federal funding cuts will negatively impact their constituents. If you do not know who your member of congress is, you can find out [here](#).
- **Mobilize:** Join coalitions or less formal assemblies of like-minded groups that are engaging in advocacy or public policy outreach and there is valuable information that can be shared when multiple groups that interact with different stakeholders can bring to bear. There is strength in numbers.

Bright Side

- Maintain focus on and scan the landscape for upcoming opportunities that your organization can plug into.
- Keep your eye on your organization's short- and long-term goals and drive toward your organization's priorities. Your mission and focus are unwavering, regardless of available federal funding or other external factors that might create a more challenging operating environment.
- Remind yourself of the critical role your organization plays in your community and how your work is changing the lives of individuals and families every day.
- Foster hope and solidarity within your team by shining a light on successes, individuals, and outcomes that are a direct result of your work and commitment.
- Find ways to incorporate levity into your interactions at work and in meetings. Laughter is helpful to offset times and conversations that can feel heavy.
- Take care of yourself and each other.

If you have any questions or comments related to this checklist, please contact Levar Martin at lmartin@nalcab.org.

Appendix A

Flagged terms to serve as guidance received by via HUD grants:

- DEI
- DEIA
- Diversity
- Diverse
- Equity
- Equitable
- Inclusion
- Inclusive
- Environmental Justice
- Gender Identity
- Racial
- Marginalized
- Underserved
- Affirmatively
- Affirmative
- Systemic
- Adversely
- Accessible
- Accessibility
- Disparate

An additional list of words (not directly received by NALCAB) was identified in a recent [Washington Post article](#):

- Advocacy
- Antiracist
- Barrier
- Biases
- Cultural relevance
- Disability
- Diverse backgrounds
- Diversity
- Diversified
- Ethnicity
- Excluded
- Exclusion
- Equity
- Female
- Gender
- Hate speech
- Historically
- Implicit bias
- Inclusion
- Inclusive
- Inequities
- Institutional
- Intersectional
- Male dominated
- Marginalized
- Minority
- Multicultural
- Oppression
- Polarization
- Racially
- Segregation
- Socioeconomic
- Systemic
- Trauma
- Underrepresented
- Underserved
- Victims
- Women