Rooted & Ready:
A Guide for Resilience and Action During Crisis and Change

Toolkit 1
Organizational Risk Assessment & Mitigation Planning

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Provecho COLLECTIVE

Introduction and Acknowledgements

Thank you for taking the time, energy, and care to invest in this important reflection and planning process as a team.

Provecho Collective, formerly the Colorado Blueprint to End Hunger, envisions a Colorado where everyone can access the food they choose, where they want it, and when they need it. To achieve this, we are building a movement for a more responsive, equitable, and sustainable food system by shifting power to our Colorado communities.

This guide is made up of toolkits which are designed to support organizations through understanding, exploring, and strategizing for potential risks. Such lofty goals cannot be achieved alone, which is why we believe in designing actionable tools as a way to ensure we are all supported in moving forward through collective impact. We hope the accompanying toolkit serves as a guiding light toward organizational resilience, fostering adaptability amid changing conditions while helping you stay grounded in your mission-driven work.

This work is courageous and demands confrontation with uncertainty, scarcity, and changing realities in creative and values-aligned ways. Whether your organization is able to make bold shifts, take small steps, or simply begin to gather information, your intentional leadership matters and makes a difference. We hope this toolkit will offer you helpful starting points while affirming the knowledge and wisdom that's already held amongst your team.

With thanks and solidarity,

Justice Onwordi,
Former Impact Director

Kasey Neiss,
Evaluation Analyst

Grace Benasutti,
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SPECIAL THANKS

This has been a major team effort and a labor of love as we reflect on the many ways in which community power and collaboration can be deeply impactful. Special thanks to:

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- Within Provecho Collective, **Michelle Ray** and **Leticia Macias** were instrumental in the accessibility, editing, and translation of this toolkit.
- Lastly, this project would not be possible without the generous financial support of **The Colorado Trust**.

STAY CONNECTED

Please don't hesitate to reach out with feedback, support needs, reflections, or general questions as you navigate this toolkit. Stay tuned for more resources and support offerings coming in the near future!

Contact us at info@provechocollective.org or visit ProvechoCollective.org.

How to Use this Toolkit

Toolkit 1: Risk Assessments and Mitigation Planning includes accompanying worksheets to make your assessment and strategizing more approachable. It's intended to be used by the staff of nonprofit organizations—ideally on an annual basis—to ensure adaptability amidst new and emerging contexts. The worksheets guide you through assessing the risk associated with individual funding streams and your organization as a whole.

The included worksheets are "**Individual Grant Risk Assessment: Current or Potential High-Priority Grants**," "**Full Organization Risk Assessment & Mitigation Planning**," and "**Risk Mitigation Considerations.**" These worksheets are highly encouraged for organizations navigating funding challenges or have large grants funding multiple programs or operational costs.

While certain leadership staff may hold the specialized knowledge needed to fill out each section of this toolkit, we also want to call out the benefits of holding these conversations collectively with your entire team. An approach that engages all staff can ensure transparency across the organization and communicates the value and skill that all team members bring to the table, regardless of their title or rank.

As you move through the worksheets you will notice the headers at the top of each page like the one below. Use this to determine the best people in your organization to complete each worksheet.

Example:

Why this worksheet matters:	This worksheet can support your team in understanding how each grant affects your organization financially and beyond.
What it will help you do:	Create long-term and short-term goals to protect your organization
Who this worksheet is for:	Everyone on the team!

Toolkit 1:

RISK ASSESSMENTS & MITIGATION PLANNING

UNDERSTANDING RISK ASSESSMENTS

When assessing a funding source, it's important to identify potential risks, understand their impact, and build a strategy to address possible implications from the funding award. In this section, you will be guided through an evaluation of your current and potential grant contracts to help visualize which grants may pose higher or lower risk to your organization—and support decisions about whether to accept or reject funding or determine if there is a risk of losing current funding. By the end, you'll be able to complete a full organizational assessment to better understand how your higher-risk grants could impact your organization. You'll then be prompted to develop an organization-wide mitigation plan, along with more targeted strategies specific to your most at-risk grants.

In this assessment, you will consider two potential risks: **1.) The risk of reduced, delayed, or eliminated funding, and 2.) The risk to your organization while managing the award.** The assessment includes a scoring rubric and space for self-reflection to help you identify low, medium, and high-risk grants.

GRANT RISK CLASSIFICATIONS

- **Low-Risk Grants**: Do not pose a threat and do not require additional effort to manage.
- **Medium-Risk Grants**: Carry some potential concerns and should be revisited with time. They may have some negative implications (which should be considered), but they do not present a major threat to the organization as a whole.
- **High-Risk Grants**: Represent a significant threat of being cut, causing challenges, or impacting the organization overall. Organizations should consider rejecting these awards OR putting a mitigation plan in place if the award is accepted.

UNDERSTANDING MITIGATION PLANS

Once you've identified which grants pose the greatest risk, the next step is to plan ahead. A mitigation plan outlines how your organization will respond if funding is reduced, delayed, or lost—or if managing the grant becomes too burdensome. These plans help you protect core operations, staff, and services by identifying backup strategies before a crisis happens.

As you complete the risk assessments, you will be able to clearly identify potential or likely risk from specific funding sources and create clear mitigation plans to address each risk.

Example risks may include:

- Loss of funding
- Staff burnout
- Harmful data reporting requirements
- Legal consequences associated with data breaches
- Funder requirements or messaging that contradict organizational values

Toolkit 1:
RISK ASSESSMENTS & MITIGATION PLANNING

To diversify funding and build in reserves
A resilient and healthy revenue model combines philanthropic and earned revenue, as well as allows for a financial cushion that leaves you less exposed to high-risk funding.

Plan for scenarios
Prepares staff for different scenarios by offering a strategic plan, before the scenario happens. This might include building wellness policies for staff and volunteers, reassigning tasks/roles across the team, creating equitable data collection and storage policies, investing in a detailed grant tracking system, or rediscovering your organization's mission and purpose.

Incorporate more collaboration
Potentially combining efforts with coalitions, community, and other organizations can help foster healthy networks and relationships. This may include more outreach or advocacy efforts to preserve funding or key programs.

DIRECTIONS

The risk assessment and mitigation planning worksheets are for your organization to use, modify, or adjust as you see fit. The purpose of **Toolkit 1** is to identify the financial and organizational impact you might face from current or potential grants.

WHEN TO COMPLETE AN INDIVIDUAL RISK ASSESSMENT

You do not need to review every single grant that your organization currently has, is considering accepting, or is interested in applying for. But you should prioritize those most vulnerable or most impactful to your organization.

Existing Grants to Prioritize for a Risk Assessment
- Federal or state-funded awards
- Awards representing 10% or more of your total budget
- Awards covering core operating costs (staffing, rent, infrastructure, etc.)
- Awards with strict compliance or reporting requirements
- If you have the capacity, you may also consider: Grants with upcoming renewals or completion (within 12 months)

Potential or Upcoming Grants to Prioritize for a Risk Assessment
- Federal or state
- If the award is critical to program development, expansion, or sustainability
- Expected to make up a large portion of the budget (over 10%)

Deprioritize
- Small (less than 10%), short-term, or one-time awards unless crucial to a program's survival
- Grants with flexible or low-stakes reporting (few restrictions, general operating support, or known funders with a long history of renewal and trust-based practices)
- Grants with long-term, multi-year commitments (not ending in the next 6-12 months)

Example:
If you have a 3-year grant that makes up more than 10% of your annual operating budget but has over 1 year left, is not state or federal dollars, and is with a trusted funder, you can skip the risk assessment and assume the risk is low for this grant.

WHEN TO CREATE A MITIGATION PLAN

Not every risk level needs a detailed mitigation plan. Use the tips below to decide what type of mitigation plan is best.

Individual Grants

- **Full Mitigation Plan with Detailed Strategies – High-Risk Grants**
  - Funding is likely to be lost or reduced
  - Program cannot continue without this funding
  - Significant operational or staff impact
- **Light Mitigation Plan with Soft Strategy – Medium-Risk Grants** ***Optional, as capacity allows***
  - Future funding status is uncertain or moderately impacts operational capacity
  - Have scenarios outlined; can be general or vague
  - Plan to revisit these risk assessments within 6-12 months to see if any have shifted to high-risk
- **No Planning Required – Low-Risk Grants / Unassessed Grants**

Full Organization

- **Full Mitigation Plan with Detailed Strategies – Entire Organization**
  - Plan for major funding loss
  - Financial resilience planning
  - Strategy to protect and prepare staff, volunteers, and wider community
  - Data, communications, and tech planning
  - Board roles and leadership coordination

Key Differences

Grant-Level Mitigation Planning	Organizational Mitigation Planning
Focuses on 1 funding source	Covers all operations and revenue
Only medium to high risk grants	Organization-wide threats or structural shifts
Responsibility of program/development leads	Responsibility of executive leadership and board
Short-term, reactive, proactive, and immediate	Long-term, proactive, reactive, and strategic

Using These Worksheets

Worksheet 1a: Individual Grant Risk Assessment: Current or Potential High-Priority Grants.
(Jump to this worksheet).
Once you've identified which grants are a priority, you're ready to begin this worksheet. You can make copies of this worksheet to complete for all of your high-priority grants. If you do not have the capacity to complete the full assessment, there is an expedited option included as well.

Worksheet 1b: Full Organization Risk Assessment & Mitigation Plan.
(Jump to this worksheet).
In this worksheet, you will review all of your funding sources and consider how much of your funding may be at risk due to medium or high-risk grants. Once each assessment is complete, proceed to the Mitigation Planning section at the bottom of each risk assessment worksheet 1a and 1b.

Worksheet 1c. Risk Mitigation Considerations.
Review the prompts in this worksheet for help designing a mitigation plan.
(Jump to this worksheet).

- Start with your **High Risk grants**. Create a mitigation plan for each one.
- For **Medium Risk grants**, *it is not required* to create a full mitigation plan, but encouraged to develop a lightweight or high-level contingency plan, if capacity allows.
- Finally, develop a mitigation plan for your full organization, which brings together key risks across funding, staffing, operations, and equity.

Helpful Definitions

Allied Funders	Grantmakers, donors, or institutions that understand and support your organizational values, mission, and approach to your work. Allied funders might offer more flexibility and work in partnership with you.
Articles of Incorporation	The legal documents that were filed to officially start the nonprofit organization. Typically includes your organization's name, mission, location, structure, and 501(c)3 status.
Assets	Anything that your organization owns that has value and supports your work. Some examples could include cash reserves, equipment, buildings, land, intellectual property, relationships, etc. Some assets could be liquified, or sold.
Boilerplate Language	Ready-to-use, standard text that helps describe your organization's mission, history, vision, values, and impact. It can easily be copied and adapted for messaging, grant writing, reporting, and other communications to ensure consistency and save you time.
Endowment	Long-term savings fund for your organization, where money is typically invested and you only spend the interest or earnings on that money.
Mitigation Plan	Outlines how your organization will respond if funding is reduced, delayed, or lost; or if managing the grant becomes too burdensome. These plans help you protect core operations, staff, and services by identifying backup strategies before a crisis happens.
Policy	Your organization's plan for how much money you can or want to set aside, and how you might use it. This policy can help your organization find stability when the unexpected happens (i.e. funding losses or other crises).
Reserve Funds	Savings that your organization sets aside for when you face uncertainty and emergency. A "rainy day fund" that may be guided by your reserve policy (see above).
Restricted	Money/funding that must be used for a specific purpose. Typically you are required to report on that specifically.
Surplus Balance	Extra money that is leftover after all expenses are paid in a certain timeframe (typically a year).
Unrestricted	Money/funding that can be used however your organization needs and supports general operating costs like salaries, rent, etc.

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

Why this worksheet matters:	This worksheet can support your team in understanding how each grant affects your organization financially and beyond (team workload, ability to deliver on programs, overall stability, etc.).
What it will help you do:	This assessment will help you notice where grants might be creating more stress and strain, identify operational and DEI-related risks, and track how much staff time and resources are being used for and with this funding. It is intended to support clearer and more confident decisions about funding sustainability.
Who this worksheet is for:	Development Director, Board Treasurer, Program Lead

Once your assesment is scored, mark your risk level here:

{Select Risk Level} Identified Funding Risk Level

{Select Risk Level} Identified Operational Risk Level

If **High Risk, continue to the Mitigation Plan at the very bottom of this page, optional for **Medium Risk** grants

GRANT INFORMATION

***Copy, complete, and save this document for each individual grant you have in this category.**

Grant Name:

Granting Agency/ Funder Name:

List Specific Programs, Initiatives, or Operations Funded by Grant:

Grant Type:

☐ Federal/ Federal Passthrough ☐ State/ Local Government ☐ Private/ Philanthropic

Relationship type: ☐ New ☐ Longstanding / Established ☐ Unstable / Unreliable

Award Amount: **Date Awarded:**

Final Reporting/ Grant Conclusion Date:

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

Expedited Assessment Option:

If you don't have the time or capacity to complete the full grant assessment, you may use the expedited risk survey below. **If you answer "Yes" to three or more questions**, consider the grant **High Risk** and continue to the Mitigation Planning section at the bottom of this worksheet.

If you do have the capacity, we highly recommend skipping the expedited assessment and completing the full assessment (directly below), especially for current or potential priority grants.

Answer the following:

Is this federal funding or funding that has been cut or restricted in the past?

☐ Yes ☐ No

Does your organization struggle to cover upfront costs while waiting for reimbursement or delayed payments?

☐ Yes ☐ No

Is the funder's DEI language misaligned with your organization's values or language used in your application?

☐ Yes ☐ No

Is the grant burdensome to staff (more hours, onboarding new staff or volunteers, or other heavy infrastructure changes)?

☐ Yes ☐ No

Does the grant require sensitive personal data or complex, high-frequency reporting?

☐ Yes ☐ No

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

In this assessment, each prompt includes space for either a written reflection or a dropdown selection. The dropdowns are labled as "Select Risk Level", use the examples in each prompt to select which option mostly closely aligns with the grant being reviewed **[1]**, **[2]**, or **[3]**. Dropdown responses will be calculated for each section and reflect which grants are Low, Medium or High risk for your organization.

GRANT IMPACT ON FUNDING

A. Grant Contract & Funding

Review grant contract for Termination Language and Payment Requirements, consider linking the contract, page and section that was found to easily retrieve this information again:

Tip: *To better understand potentially complex legal jargon, consider asking AI to review the document and transcribe it into plain language (options: Claude AI or Perplexity AI).*

Select Risk Level	**Stability of funding source** (i.e., long-standing or stable **[1]**, cut or reduced prior but not frequently, unknown **[2]**, unstable or frequently cut **[3]**)
Select Risk Level	**Payment Reliability** (i.e., one-time/upfront payment **[1]**, installments or occasional delays, unknown **[2]**, reimbursements, invoice, frequent delays **[3]**)
Select Risk Level	**Select Risk Level Covering Upfront Cost** – Does your organization have flexible funding to cover upfront cost for grants with installment or reimbursable payments without pulling money away from other programs or general operations? (i.e. dedicated flexible spending **[1]**, sometimes need to borrow or reallocate **[2]**, cannot cover without risking operations **[3]**)
Select Risk Level	**Flexibility in Spending** (i.e., broad coverage including admin or operations / direct **[1]**, some restrictions, unknown **[2]**, highly restricted narrow scope **[3]**)
Select Risk Level	**Funding Term** (i.e., multiyear **[1]**, one-year or more with history for renewal **[2]**, short-term, one year or less**[3]**)
Select Risk Level	**Renewal** (i.e. low competition or guaranteed **[1]**, full reapplication, competitive, unknown **[2]**, no renewal or reapplication allowed **[3]**)
Select Risk Level	**Connection to a government agency, directly or indirectly** (none **[1]**, local, state, unknown **[2]**, federal **[3]**)
Select Risk Level	**Political/ Economic Risk** (i.e. unaffected by current climate **[1]**, vulnerable to to priority shifts**[2]**, highly vulnerable due to political or economic changes **[3]**):
Additional Reflections:	
TABLE TOTAL (out of 24)	

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

B. Diversity, Equity, and Inclusion (DEI) Risks & Updates

When assessing the language you use in your grants, remember that you are under no obligation to censor yourself; although, if you hope to continue to pursue federal funding, you may need to change the language used in your grant(s) and beyond, examining elements like the mission statement and program descriptions listed on your website. For reference, PEN America is tracking a complete list of the Federal Government's Banned Words List. **(Review this list to help you complete the section below.)**

Tip: *If there are words you regularly use that are found on the banned list use the "Find" or "Search" function (crtl + F/cmd + F) in your application to see where and how often they pop up.*

Most Recent IRS-approved Mission Statement:

Mission Statement used in Application:

Your **grant or public mission statement can evolve** or be tailored, as long as it's **aligned with your IRS-approved purpose**. Small differences in tone, emphasis, or wording are usually fine. But:

- If the *substance* of your mission has changed, like shifting from youth education to environmental advocacy, you'd need to notify the IRS.
- If a funder reviews your 990 or your Articles of Incorporation and sees a major mismatch, that could raise concerns about alignment or even compliance.

Current DEI language found on the funder's website, including organizational history, mission, and purpose	
Current DEI language found on your organization's website, including organizational history, mission, and purpose	
DEI language in submitted application	
DEI language in grant agreement or contract	
Select Risk Level	**Funder's allyship / strategic alignment status** (i.e. strong alignment / public statements supporting DEI **[1]**, priorities potentially shifting / no public statement/ unknown **[2]**, major misalignment / rapid strategy change **[3]**)
Additional Reflections:	
TABLE TOTAL (out of 3)	

Select Funding Risk Level	**Total Funding Risk Level:** / 27

Low: 1–9
Medium: 10–15
High: 16–27

Don't forget to mark the risk level at the top of the worksheet so it is easy to reference later.

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

GRANT IMPACT ON PROGRAM OPERATIONS

Directions: Using the same grant, determine each risk point based on how this grant impacts your organization. This section is about what burdens or threats may come along with meeting a grant's requirements. Based on your organization's size and operation, determine the risk level on a low-to-high scale. If you have 3 - 4 staff members, your organization could be more at risk of reaching capacity than an organization with 20 - 30 staff; but an organization with more staff may be more likely to have to lay off staff or cut hours. Consider the compliance load, necessity of staff and programs, and sustainability of the work. At the bottom, add up the total for the complete assessment.

A. STAFF AND OPERATIONS

List the **funded categories in this grant's budget** (general operating, specific programs, infrastructure, etc.)

1.
2.
3.
4.

List the **staff** who are affected (staff funded by this grant or who oversee programs funded by this grant)

1.
2.
3.
4.

Select Risk Level	Is the grant funding a **new or existing program** within the organization (continued= likely less time and less capacity **[1]**, recently developed **[2]**, new= more time and capacity **[3]**)
Select Risk Level	**Staff Capacity** (existing staff can handle **[1]**, may need to backfill or add hours **[2]**, need/ needed to hire new staff **[3]**)
Select Risk Level	**Volunteers & Paid Community Members** (not applicable / can be handled by current volunteers / compensated leaders **[1]**; may need more coordination / adjust roles or hours for compensated leaders **[2]**; need to recruit/train new volunteers / or stop compensating community **[3]**):
Select Risk Level	**Operational Burden** (minimal or no changes **[1]**, moderate changes or new workflows **[2]**, heavy changes to infrastructure or operations **[3]**)
Additional Reflections:	
TABLE TOTAL (out of 12)	

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

B. GRANT DATA & REPORTING BURDEN & SENSITIVITY

Select Risk Level	**Frequency of reporting** (annual or semi-annual [1], quarterly [2], monthly [3])
Select Risk Level	**Sensitive personal data required** (non-identifiable [1], names or contact info [2], personally identifiable info / PII [3])
Select Risk Level	**Data and deliverable complexity** (straight forward [1], some analysis [2], mixed methods or custom evaluation [3])
Select Risk Level	**Staff time and effort for data** (fits existing work [1], some additional hours [2], new or significant workload addition [3])
Select Risk Level	**Data security, storage, and confidentiality practices** (no sensitive data [1], need to protect some data [2], sensitive data or high-protection protocol [3])
Additional Reflections:	
TABLE TOTAL (out of 15)	

Select Operations Risk Level	**Total Operational Risk Score Level: / 27**

Low: 1–9
Medium:10–18
High: 19–27

Don't forget to mark the risk level at the top of the worksheet so it is easy to reference later.

Continue to the Mitigation Planning below if your grant is High Risk, optional for Medium Risk.

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

MITIGATION STRATEGIES

Directions: If you scored **High Risk** in either of the sections above, use the answers from your risk assessment to identify your top vulnerabilities. Think of this section as an "If, Then" statement: **IF** your program or team is impacted by the funding assessed above, **THEN** how will your organization proceed? Use the following questions to help shape realistic, values-aligned plans that protect your team and help your organization adapt if funding is reduced or lost. The mitigation plans should be used to provide clarity and maintain transparency across your organization, ensuring everyone is aligned on the potential outcomes for the team and the organization as a whole. In the full risk assessment, Worksheet 1b, you will have the opportunity to create an organization-wide mitigation strategy. This mitigation plan should be specific to the grant assessed above.

*If you have the capacity, consider completing the Mitigation Plan and skipping the Full Strategy for your **Medium Risk** grants.

DRIVING QUESTIONS

PROGRAM FUNDING RISK MITIGATION PLANNING

Examine other funds that could support or uplift this work. *(Worksheet 2d: Shifting in Times of Crisis will support programmatic decision-making in more depth.)*

To Keep this Program (or Not)

- Is this grant funding a necessary program for your organization/community? (i.e. do whatever it takes to keep the program or can your organization or community go without it)
- What is the next step for this program? (i.e. maintain, pause, pivot/merge, or sunset)

If Keeping the Program…

- Is there surplus funding from your organization that could help sustain this program/ project if funding is terminated?
- Are there any active grants or contracts that can be reallocated or modified to cover overlapping needs?
- Does the funder have emergent needs funds you might be eligible for?

Worksheet 1a

INDIVIDUAL GRANT RISK ASSESSMENT

- Are there partnerships or coalitions to collaborate with which could reduce the program cost or share financial burden?
- What fundraising efforts could be launched or expanded to support this area (e.g., individual donors, sponsorships, or mission-aligned earned income)?

PROGRAM OPERATION RISK MITIGATION PLANNING

Examine strategies to keep your organization afloat even when funding is reduced and grants may be burdensome.

STAFFING

- Can you strengthen internal cross-training to increase flexibility in roles across staff?
- Are there additional staff who have the capacity to suport this program if it becomes too burdensome? If so, how?
- In what scenarios would you reorganize job responsibilities across your team?

If program funding is at risk:

- What other projects or programs could the team members impacted from this grant work on to ensure they keep their jobs and income?
- In what scenarios would you reduce or add hours across the team?
- In what scenarios would you terminate contractors and/or employees?

- In what scenarios do community needs take precedence over staff employment?

GRANT TRACKING & REPORTING

- If grant reporting and the deliverables are complex and burdensome, are the funders willing to revisit the contract or modify requirements?

- If grant reporting, data collection, or other requirements are burdensome, what templates, automating tools, or extra support could help manage the load?

- Are your data practices aligned with your values and the funder's requirements? If not, what might need to change?

DEI

- If this funder is no longer supporting DEI or is not aligned with the mission and values of your organization, consider creating boilerplate (standardized) language when communicating with this specific funder.

- If you are interested in adjusting, refining, or reaffirming your organizational narrative, this will be covered in more detail in Worksheet 2a: Finding Your Narrative & Message Crafting.

Worksheet 1a

INDIVIDUAL GRANT MITIGATION PLANNING

SYNTHESIZE AND ACT

Use this section of the Mitigation Plan to outline your full strategy for how your organization would respond before and after a funding loss. Describe how you would manage the impact on your organization, staff, and community.

Your response should include two parts:

1. Proactive Strategy (Short-term)
Detail the steps you can take *now (over the next few months)* to prepare for a potential loss of funding and protecting organizational capacity. This may include strengthening organizational resilience or putting proactive systems and practices in place.

2. Reactive Strategy (Immediate response)
Explain what your organization would do *immediately (right when you are aware that funding will be lost)* if the funding were lost. For example: Would you seek new funding sources? End or scale down the program? Reassign staff to other projects? Lay off staff?

Identify the approach that best fits your organization's context and values. Refer to the Worksheet 1c: Risk Mitigation Considerations to help build a well-thought out, strategic, and realistic plan.

Response to Program Funding:
(i.e. plan to keep or secure more funding, funding forecasting, expense management, program security, positions impacted, etc.)

- Proactive Strategy Details:
- Reactive Strategy Details:

Response to Program Operations:
(i.e. plan for staff capacity, meeting grant requirements, staying values- aligned with the funder, community needs, etc.)

- Proactive Strategy Details:
- Reactive Strategy Details:

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

Why this worksheet matters:	This worksheet will support your team in zooming out and looking at the big picture across all of your funding and programs, so you are better able to identify where the risks exist and plan ahead.
What it will help you do:	This assessment can help you notice the staffing, programs, and operations that are most at risk, consider what to do if certain funding is lost, and ultimately help plan short and long-term strategies to reduce your organizational risk and increase resiliency.
Who this worksheet is for:	Executive leadership and board

Once your assesment is scored, mark your risk level here:

{Select Risk Level} Identified Funding Risk Level

{Select Risk Level} Identified Operational Risk Level

If **High Risk, continue to the Mitigation Plan at the very bottom of this page; optional for **Medium Risk** grants.

This worksheet consolidates information from the grants assessed as **Medium** to **High** Funding Risk and **Medium** to **High** Operational Risk. It is designed to identify areas where risks may overlap and compound. It will guide you in outlining mitigation strategies for your higher-risk grants, supporting proactive preparedness and sustainability planning for your team or organization.

As you complete this section, keep in mind:

- *Many high-risk grants are federal.*
- *While state funding may currently feel more stable, it's important to anticipate a potential trickle-down effect from federal funding shifts.*
- *Similarly, philanthropic and private funders may adjust their giving strategies in response to political, social, or economic pressures.*

Even if a funding source is currently categorized as **Medium Risk**, it's worth tracking and revisiting periodically with your team to monitor for any changes that could threaten your organization's stability.

ORGANIZATION INFORMATION

- Fiscal Sponsor (if applicable):
- Total Operating Budget: $
- Total Current Funding Sources (Annual):

Federal	State	Private	Donors	Earned Income	Other	Total
$	$	$	$	$	$	$
%	%	%	%	%	%	%

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

RESTRICTED VS. UNRESTRICTED FUNDING RATIO

Restricted Funding	Unrestricted Funding (Flexible Spending)
%	%

FUNDING RISK IDENTIFICATION

Directions: Use this section to break down your financials into smaller, more manageable pieces. Each part focuses on specific risk factors to help you assess vulnerabilities within your current funding landscape. While we've outlined key areas to review, feel free to add others based on your organization's unique context.

Fill in any notes for each risk point and copy over relevant details from Worksheet 1a or other internal sources to support your analysis.

A. FINANCIAL RISKS:

Potential Risks of Federal and Other High Risk Funding Reductions: What is the impact for your organization if you lose federal funding?

Looking at Worksheet 1a, calculate cumulative amount of total funding that comes from your **High Funding** Risk Grants:

$

Looking at Worksheet 1a, calculate cumulative amount of total funding from your **Medium Funding** Risk Grants:

$

Risk Type	Risk % out of total budget	
Medium	%	**Total % of budget at risk**
High	%	%

Looking at the Funding Risk section from Worksheet 1a, list the programs and initiatives funded by **Medium** to **High Funding** Risk Grants:

1.
2.
3.
4.

Are multiple Medium or High Risk Grants funding the same program or service area?

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

List staff funded by **Medium** or **High Risk** Grants, and how many at-risk grants are they tied to:

Staff Name	Grant Name(s)	Risk(s) Medium or High

Select Risk Level	**What % of team members are listed above?** (depending on staff size over 50% may be **High [3]** and below 10% is **Low [1]**):	
Note other impacts or considerations:		

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

B. CURRENT RESERVE FUNDS:

Does your organization have a cushion or other funding sources if you lose High Risk funding?

Does the organization have a board-approved financial reserve or funding sustainability policy?

☐ Yes ☐ No ☐ In Progress

Select Risk Level	**Calculate the total surplus balance, endowment, or reserve funds** (i.e. 30% or more of your budget may be low risk [1], 10% or lower (less than 2 months) of funding may be high risk [3]):
Select Risk Level	**Calculate the total general operating funds compared to total budget** (i.e. a higher ratio may be lower risk [1] offering more room in the budget to redirect spending; a low ratio may be a high risk [3]): which means you are more reliant on restricted funding):
Select Risk Level	**Calculate the timeline the organization can sustain without (Medium and High risk) federal** ☐ weeks ☐ months ☐ years (more than 12 months [1], less than 3 months [3])
Select Risk Level	**Calculate the timeline the organization can sustain without (Medium and High risk) general funds**: ☐ weeks ☐ months ☐ years (more than 12 months [1], less than 3 months [3])
Select Risk Level	**Assume the likelihood of needing these reserve funds in the next 12 months.** (3 months [3], 12 months or more [1])
Note other impacts or considerations:	
Select Risk Level	**Total Financial Risk Level:** ____ / 18

Low: 1–6
Medium:7–12
High: 13–18

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

ORGANIZATIONAL RISK IDENTIFICATION

Directions: Use this section to break your organizational risks into smaller, more manageable pieces. Each part focuses on specific risk factors to help you assess vulnerabilities within your current funding landscape. While we've outlined key areas to review, feel free to add others based on your organization's unique context.

Fill in any notes for each risk point and copy over relevant details from Worksheet 1a or other internal sources to support your analysis.

ORGANIZATIONAL RISK:

A.) COMPARING ORGANIZATIONAL AND FINANCIAL RISK

Looking at the Program Operations Section in Worksheet 1a, list the programs and initiatives funded by Medium to High Organizational Risk Grants:

1.
2.
3.
4.

Do any of these overlap with the ones listed in your **Financial** risk above?

1.
2.
3.
4.

List staff affected by the **Medium** to **High** Operational Risk Grants:

1.
2.
3.
4.

Select Risk Level	% of team members this makes up (over 50% is **High [3]**, below 10% is **Low [1]**):
Select Risk Level	Do any of the names overlap with the staff listed in your **financial** risk above? 1. 2. 3. 4.
Select Risk Level	Are key grant roles documented and cross-trained in case of staff turnover? (always **[1]**, sometimes **[2]**, never or rarely **[3]**)
Other impacts:	

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

B.) MEASURES, POLICIES, AND REPORTING TO ENSURE ORGANIZATIONAL SAFETY

Select Risk Level	Examine organizational policies and protocols for data security, storage, and ethics (if none exist, then high risk [3]):	
Select Risk Level	Examine organizational grant management and reporting protocols for tracking grants (applied and awarded), spending down, and reporting timelines (if none exist, then high risk [3]):	
Select Risk Level	Are policies (fiscal, HR, data, etc.) reviewed annually or as part of strategic planning? (if no regular review, then high risk [3])	☐ Yes ☐ No
Select Organizational Risk Level	**Total Organizational Risk Level: ____ / 18**	**Low: 1–6** **Medium:7–12** **High: 13–18**

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

MITIGATION PLANNING

Directions: Now that you have completed the Full Financial and Organizational Assessments, consider any additional information that will help you create the best plan of action for your organization, prioritizing both short-term and long-term protocols.This mitigation section encompasses your organization as a whole. Consider strategies for identifying new funding sources, exploring partnership opportunities or resource sharing to reduce financial strain, updating templates or policies, investing in technology that assists in efficacy, and identifying the appropriate roles and capacity of your staff.

Make sure to collaborate and review this section with executive leadership, team leads, and your board to ensure everyone is aligned on the potential outcomes for the entire organization. Prompts from Worksheet 1c: Risk Mitigation Considerations may help guide your team through conversations, ideas, and potential strategies.

If Mitigation Planning feels like a big lift for your team at this time consider reviewing existing policies or creating a guide to facilitate discussions to develop new policies and initiatives with your board and team. Or jump to the section that feels most helpful to you at this time!

What to Expect:

Driving Questions: These questions are provided to help encourage strategic conversations and note initial reactions. This can be a quick brain dump or first take before you design your detailed strategy in Synthesize and Act.

Synthesize and Act: You've answered the hard questions, now choose your next steps with caution and intention, capture what feels most important to invest time and energy into both long-term and short-term. This should be a more detailed and thought-out approach to some of what was touched on in the driving questions with additional considerations.

Proactive Action Plan Template: At the bottom of this document, there is a table where you can track urgent actions you need to take. Feel free to fill in the table as you identify the most immediate strategies from the Synthesize and Act section. Here you will assign roles, responsibilities, and deadlines for the most immediate action items.

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

DRIVING QUESTIONS

Leadership & Decision Making

Questions to Consider

- *Who is involved in major decision-making during a crisis or organizational transitions?*
- *What values or principles guide decisions about keeping, pausing, or ending staff roles, programs, or overall work?*
- *What internal practices are or could be used to help leadership make values-aligned decisions during times of uncertainty? (i.e. reflection sessions, financial dashboards, equity check-in, community forums)*

Notes:

FINANCIAL RISK MITIGATION

Examine other funds that could support or uplift this work.

Funding & Reserves

Questions to Consider

- *What funding sources are most at risk?*
- *What is your plan if your top 1-2 funders pull out or significantly reduce support?*
- *Have you set a funding reserve goal for your organization? Are you near that goal?*

Notes:

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

Funding Stability & Adaptability

Questions to Consider

- *Are there ways to diversify revenue without compromising your values or overextending your team?*
- *What's your process for identifying and pursuing new grant funding opportunities and who in the organization is responsible for that?*
- *What fundraising efforts could be launched or expanded to support your full organization and who is responsible for that? (e.g., individual donors, social enterprise, mission-aligned earned income)*
- *In what scenarios would you pause or stop seeking a particular kind of funding (e.g., restrictive government grants, corporate funding)?*

Notes:

Tip: • *Planning to have 3-6 months of operating expenses in reserves gives some cushion.*
• *To determine how much this would be, divide your total annual operating expenses by 12 and multiply by your reserve goal.*

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

ORGANIZATIONAL RISK MITIGATION

Examine strategies to keep your organization afloat even when funding is reduced and grants may be burdensome.

Staffing Organization & Capacity

(Toolkit 2: Worksheet 2b helps explore team morale and wellbeing.)

Questions to Consider

- *Can you strengthen internal cross-training to increase flexibility in roles across staff?*
- *Are there ways to reorganize job responsibilities for most at-risk staff across your team?*
- *In what scenarios would you reduce hours across the team?*
- *In what scenarios would consider cutting salaries across the team?*
- *In what scenarios do stop compensating or onboarding community leaders or volunteers?*
- *In what scenarios do community needs take precedence over staff employment?*

Notes:

Community Accountability & Capacity

(Toolkit 2: Worksheet 2c helps explore more in-depth your community and collective partnerships.)

Questions to Consider

- *In a funding crisis, how would you communicate transparently with community partners and community?*
- *How do you weigh the organization's survival against continued service to your community? Where do you draw the line?*
- *How might you step into or shift advocacy efforts to uplift emergent organization or community needs?*

Notes:

Grant Tracking & Reporting

Questions to Consider
• *Examine or update organizational grant management and reporting protocols. When were they last updated?* • *Consider making a logic model for your organization that organizes the programs, roles, outcomes, and impact. If you have one, when was it last updated?* • *Consider creating data policies that cover issues of data security, storage, and ethics. If you have this, when was it last updated?*

Notes:

DEI

- If you are interested in adjusting, refining, or reaffirming your organizational narrative, this will be covered in more detail in Worksheet 2a: Finding your Narrative & Message Crafting.

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

SYNTHESIZE AND ACT

You've explored possibilities of your organizational shifts, along with balancing the capacity of your team and your programs. This section should hopefully allow you to summarize what feels most urgent, promising, and grounding; and determine next steps for your team and organization as a whole. Use the section below to write a more detailed plan for each focus area and consider adding any additional priorities specific to your organization.

Your response should include two parts:

1. Proactive Strategy (Long-Term Approach)
Detail the steps you can take over the next 3-6 months to prepare your organization for a resilient future. This may include strengthening organizational sustainability or putting proactive systems, practices, and policies in place. You will focus on creating a long-term strategy where you can start initiating and acting before a crisis hits, or in anticipation of a crisis.

2. Reactive Strategy (Strategic Response)
Outline your organization's anticipated strategy if there is a sudden or confirmed loss of one or more critical funding sources. This is your plan for how the full organization will respond to stabilize operations, support staff, and communicate clearly.

This strategy should include how your leadership team will:

- Assess the scope of the impact across departments, staff, and programs.
- Prioritize essential functions and determine where to scale back.
- Communicate internally with staff and board, and externally with partners and funders.
- Make short-term financial adjustments, such as freezing non-essential spending, tapping reserves, or implementing cost-containment measures.
- Decide whether to pursue rapid fundraising, reallocate existing flexible funds, or prepare for more structural changes.

Use this section to create a realistic, calm, and coordinated organizational response plan that protects your mission and people while buying time for longer-term planning.

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

Funding Strategy & Reserves

Proactive Strategy Details:	Reactive Strategy Details:

Funding Stability & Adaptability

Proactive Strategy Details:	Reactive Strategy Details:

Staffing Organization & Capacity

Proactive Strategy Details:	Reactive Strategy Details:

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

Community Accountability & Advocacy:

Proactive Strategy Details:	Reactive Strategy Details:

Grant Tracking & Reporting:

Proactive Strategy Details:	Reactive Strategy Details:

Other:

Proactive Strategy Details:	Reactive Strategy Details:

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

OPTIONAL PROACTIVE ACTION PLAN TEMPLATE

Directions: Consider the strategies that you can start to implement in the **next 3-6 months**, before you're facing potential challenges, burnout, or funding loss to best protect your organization. For the most urgent strategies, list them below to have a simple reference for tracking progress. In this section, include your follow-up plan and deadline to complete the task. This is more of a quick reference and high-level overview for next steps that might be separate or stem from some of your proactive and reactive strategies. Remember to add task reminders to appropriate calendars for deadlines and future reviews of this document.

Questions to Consider

- *What are clear and actionable takeaways from details completed above?*
- *What is the next or most immediate course of action for your team?*
- *How will you track the impact or success of these strategies for your organization?*
- *What is the feasibility/possibility of the actions you are outlining below? What is the impact of each action item?*

Strategic Activity	Focus Area *select from drop down*	Responsible Parties or Teams	Priority *select from drop down*	Deadline
Example: *Funding freeze of USDA grant and insufficient cash reserves, meaning layoffs of 3 FTE in 3 months - **Strategy** is to communicate layoffs in a timely, transparent and equitable manner*	*Funding & Reserves*	*Leadership team and Team leads/ Supervisors*	*High*	*Funding freeze - 3 months to complete layoffs; notify staff - 2 months remaining; transition period - 4 weeks paid*

Worksheet 1b

FULL ORGANIZATION RISK ASSESSMENT & MITIGATION PLANNING

Strategic Activity	**Focus Area** **select from drop down*	**Responsible Parties or Teams**	**Priority** **select from drop down*	**Deadline**

Metrics for Success

Suggested examples:

- % reduction in federal funding dependence
- % of new funding sources secured
- Improvement in grant tracking & reporting
- Increased representation of diverse voices in reporting (if appropriate)

Accountability Log

- Last Updated:
- Next Review Date:
- Reviewed by:
- Approved by:

Worksheet 1c

RISK MITIGATION CONSIDERATIONS: BUILDING RESILIENCE THROUGH RISK MITIGATION

Worksheet 1a. Individual Grant Risk Assessment: Current or Potential High-Priority Grants
Worksheet 1b. Full Organization Risk Assessment & Mitigation Planning

Why this worksheet matters:	This worksheet offers some ideas on how to get prepared, not just for urgent situations, but also in making your organization stronger and more flexible over time.
What it will help you do:	The intent is to help you identify backup plans for your team and your organization, better understand where you may be stretched too thin, and think through a plan for when unexpected challenges arise.

Directions: Below are considerations to help you navigate the mitigation sections for each grant worksheet and your organization as a whole. These are simply ideas—not a checklist or "right way" to do things. Every organization is different, and this is not meant to be a one-size-fits-all. Use what resonates, skip what doesn't, and adapt the rest to fit your unique context.

Mitigation planning isn't just about avoiding risk—it's about strengthening your foundation, staying aligned with your mission, and identifying opportunities to grow, shift, or protect the work that matters most. Let these considerations guide strategic thinking, deepen reflection, and help you fill any gaps that might exist in your systems or structures.

OPERATIONAL CONSIDERATIONS

- Clarify which programs could be paused, pivoted/ merged, or sunsetted if funding is lost.
- Evaluate flexible staffing options.
- Develop a staffing decision-making flowchart to guide what happens in various scenarios (e.g., emergency leave, layoffs, long vacancies).
- Identify cross-trained team members who could step into key program areas temporarily.
- Document institutional knowledge and program standard operating procedures (SOPs) so others can step in quickly during absences or transitions.
- Conduct a quarterly review of team capacity, burnout risks, and workload distribution—build this into your culture, not just for crises.
- Identify and cultivate a pool of trusted contractors or past employees who could be called in during a staffing shortage.
- Define which roles or programs are most dependent on single individuals and build out plans to reduce that risk.
- Create a "slow-down strategy" to activate during times of organizational stress (e.g., simplify programming, reduce meetings, and only prioritize essential work).

Example Strategy: You have one federal grant from the USDA that completely funds the salary of 3 staff members. However, that grant funding is frozen, and you can't cover the cost of salary without that funding. Based on your current assets and cash flow, you will need to layoff these 3 staff members if the funds remain frozen for 3 months. At the 2-month mark, these staff members will be notified and given 4 paid weeks for their transition. Staff members are notified immediately when the grant is frozen of the specific dates when these decisions will happen. Additionally, you might create a policy stating that if funds are released within 6 months of the layoff, those staff members get the first chance to reapply for the position.

Worksheet 1c

RISK MITIGATION CONSIDERATIONS: BUILDING RESILIENCE THROUGH RISK MITIGATION

FINANCIAL CONSIDERATIONS

- Speak to your allied funders to understand their additional funding or future funding opportunities.
- Speak to **allied funders** about the possibility of reallocating current grants to cover other budget gaps caused by federal funding losses. (Use this toolkit to demonstrate the impact on your programs and organization.)
- Explore mission-aligned financial diversification, including appeals to individual donors, campaigns for new donors, launching an earned-income program (selling services, selling products made by clients, offering paid tours or classes, selling merchandise, and more), investing in stocks, establishing an endowment, and low-interest or no-interest loans. This will take effort and time, and is a long-term strategy. Also, consider consulting a tax expert.
- Invest in a donor and grant management system.
- What **assets**, if liquified, would extend your organization's sustainability?
- Conduct a power-mapping exercise of your funder relationships to identify where there's potential for increased flexibility or partnership.
- Build financial dashboards that make it easy for leadership and community boards to see the organization's financial health at a glance.
- Develop and test a 3-tiered budget scenario plan: full funding, moderate cuts (20–30%), and severe cuts (50%+).
- Talk to allied organizations about shared fundraising efforts (e.g., pooled donor campaigns, co-written proposals, regional partnerships).
- Assess your current **reserve policy**: Is it aligned with your values, board policies, and actual risk? If not, revise it.
- Establish a standing finance or sustainability committee that includes staff, board, and possibly community representatives.

Example Strategy: In the assessment of your funding risk, you realize that you only have 3 months of operating budget. You look through your overhead and assets you own and realize you can extend that time by getting rid of your rented office space, shifting to work from home, and splitting the cost of a Zoom.com subscription with a partner organization.

You also examine diversified funding streams and decide that corporate sponsorship will take too much energy from your leadership because you do not have existing relationships. Instead, you realize that you serve 2,400 people a year who are highly active in your programs. If everyone gave $3/month that would amount to $86,400 a year, which is enough to cover one salary with benefits. You launch a membership campaign on ColoradoGives.org, making it easy for people to give $2, $3, $5, or $10 monthly and ensure there are low-barrier ways for people to give in-person. While some community members don't join, others can give higher amounts.

RISK MITIGATION CONSIDERATIONS: BUILDING RESILIENCE THROUGH RISK MITIGATION

DATA & REPORTING CONSIDERATIONS

- Create a logic model and data structure for all the data you collect across programs and activities. Identify what sensitive data you're willing and able to collect and what sensitive data is too risky and not aligned with your mission and vision. Create language that helps explain this structure to funders (e.g., why you don't collect certain data).
- As your budget allows, invest in data tools and storage that prioritize privacy, security, and encryption. Use Capterra: Find The Right Software & Services for free software brokerage services.
- Create data policies that cover issues of data security, storage, and ethics.
- Hire a team member or contractor, or find a pro-bono volunteer, who is familiar with data security, data governance, data analysis, or evaluation.
- Provide data safety training to your employees.
- Develop community-informed consent language for any sensitive data collection.
- Host regular "data reflection" sessions where staff review what's collected, why, and how it's used, to ensure alignment with values.
- Review who has access to sensitive data, and assess whether permissions and access are aligned with risk and necessity.
- Speak to allied funders about the possibility of changing or altering reporting data or complex deliverables.

Example Strategy: Your team has expressed concern about data privacy and wants to make sure their program participants feel safe when using your services and providing their information. Through conversations with staff and program participants, you realize that the biggest concern is when your food pantry line is in a public place.

You examine the intake form, alongside your program objectives and goals, and realize that you do not need a person's full address or their employment status, so you remove those questions from your form. Your funder requires you to report on demographics, so you create a separate anonymous form to collect required information while also protecting the privacy of individuals. You create a protocol for data collection, such as only using first names in public places. You purchase company devices for all data collection and stop volunteers from use of personal phones for data collection. You train staff on a "Know Your Rights Data Script" so they know what to do if law enforcement arrives and asks about your clientele. Lastly, you implement a data ethics statement so that your community understands more about how you are keeping their safety your top priority.

DEI CONSIDERATIONS

- Maintain a document of boilerplate (standardized) language for the organization's mission, vision, and history as well as descriptions of programs and the community served. Update that document as needed with the most current language you hope to use for specific funders.
- Work with your team to develop external messaging that continues to focus on your impact while maintaining awareness of different audiences and "hot" terms.
- Build a crisis communications plan that includes a DEI lens: How will you respond if challenged on language, partnerships, or programs that center marginalized groups?
- Conduct an internal language audit across programs and proposals to ensure that you are not defaulting to funder-friendly euphemisms that erase your core values.
- Use Worksheet 2a: Finding your Narrative & Message Crafting, and 2b: Sustaining Team Morale & Wellbeing to ensure that your organization stays aligned with its original purpose and values and so that your team and community still are aligned with your vision.

Example Strategy: You know that your organization's power and impact come mostly from the work you do around racial equity and gender equity, but a grant you get from your city government is connected to federal funds and cannot include terms like equity, BIPOC, or LGBTQ+. You use Worksheet 2a: Finding your Narrative & Message Crafting to create descriptions of these programs that avoid banned terms.

You also decide now is the right time to create a boilerplate document that contains standard and common grant language so you don't have to rewrite your mission, background, and purpose every time. In this document, you include the program description for various types of funders so that you can quickly choose the right description for the right audience. This ensures that there is less of a lift on your team's capacity, and you don't have to recraft your message everytime you seek funding.

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