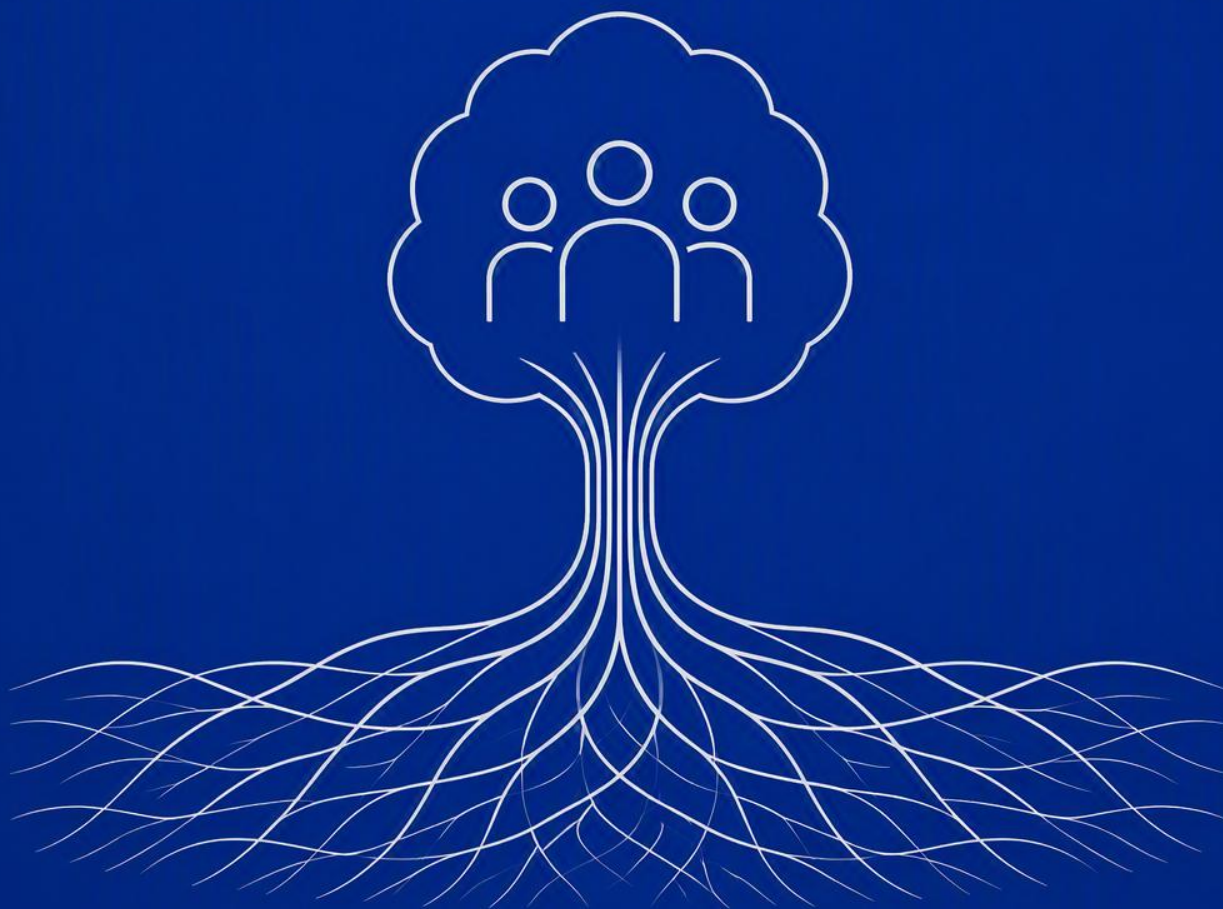




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Organizational Resilience Guidelines for Civil Society Organizations



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Author: Ivana Ivanová

Translation: Veronika Zimová

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Contents

1	How to Use This Guide.....	5
2	A Healthy Organization	6
2.1	Four Elements That Must Work Together.....	6
2.2	Clear Roles and Responsibilities	7
2.3	Practical Example	7
2.4	Governance: Management, Oversight, and Allocation of Powers.....	8
3	Planning: From Vision to Day-to-Day Work	10
3.1	Strategic Planning Without Unnecessary Bureaucracy.....	10
3.2	From Annual Plan to Specific Tasks	10
3.3	How to Plan in Uncertainty.....	11
4	Meetings and Internal Coordination	11
4.1	The Need for Meetings	11
4.2	How to Lead Effective Meetings	12
4.3	Frequency of Meetings	13
5	Evaluation and Learning	13
5.1	An Organization That Learns From Experience	13
5.2	Quantitative vs. Qualitative Criteria	13
5.3	From Evaluation Back to Planning.....	14
6	Risks, Crisis Scenarios, and Organizational Continuity	15
6.1	Why Prepare for a Crisis Before It Happens	15
6.2	Basic Organizational Risk Map	15
6.3	Risk Scenario Examples	16
6.4	A Simple Contingency Plan.....	16
6.5	Ten Rules for a Crisis-Ready Organization	17

Organizational Resilience Guidelines for Civil Society Organizations

7	People, Capabilities, and Healthy Team Functioning	18
7.1	An Organization's Capacity Is Not Infinite	18
7.2	Substitutability and Knowledge Transfer.....	18
7.3	Feedback and Difficult Conversations.....	18
7.4	Sustaining People.....	19
8	Finance and Organizational Sustainability	19
8.1	The Budget as a Management Tool.....	19
8.2	Dependence on a Single Source.....	20
8.3	Decision-Making During Times of Shortage.....	20
9	A Practical Organizational Cycle.....	21
9.1	Five Questions for Leadership	21
9.2	A Brief Organizational Health Check	22
10	Resources Used.....	23
11	Appendix 1: Risk Assessment.....	24
12	Appendix 2: Crisis Card.....	27

1 How to Use This Guide

Civil society organizations are often established because a group of people wants to bring about change: to protect rights, help the community, provide services, advocate the public interest, or address an unresolved problem. In their early years, therefore, they devote most of their energy to programs and projects. Organizational issues are addressed on the side, often only when something that had previously been held together by the personal commitment of a few people stops working.

Organizational development is an ongoing effort to improve how an organization functions as a whole. It encompasses its direction, decision-making, people, finances, processes, culture, learning, and ability to manage a setback or crisis. It is not a one-time “cleanup” of the organization. A good organization is not one that has the most processes and guidelines, but one that knows where it is headed, who is responsible for what, what it is capable of, how it makes decisions, and what it will do when conditions change.

A SIMPLE RULE: Every tool should be as simple as possible and as formal as the organization needs it to be. For a small team of five, a one-page plan and a brief record of decisions may suffice. As the number of people, projects, partners, finances, or legal obligations grows, so does the need for clearer rules.

This guide is intended primarily for the leadership, team members, and governing bodies of civil society organizations. It can also be used for mentoring, organizational assessment, or change planning. You do not have to read it all at once. If your organization is currently dealing with overload, start with the chapter on people and capacity. If it has lost a donor, look at finances and crisis scenarios. If decision-making is concentrated in the hands of a single person, start with roles, governance, and accountability.

This handbook is based on an international nonprofit context. Terms such as “board”, “board of directors”, “executive committee”, and “statutory representative” do not have the same legal meaning in every country. General principles of governance must therefore always be adapted to an organization’s legal form and jurisdiction. The same applies to labor law, accounting, data protection, obligations toward donors, and other regulated areas.

2 A Healthy Organization

2.1 Four Elements That Must Work Together

Even an organization with a strong mission may not be sustainable in the long term. Despite a track record of successful projects, the team may not have the capacity to take on another grant. Sufficient funding does not guarantee a good division of roles and clear decision-making.

An organization's health does not come from optimizing a single area but from continuously balancing four questions:

1. What do we want to achieve? (mission)
2. Who can do it? (people)
3. How will we pay for it? (funding)
4. How will we work together? (work methods)

Area	Practical Question	Warning Sign
Mission and direction	Do we know what change we want to bring about and what is not our priority today?	Do we take on projects mainly because they are funded?
People and capacity	Do we have the time, expertise, and flexibility to address our priorities?	For a long time, it has been the same people putting out fires in the organization.
Money	Do we know the actual costs and cash-flow trends?	The project looks good from a financial standpoint but the organization has no funds for co-funding.
Work process	Is it clear who makes decisions, how we coordinate, and what we document?	Decisions remain in chat rooms or in one person's head.

When deciding on a new activity, it is not enough to ask: Does this fit our mission? You also need to ask: Do we have the people for it? Do we have the money, including overhead costs? What will we have to give up to make it happen? And what new risks or dependencies could it create?

2.2 Clear Roles and Responsibilities

An organizational chart alone will not resolve unclear operations. It is a tool to help define and communicate within the organization who bears responsibility, who has the authority to make decisions, and who must be informed or consulted when a decision is made.

In a small team, it is quite common for one person to hold multiple roles.

For each key area (such as projects, people, finances, fundraising, communications, security, IT, and contracts), it is a good idea to designate a primary person in charge as well as (ideally) a deputy.

Make a special note of activities that currently can only be performed by one person, such as accessing the bank, signing contracts; communicating with the main donor; and managing the website domain, accounting, system passwords, or key contacts. For each of these items, consider whether this is intentional (you want it to be this way) or whether it poses risks and needs to be changed.

PRACTICAL ROLE TEST: Select five decisions from the past month. Could two different team members independently identify who had the authority to make them? If not, the problem may not lie with the people, but with the decision-making structure.

2.3 Practical Example

A simple matrix of decision-making authority is often more useful than the general statement that “we decide together.” The following example is not a universal model—an organization must adapt it according to its legal form, bylaws, and size, and to the nature of its risks.

Decision	Prepared by	Decides/Approves	Informed/Consulted
Annual work plan	Management + team	Executive management according to mandate	The board receives an overview
Annual budget	Director + finance	Board/relevant body in accordance with the rules	Project managers
New grant with standard risk	Program + fundraising	Director/designated person	Finance and the relevant team
New grant that changes the strategic direction	Leadership	Board + management by competency	Team

Hiring or termination of employment	Immediate supervisor + management	Authorized person in accordance with the law and internal rules	Relevant team
Conflict of interest involving a director	Board/independent person	Board or the relevant authority	In accordance with the internal rules
Activation of crisis mode	Designated member of management	Pre-determined crisis mandate	Board, team, and others as the situation requires

During a crisis, decision-making may be temporarily streamlined, but it should still be regulated. It is necessary to determine in advance which powers may be delegated in an emergency, for how long, and how decisions made under delegated authority will be recorded retrospectively and subject to review. Some powers vested in management or statutory bodies may not be delegable under applicable local law.

2.4 Governance: Management, Oversight, and Allocation of Powers

Organizations can have very different models of management and division of powers and responsibilities. In some cases, a board of directors oversees the executive director. Some organizations have a supervisory board; in others, the executive director's role is divided among several people. There is no single organizational structure that every civil society organization should replicate. Furthermore, the names of governing bodies and their powers vary by country and legal form.

More important than the name of a body is the principle of **checks and balances**. Significant power, control, and information should not be concentrated exclusively in the hands of a single person. An organization needs people who are close enough to understand it, yet maintain a certain distance from day-to-day operations. They are able to view the organization as a whole, ask uncomfortable questions, and draw attention to problems.

A SIMPLE TEST: If a director has a serious conflict of interest, the organization faces financial problems, or the director's performance needs to be evaluated, is there someone who has the information, legitimacy, and authority to resolve the situation?

Organizational Resilience Guidelines for Civil Society Organizations

Examples of leadership and oversight:

Model/Element	Possible Structure	Typical Role
Board of directors	A group of people who are not involved in the day-to-day management of the organization. Members may contribute expertise, contacts, community perspectives, or long-term organizational memory.	Strategic direction, oversight of finances and risks, monitoring of mission fulfillment, support for and oversight of executive leadership.
Supervisory board	An independent body separate from executive management; its exact structure depends on the legal system and the organization's bylaws.	More independent oversight of selected areas, such as financial management, compliance with regulations, or the conduct of management.
Executive committee	A smaller group with delegated authority. It may be part of the board or serve a different function depending on the organizational model.	It allows for addressing specific issues between meetings of the broader body or for sharing part of the management responsibility. It should not automatically replace the entire board.
Shared leadership	Two or more people share the top executive role—for example, co-directors or collective leadership.	Division of responsibilities, workload, and decision-making. This requires very clear boundaries of authority and a mechanism for resolving disagreements.
Advisory body	External experts, community representatives, former members, or partners without formal management authority.	Expert insight, contacts, feedback, or representation.

Even the composition of these bodies does not follow a single universal model. They may include external individuals who bring a more independent perspective and expertise, as well as people closely connected to the organization or the community affected by its work. The method of selection is often determined by the bylaws—members may be elected by the membership, appointed, co-opted, or selected in some other way.

Similarly, there is no universal rule that membership must be unpaid. Positions may be volunteer roles, partially compensated roles, or even paid positions. The appropriateness and legality of compensation depend on the context and jurisdiction.

For a smaller organization, creating additional bodies and committees may not be a good solution. Not every organization needs these bodies in the same number or size. It is important that there be an appropriate

counterbalance to day-to-day executive management and that it be clear who has the right to ask management questions, access necessary information, review major decisions, and intervene if the organization is heading toward a serious problem. As the organization budget, number of employees, and risks grow, so does the need for a more formal division of these roles.

3 Planning: From Vision to Day-to-Day Work

3.1 Strategic Planning Without Unnecessary Bureaucracy

A strategy is meant to help with decision-making. If an organization only refers to it when writing its annual report, it is likely not fulfilling its purpose. A useful strategy defines the change the organization is striving for, several priorities, the assumptions on which the plan is based, and boundaries (what the organization will consciously avoid doing).

For a smaller organization, a time horizon of two to three years and two to four main priorities may be sufficient. A longer document is not automatically better. What is more important is that the priorities have an owner, allocated resources, progress metrics, and a regular review schedule.

1. Start with your mission and the change you want to achieve, not with a list of existing projects.
2. Look at the environment: what is changing among communities you work with, donors, partners, competitors, the government, or in the security situation?
3. Select a small number of priorities. Each new priority creates additional demand on organizational capacity.
4. For each priority, define what progress will look like and what conditions must be met.
5. Identify what you will not do or what you will stop doing.
6. Link the priorities to people, the budget, and the annual plan.
7. Set a deadline for reviewing the strategy and the conditions under which you will revisit it sooner.

3.2 From Annual Plan to Specific Tasks

The annual plan is the bridge between strategy and the calendar. For each priority, it should outline the key results or milestones to be achieved, the person responsible, the deadline, the required capacity, and the budget. If the

plan contains only activities, the organization may remain busy without knowing whether it is moving closer to its goals.

Priority	Goal at End of Planning Period?	Who Is in Charge?	Capacity/Budget	Next Milestone
Example: Strengthen the regional network	Three active regional groups are operating	Program manager	0.4 FTE staff + travel expenses	Agreement with local partners by March 31

When planning, treat capacity as a realistic limit, not a wish. If a person's working time is already fully allocated to projects, a new task will not fit into the plan simply by adding it to the spreadsheet.

3.3 How to Plan in Uncertainty

A plan is a working hypothesis about the future. The more uncertain the environment, the less useful it is to pretend that it is possible to be precise three years in advance, and the more important it is to regularly review the assumptions underlying the plan. Scenario-based thinking does not attempt to predict a single future based on incomplete information and changing conditions. Instead, it explores multiple plausible futures and prepares the organization for the decisions it may need to make if any of them materialize. It is a tool for preparing for uncertainty and unexpected change. In practice, during your quarterly review, you can categorize your priorities as follows:

- A: Must maintain.
- B: Important, but we can slow down.
- C: Can be postponed or stopped.

This is not a permanent order of importance, but a decision-making tool for situations where resources or conditions change.

4 Meetings and Internal Coordination

4.1 The Need for Meetings

Just as with management models, there is no single correct or universal answer for every organization when it comes to meetings. There are many types of meetings, requiring varying durations, frequencies, and levels of

participation from other team members. Meetings are a tool and are particularly useful when a group needs to make a decision, resolve an issue, plan, or align their efforts. One-way information that does not require discussion is often better communicated in writing.

Examples of meetings by purpose:

Type	Objective	Output
Informational	A shared understanding of an important change	Clear information and questions
Decision-making	Choose an option or confirm a direction	Decision + owner of the next step
Planning	Align tasks, capacities, and deadlines	Updated plan
Reflection/debrief	Learn from experience	2–3 specific changes for the future

Before sending out the invitation, ask yourself: “What should be different after this meeting?” If you cannot answer that question, the meeting probably does not have a clear purpose yet.

4.2 How to Lead Effective Meetings

Basic steps for a more effective meeting:

- **Agenda in Advance:** For each item, specify whether it involves information, discussion, or decision-making.
- **The Right People:** Invite only those who are necessary for the specific purpose. Having the entire team attend is not a sign of transparency, but of inefficiency.
- **Facilitation:** A designated person should be responsible for guiding the team through the meeting, monitoring the agenda and time, and creating space for everyone to speak.
 - Facilitation of the meeting should not be concentrated in the hands of the person with the greatest decision-making authority—responsibility for the process (leading the meeting) and responsibility for the content (contributing to the discussion, answering questions, formulating opinions) are distinct matters.
- **Conclusions:** At the end, there should be clear decisions and tasks in the form of who—what—by when.
- **Minutes:** There should be a record of the decisions, responsibilities, deadlines, and, if applicable, the reasons behind major decisions.
 - The minutes are not, and should not be a transcript of the discussion.

4.3 Frequency of Meetings

An organization should establish a rhythm in which the team reviews its work from different perspectives and at different intervals, such as a weekly/biweekly check-in (to address coordination), a monthly review (which can align tasks, capacity, and finances), a quarterly review (revisiting priorities, results, and risks), and an annual reflection (linking strategy, budget, team, and governance).

Rhythm is not meant to fill up the calendar. If the same information is repeated at three meetings, if leadership holds multiple meetings with the same purpose, or if the team lacks uninterrupted time to work, coordination begins to consume the capacity it was meant to protect.

5 Evaluation and Learning

5.1 An Organization That Learns From Experience

Learning is how an organization transforms experience into better decisions. Without reflection, the same mistakes are repeated, know-how remains with individuals, and the departure of a team member can mean the loss of a large part of the organization's memory.

After a significant activity, take time to reflect. What did we want to achieve? What actually happened? Why was there a difference? What will we keep or change next time? For a smaller activity, such a debrief may take a few minutes; for a demanding project, it may require a separate meeting and data.

Reflection should not take place immediately after the activity (give yourself time to rest and gain some perspective), but it should not be postponed for too long either (so that the details are still fresh in your memory). Do not confuse evaluation with criticism. Focusing on what went well and what you want to repeat next time is just as important as addressing what did not go so well and what needs to be done differently next time.

5.2 Quantitative vs. Qualitative Criteria

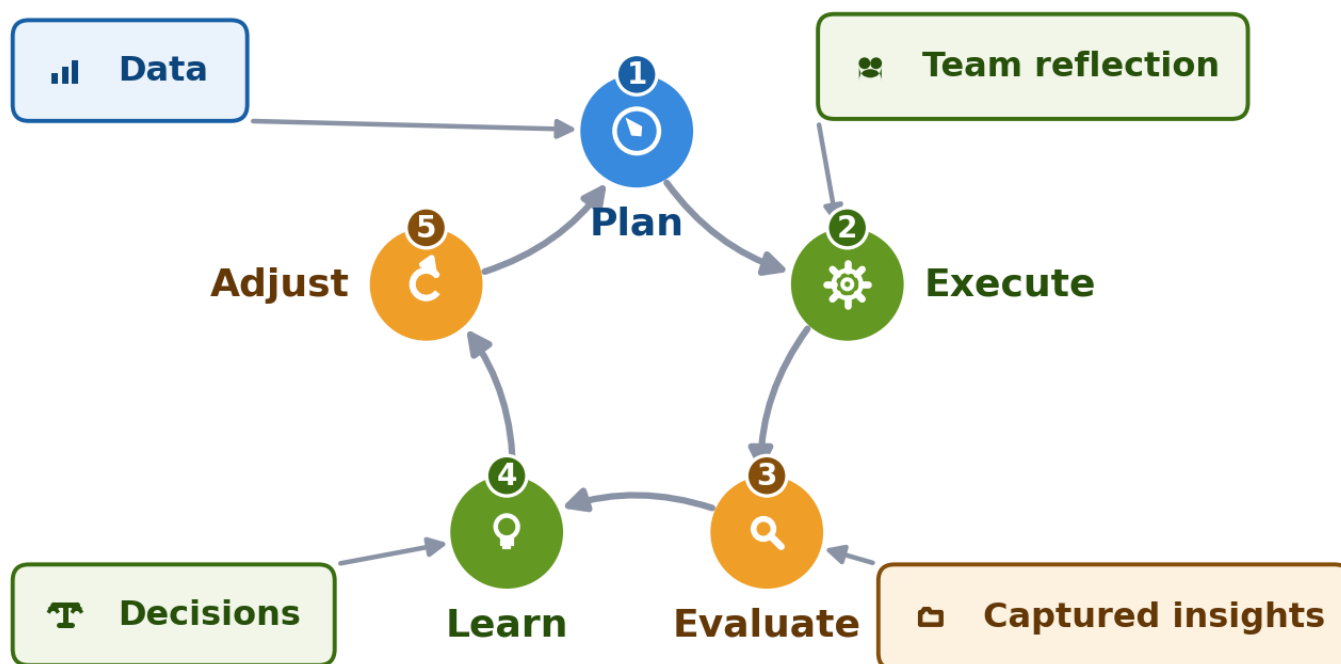
Evaluation should not be limited to the number of participants or completed activities. Distinguish between what the organization did, what immediate results it produced, and what change it brought about. At the same time, it

is also a good idea to evaluate how the project was carried out, how much capacity the activity consumed, what was unreasonably demanding, where risks arose, or what we would not do the same way again.

Question	Example
Result	Did we achieve the participation or change we planned?
Quality	How did the people for whom the activity was intended evaluate it?
Costs and capacity	Was the result commensurate with the time, money, and workload of the team?
Process	Where did delays, conflicts, or ambiguities arise?
Lessons learned	What one to three decisions can be drawn from this for the next cycle?

5.3 From Evaluation Back to Planning

An evaluation is only valuable if it influences future decisions. For every important lesson learned, ask yourself: What will we change? Who will do it? And when will we check to see if it is been implemented? This creates a simple cycle:



6 Risks, Crisis Scenarios, and Organizational Continuity

6.1 Why Prepare for a Crisis Before It Happens

In crisis planning, it is not possible (nor is it the goal) to predict everything that might happen. However, it is recommended to prepare for situations where there will be less time, less information, or fewer people available to make decisions. The goal is to know which organizational functions are critical, who can take action, where information is located, and what minimum operations must remain functional.

Start with the question: “What must the organization be able to do even during a bad week?” For one organization, this might be maintaining secure contact with clients; for another, payroll and access to the bank; for yet another, public communications or the protection of sensitive data. Business continuity does not mean continuing everything. It means knowing what to keep running first.

6.2 Basic Organizational Risk Map

A simple risk assessment often combines probability and impact. Such a matrix is useful for prioritization. The estimate is always based on judgment and may change. It is important to use consistent definitions, document the reasons for the assessment, and reassess the risk after implementing measures.

Pay particular attention to financial, personnel, legal/regulatory, reputational, security, technological, and program risks. For each significant risk, designate an owner (a person or body responsible for monitoring indicators and initiating a response).

Risk	Probability	Impact	Existing Measures	Next Step	Owner
Loss of a major donor	Possible	Serious	Monthly cash-flow statement	Prepare 20% and 40% decline scenarios	Director + board
Loss of a key person	Possible	Serious	Shared documents	Add delegation and access rights	Management

6.3 Risk Scenario Examples

Every organization may face different risk scenarios. Common ones include:

- The main donor stops its funding or a payment is significantly delayed.
- The director or another key person suddenly becomes unavailable.
- The organization must quickly reduce its staff or scale back its program.
- A serious conflict arises or the team falls apart.
- The organization or its staff faces a smear, hate, or intimidation campaign.
- A legal or regulatory problem arises.
- The organization loses its office, equipment, data, or access to a critical system.
- It is impossible to carry out a key project or safely provide a service.
- An external political, military, public health, or social crisis fundamentally changes working conditions.

Not every organization needs a plan for every scenario. Priority should be given to events with high impact, high probability, or those where improvisation would be extremely dangerous.

6.4 A Simple Contingency Plan

A contingency plan (a plan for unforeseen or crisis situations) is a pre-prepared procedure that helps an organization continue its most critical activities or safely scale back operations when a serious outage or crisis occurs. It does not include every possible detail. Its purpose is to agree in advance on the most important decisions, responsibilities, and alternative procedures so that the organization does not have to come up with them under time pressure. It should include:

- **Trigger:** How will we know when to activate the plan?
- **Decision:** Who can activate the plan, and who serves as their alternate?
- **Crisis Team:** Who needs to be involved in decision-making, and what are their points of contact?
- **People:** Who needs to be protected, contacted, or relocated, and what are our obligations toward them?
- **Communication:** Who communicates internally, with the community, donors, partners, and the media?
- **Data and Systems:** Which access rights, backups, and information are critical?
- **Finances:** Which payments must continue, and who has authorization?

- **Alternative Operating Mode:** What will we suspend, what will we shift, and what must continue?
- **Return:** Who will decide when to return to normal operations, and what will we evaluate after the crisis?

WHAT IF TOMORROW NEVER COMES?: One of the quickest ways to test resilience is to imagine that, tomorrow, the director, fundraiser, accountant, IT support, major donor, office, bank account, or key partner is unavailable. For each item, ask: What will come to a halt within 24 hours? What within a week? Who has the necessary access and information? Who can make decisions? This exercise can reveal single points of failure—situations where a single person, system, or relationship is responsible for a critical function with no backup.

6.5 Ten Rules for a Crisis-Ready Organization

1. **Do not predict a single future.** Stick to your mission but test your assumptions and work with scenarios.
2. **Know your most serious risks.** Not all risks deserve the same attention. Start with the impact on people and the ability to fulfill the mission.
3. **Determine who makes decisions.** A crisis will expose unclear responsibilities faster than normal operations. Ensure that alternates are identified in advance.
4. **Protect critical activities.** Know in advance what must continue and what can be temporarily halted.
5. **Reduce dependence on individuals.** Access, contacts, banking authorizations, and know-how must be replaceable.
6. **Communicate confirmed facts.** Saying “We do not know yet” is better than confidently spreading incorrect information.
7. **Monitor cash and decision points.** A budget alone is not enough. Have a cash-flow forecast, scenarios, and rules for reserves.
8. **Create space for dissent.** Under pressure, you need someone who can point out blind spots without fear of punishment.
9. **Practice.** A simple tabletop exercise once or twice a year can reveal a broken line of communication, missing authorization, or an unclear role.
10. **Change the system after the crisis.** The review should result in a few specific adjustments, not just a statement stating “We made it through.”

7 People, Capabilities, and Healthy Team Functioning

7.1 An Organization's Capacity Is Not Infinite

In the nonprofit sector, it is easy to confuse the urgency of a mission with the seemingly limitless capacity of people. A new grant, campaign, or crisis may be important, yet it may not fit into the organization's existing workload. Capacity planning, therefore, should be viewed not as an administrative hurdle but as a way to safeguard the quality of the program, the people, and the organization's reputation.

When a new opportunity arises, ask not only "Do we have the staff for this?" but also "How much time will this realistically take, including administration, reporting, and coordination? Which existing commitments will be postponed as a result? Do we need new expertise? Is the funding sufficient to cover all costs? What will happen when the grant ends?"

DECIDING ON A NEW OPPORTUNITY: If an organization cannot specify what it will postpone, scale back, or stop doing because of a new priority, it is often not a matter of prioritization but of adding more work.

7.2 Substitutability and Knowledge Transfer

Substitutability does not mean that everyone has to know how to do everything. It means that a critical activity will not be left unfinished simply because a single person gets sick, leaves, or is unavailable. For every critical role, therefore, designate at least one substitute, a location for documentation, the necessary access credentials and contacts, and a brief procedure for emergency handover.

Onboarding and offboarding are two sides of the same process. When someone joins the team, they should receive not only tasks but also context (mission, priorities, decision-making rules, key relationships, and work culture). When someone leaves, they must hand over work in progress, deadlines, documents, contacts, and access permissions, while also securely revoking any permissions that should no longer remain active.

7.3 Feedback and Difficult Conversations

Feedback works better as a regular part of the job than as a once-a-year event. Short one-on-one meetings can serve to check in on priorities, capacity, obstacles, collaboration, and development. When a problem arises, addressing it early is usually less costly than waiting until an unclear expectation turns into a conflict.

A performance review, held once or twice a year, provides an opportunity to look at the longer term and address topics that can easily get lost in day-to-day operations during regular one-on-one meetings. It allows to jointly evaluate an individual's results and performance in their role, identify strengths and areas for development, discuss the way forward, and at the same time verify whether that the expectation of that individual and the organization are still aligned. It is also an opportunity for managers not only to give feedback but also to receive it.

During a challenging conversation, separate observation from interpretation. Identify specific behavior or outcomes, their impact, and expectations for the future. Give the other party an opportunity to add information. If the issue involves an employment or disciplinary matter, the process must comply with local law and the organization's internal policies.

7.4 Sustaining People

Burnout is an occupational phenomenon resulting from chronic workplace stress that has not been successfully managed. Prevention cannot rely solely on individual resilience. It also requires attention to workload, control over work, working hours, support, communication, and work organization.

Crisis mode may sometimes be unavoidable. However, it must not become the standard operating model. After a period of exceptional strain, it is essential to consciously slow down, reassess priorities, and create space for recovery. Vacation will not help if a person returns to the same workload and constant availability.

8 Finance and Organizational Sustainability

8.1 The Budget as a Management Tool

Accounting tells us what has happened financially; financial management also needs to anticipate what is likely to happen. Management therefore needs a regular overview of actual performance against the plan, cash flow, and obligations coming due over the next few months. The level of detail in the budget and the frequency of updates should depend on the size and financial stability of the organization. When liquidity is tight, more frequent monitoring is needed than when the organization has stable, multi-year funding.

Organizational Resilience Guidelines for Civil Society Organizations

A project budget is not the same as an organization's overall finances. An organization also needs to cover overhead costs (management, accounting, fundraising, IT, office space, insurance, auditing, security, and time for learning and development). If grants do not systematically cover a reasonable share of these costs, an increase in the number of projects can, paradoxically, undermine financial stability.

Monthly Financial Overview	Question
Cash flow	Do we have enough cash to cover our obligations over the next 3–6 months?
Plan vs. actual	Where do revenues or expenses deviate significantly?
Receivables and grant payments	Which expected funds are delayed or uncertain?
Shared costs	Are they covered or are we subsidizing them from limited resources?
Crisis scenarios	What will happen if a significant source of income does not arrive on time?

8.2 Dependence on a Single Source

Diversifying funding can reduce dependence on a single donor or type of source, but it comes at a cost. More sources can mean more fundraising, reporting, differing rules, and administrative work. The goal, therefore, is not to have as many donors as possible, but to understand the concentration of funding risk and manage it consciously.

Funding that is not tied exclusively to a specific project or precisely defined activities gives an organization greater flexibility. It can be used, for example, to cover management, administrative, and team development costs, as well as the preparation of new activities, and to respond more easily to unexpected changes. A financial reserve can serve a similar purpose. It gives the organization time to make decisions and can help bridge the gap between projects or during a revenue shortfall. The appropriate amount depends on the organization's funding model, the stability of its revenue, and the conditions set by individual donors.

8.3 Decision-Making During Times of Shortage

If revenue declines, the first step should not be to make across-the-board cuts to everything. First, identify critical functions and obligations (people's safety, legal and contractual obligations, salaries, and key services). Then determine what can be postponed, scaled back, reorganized, or discontinued.

Organizational Resilience Guidelines for Civil Society Organizations

Prepare at least two scenarios—for example, a moderate and a significant decline in revenue—before an emergency arises. For each scenario, identify the trigger, the decisions that will need to be made, and who can make them.

Transparent communication with the team does not mean reporting every uncertain signal. However, it is important not to conceal significant risks and to explain the decision-making process.

9 A Practical Organizational Cycle

The individual components of organizational development (chapters) are interconnected. A strategy without a budget is just a wish. A budget without capacity planning can overload the team. Clear roles without accountability create fragility. Evaluation without a follow-up decision does not lead to learning. The organizational cycle therefore brings together direction, work, people, finances, and risk management in a regular cycle of planning, implementation, and review.

Frequency	What to Look For	Typical Output
Week	Priorities, obstacles, coordination, urgent changes	Clear tasks and decisions
Month	Plan, capacity, cash flow, key deadlines	Plan adjustments and work distribution
Quarter	Strategic priorities, results, risks, fundraising	Decision to continue/adjust/stop
Year	Strategy, budget, team, governance, organizational health	Annual priorities and budget; areas for improvement

9.1 Five Questions for Leadership

1. Are we still doing the right things given our mission and the changing environment?
2. Do we have the right people, time, and money to do them?
3. What has changed around us, and which assumptions in our crisis plan are no longer valid?
4. What is our biggest threat right now, and where is our single point of failure?
5. What have we learned, and what specific changes will we make based on that?

If leadership and the board can regularly raise these questions and turn the answers into decisions, the organization does not need dozens of parallel management systems. It needs enough discipline to revisit important questions before a crisis forces them to the surface.

9.2 A Brief Organizational Health Check

The following questions are not a validated assessment tool. They provide a practical framework for a semi-annual or annual discussion between management and the board. For each area, rather than assigning a grade, note what is working, what is vulnerable, and what single decision follows.

- **Strategic Direction:** Can we identify two to four priorities, and also what is not currently a priority? Are projects adjusted based on strategy, or does strategy change based on available grants?
- **Decision-Making:** For important types of decisions, is it clear who makes the decision, who must be consulted, and who bears ultimate responsibility? Does the board function as a supervisory and steering body, rather than as a parallel management team?
- **People:** Does the number of commitments match our actual capacity? Are people in critical roles replaceable, and can we safely hand over work when someone leaves?
- **Finances:** Does management have an up-to-date view of cash flow, shared organizational costs, and revenue sources? Do we know what to do in the event of a significant shortfall?
- **Processes and Information:** Are critical procedures, contacts, contracts, and access rights stored in a way that does not rely on a single person? Do we document decisions to an appropriate extent?
- **Learning:** Do our evaluations actually influence future plans? Can we name at least one recent decision that was made based on reflection or data?
- **Risks and Continuity:** Do we know our three to five most significant risks? Does each risk have an owner, and do we know who takes over decision-making if a key person is unavailable?
- **Relationships and Trust:** Do we have effective feedback mechanisms from the team, communities, partners, and other stakeholders? Can we resolve conflicts of interest and sensitive complaints without relying on a single person?

After the discussion, select up to three areas to focus on for the coming period. If a health check results in a list of many organizational projects, it has likely failed in its prioritization. Organizational development is meant to free up capacity for the mission, not to create a new parallel program of work.

10 Resources Used

The following resources serve as professional references and further reading. For legal/regulatory issues, it is always necessary to verify the current rules in the specific country.

- BoardSource. *Board Member Roles and Responsibilities; Board Chair and Chief Executive Responsibilities*. Practical frameworks for the division of governance and management roles in nonprofit organizations. <https://boardsource.org/fundamental-topics-of-nonprofit-board-service/roles-responsibilities/>
- OECD (2021). *Global Scenarios 2035*. An example of using scenarios and strategic foresight in conditions of high uncertainty. https://www.oecd.org/en/publications/global-scenarios-2035_df7ebc33-en.html
- World Health Organization. *Burnout: An Occupational Phenomenon (ICD-11)*. Definition of burnout as an occupational phenomenon related to chronic workplace stress. https://www.who.int/standards/classifications/frequently-asked-questions/burn-out-an-occupational-phenomenon?utm_source=chatgpt.com
- World Health Organization. *Psychosocial Risks and Mental Health*. An overview of organizational factors contributing to work-related stress and preventive interventions. https://www.who.int/news-room/fact-sheets/detail/mental-health-at-work?utm_source=chatgpt.com
- ISO 31000: *Risk Management – Guidelines*. General International Framework of Risk Management Principles

11 Appendix 1: Risk Assessment

A practical tool for discussing and prioritizing risks. For each possible crisis situation, estimate its likelihood and impact using the matrix below, determine the risk level, and indicate whether the situation has occurred in the past. Add your own situations relevant to your context.

1. How to use the table

For each possible crisis situation:

- Assess the likelihood of it occurring using the scale 1–5, from rare to almost certain.
- Assess the potential impact using the scale A–E, from negligible to very severe.
- Determine the level of importance attached to the risk (Low, Medium, High or Extreme) based on the likelihood and impact ratings.
- Indicate whether the situation has occurred before in your organization or context (yes/no).
- Add other situations that are relevant to your organization or context, including possible crises that may not be listed here.

A. Possible Crisis Situations

Probability: 1 – rare, 2 – occasional, 3 – possible, 4 – likely, 5 – almost certain.

Impact: A – negligible, B – minor, C – moderate, D – severe, E – very severe.

	Risk assessment			
	Likelihood	Impact	Importance	Has this happened to you before? (yes/no)
EXTERNAL:				
1. A key donor has stopped funding your organization.				
2. War has broken out in a neighboring country or in your own country.				
3. The government has designated your organization as a “foreign agent.”				
4. The state is persecuting you in connection with so-called “LGBTI+ propaganda.”				

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5. The people or communities your organization works with are facing persecution or intimidation by the state.				
6. A colleague of yours has been arrested, and you have no information about what is happening to them.				
7. Your community or the people you work with are facing verbal threats or hate speech from a segment of the public.				
8. Your community or the people you work with are facing physical threats from a segment of the public.				
9. You have lost a safe space for meetings; you suspect that you are being followed or that your mail, phone, premises, or movements are being monitored.				
10. – X. Add your own external or contextual situations.				
INTERNAL:				
1. One of the key people has left the organization.				
2. One of your colleagues has been diagnosed with a terminal illness.				
3. One of the organization's leaders has suddenly passed away.				
4. Due to a lack of resources, you have to lay off some of your colleagues.				
5. You suspect that a colleague, friend, or community member is providing information about you to the authorities.				
6. Someone is trying to discredit you or a colleague by publishing intimate photos or information.				
7. Someone is trying to discredit the organization by publishing confidential information; for				

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example, about funding sources, collaboration with people from other countries, or intimate materials belonging to employees.				
8. – X: Add your own internal situations.				

Importance	Recommended procedure
Low	The activity can proceed as planned. Continue to monitor the situation and review the risk if circumstances change.
Medium	The activity can generally proceed, but the team should increase vigilance and introduce proportionate measures to reduce the risk. The risk should be monitored and reviewed regularly.
High	Do not start or continue the activity until appropriate measures have been identified and implemented to reduce the risk. Once mitigation measures are in place, reassess the risk and obtain approval from the responsible person or body where required.
Extreme	Do not proceed with the activity, or stop it if already underway. Consider alternative approaches and take immediate steps to reduce the risk before the activity can be reconsidered.

B. Worksheet

Situation	Risk Level	What impact would it have on people, the organization's operations, and the community?	What can we prepare in advance?	How can we reduce the risk?

12 Appendix 2: Crisis Card

A single A4 sheet that you can find even under pressure. A comprehensive plan can be useful as a reference, but in an acute situation, the team needs quick guidance. The following “card” is a practical tool that an organization can customize and store where it remains accessible even if regular systems fail.

ACTIVATION

Crisis mode is declared by: _____

Deputy: _____

Triggers: threat to people/major disruption of a critical service/incident exceeding normal competencies/other

FIRST 30 MINUTES

1. Human safety
2. Verify basic facts
3. Activation of the crisis team
4. Securing critical systems and information
5. Determining the time of the next update

CRISIS TEAM

Coordination: _____

People/Security: _____

Finance/Operations: _____

Communications: _____

Program/IT/Legal Expertise as needed: _____

COMMUNICATION

Primary channel: _____

Backup channel: _____

Spokesperson: _____

Approval of external communications: _____

Board contact: _____

CRITICAL ACTIVITIES

Activity 1: _____ Owner: _____ Alternative method: _____

Activity 2: _____ Owner: _____ Alternative method: _____

Activity 3: _____ Owner: _____ Alternative method: _____

EXTERNAL ASSISTANCE

Legal: _____

IT/cybersecurity: _____

Security: _____

Psychosocial support: _____

Insurance: _____

Next: _____

SUMMARY OF THE DECISION

Time: _____

Decision: _____

Based on: _____

Who made the decision: _____

Who will implement it: _____

When will we review this: _____

Review this form after every significant change in roles, contacts, or risks, and after every drill or actual incident.

- Date of last review: _____
- Person responsible: _____



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