

Playbook for Mission Resilience

Prepared for:

Members of

National
Family Planning
& Reproductive Health Association

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Executive Summary

Title X-funded entities like yours are experiencing sustained, disruptive change and operating risks, ranging from funding freezes to threats to organizational security, financial viability, and workforce stability, to name only a few. Many of the risks carry existential implications due to the federal government’s targeting of sexual and reproductive health providers. Yet, in this changing environment, you have an opportunity to rethink your current approaches to work.

One of the biggest risks when confronting sustained, ongoing change is getting stuck in short-term thinking and maintaining a scarcity mindset that limits imagining how sexual and reproductive health (SRH) services could be delivered differently in the future. If instead you can think expansively about pursuing opportunities, you can create significant changes and greater resilience in the SRH ecosystem.

In biology, an ecosystem is a functional, self-sustaining unit comprising a community of living organisms interacting with their non-living, physical surroundings. In the SRH field, the ecosystem can be understood as an interconnected network of organizations, partners, and resources that work collaboratively to address complex challenges. The ecosystem includes nonprofits, funders, government agencies, private sector partners, intermediary support organizations, and community members accessing services.

Why take an ecosystem view? Because no organization operates in isolation, and taking an ecosystem view opens up perspective into overall strengths, gaps, and field resilience.

This playbook outlines options for Title X-funded entities like yours to explore in the coming years. These options aim to create healthier organizations and an overall stronger SRH ecosystem. Some options may be more applicable to your organization than others based on your organizational structure.

Opportunities and options explored are loosely divided into five categories:

- Business model revamp or redesign
- Expanded service reach
- Corporate structure changes
- Administrative consolidation/shared services
- System strategies across geographies

These categories are not distinct; there is no industry standard or universally accepted definitions for each term, and some ideas could fit into multiple categories. The use of categories is meant to support general organization and not limit what is possible.

Each category of opportunities explores the history of this practice within and outside the SRH ecosystem, how to begin pursuing the idea, and possible challenges.

Regardless of the change(s) your organization may pursue, keep in mind that change management requires significant energy and attention. Change management best practices are outlined to support the process of pursuing new opportunities.

The opportunities and recommendations put forth are reflective of discussions with National Family Planning and Reproductive Health Association (NFPRHA) staff and a cohort of five organizations in the Title X network between August 2025 and February 2026. However, this report does not speak for any organization's specific next steps or individual recommendations.

Organizational Change to Create Field Resilience

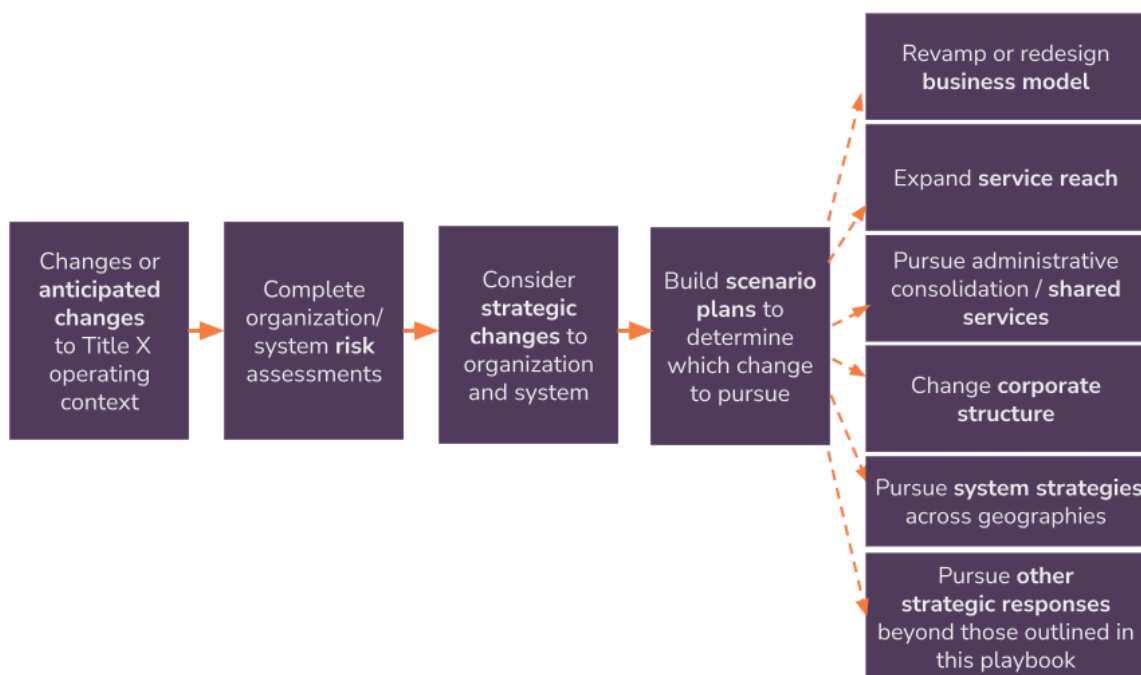
Prompts for Change

As you know, your organization and other Title X-funded entities are experiencing dramatic changes to the SRH operating context. From the unlawful withholding of Title X grants in 2025 to anticipated changes to Title X regulations to provider bans and significant cuts to Medicaid through the FY 2025 budget reconciliation package, there has been a continual assessment of the risks you individually and collectively face.

As a Title X-funded entity faced with these challenges, you have a variety of response options: take action to avoid the risk, take action to reduce or control the risk, or acknowledge the risk and continue to monitor the situation. Use this playbook to identify actions you can take to avoid, reduce, or control risk by changing some portion of your current approach to your work.

While the range of risks and their unpredictability are challenging, the dynamic environment creates opportunities to reimagine stronger organizations and a stronger collective SRH system for all Title X-funded entities.

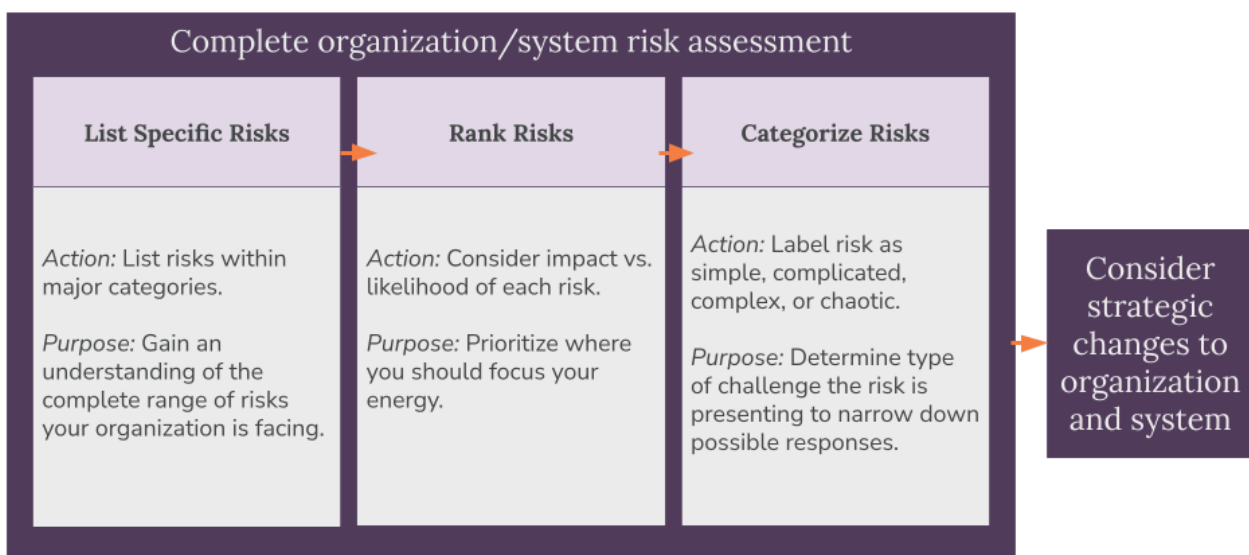
These are by no means the only solutions, and finding the right approach requires that you know the strengths and potential of your own organization.



Graphic describes pathways from operating context changes to a new organizational approach.

Risk Assessment

Risk assessments enable you to articulate and categorize different risks, compare them with your organization’s risk tolerance, and devise immediate, future, or provisional action plans for addressing them. There are three major steps to a risk assessment: list specific risks, rank risks, and categorize risks. By following each step, your organization can move toward strategic changes that reflect your greatest needs and potential impact.



Graphic describes a pathway to complete a risk assessment from listing risks to ranking risks to categorizing risks.

List Specific Risks

Changes to the Title X operating context present risks across five major categories:

Risk Type	Example Risk	Example Impact
Communication and community relations	<ul style="list-style-type: none"> ● Fraud/mismanagement allegations ● Political targeting 	<ul style="list-style-type: none"> ● Loss of community and funder trust
Compliance and tax status	<ul style="list-style-type: none"> ● Failure to comply with federal or state compliance requirements, such as missing an IRS Form 990 filing deadline or a grant report deadline 	<ul style="list-style-type: none"> ● Loss of tax exempt status ● Legal action against organization
Funding	<ul style="list-style-type: none"> ● Frozen or withheld Title X funding 	<ul style="list-style-type: none"> ● Threat to ongoing financial viability ● Increased influence of a subset of funders
Mission and/or Strategy	<ul style="list-style-type: none"> ● Key partners no longer able to implement an interdependent strategy 	<ul style="list-style-type: none"> ● Diminished impact of organization
Operations	<ul style="list-style-type: none"> ● Ransomware/malware attack ● Inability to hire/retain employees 	<ul style="list-style-type: none"> ● Financial loss ● Diminished capacity for work

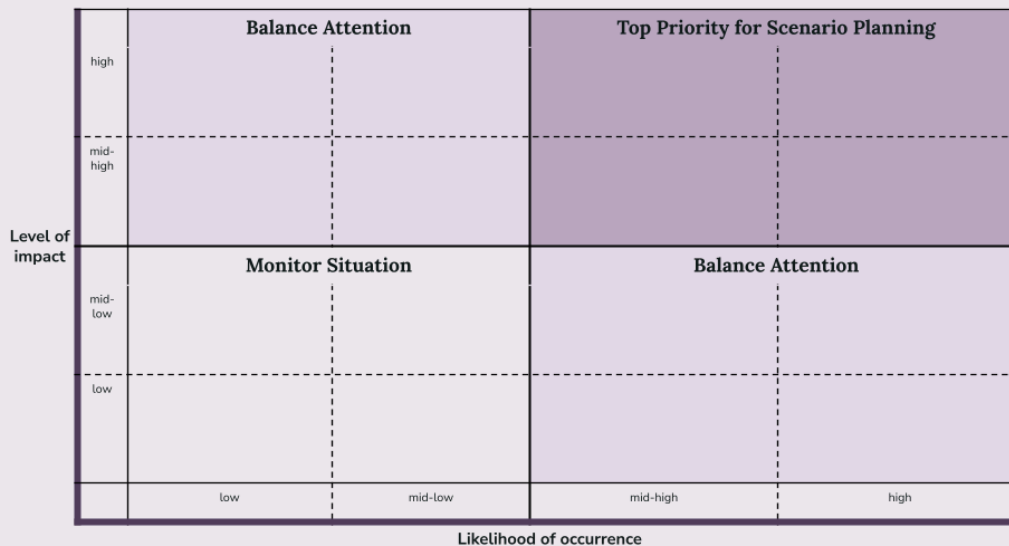
Suggested Action: Have a focused discussion to identify and record the risks you are experiencing, using the five major categories. Putting pen to paper helps narrow your focus.

Rank Risks

At this point, it is likely you have a long list of potential risks. This can elicit feelings of overwhelm or shutdown due to the pure number of possible risks. It can be helpful to consider how you want to prioritize your limited energy and capacity.

To help prioritize, consider the impact vs. likelihood of occurrence for different risks. While some risks may present a potentially huge impact, if their likelihood is very low, you should not designate significant capacity in addressing them. Similarly, if a risk is a low likelihood and low impact, you can deprioritize focusing on it. For risks that are high likelihood and high impact, carry them forward to the next step.

Suggested Action: Map your risks onto the chart below to determine where to prioritize your focus.



Graphic describes a four quadrant graph comparing level of impact to likelihood of occurrence with potential actions including monitoring situation, balancing attention, and top priority for scenario planning.

Categorize Risks

Once you have narrowed down your list of possible risks, it is time to determine what style of response the risk may need. Your path forward depends on the type of risk: simple, complicated, complex, or chaotic.¹

Risk Types ¹	Definition	Title X Example	Path Forward
Simple	You can follow a “recipe” to address the risk (i.e., baking a cake).	Responding to some types of new regulations	Build/maintain capacity to address risk and stay ready.
Complicated	It’s a hard problem requiring expertise to address, but once you have solved it once, you can do it over and over again (i.e., launching a space probe).	Spread of misinformation on sexual and reproductive health	Consider what specific expertise you need to bring in to plan for the risk.
Complex	It is a hard problem, and past experience or levels of expertise will not necessarily help you this time (i.e., raising a child).	Public funding cuts	Determine what questions you need to ask and answer if/when the risk is realized.
Chaotic	The context is too turbulent to chart a path forward.	Loss of 340B eligibility	Break down the risk into smaller portions that fall into the other categories.

Suggested Action: Take your 3-5 prioritized risks and determine which category they belong to. Then, consider the path forward and document potential responses.

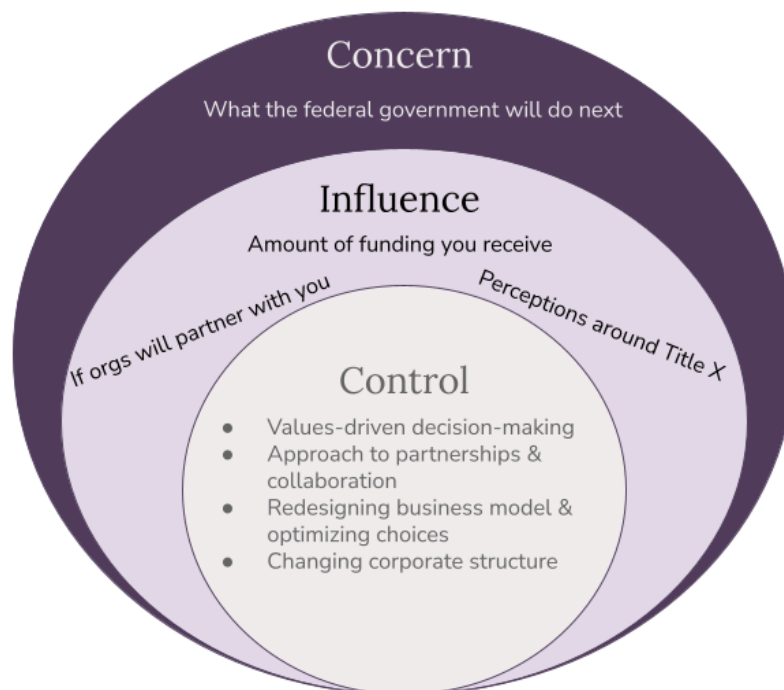
Consider Strategic Changes Based on the Risks

Your organization’s response to the prioritized risks will vary depending on both the type of risk and your organization’s risk tolerance. Risk tolerance is influenced by your organization’s leadership, culture and familiarity with taking risks, strategic goals and priorities, external requirements or regulations, financial reserves, type and diversity of revenue sources, and social/political environment.

While team members may bring varying personal approaches to risk tolerance, your leadership team should set organization-wide criteria to assess when a risk can be taken.

Regardless of the risk type and your risk tolerance, it is essential to focus your efforts where you have the largest opportunity for creating change. The three spheres of control help organize where an action has the potential for impact.

- **Concern:** Changes that will impact an organization, but you do not have the ability to influence this change in any capacity.
- **Influence:** Changes that an organization can have *some* impact on but the desired changes are not fully determined by only that organization.
- **Control:** Changes that an organization can directly take action on to make happen.



Graphic describes examples for spheres of concern, influence, and control.

Through prioritizing responses focused on your area of control, you can have the largest impact on addressing a risk. However, the sphere of influence should not be overlooked as it has the power to create bigger change when working collectively with partner organizations. After all, what is inside one organization's sphere of influence is within another's sphere of control. We recommend limiting the amount of energy dedicated to the sphere of concern.

Unfortunately though, many of the challenges that Title X-funded entities are facing currently fall into the “concern” category. This can create a real challenge when it comes to strategic planning. But, as you break down risks in the areas of concern into smaller pieces, some of which may fit into areas of influence and control. By doing so, you have a greater chance to identify and address places to establish resilient response plans, even in the face of unknowns.

For example, an area of concern for nonprofits could be how the broader economy will impact charitable giving, specifically from institutional philanthropy. Your organization cannot control macroeconomic factors. However, you can influence your partners by prioritizing investment in current philanthropic relationships. Your organization can also control how your fundraising team spends time and energy.

Similarly, an area of concern for public agencies could be the introduction of new mandates or guidelines by a state legislature. You cannot control the outcomes of legislative actions, but you can influence your peers to advocate and provide supporting research for sound policies. You can control your organization's overall resilience by establishing a plan for prospective changes.

Suggested Action: Ask yourself: Where is my organization prioritizing our energy currently? Where should we be prioritizing our energy? Repeat this conversation with other senior leaders and see where there is overlap in ideas.

Organizational and Ecosystem Views

When facing extraordinary risks, organizations, like other living things, tend to turn inward and focus on individual survival. But your organization does not exist in isolation – you are part of overlapping ecosystems.

In biology, an ecosystem is a functional, self-sustaining unit comprising a community of living organisms (like plants, animals, and microbes) interacting with their non-living, physical surroundings (like sunlight, air, water, and soil).

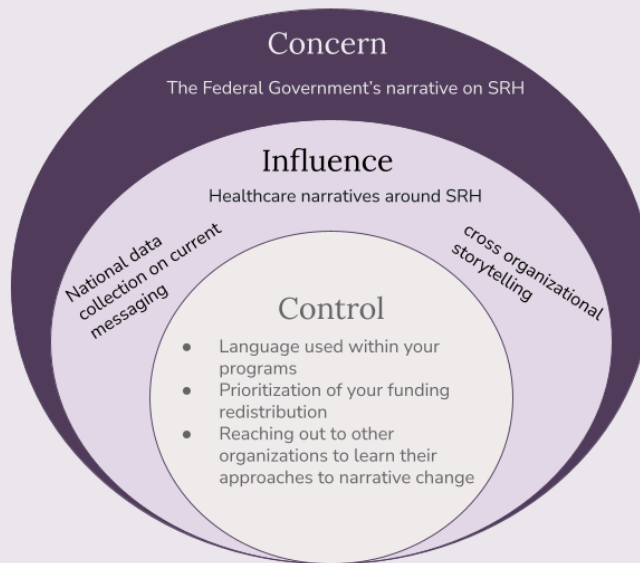
In the SRH field, the ***ecosystem can be understood as an interconnected network of organizations, partners, and resources that work collaboratively to address complex challenges.*** The ecosystem includes nonprofits, funders, government agencies, private sector partners, intermediary support organizations, and community members accessing services.

Many external and systemic factors influence your ability to contribute to a robust SRH field. These factors include adjacent movements, individuals, communities you serve, other healthcare organizations, and more. By holding an ecosystem view, you can support ongoing resilience, even if it means that not everything continues in its current form. What ultimately matters is the accessibility, quality, and affordability of SRH care, not the continuation of a specific program or organization.

Ecosystem work requires leadership with a holistic view of the field. While it can be challenging to balance both organizational and system views, you likely already have some practice doing this. You may have weighed where to prioritize funding and capacity. You may have heard from a variety of people and partners to determine next steps. You may have seen when changes with one subrecipient impact another subrecipient.

Suggested Action: Finish this sentence: To be healthy, the ecosystem needs____. Then, select 2-3 ideas to map onto the sphere of control. Break down the idea into smaller portions that are within your control or influence.

Example: To be healthy, the ecosystem needs refreshed national narratives on sexual and reproductive health.



Graphic describes an example of the Federal Government's narrative around SRH through the spheres of control.

Imagine what could be possible when we think, plan, and operate at the ecosystem level. We can collectively create a system that supports our visions for a stronger sexual and reproductive health field.

Opportunities & Options for Change

Overview and Organization of Options

The following opportunities were built through discussions with a cohort of five organizations in the SRH field: Beacon Reproductive Health Network, Bridgercare, Converge, Reproductive Health Collaborative Nebraska, and a new startup nonprofit in Georgia. While the ideas presented do not represent paths that all cohort organizations will pursue, they are reflective of challenges and opportunities Title X-funded entities are experiencing and may continue to experience in the future.

Descriptions of each organization are available in Appendix A.

The cohort used the activities outlined for risk assessment, categorization, and prioritization. Each organization developed an ecosystem view based on the results and considered how to best contribute to the overall health of the ecosystem while strengthening its own programs, services, and operations. Five primary categories of opportunities emerged:

- Business model revamp or redesign
- Expanded service reach
- Administrative consolidation/shared services
- Corporate structure changes
- System strategies across geographies

These categories are not fully distinct; there can be considerable overlap between each. The division into five categories is meant to support general thought organization and not limit what is possible.

While we encourage holding an ecosystem mindset when pursuing any of these options, some opportunities require a more intensive investment from partners outside of your organization. The options are organized from least-required-investment of other partners to most-required-investment.

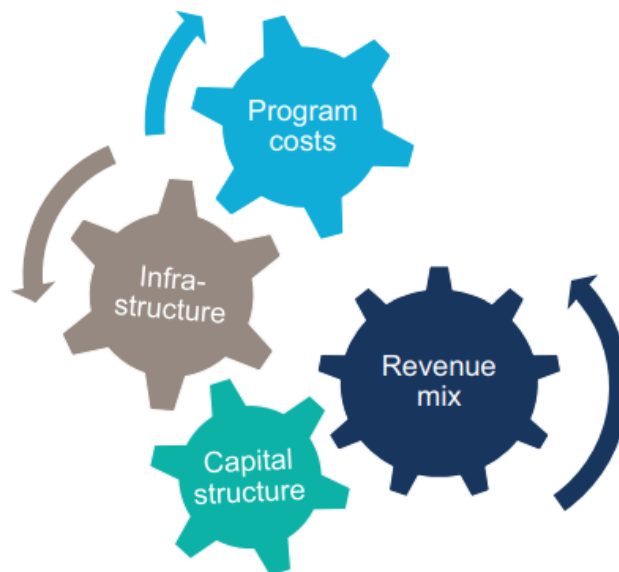
Lower Collaboration	Medium Collaboration	Extensive Collaboration
<ul style="list-style-type: none"> ● Business model redesign/revamp ● Expanded service reach 	<ul style="list-style-type: none"> ● Administrative consolidation/shared services ● Corporate structure changes 	<ul style="list-style-type: none"> ● System strategies across geographies

Business Model Revamp or Redesign

Defining Concept

Business models include program costs, operating infrastructure, capital structure (i.e. financial assets, like cash and buildings), and revenue mix.² Each of these factors has the ability to adjust the overall business model through their interconnection with the other factors.

- **Program costs:** the direct costs associated with a program and the allocated indirect costs for organizational-wide supports like technology, marketing, operations, etc. An understanding of true program costs is powerful information when considering business model redesign.
- **Operating infrastructure:** the systems and structures that allow for the organization to deliver its mission. Operating infrastructure often follows compliance requirements; in this way, revenue is destiny.
- **Capital structure:** the mix of your organization’s financial assets – ranging from liquid assets such as cash, to receivables that will be converted to cash, and all the way to the least liquid assets like property and equipment – has a significant impact on what response choices your organization has when considering its risk and potential business model changes.
- **Revenue mix:** the different amounts and types of funding streams for an organization like grants, donations, direct service fees, etc.



Graphic describes four portions of the business model. ²

Business model revamp or redesign refers to making significant, strategic changes to the above options to strengthen your foundation and mitigate risks.

Business model revamp or redesign can include a range of strategies, such as:

- Making significant changes to program offerings and revenue sources (e.g., adding fundraising, creating revenue-producing programs and services, ending a program offering if it is not viable)
- Staff reorganization or restructuring, or
- Purchasing or selling property.

You would pursue a business model revamp with hopes to pursue an organizational strategic shift, a new strategic direction, or to shield the organization from legal/regulatory risks. It can also help to strengthen your financial foundation by strategically reconfiguring revenue and expense drivers and/or the assets and liabilities on the balance sheet. Business model revamps or redesigns also present opportunities to diversify revenue, change sources of goods and services, and eliminate redundancies.

History of Idea

Business model revamps and redesigns have been pursued in a variety of contexts. Shifts in an organization's operating environment, such as changes to major funding streams, and significant shifts in the competitive landscape, such as the dissolution of a competitor/peer organization, require regular monitoring and change.

For example:

- A healthcare organization created one pool of its affiliated orgs to leverage stronger purchasing power for various types of insurance.
- An anonymous foundation supported the creation of Medicines360, which offers low-cost pharmaceutical products to SRH providers working in the safety net.
- Some organizations have created divisions between state dollars and federal dollars. This allows the organization to be able to fund abortion agencies with state funds and use Title X for the other services.
- One Midwestern organization has created an investment account for its private funding.
- Some organizations, especially in rural areas, have shared providers to support delivery of the more complicated or specialized services.

Outside of the Title X field, organizations have undertaken a variety of business model redesigns as a strategic response to changes and challenges. For example:

- [DOROT](#) scaled its Aging Alone Together program for national reach by adapting its service delivery model.
- [Arts Midwest](#), a regional intermediary with significant governmental funding, launched a new mission-aligned earned income business line, its Creativity News Desk.
- [Outward Bound USA](#) provides a uniform marketing strategy and platform for all of its affiliates’ programmatic offerings.

Future Directions

- Establish a revenue-driving program or service arm like clinical training or sexual health curricula or teaching aids.
- Stand up a company to invest in pharma or lab services.
- Create an investment fund.
- Separate identities and branding within an organization to create greater flexibility independent of rules associated with specific funding sources.

Common Challenges and How to Address Them

Common Challenge	How to Address
Changing the business model would be disruptive and distracting from current programs and services	<ul style="list-style-type: none"> ● Assess strategic and financial opportunity cost (what could be lost or gained) and be realistic about the energy and resources the business model change will require. ● Wherever possible, integrate the new directions into existing teams and processes. ● Avoid the common mindset that compares a new organizational future against organizational history; if change is required, the historical or current mode of operations is likely no longer a viable option.
Changing the business model can include significant expenses (legal, HR)	<ul style="list-style-type: none"> ● Consider whether there are one-time funding sources that could support the distinct needs. ● Assess additional resource needs that are required by the change against the cost of not changing.

Common Challenge	How to Address
Gets harder before it gets easier	<ul style="list-style-type: none"> ● Be clear on the purpose for the change initiative, communicate it clearly, and check in frequently. ● Assess and convey the appropriate level of urgency for change.
Can require new skillsets beyond what your organization currently has	<ul style="list-style-type: none"> ● Conduct an organizational assessment to help articulate current skills, the desired skills, and set a clear direction and plan for development. ● Consider the role new partners and/or hires can serve to add new capacities.

How to Get Started

- Explore your financial strategy by assessing your income mix with Tangelo Tree's [Income Mix Dynamics](#) worksheet.
- Assess your overall financial health and capital structure with Propel Nonprofits' [Balance Sheet Cheat Sheet](#).
- Assess programs across mission and financial impacts using tools from the [Sustainability Mindset](#).
- Identify your income and expense drivers as a beginning step to building multi-year financial projections.

Expanded Service Reach

Defining Concept

Expanded service reach means increasing the geographic area your organization serves.

Motivation to pursue expanded service reach includes increased funding going to values-aligned organizations. In addition, with fewer organizations receiving Title X funding, this strategy offers the potential to reduce redundancies across organizations, resulting in more funding going to support programming.

Expanded service reach presents opportunities around growing to a more effective organizational scale, protecting current services, increasing alignment across a broader range of Title X-funded entities in the expanded service area, and increasing funding opportunities.

History of Idea

A variety of Title X-funded entities have pursued expanded service reach. For example:

- After more than 40 years of not participating in Title X, in 2014 the Massachusetts Department of Public Health secured a Title X grant to cover a service gap in part of the state. Throughout most of the next decade, the state continued to add to its service area and now holds the largest of two Title X grants for Massachusetts.
- The State of Wisconsin competed for and was awarded a Title X service grant in 2018, replacing a nonprofit grantee; the state remains the sole grantee for Wisconsin.
- Bridgercare competed with the state health department in Montana in response to political shifts in the state. Had they not competed, they faced being completely defunded because the Montana Legislature passed the same restrictions on Title X that Oklahoma and Tennessee passed.
- Converge worked across state lines by expanding from Mississippi into Tennessee and experienced savings from sharing administrative staff and marketing.
- Beacon expanded services from Missouri into Oklahoma.

Outside of the SRH field, organizations have also expanded their service reach to experience similar opportunities. For example:

- [Family Housing Fund](#) (FHFund) is a 50+ year old organization in Minnesota that for most of its history focused on affordable housing and the housing ecosystem in the Twin Cities - first with a focus on Minneapolis and St. Paul, then expanding to the surrounding counties. Over the past few years, FHFund has expanded its geographic reach to include work across the entire state of Minnesota. The shift required intentional reexamination of organizational purpose and identity and redefinition of which government partners FHFund supports. Today, FHFund serves all of Minnesota through its relationships with cities, counties, and the state of Minnesota.³

Future Directions

- Compete to serve a larger service area with Title X funding.
- Expand service areas, both within and across state lines.

Common Challenges and How to Address Them

Expanding service reach comes with its own set of challenges.

Common Challenge	How to Address
Working capital, most often cash or access to cash in the short-term, required to grow	<ul style="list-style-type: none"> ● Complete multi-year financial forecasts to assess new revenue opportunities and growth capital needs. ● Pursue and/or dedicate distinct capital sources to support growth, such as one-time dedicated contributed revenue or debt capital through borrowing.
Lack of connection in new location	<ul style="list-style-type: none"> ● Conduct a thorough landscape scan to identify key players in the new geography. ● Establish partner screening criteria and/or clear partnership priorities to guide relationship-development efforts. ● Hire staff and/or recruit volunteers with ties to the local community and knowledge of community organizations already present.

Common Challenge	How to Address
State contexts vary drastically (ex: centralized vs. decentralized state health departments)	<ul style="list-style-type: none"> ● Research environmental, political, compliance, and funding landscapes for targeted service areas; the more similarities between the locations, the easier it will be to serve both.
Navigating breadth/depth across a big geography	<ul style="list-style-type: none"> ● Understand what drives program efficacy. ● Set clear program impact criteria and priorities to guide program growth decisions.

How to Get Started

- Conduct a landscape scan to identify key partners and potential service gaps.
- Clarify team roles for external relationships and outreach.
- Connect with other organizations who have competed for Title X funding previously.

Corporate Structure Changes*

**This section is primarily relevant to non-governmental organizations. Governmental organizations may be interested in understanding these options when considering the ecosystems in which they operate.*

Defining Concept

Corporate structure changes can include spin offs, mergers, joint ventures, affiliations through parent-subsidiary structures, and new administrative service organizations. The available options depend on your type of organization (e.g., nonprofit, state health department, health center) and the goals you have for structural change.

- **Spin offs:** Standing up a new organization by moving programming and/or operations into the new organization; and/or transferring programmatic assets to another organization.
- **Partnerships:** Deliberate connection of two or more organizations to produce, contribute to, or run services, programs, events, operational initiatives, etc. May or may not include changes to legal structure for one or more of the entities involved. Partnerships can take on a range of possible configurations.
- **Mergers:** Joining two or more organizations together into a single legal entity.

Additional structure descriptions and the purposes of each structure are available in Appendix B.

Each of these changes emerges from different motivations, but we group them together here because they involve similar processes for exploration, development, and execution.

Corporate structure changes present the opportunity to reduce duplication in the field which can preserve funding for programming. Corporate structure changes can also strengthen positioning for fundraising. With multiple entities, there is an opportunity to mitigate risk by narrowing the focus of each organization.

History of Idea

Structural changes are often pursued outside the SRH field for a variety of reasons like:

- Goal of reducing competition
 - [JourneyCare, Midwest, and Horizon](#), three geographically connected nonprofit hospice providers, merged to expand impact and to gain advantage in an industry where for-profit providers had become a large source of competition.⁵
 - [MinnPost](#) and [Sahan Journal](#), two news organizations, used coalition-based fundraising around a joint cause, World Press Freedom Day, where a donation to one organization was matched with a donation to the other organization.⁶
- Goal of incorporating a specific skill set into work
 - [The Food Group](#), an organization providing food access, and [Hunger Solutions MN](#), an organization advocating for long-term food solutions, merged to create a two-pronged approach to hunger within one organization. They connected advocacy more closely with direct services.⁷
- Goal of acquiring/diversifying revenue
 - [Colorado Public Radio](#) acquired a for-profit news site, [Denverite](#), to leverage their membership model and expertise.⁸

Future Directions

- Create a new organization or spin off, e.g. spinning off existing or launching new business lines in a separate related entity; create a new joint venture, such as an administrative services organization.
- Merge with other Title X-funded entities to consolidate operations in an effort to ensure more funding goes to programs and services.
- Partner with non-Title X-funded entities to mitigate funding concentration risk and capitalize on program complementarity.

Common Challenges and How to Address Them

Common Challenge	How to Address
Lengthy process to complete a structural change well	<ul style="list-style-type: none"> ● Set a clear process with identifiable milestones and decision points along the way. ● Engage a professional facilitator focused on good processes.
Significant investment of time on the part of staff and board	<ul style="list-style-type: none"> ● Estimate staff and board time that will be required and prioritize/deprioritize accordingly.
Requires nonprofit-specific knowledge of processes	<ul style="list-style-type: none"> ● Access freely available resources from The Power of Possibility or Sustained Collaboration Network.
Touches on sensitive topics of organizational identity	<ul style="list-style-type: none"> ● Commit time for honest conversations and meaningful connections across staff leadership and board to ensure alignment and a solid foundation of trust. ● Hold a mindset that is focused on the future and open to change.
Often requires approval from the state and/or federal government for compliance purposes	<ul style="list-style-type: none"> ● Maintain close communication with legal counsel. ● Stay in contact with leaders in your field to monitor regulatory activities and assess risks.

How to Get Started

- Practice asking “why” before you ask “how” - do not get too distracted by a particular structure or approach (e.g., merger, new organization, etc.) until you’ve defined clearly why it’s needed and what challenges you are trying to resolve - there’s always a structural form that will suit what you are trying to do
- Connect with your peers and build relationships.
- Be bold, and perhaps vulnerable, in sharing some big ideas with colleagues from other organizations
- Give yourself (and your team) space for expansive thinking and strategizing
- Develop a [partner screen](#) to determine who you want to work with.

Administrative Consolidation or Shared Services

Defining Concept

Administrative consolidation or shared services involve sharing or outsourcing components of your work, like IT, HR, finance, etc, with other organizations.

Shared services are often motivated by the idea of economies of scale; meeting common administrative needs of more than one organization creates an opportunity to potentially provide services more efficiently and effectively than you could on your own.

Shared services present opportunities for access to a higher quality or depth of administrative service and skill. It can free up staff capacity to focus on programming, fundraising, and other organization-specific initiatives. It also has the potential to produce cost savings and can create consistency across organizations that participate.

History of Idea

Within the reproductive health field, a variety of approaches to shared services have been utilized, like:

- Affiliates of one national healthcare network created a collaborative around health IT and electronic medical records.
- The National Abortion Federation offers group purchasing for its members.
- An organization offers a specialized skill or expertise to multiple organizations, such as:
 - John Snow, Inc. (JSI): The Reproductive Health National Training Center
 - UMKC School of Nursing & Health Studies: Clinical Training Center for Sexual and Reproductive Health
 - Essential Access Health's training and consulting services, or
 - AccessMatters' training and capacity building services.

Future Directions

- Fully consolidate select services into a newly formed administrative services organization (ASO).
- A new or existing entity provides a select specialized service as an outsourcing option to grantees.
- Share select capacities at the organization level, implemented via contracts.

Common Challenges and How to Address Them

Common Challenge	How to Address
Expense savings are not always as significant as anticipated	<ul style="list-style-type: none"> ● Create realistic operating plans with sound financial assumptions when estimating financial impact.
Decreased autonomy at the individual organization level and loss of site-specific processes and procedures	<ul style="list-style-type: none"> ● Create values-based criteria to assess potential partnership to increase confidence in values alignment with partner organizations.
Requires significant ongoing cross-site support, time, and project management	<ul style="list-style-type: none"> ● Develop a framework for assessing which services and processes are most easily replicable and prioritize those first.
Managing compliance across multiple jurisdictions	<ul style="list-style-type: none"> ● Explore outsourced providers and software for select, highly specialized knowledge.

How to Get Started

- Begin assessing roles and functions that:
 - a. Must be retained in-house because they are organization-specific
 - b. Could be transferred or outsourced to any competent provider
 - c. Require SRH knowledge or expertise in the outsourced provider
 - d. Demand advanced skills
- Investigate shared services for anything in category b, by asking self-assessment questions such as:
 - a. Do we possess a transferable capacity?
 - b. Do we bring unique value given our Title X experience?
 - c. Would partnering on this service enable new capacity for mission pursuit for our org and field?
 - d. Would a partnership lead to a higher level of service quality?
- Network with other Title X-funded entities around needs in categories c and d to investigate who else shares these needs, how they are currently getting them met, and what might be achievable through shared services (streamlining, cost reduction, enhancement of service level)

System Strategies Across Geographies

Defining Concept

System strategies across geographies require a shift of thinking from seeing individual organizations and health centers as separate nodes of service delivery and instead collectively as an overall system across a larger region. Instead of asking, “What are the needs of individual organizations or local populations?” the question is, “How do we transform this region for optimal SRH services?” This shift builds on the ecosystem mindset and can formalize a loose ecosystem into a deliberate and collaborative association.

Organizations that are regranteeing Title X funds to multiple subrecipients already have some structure in place to shift toward system strategies across geographies: What does it look like to treat the network of subrecipients as an SRH ecosystem, for which you can think strategically and holistically about strengths, opportunities, needs, and risk management?

History of Idea

Within the Title X world, networked systems have tended to be ad hoc rather than shaped strategically. These networks are ripe for development as intentionally strategic systems.

Outside of the Title X world, some examples of the systems strategies approach include:

- When the [United Way](#) shifted from its long-term identity as a workplace fundraising program to investing in community impacts, it evolved towards a systems strategy, i.e., addressing complex social challenges holistically, through networks of organizations and programs, focused on community outcomes.
- [Leading Edge](#) is a national organization that conducts research and evaluation, runs training and leadership development, and builds systems resilience across the field of the professional workforce in Jewish nonprofits. By taking a systems-wide view, Leading Edge surfaces and addresses root causes, optimizes resources, and builds the overall talent pool for Jewish nonprofits.

Future Directions

- Relationships and practices that facilitate increased circulation of resources, ideas, and capacity across organizations. This could look like more collaborative spaces with easier entry points to cross-organizational collaboration.
- Aligned strategies and coordinated actions that allow various organizations in one system to leverage unique capacities and strengths while multiplying impact throughout coordinated efforts.

Common Challenges and How to Address Them

Common Challenge	How to Address
Resistance to shifting from individual view to system view	<ul style="list-style-type: none"> ● Practice the ecosystem thinking skills and orientation presented earlier in this Playbook.
Limited insight on the broader operating context of service providers and health centers in the region	<ul style="list-style-type: none"> ● Conduct structured interviews with network partners to better understand <i>why</i> they deliver services the way they do and what opportunities they see for creative solutions.
Limited skills or experience with geographic and/or field-wide thinking	<ul style="list-style-type: none"> ● Practice! And get peer support and mentorship from other Title X-funded entities.

How to Get Started

- Bring together subrecipients for collective thinking as an ecosystem; work on the question, “How do we transform this region?”
- Reach out to neighboring states, particularly where extended metro areas cross state lines, to gain a comprehensive view of SRH services in the region and collectively identify where redundancies or gaps might be.
- Map your own ecosystem. Analyze for strengths and weaknesses the subregions and/or extended regions, and consider how systemic geographic thinking could help prioritize investments, skill development, and other actions.

Foundational Tools of Change Management

Regardless of the direction for change you decide to pursue, there are unifying best practices on managing an organization through change. These best practices – including stating your “why,” decision making roles, leader mindsets, project management, and financial scenario planning – are outlined below.

Start with Your Why

We do not pursue change just for its own sake; we pursue change because we think it has the potential to create a positive difference in the well-being of the people who rely on the services of an organization and/or system. Any meaningful conversation on organizational change must start with why you are pursuing the change.

Suggested Action: With a small group, answer the following questions. The answers will help define what opportunity will be most effective in creating the change you want.

- What are our mission-rooted priorities for exploring this change?
- What could we accomplish with this change that we couldn't accomplish with our current approach to our work?
- What crisis/challenge/opportunity are we hoping to respond to?

Once you have named your “why,” you are ready to dive into the process of starting change. However, do not leave your “why” behind as you get deeper into the change process. By periodically returning to your organization’s motivation, you can maintain investment in the process and notice if your ideas start to stray from what is truly needed.

Decision-Making Roles

Once you have begun pursuing a change, it is essential to prioritize clear communication for all involved. In the absence of explicit communication, decision making can quickly get challenging. When decision-making roles are unclear, processes can take longer than necessary, essential input can be lost, and changes can be received negatively.

Naming Decision Making Modes

Being explicit around the mode of decision making you are in can support a smoother change process. There are five modes of decision making: joint, consult, test, persuade, and tell.⁹

- **Joint:** Collaborate amongst a team to come to a decision.
- **Consult:** Ask for specific input on an idea to help shape the final action.
- **Test:** Explore how a drafted idea works for a variety of people and partners.
- **Persuade:** Generate buy-in to the idea and use concerns for minor changes.
- **Tell:** The decision has been made; comments can support how the decision is put into action.⁹

For example, if two organizations decide to merge and then do a community focus group to get ideas on how to best communicate this change to impacted community members, there may be tension if the community group believes they are actually giving input on whether or not the merger should happen. By being explicit and “telling” the focus group that the merger is happening and that they are being “consulted” on a few marketing approaches, the group has a better chance of resulting in genuinely helpful feedback and engagement.

Or, for example, if an organization’s senior staff is attempting to “jointly” consider what changes to pursue, but the executive director uses the opportunity to try to “persuade” toward one specific idea, there may be a shutdown of idea generation too early on in the process.

For major changes, it may not be possible, or desired, to jointly decide on all aspects of change. However, to make the change as well-thought out and as well-received as possible, it is important to include a variety of people and partners at different stages of decision making.

Suggested Action: Think of a recent decision your organization made. Determine what mode of decision making you were in. Consider:

- Who was involved in the process? How were they selected?
- What input was gathered and how?
- How did your organization communicate before, during, and after making this decision?
- What from this example would you like to recreate or change in future decision making?

Naming Decision Making Roles

Defining clear roles, including who has what authority, can also create a smoother change process. These conversations are best had early on in the process to reduce opportunities for confusion. There are numerous frameworks to support explicit decision-making roles.

For example, MOCHA names five main roles:¹⁰

Manager	Supports and holds the owner accountable through delegation. Serves as a resource, shares feedback, asks probing questions, reviews progress, and intervenes if the work is off-track.
Owner	Has overall responsibility for driving the project forward and coordinating steps to accomplish the goal. Ensures all the work gets done and involves others (consults) in a meaningful way.
Consulted	Provides input and perspective . May share resources or referrals.
Helper	Implements aspects of the work and actively contributes to project success.
Approver	Signs off on the final product or key decisions

For example, nonprofit organizations considering partnerships often have a subset of staff and volunteers that form a due diligence or negotiating committee. By explicitly describing it as a “recommending body,” it is clear that the group has the authority to make suggestions to the board as a whole, but it does not have the authority to stop or start a partnership on its own based on its findings.

Organizing Decision Making Roles for Process Participants

During change, a tiered approach to roles can support decision making through two main groups: Core Team/Project Management Team and Strategy Team.

Team	Purpose	Participants	Responsibilities
Core Team/ Project Management Team	Handle high-level project management, guiding the project to keep goals within sight and on track.	Normally this team is made up of 1-3 staff members, with the potential inclusion of a volunteer if they have a formal leadership role in the process (chair of the strategy committee, for example).	<ul style="list-style-type: none"> ● Preview materials before they are sent to the Strategy Team. ● Be the “eyes and ears” for the larger team; share information and manage expectations.
Strategy Team	Steward the change process.	Normally this team is made up of the Core Team plus 4-6 additional staff and volunteers.	<ul style="list-style-type: none"> ● Consider what perspectives should be included in the process. ● Set research focus, assist in synthesizing information, vet concepts and ideas, and develop recommendations. ● Provide input to assist in framing conversations and decisions for the board. ● Help distill and apply feedback, ensuring that perspectives are heard and understood.

The activation of these two teams allows for clear decision makers throughout the process. It also helps avoid the pitfalls of involving the board too late in the process. Too often, organizations will delay the involvement of their board until they are in a “persuade” or “tell” decision-making mode. To prevent this, include select members of the board throughout the change process and utilize them as spokespeople to the rest of the board.

Beyond the Core Team and Strategy Team, additional participants like other staff, other board members, and community members, can be involved in decision making through a few avenues. Surveys, retreats, interviews, and focus groups all allow for people and partners to give specific feedback based on the current mode of decision making. Because these people and partners will not be involved in as many conversations as the Core and Strategy Team, it is essential to ensure they remain knowledgeable on the progress of the change and how their feedback informs the outcomes.

Suggested Action: Reflect on a recent decision your organization made. Ask yourself: How explicit were the organizational roles in making that decision? What would our junior staff say? Our board?

If you notice the roles are less explicit than desired, explore [The Management Center's MOCHA tool](#).

Process & Project Management

All projects benefit from being able to answer the following questions near the start of the process and return to them periodically to ensure the project is on track with expectations:

Question	Considerations
What is our motivation for this project and why?	Consider how your response connects to mission, vision, and values.
What does success look like? How will we know we have achieved a successful outcome?	Consider both long- and short-term impacts of the project.
Who are the relevant people and partners we should engage with? How frequently should each of these people and partners be engaged?	Consider staff, board, community members, funders, and partner organizations.
What are the boundaries of this project (financial, time, scope of change, etc)?	Consider which aspects are hard lines and which are open to discussion and change through the process.

In addition, creating change requires balancing and tracking many moving parts at once. It is important to map out both the overarching approach and the specifics to ensure progress toward goals.

By investing additional time at the start of your project in setting up communication systems and aligning on norms like decision-making authority or MOCHA, your project has the best opportunity for success.

Suggested Action: Reflect: Who on your team holds skills in project management? How can their expertise be utilized here? Hint: consider beyond the “traditional suspects.” This can be an opportunity to also support your staff’s leadership development.

Leading During Change

Leading during change requires you to hold multiple, often conflicting, mindsets at once. These mindsets lend themselves to creating stronger changes that reflect an organization’s values. The mindsets include: autonomy and interdependence; planfulness and responsiveness; and prompt and engaged decision making.

As you review the characteristics of each pair of mindsets, keep in mind that the goal is to find the balance between the two. Particularly when considering or pursuing partnerships, a “both/and” mindset enables organizations to stretch towards systemic change while maintaining core values.

Autonomy and Interdependence

Recognizing the power your organization holds and the role of other organizations in your work.

	Autonomy	Interdependence
Actions that Demonstrate Mindset	<ul style="list-style-type: none"> ● Have check-in points throughout the change process to see how your team feels about proceeding. ● Be direct about the desires and needs of your organization. ● Be selective in which options your organization will pursue. 	<ul style="list-style-type: none"> ● Maintain regular conversations with other organizations in your community. ● Embrace holding both mission and fiduciary stewardship as role of board. ● Remain informed as new challenges arise that affect the collective well-being.
Phrases that Demonstrate Mindset	<ul style="list-style-type: none"> ● “We won’t compromise on our value of ...” ● “Holding ___ value is essential to our process.” ● “What will happen to our staff?” ● “This does/doesn’t feel like us.” 	<ul style="list-style-type: none"> ● “Who else is serving our same communities?” ● “We need each other to survive.” ● “Our organization wouldn’t work without their...” ● “Laws are targeting ___ types of organizations.”

	Autonomy	Interdependence
Feelings that Demonstrate Mindset	<ul style="list-style-type: none"> ● Agency ● Freedom ● Choice ● Power 	<ul style="list-style-type: none"> ● Connection ● Support ● Held ● Solidarity ● Community
Tools to Support Value	<ul style="list-style-type: none"> ● Create a partner screen rooted in your values. ● Complete a sustainability matrix to see the biggest impact of your work. ● Hold onto the ability to negotiate around essential components of your work (ex: a specific program, staff, board seats). 	<ul style="list-style-type: none"> ● Make a brief map of your organization's ecosystem to help consider system-wide theory of change. ● Reach out to people holding similar roles as you and build/strengthen those connections. ● As an organization, reflect on the Seven Generations Principle to practice visioning beyond your individual organization.

Planfulness and Responsiveness

Knowing how to both make a plan with the information you have and change the plan when something new comes to light.

	Planfulness	Responsiveness
Actions that Demonstrate Mindset	<ul style="list-style-type: none"> ● Define roles of different staff, board, and community members. ● Communicate long-term goals of the organization. ● Outline policies and procedures for approaching situations. 	<ul style="list-style-type: none"> ● Explore an option that hasn't been considered before (ex: partnerships). ● Re-prioritize tasks and the way people spend their time.
Phrases that Demonstrate Mindset	<ul style="list-style-type: none"> ● "Our goal for next year is to..." ● "___ is in charge of..." ● "We approach ___ by doing..." ● "Our strategic plan outlined..." 	<ul style="list-style-type: none"> ● "Our shifting priorities show..." ● "Because of ____, we must ..." ● "Nobody knew ___ was going to happen."
Feelings that Demonstrate Mindset	<ul style="list-style-type: none"> ● Confident ● Intentional ● Determined ● Secure 	<ul style="list-style-type: none"> ● Flexible ● Curious ● Imaginative ● Engaged
Tools to Support	<ul style="list-style-type: none"> ● Assign decision making roles using something like MOCHA to the partnership process. ● Use a partnership development timeline to map out when major decisions need to be made. 	<ul style="list-style-type: none"> ● Add a standing item on leadership agendas to check-in on current events. ● Go through your major activities and assign them start, stop, or continue in accordance with your current values and needs.

Prompt and Engaged Decision Making

Responding to true urgency and doing so in a collaborative manner.

	Prompt Decision Making	Engaged Decision Making
Actions that Demonstrate Mindset	<ul style="list-style-type: none"> ● Minimal delay between introduced challenge and response. ● Explicit deadlines. ● One person/group having the final decision making authority. 	<ul style="list-style-type: none"> ● Communicate with major partners and people about the process. ● Have listening sessions on critical topics. ● Multiple, conflicting opinions.
Phrases that Demonstrate Mindset	<ul style="list-style-type: none"> ● “We need a decision by ____ deadline.” ● “If we don’t decide now, we risk losing out on...” ● “To move forward, we must...” 	<ul style="list-style-type: none"> ● “What is your perspective on this?” ● “Who else should we involve in this conversation?” ● “____ is going to be impacted by this choice so they should...” ● “We are at ____ step in the process.”
Feelings that Demonstrate Mindset	<ul style="list-style-type: none"> ● Decisive ● Assertive ● Relieved 	<ul style="list-style-type: none"> ● Collaborative ● Trusting ● Valued
Tools to Support	<ul style="list-style-type: none"> ● Reflect on your process timeline and which portions to prioritize based on values ● For nonprofits, call a bi-weekly meeting with your board and work with your board chair to map out a sequence of topics for appropriate board engagement ● Have explicit conversations about who holds what decision-making power and what mode of decision making you are in. 	

Financial Scenario Planning

Any opportunity you explore likely will have an impact on your organization's finances. Therefore, it is essential to consider these impacts when determining what options you would like to explore. Financial modeling can support your decision making by building out alternative financial projections—base case, best case, worst case, or specific-risk-based scenarios—to understand different possible futures.

Best practices for financial scenario planning include:¹¹

- **Define a clear, collaborative process.** Involve staff across departments, not just finance. Use planning guidelines to center equity and mission, especially in hard trade-offs.
- **Focus on key drivers.** Identify the 3–5 most important revenue and expense variables—like people served, major grants, or staffing—that have the biggest impact and most uncertainty.
- **Model programs explicitly.** Map out how each scenario affects individual program areas, not just your overall budget.
- **Use your accounting system structure.** Design your model around your chart of accounts or department codes so that it's easy to keep updated.
- **Develop a few realistic scenarios.** A base case plus best-case and worst-case models is often enough. Anchor each to real risks or decisions—like delayed program starts, revenue dips, or expansion opportunities.
- **Make it a communication platform.** Build your model to tell a story, not just crunch numbers. Aim for 4–5 key takeaways that resonate with staff, boards, and funders alike.

Suggested Action: If you are unsure how to begin financial scenario planning, explore [Tangelo Tree's Financial Modeling Planning Template](#).

Conclusion

What will prevent us from creating the SRH ecosystems we need? Yes, changes at the federal level have a seismic impact on the field. But it is just as important to pay attention to our own biases and assumptions and examine how they might be holding us back. Another fundamental risk is the tendency to only engage in short-term thinking and maintain a scarcity mindset. Although understandable, given the cycles of grantmaking and reporting, these approaches to the work prevent organizations from imagining what could be possible; they freeze organizations before the work can even deeply begin. It is okay to be overwhelmed by the number of directions your organization could take. And, we cannot stay in this space of frozen fear. We must move through it, together, so that we can build healthy SRH ecosystems.

Suggested Action: Complete a body scan right now. Where are you noticing tension? Can you breathe a bit of space into that tension?

You have a number of options for moving forward from here: pick one of the ideas explored above and add to it, complete some of the supporting tools, build out a different concept your organization has been considering. We encourage you to select some action, of any size, to help keep your momentum going. Repeated small steps toward an expansion vision can create lasting change.

Suggested Action: Write down your next step and share it with a colleague. After all, we work better together.

Tangelo Tree Consulting

Tangelo Tree Consulting is a strategy and planning practice that helps organizations pursue big ideas for social change. We work with clients to reimagine, rebuild, and redefine nonprofit success and impact through strategy development, partnership development, business planning, and financial analysis.

We facilitate essential conversations, explore big ideas and possible outcomes, navigate through critical decision-making processes, and develop new models for transforming delivery of your nonprofit mission.

Tangelo Tree Consulting is built around four guiding principles: recognizing that nonprofits are critical community infrastructure, changing the underlying conditions at the root of social inequities, supporting the growth of strong, equitable communities, and facilitating vibrant connections between community members.

Process

Tangelo Tree Consulting was hired by National Family Planning and Reproductive Health Association to lead a cohort of five Title-X funded entities through a three stream process: cohort education and connection sessions, individual organization coaching and planning, and creation of a playbook for mission resilience.

Participating organizations attended four cohort sessions covering tools and discussion on topics outlined in the playbook like revenue mix or risk assessment. Each participant had five organization-specific meetings to cover their individual opportunities and plan forward resulting in a strategic response plan for each organization.

Tangelo Tree Consulting welcomes queries about any aspect of this playbook. [Please contact us](#) with your questions and feedback.

Appendix A: Cohort Organization Overview*

	Reproductive Health Collaborative Nebraska	Beacon Reproductive Health Network	Bridgercare	Converge
Website	<u>Reproductive Health Collaborative Nebraska</u>	<u>Beacon Reproductive Health Network</u>	<u>Bridgercare</u>	<u>Converge: Partners in Access</u>
Mission	The Reproductive Health Collaborative Nebraska bridges the advancement of reproductive health equity with high-quality sexual and reproductive health care through robust support, education, and advocacy.	We exist to ensure that everyone — no matter their income, geography, identity, or circumstances — can access high-quality sexual and reproductive healthcare.	Provide excellent, affordable reproductive and sexual healthcare and education in a safe, supportive, empowering atmosphere.	Converge collaborates with health care providers, patients, and communities to build a system that places people at the center of reproductive and sexual health care.
Location	Nebraska	Missouri and parts of Oklahoma	Montana	Mississippi and parts of Tennessee
Funding	FY 2025 Title X funding: \$1,916,944	FY 2025 Title X funding: \$7,921,895	FY 2025 Title X funding: \$1,873,490	FY 2025 Title X funding: \$7,806,074
Structure	Administrative agency	Administrative agency	Administrative agency and direct service	Administrative agency with telehealth

*A newly formed organization in Georgia also participated in the cohort; they are not included in the overview chart as they are still in the process of forming.

Appendix B: Structural Options for Partnerships

Structure	Description	When to Consider
Informal Collaboration	Organizations coordinate efforts through shared campaigns, learning networks, networks, or referrals.	For mutual learning, advocacy, or low-stakes alignment of strategies.
Shared Services	Organizations share back-office functions (HR, IT, finance) while maintaining separate programs via contracts or MOUs.	To reduce costs, improve efficiency, or focus more on mission delivery.
Joint Programming	Two or more organizations co-design and deliver programs, sometimes sharing staff or infrastructure.	To amplify community impact, take advantage of complementary capabilities, or pilot new approaches together.
Asset or Program Transfer	One organization transfers a program, site, or resource to another organization better positioned to manage it.	When preserving the program or asset matters more than maintaining ownership or when winding down is likely.
Fiscal Sponsorship	A smaller or emerging initiative operates under the 501(c)(3) status and support of a host organization.	For startups, time-limited initiatives, or groups not ready for full independence. May also support long-term projects that don't necessitate a full org structure.
Parent–Subsidiary	One organization becomes the sole member of another; allows coordinated governance but distinct entities.	When integration is desired but retaining legal separateness (e.g. for funding, licensing) is vital.
Full Merger / Consolidation	Two or more organizations legally combine into a single entity with unified governance and operations.	When deep alignment exists and full integration strengthens sustainability and mission delivery.

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