

Navigating the Polycrisis: A Tool for Leaders

Executive Directors (EDs) and non-profit leaders in the North America are facing a "polycrisis" characterized by intense financial instability, severe workforce burnout, and rapid political and regulatory changes. For some, this looks like operating on thin margins or facing deficits due to rising costs and declining, unpredictable funding. For others it looks like not being able to strategize because the boundaries or targets keep changing. Caught in the middle are staff trying to keep up with the ever-growing workload.

While much of this pressure is rooted externally, there are a few things leaders can do to support their organization to navigate these pressures. This worksheet will help you identify key areas for consideration or focus to help shift you from reactive leadership to strategic leadership.

Table of Contents

Part 1: Rapid Reality Check (30–45 Minutes)	2
Part 2: Systems View — How the Crises Interact	3
Part 3: Leadership Posture Audit	4
Part 4: Strategic Triage Framework	4
Part 5: Financial Resilience Actions	5
Part 6: Workforce Sustainability Reset	6
Part 7: Political & Regulatory Navigation Plan	6
Part 8: Board Alignment Check	8
Part 9: Personal Leadership Sustainability	8
Part 10: 90-Day Crisis Action Plan	9
Closing Reflection	9
TREC Resources	10

Part 1: Rapid Reality Check (30–45 Minutes)

1. Financial Stability Snapshot

Current Financial Position

- Months of cash on hand:
- % of budgeted revenue confirmed for the next 12 months:

Top 3 revenue vulnerabilities:

- 1.
- 2.
- 3.

Top 3 revenue opportunities:

- 1.
- 2.
- 3.

Financial Stress Signals (check all that apply):

- ☐ Delayed receivables (grants or other)
- ☐ Funders reducing grant size
- ☐ Overreliance on one funding stream (e.g. grants, major donors, events, etc.)
- ☐ Emergency reserve dipping below policy level (or not having a 3month or greater reserve)
- ☐ Staff roles that are not funded by confirmed sources

Reflection:

- Where are we structurally fragile vs. temporarily strained?
- What would a 20% revenue reduction require us to change?

2. Workforce Health & Burnout Index

Rate each area from 1 (low risk) to 5 (critical risk):

Indicator	Score (1–5)
Leadership team exhaustion	___
Staff turnover risk	___
Emotional climate (morale)	___
Workload sustainability	___
Psychological safety	___

Burnout Warning Signs I am Observing on the Team:

-
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Reflection Questions:

- What are we asking staff to absorb that should be redesigned (e.g. structural, organizational, or programmatically)?
- Where are we mistaking martyr culture and overwork for sustainability, success, and commitment?
- What would sustainable workloads look like?

3. Political & Regulatory Exposure

Identify key external pressures:

Funding-related policy shifts:

-

Regulatory compliance risks:

-

Community / stakeholder polarization:

-

Reputational risk areas:

-

Scenario Prompt

If a major government policy shift occurred tomorrow affecting our funding or mission, what would we do in the first 30 days?

For a more in-depth exploration of your organization's health, see [TREC's Organization Health Review Assessment](#).

Part 2: Systems View — How the Crises Interact

Describe how these pressures reinforce each other at your organization:

How does financial stress increase burnout?

How does burnout weaken fundraising or advocacy?

How do political shifts affect both revenue and morale?

Insight

Where is the reinforcing loop that most threatens your mission continuity? What are some possible paths through?

Part 3: Leadership Posture Audit

In a crisis or high stress environment, Executive Directors often drift into one of these stances:

- ☐ First Responder (constant reaction)
- ☐ Protector (shielding staff but absorbing everything)
- ☐ Avoider (delaying hard decisions)
- ☐ Strategist (prioritizing and sequencing trade-offs)

Reflection

Which posture am I currently embodying?
Which posture does this moment require?
What support do I need to lead at that level?

What's getting in the way

Am I avoiding anything?

What is triggering me or making me feel reactive (puts me on autopilot in a negative way)?

What can I do to flip the switch back to my creative side and forward thinking?

Part 4: Strategic Triage Framework

Prioritize decisions

1. Protect (Mission-Critical & Time-Sensitive)

What must not fail? What is mission critical and we must do or hold on to?

2. Pause (Important but Not Urgent)

What can we slow or defer? What are we working on or holding that is still important but might be able to wait?

3. Pivot (Needs Redesign)

What activities require structural change?

4. Let Go (No Longer Sustainable)

What must we courageously stop? What are we holding on to that is not mission-critical?

Reflection

Considering the information above, what three things do I need to do or focus on in the next 30 days?

- 1.
- 2.
- 3.

Part 5: Financial Resilience Actions

Short-Term Stabilizers (0–90 Days):

- ☐ Cash flow forecasting weekly
- ☐ Scenario budgets (best/middle/worst cases)
- ☐ Funder communication plan
- ☐ Expense triage
- ☐ Board finance task force

Add your top 3 actions:

- 1.
- 2.
- 3.

Long-Term Structural Moves:

There are many structural changes that could affect financial resilience.

- Revenue diversification strategy
- Organizational restructure
- Cost structure realignment

What one structural shift (may be different than above) would most increase the organization's financial resilience?

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Part 6: Workforce Sustainability Reset

Immediate Relief Measures:

- ☐ Reprioritize goals
- ☐ Remove low-value work
- ☐ Temporary staffing support or training
- ☐ Additional mental health resources
- ☐ Transparent communications about constraints and possible workforce adjustment

Structural Fixes:

- Role clarity redesign
- Workload rebalancing
- Leadership succession planning
- Cross-training for resilience

What must change to prevent burnout from becoming ubiquitous at your organization?

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Part 7: Political & Regulatory Navigation Plan

1. Monitoring System

Who tracks political policy changes?

-

How often are risks reviewed and by whom?

-

2. Stakeholder Map

Who are:

Key funders

-

Policy influencers

-

Advocacy partners

-

Oppositional forces

-

3. Risk Mitigation

☐ Legal compliance review?

- When was it last done:

☐ Legal counsel engaged?

- Who (contact information):

☐ Crisis communication plan?

- When was it last updated:

Reflection

Considering the information above, what three things do I need to do or focus on in the next 30 days?

- 1.
- 2.
- 3.

Part 8: Board Alignment Check

Rate board readiness (1–5):

Dimension	Score
Financial literacy	___
Crisis decision-making process	___
Willingness to make trade-offs	___
Supportive of ED wellbeing	___

Conversations I need to have with the Board

-

Part 9: Personal Leadership Sustainability

Executive directors cannot stabilize systems while personally destabilized.

My current energy level (1–10):

Warning signs I am ignoring:

-

Non-negotiable boundaries I will set this quarter:

-

Support structures I will activate:

- ☐ Coach
- ☐ Peer cohort
- ☐ Therapist
- ☐ Executive team
- ☐ Board chair partnership

What steps do you need to take to ensure you are resourced and able to navigate this current phase?

Part 10: 90-Day Crisis Action Plan

Goal/Outcome for the next 90 Days

-

Top 3 Organizational Priorities (include who will be involved and how):

- 1.
- 2.
- 3.

Top 3 Leadership Behaviors I Will Model:

- 1.
- 2.
- 3.

One Hard Decision I Am Avoiding:

- 1.

First step I'm going to take toward making the hard decision (within 2 weeks):

-

Closing Reflection

Crisis leadership is less about control and more about thoughtful prioritization, transparent communication, and adaptive resilience. Take the time to reflect on what you have AND where you want to go, then think about creating a plan to get there.

If your whole team were to emerge stronger in 12 months, what will you all have done differently starting now?

TREC Resources

Financial and Fundraising

- [Fiscal management essentials](#)
 - [Budget scenario planning](#)
 - [Financial status tracker](#)
 - [Fiscal strategies for today's challenges](#)
- [Fund development essentials](#)
 - [Using the 2026 data to build a fundraising plan](#)
 - [Creating successful fundraising strategies](#)
 - [Building fundraising plans](#)
 - [Engaging the Board in fundraising](#)
 - [Grant writing tips](#)

Burnout and Workload Management

- [Building a foundation for resilience](#)
- [Caring for ourselves and our communities in chaotic times](#)
- [Sample workplans](#)
- [Personal development plans](#)

Strategy and Planning

- [Strategic planning in turbulent times \(webinar\)](#)
- [Campaign strategy essentials](#)

Boards

- [Board essentials](#)

Leadership

- [Executive Director resources](#)
- [Intentional leadership](#)
- [Leading in challenging times](#)

Networking, Collaborations, and Coalitions

- [Network building](#)
- [Collaboration and coalition essentials](#)