

# CONSIDERING CLOSURE?

## A workbook to accompany the Sensing An Ending Toolkit from Stewarding Loss

Are you thinking about whether the time has come to close? Or are you simply wondering if you think the idea should be put on the table with a range of others?

The guidance in the following pages is drawn from hundreds of hours of coaching and consultancy we've offered staff and trustees of charities and nonprofits who have themselves been considering or undertaking closure since 2020. So in the following pages we've developed a set of worksheets and guidance notes for people who are wondering if an organisational ending should be 'on the table'.

This worksheet is framed to support staff, trustees, teams or communities to explore the idea of an ending - specifically in this instance, a possible organisational closure. However the prompts in here could easily be used to aid the consideration of other endings in organisations - eg. a transition of leadership, the end of a programme or project cycle, or the end of a partnership.

This worksheet is a bitesize introductory worksheet that sets the scene for the Sensing An Ending Toolkit: A toolkit for nonprofit leaders to help decide, design and deliver better organisational endings which Stewarding Loss published in 2021.

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## 1. Wondering whether this worksheet is for you?

Over the past 2 years we have heard countless accounts of the messy, confusing and even tormenting part of an organisation's journey towards an ending: the part before taking the decision to end or close something. It's the part of the journey you hear little about and will be so contextual for each person and organisation deciding, or not, as for some the decision to close is taken out of their hands.

So we've gathered a few prompts to help you work it out. There are many more, but treat these as a starting point...

### **Are you finding it hard to find and keep committed, talented, motivated people?**

It could be that you've had repeated failures of recruitment, or that previously committed staff have left/are leaving? This is part of the natural cycle of staff change and turnover is healthy - but could it be a signal that the time has come to put a possible decision to close on the table?

### **Are you undergoing a time of significant change in your organisation?**

'Significant moments' can be the end of a strategy cycle or the start of a new strategy review, a new board Chair, significant staffing changes or shifting of office and location. These are things that impact the culture, the leadership and everyday feeling of a nonprofit — both in a positive and negative way. These moments can often be opportunities to deeply consider the nature and purpose of an organisation and the impact it's having and could have. Having new people come in and offer a different perspective on the work. Asking the question — 'How will we know when our work is done?' — is a powerful one and can open up different avenues of conversation and potential. Asking this regularly can support a healthy and motivated culture too even if an ending isn't the answer right now.

### **Are you noticing a consistent decrease in the quality and quantity of your engagement?**

This might be because there are fewer donations coming in or people not attending events. It could be staff not engaging in conversations or claiming ownership in the same way or no longer identifying as the group or organisation. Any of these things can mean the tone of conversations has changed — people start questioning and challenging why something exists and asking big questions about what could be. It's important not to avoid these signals but to be curious and open to the wisdom, insight and different perspective this brings.

### **Are you spending more time fundraising than doing 'the work'?**

Do you find yourself spending a huge amount of time and energy seeking funds rather than spending funds and doing the work? Does the spend on fundraising or seeking donations outweigh the amount of actual funds raised? [Since the start of the Covid pandemic, nonprofits have experienced a substantial growth in demand for their support. At the same time, they have suffered a reduction in income, across many funding sources. And 81% have reported the need to seek alternate funding sources as a result of covid.](#) Yes the grant making system needs to change, but could it be a sign of the proposition not being what is needed now, or that there are other ways to achieve the desired change and impact you're seeking?

### **Are you experiencing disrupted sleep?**

[Nine in 10 charity workers have felt stress, overwhelm or burnout over the past year, surveys show.](#) There can be lots of reasons for middle of the night woes. But if you or any of your team find themselves lying awake at 3am worrying about how to keep the organisation afloat or where it goes next it's likely to be a strong signal that there is a need to seek a healthy balance and this pattern might not be desirable or sustainable in the long term. Without paying attention to this it can risk burnout and negatively impacting well being and reducing the collective capacity of the organisation.

Those who have closed organisations talk of the relief on making the decision and the energy it releases for them personally and the wider purpose of the work. If these or any other niggles are pushing you to read on. We hope you do!

## 2. Navigating the journey: Locating you and your organisation in the stages of an ending

All organisations are different, and so all journeys and life cycles will be too. To help you locate yourself in the here and now, below we share the six distinct phases to the journey towards an ending which are explored in more detail in our Sensing an Ending Toolkit.

The 6 stages of navigating an ending:

1. [Pre-decision](#) ⇒
2. [Taking a decision](#) ⇒
3. [Committing to the ending](#) ⇒
4. [Designing the ending](#) ⇒
5. [Implementing the ending](#) ⇒
6. [Beyond the ending to new beginnings](#)

In the toolkit, each stage is broken down into 3 practical sections designed to support you to design and navigate your ending:

1. Questions to think through
2. Advice from others who have led organisations through endings
3. Some tools that might help you navigate this phase

We've heard that the journey through an ending is a logistical and practical one that requires exacting attention to detail hand in hand with giving space to the emotional journey. So in the toolkit we draw together advice, guidance and inspiration for the practical steps and emotional considerations needed to design and deliver better organisational endings.

As with all our work, this advice is drawn from leaders who have shared their experiences and learnings from closure with us.

### 3. Considering Closure: 3 exercises and worksheets to support you to consider whether you should put closure ‘on the table’

Through our work with staff or trustees of nonprofit organisations who themselves were in the process of considering closure, we’ve found the following questions a useful way of teasing out what the organisation’s options are. And how and where to start with building a ‘shared view’ with those around you around the need for a possible closure to be ‘on the table’ as an option for the way forward.

#### Exercise 1: Personal reflection

Here are a set of questions for you to consider on your own.

Question	Answer
What is it that is making me wonder whether closure or an ending should be on the table?	
What evidence do I have that underpins this line of thought? Consider both ‘hard’ and ‘soft’ data: what is your heart, gut and head telling you?	
To what extent do I think my worries or concerns might be shared? By staff, trustees, volunteers, community members, peer organisations, funders?	
How long have I wondered this?	

## Exercise 2: Group discussions

In order to build a 'shared view' of your organisation's position, we have a tried and tested set of questions which can help guide conversations in a group setting (a staff team, trustee group or any other).

Question	Answer
Does our purpose and our work still feel as relevant as it did at other points in our journey?	
Are we confident that we are the best organisation to be delivering our mission?	
What is our strategic position? What are our strengths, weaknesses, opportunities and threats?	
What is it that is making us (or some of us) wonder whether closure or an ending should be on the table?	
Do we have <u>all</u> the information we need to consider the future and our role within it? What is certain vs unclear?	
What is our financial position? What scenarios should be planned for?	
Are all parts of the organisation in the same position? Do some areas	

<p>feel more sustainable or relevant than others?</p>	
<p>What are the biggest risks facing the organisation? Do we have the kinds of expertise we need to foresee these risks or macro trends? Do we have adequate plans in place to mitigate them?</p>	
<p>Can we identify a ‘survival at all costs’ mentality? Is it possible we are individually or collectively unnecessarily resisting putting closure on the table?</p>	
<p>Are we open to collaboration with other organisations in order to achieve our mission? If not, why not?</p>	
<p>Who, inside and outside of the organisation, can help us think this through? These might be funders, fellow / peer organisations working in the same sector or space as you, beneficiaries / the communities you work in.</p>	

## Exercise 3: Reflect on advice from others who have led organisations through endings

Print out or write each of the following quotes from leaders who have led organisations through change and distribute them equally across a group of people. Ask each person to reach their quote(s) out in turn and allow time for personal and group reflection.

- “ *Look out for an attitude of ‘survival above all’: the organisation’s purpose is not to survive, but to deliver its charitable or nonprofit purpose* ”
- “ *It’s hard but you must make time for these conversations. Until you have decided to close (and even for some period afterwards) you will still have to keep the show on the road and do the job of leading the ‘living organisation’ in parallel with leading the ‘dying organisation’* ”
- “ *Raise your concerns appropriately with others. While it’s fine to have a series of private conversations at the beginning, if there is real cause for concern, then collective conversations will be important* ”
- “ *Encourage, enable and support open and honest conversations. My grandmother was right when she said ‘2 heads are better than 1; and 4 are better again’* ”
- “ *Avoid things becoming personal between people – blame for things that have happened and accusations of giving up or not believing in the future are natural but unhelpful. Try to create a shared analysis and view that always takes into account the wider context* ”
- “ *It is important to have people across your organisation own financial sustainability checks. For example your Finance Director, Treasurer and Operations Manager should all scrutinise and have confidence in financial sustainability ensuring the responsibility is not just sitting with one person* ”
- “ *It can be scary to start saying things that have been rolling around your head out loud, but don’t shy away from sharing your thoughts or concerns with others around you. More likely than not, you aren’t alone in your wonderings!* ”
- “ *If you think your funders are the last people who should find out you are thinking about this, think again. Of course finding the right time to bring them in is important, but I wish I’d gone to our key funders sooner and shared our thinking about closure.* ”



*“ In indigenous cultures, processes of grief and mourning are often led by communities and groups adjacent to that which have lost someone. The same principle can and should be applied to organisational closures. Drawing in the peer organisations in your sector for their support and input early on in your consideration and designing of closure is a crucial step towards securing your legacy. They will be the ones left standing if and when you do close.*

*“ If you do take the decision to close or end something, it's important to recognise your mindset needs to shift. We made the mistake of saying 'let's keep delivering our programmes up until the final moment we closed'. We did this for financial reasons, but it meant we didn't turn to the ending and consider our story and legacy until much too late in the process and it limited our ability to focus on these arguably more important and longer lasting elements of our ending.*

## 4. Turning to the end: What to expect from a closure and how the Sensing An Ending toolkit can support you

This final section is a short introduction to the comprehensive Sensing An Ending Toolkit: A toolkit for nonprofit leaders to help decide, design and deliver better organisational endings which Stewarding Loss published in 2021. You can access the toolkit [here](#). While this was written with organisational endings in mind, the principles are transferable for many different types of ending, be that role, programs, projects and more.

**In the toolkit you will find:**

## 7 Principles for better endings

No two organisations are the same, so no two endings will be the same. Some organisations will have time and resources on their side whilst others will have little and the pressures of Covid-19 are looking likely to leave many nonprofits facing challenging and uncertain times.

We believe whatever the constraints of the time and resources you have available, there are some principles that can guide the decision, design and delivery of better organisational endings.

1.

✧ **Root your organisation and its culture in its mission and purpose, not the organisation's ongoing existence**

*from* a mentality of 'survival at all costs'

*to* focusing on pursuing your mission whether that's within or outside of the organisation you are standing in

2.

✧ **Acknowledge that endings, as with beginnings, are part of the inevitable cycle of renewal for people and organisations engaged in change work**

*from* shame, guilt and other unhelpful emotions we hold around endings and decline

*to* conviction around the power of better endings to create sustaining legacies and create space for new work that stands on the shoulders of those who've come before

3.

✧ **Find agency and determine your pace by bringing design and intent to the ending**

*from* feeling defeated and without control

*to* designing the process within the constraints of the time, energy and resources you have available

4.

✧ **Harness the power of language and narrative**

*from* letting others tell your story for you

*to* designing the narrative of your organisational ending from the outset and working with volunteers, staff and communities to compile and share the story of your impact and the legacy that will live on

5.

✧ **Understand the technical, practical and legal steps needed and your accountabilities**

*from* muddling through

*to* knowing the facts

6.

✧ **Give space to emotions and the emotional journey**

*from* leading through shame, guilt and anger

*to* leading with a vision of what comes next, vulnerability and rooted in the power and possibility of a good ending

7.

✧ **Assign people roles which share the responsibilities needed to deliver the ending**

*from* relying on a single leader to carry the burden of the practical and emotional endings

*to* harnessing the power of a collective and community wide approach to ending. Share the tasks, co-design and assign tasks and leadership of the practical and emotional components of an ending across teams and communities, and call on the support of other organisations to help you steward your ending