Eight Step Organizational Self-Reflection

Evolving health, racial justice, and economic challenges are reshaping our world and creating an even greater need for philanthropic investments. By reflecting on how their organizations are weathering these crises and preparing to navigate future ones, funders can bolster their ability to drive social change and contribute to a healthy social impact sector that is not "starving" nonprofits.

Fifteen years of helping guide our clients on the journey from <u>idea to impact</u> has taught us at <u>Arabella Advisors</u> to think closely about three forces that determine a funder's success: People, Partners, and Platforms.

Sound organizational design and operational infrastructure serve as the critical foundation for effectively supporting the "3Ps," which in turn are essential for propelling philanthropic efforts along on the journey toward impact, especially in times of crisis.

How prepared is your organization for the journey?

The self-reflection below outlines a selection of eight organizational capacities that funders need to overcome the challenges of today and tomorrow and stay on the uphill course.

We encourage you to take this quiz to see how your organization is performing.



		We need to improve at this capacity significantly	We could improve at this	We are excelling at this
Speed and ease of supporting partners and allocating resources Does your organization have clear grant-making and/or impact-investing processes, including rapid response procedures to quickly address your partners' urgent financial needs?				
Fitting team and leadership structures Do your organization's team and leadership structures facilitate effective collaboration and decision making across the organization?				
Are your organization's team structures flexible enough to rapidly shift responsibilities and fill gaps in times of crisis?				
Adaptable budgets and contingency plans Does your organization have processes and contingency plans in place to adapt to uncertain budget scenarios and financial challenges?				
How quickly is your organizat	ion able to modify its organizational and grant-making budgets?			
Speed and ease of decision making Does your organization have structures that facilitate prompt and effective decision making? To what degree has your organization's decision making been nimble in moments of crisis?				
Has your organization clearly articulated its appetite for risk (including financial, reputational, governance, and impact risk) in a way that eases its decision making? How has your organization's appetite for risk changed—either formally or informally—due to the current pandemic?				
Productive partnerships with peer funders and grantees Does your organization have new or existing collaborations that help amplify its message, scale its work, and achieve greater impact?				
In what ways has the current crisis impacted the critical partnerships your organization has with peer funders and grantees?				
Effective change-management strategies Is your organization skilled at introducing and communicating strategic, personnel, and other changes; providing the necessary supports for transition; and driving adoption by all critical stakeholders?				
Appropriate operational infrastructure Does your organization's operational infrastructure include a comprehensive operational plan, operational key performance indicators, and a sound financial model?				
To what extent does your organization have the right human resources, systems, and processes to achieve its strategic objectives?				
Do your organization's performance targets help to refine its strategic actions or influence its next best steps?				
Suitable platform(s) Is your organization familiar with the range of vehicles and approaches that it can employ to achieve social impact, including limited liability corporations, donor advised funds, and social welfare organizations like 501(c)(4)s, in addition to traditional grant-making, program-related investments, and mission-related investments? Is your organization aware of the pros and cons of each?				
	v months, have the vehicles and approaches your organization is d your ability to further its vision and be nimble in times of change?			
How prepared is our organization for the journey?	If you identified select organizational capacities where your organization can improve, then by making those investments, you will be able to increase your organization's resilience and ability to adapt to crises and unexpected opportunities.			
Ri-	Arabella Advisors is here to help your organization enhance those capacities and make sure that you are ready for the journey ahead and poised for impact.			

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At Arabella Advisors, we know philanthropists not only need a plan to generate impact. They need action. But it can be hard to see a way forward through a maze of endless possibilities. So we've built a company of creative problem solvers—more than 200 experts we can choose from to craft the most efficient path between your inspiring idea and life-changing impact. A path that's just right for you. Wherever you are on your philanthropic journey, Arabella offers advisors who understand the problem you seek to solve and the complex network of people, institutions, and investment vehicles that can help you address it. Whether you want to launch a global movement, more effectively manage your existing work, better understand your outcomes, or amplify them with Arabella's advocacy, impact investing, and donor partnership platforms, we can guide you forward. Your philanthropic investments are too important, and the need too great, to get bogged down. So let's get there faster. Let's get there smarter. Let's go from idea to impact.

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