

What the Nonprofit receives from Patmos' ORG Tool and services:

The Organizational Resiliency Gameplan: a diagnostic snapshot around which leadership can engage, including:

- Overall Resiliency Index Score
- Executive Summary
- Benchmarking (within sector and budget amongst participant pool)
- Easy to use dashboard report and urgency indicators for board and management strategic and operational decision making
- Resiliency assessment for each of the five major areas (i.e. Financial and Organizational Management, etc.)
- Detailed action steps
- Resource library links for best practice solutions and case study materials



For our participating nonprofits, their interaction with the Tool created an opportunity for rich and informed board and leadership discussion and identified areas of expertise and areas where additional assistance may be indicated."

- Joanne Pulles

President,
The HCA Foundation

Connecting People and Resources to Build Resilient Organizations

from Patmos Consulting

To Foundations: Are your grantees good stewards of your gifts?

- Are they adapting to today's challenging and complex realities?
- Are they effective in their mission impact?
- Are they resilient?

And how do you know?...

- If your grantees are good stewards?
- If they are strong and adaptive?
- How do your grantees compare against others of their size and type? To each other?
- Do you have a way to measure their resiliency?

Is your foundation board confident that your allocations result in maximum community impact? Would they appreciate more information to assess this?

If you had all of these answers, and your grantees had a plan for solutions with action steps, would it strengthen the outcome of your gifts, and the impact of your grantees' programs?

...Then we have what you need!

Helping Nonprofits survive, adapt and grow

Whether you are a public or private funder, policy maker or executive, resiliency in nonprofits is a crucial determinant for success, and is essential for sustainability.

Patmos' Organizational Resiliency Gameplan Assessment Tool and strategic services are vital resources for foundations interested in strengthening the nonprofit sector.

**Quick
Easy to Use
Cost Effective**

Scalable: affordable option for use by multiple organizations with aggregate data results

mygameplan.org
patmosconsulting.com



Patmos is pleased to offer the **Organizational Resiliency Gameplan Assessment Tool** (“ORG Tool”).

Our software incorporates a survey which generates a customized in-depth report, providing nonprofits with important feedback mechanisms in order to help them take decisive action to resolve challenges and drive innovative thinking. With its carefully targeted questions, the ORG Tool functions as a business intelligence app, measuring a nonprofit’s health across a range of capacities, recognizing strengths and identifying vulnerabilities to address. We provide a tailored roadmap of “how-tos” contained in the organization’s Resiliency Gameplan Report. Your grantee’s Board and Staff leadership can engage in decision making with the help of this report and its easy-to-use dashboard. Foundations can use the assessment’s determination of resiliency levels across key capacities in the evaluative process for effective grant making and to facilitate dialogue between grantors and grantees.

The combined assessment tool and gameplan report is an outgrowth of having listened to our clients’ need for a low cost, broad based resource which outlines clear steps forward, including extensive recommendations, supplemental tools, and a resource library. The ORG Tool is unique to the field in its measuring of organizational resiliency, with its detailed recommended action steps, and invaluable benchmarking against budget and sector, and its compendium of resources to assist the nonprofit in this low-cost solution.

Why Resiliency?

In today’s landscape, nonprofits have the difficult task of measuring their ability to be effective and to succeed by how well they deliver on their mission while simultaneously adopting business practices that lead to greater sustainability and achieve measurable results. In the current complex environment, a new measure of success is needed: a nonprofit’s ability to be resilient. A resilient nonprofit has the capacity to overcome disruptions and continually transform itself to meet the changing needs and expectations of its customers and other stakeholders. Resilience is increasingly an essential trait of effective, high-impact nonprofits. Improving an organization’s resilience will help it better achieve its mission, ensuring success and sustainability.

The Resiliency Index Score is derived from measuring:

Organization’s health and capacity resiliency is assessed in 3-tiered range structure similar to a credit score.

Resiliency Index Score is benchmarked through industry best practices in 5 major areas:

- **Financial Management and Organizational Management:** (cash forecasting, budget analysis, cash flow, sound business management disciplines, liquidity, mission effectiveness, well-defined and aligned processes and structures)
- **Resource Generation** (diversity of funding types, reliability of funding, fundraising developmental analysis)
- **Governance/Leadership:** (board roles and responsibilities, IRS 990 requirements, policies and decision making, ability to execute change)
- **Program** (program economic analysis, staff retention, performance measures, demand for services and organizational readiness)
- **Operations/Infrastructure** (capacity building, business interruption preparedness, communication of priorities, adaptive capacity of corporate culture, management aptitude to act on recommendations)

Benefits

- Nonprofits have benchmark of their resiliency, can implement recommendations within strategic planning, and build organizational capacity, leading to long-term sustainability
- Increases organization’s readiness for funding by providing the answers Foundations are seeking from their grantees
- Opportunity to provide transparency for funders and stakeholders leading to increased trust and sustained support
- Cost effective resource
- Easy to use, minimal time required

Sample Modules:

- Succession Planning for Your Organization
- Board Governance: Scenario Planning, Strategic Planning
- Aligning Key Processes and Systems for Greater Mission Effectiveness
- Financial Management Practices
- Developing Organizational and Programmatic Metrics
- Continuity of Operations Planning for Reducing Risks and Preparing for Business Interruptions and Disasters

The Value Proposition

Foundation Costs:

Option A "One Time Use"

Option B "Bundled Services"

Option C "Bundled Services"

One Year Subscription
Available if purchasing 10 or more passes

Multiple Year Subscription (2 or more years)
Available if purchasing 10 or more multi-year passes

Foundation cost per participant pass:

2-9	\$270 each
10-24	\$250 each
25-50	\$225 each
51+	\$200 each

2-9	N/A
10-24	\$375
25-50	\$360
51+	\$285

2-9	N/A
10-24	\$300 / year
25-50	\$285 / year
51+	\$225 / year

Ex: Foundation one time subscription of 30 participant passes: \$6,750

Ex: Foundation bundled services subscription of 30 participant passes: \$10,800

Ex: Foundation bundled services subscription of 30 participant passes: \$8,550 each year

Foundation receives:

- Participant passes for one time use by multiple grantees at discount rate (cost for individual nonprofits is \$500)
- Access to individual nonprofit reports WHEN stated in privacy disclosure before nonprofit use of the ORG Tool
- Access to services and modules

Same as Option A, plus:

- Report to the Foundation (and grantees) on the aggregate health of participating organizations in a face-to-face half day report out session (travel costs provided by Foundation)
- Custom group training sessions offered at a 20% reduced price of \$800. A 2-3 hour module training for participants in conjunction with report out session
- Software enhancements, in conjunction with up to date market research, trending data, and best practices while maintaining a core set of questions for benchmarking purposes

Same as Option A and B, plus:

- Custom group training session, held at the time of Foundation report out session, is offered at no cost. (travel costs provided by Foundation; one per year) A \$1,000 value
- Additional "participant pass" for participating nonprofits can be purchased at a reduced cost of \$100 per pass in year two, allowing for deeper benchmarking metrics

Benefits to the Foundation:

- A user friendly diagnostic tool that helps strengthen individual nonprofits
- A resource for assessment of organizational health and effectiveness of grantees
- Sharing of best practices and innovative solutions for increased social value creation and mission impact
- Follow-up modules and support available aimed at increasing organizational capacity
- Cost-effective resource
- Easy to use and transparent

Plus:

- An Aggregate Report of all the collective (de-identified) data of the participating nonprofits to measure the pool of grantees as a whole and as an evaluative learning tool.
- Data mining and reporting of the grantee pool
- Builds the Foundation community's overall organizational capacity with future benchmarking amongst varying sectors
- Module training specific to the nonprofit user offered at a 20% reduced cost

Plus:

- Complimentary module training specific to the nonprofit user
- Additional participant passes in a given year offered at greatly reduced rate, optimizing benchmarking and planning