



Self-Assessment

Organizational Strategy for Climate Finance



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Description

Completing the Organizational Self-Assessment is the first step for a community foundation (CF) entering the climate finance space. By benchmarking current strengths and weaknesses, the tool serves to evaluate individual organizational capacity for establishing a climate financing program. Your answers can help identify your CF with one or more of the three climate finance roles: Convener, Resource Mobilizer, and Capital Provider.

The six sections of the tool—Strategic Alignment and Intent, Capacity and Resourcing, Funding and Financial Strategy, Partnerships and Ecosystem Building, Impact Measurement and Accountability, and Phased Implementation and Prioritization—provide a snapshot of your organization's current situation, where to expand your efforts, and how to prioritize your initial approach in climate finance

Instructions

Step 1: Answer Each Question	Answer yes/no/in progress/unsure to each question prompt in the Organizational Self-Assessment tool and provide details in the Notes section. If you need to collaborate on answers with others at your organization, please do so. It will make the assessment more meaningful.
Step 2: Review Internally	Review the results of the tool with your team and discuss strengths and areas for improvement. Which categories are already strong and provide a good base for building a program? Where are the gaps that could be filled by capacity building?
Step 3: Define Your Role	What is your role? We recommend starting by discussing your potential roles in climate finance with your leadership and team. Based on your answers, start to think about what areas your CF needs to develop:



- **Strategic Alignment and Intent** - If you answered no, start here and think about how climate finance fits in your organization's strategy, mission, and current programs. If you answered multiple questions as yes/in progress, start thinking through implementation steps and if your organization wants to provide grants, build your role as a convener in this space, or provide impact investing capital.
- **Capacity and Resourcing** - If you mostly answered yes/in progress, start by tapping into your existing internal climate-focused staff, capacity, and programs to consider bridging climate finance strategies with current programming.
- **Funding and Financial Strategy** - If you mostly answered yes/in progress, start to assess how to incorporate climate finance as part of your impact investing and current grantmaking. If you answered no, you may want to think about how to bring in dedicated climate capital.
- **Partnerships and Ecosystem Building** - If you mostly answered yes/in progress, lean into these climate partnerships and stakeholders that you work with on climate strategies to build out your value-add, role, and strategic collaborations as a climate provider in this space. If you answered no, think about what stakeholders should be engaged.
- **Impact Measurement and Accountability** - If you mostly answered yes/in progress, start here and determine how your organization is measuring climate impacts and applying to overall strategy. If you answered no, begin to identify what metrics will show climate impacts (e.g., GHG emission reduction, energy savings, resilience, benefits to tenants, etc.).

Step 4: Implementation

Phased Implementation and Prioritization - After you have a better sense of your organization's goals and role in this space, discuss the no/unsure answers with your team and determine if the gaps should be addressed by using the Phased Implementation and Prioritization section.

Upon completing the self-assessment, we encourage you to use the findings to drive critical dialogue both internally (among staff, trustees, and donors) and externally (with grantees and community stakeholders). The insights gathered from this assessment will serve as the foundation for spearheading comprehensive organizational and community climate financing planning.



Self-Assessment

Organizational Strategy for Climate Finance

Strategic Alignment and Intent	Yes	No	Notes
1. Does your organization have any existing / published clean energy commitments or goals? <i>[GHG reduction goals, ESG goals]</i>	☐	☐	
1a. Do your board, governance, and/or donors have an appetite for risk tolerance for meeting climate goals? Please describe. <i>[donor interest, executive leadership buy-in, board approval]</i>	☐	☐	
1b. If so, does your organization have a strategy to meet these goals? <i>[grantmaking strategy, update investment policy statement, track climate metrics, increase expertise]</i>	☐	☐	
1c. Does your climate strategy integrate existing community priorities? Please describe. <i>[health equity, education, environmental justice, housing]</i>	☐	☐	
2. Do your non-climate program focus areas and impact investing incorporate climate goals? <i>[grant programs, existing impact investing programs, DAFs]</i>	☐	☐	
2a. Do you have a climate grantmaking strategy? If so, how much do you give per year?	☐	☐	
2b. Are you implementing climate goals through nonprofit partners? If so, how?	☐	☐	

Capacity and Resourcing

	Yes	No	Notes
3. Do any of your staff have climate expertise? <i>[climate certifications like LEED, technical skills, understanding climate finance and other climate knowledge]</i>	☐	☐	
4. Do any of your staff have dedicated time towards climate? If so, how many? <i>[program officer or VP with dedicated climate workstream]</i>	☐	☐	
4a. If none, is there a plan to fill the gaps in staff capacity? <i>[anticipated staff time, hire FTE, hire 3rd party sustainability consultant]</i>	☐	☐	
5. Do you sustain business relationships or referrals with any third party technical assistance providers? Please describe. <i>[energy / sustainability consultants, green capital needs assessment (GCNA), energy auditors]</i>	☐	☐	
5a. If so, do you have a budget for procuring third-party technical assistance?	☐	☐	

Funding and Financial Strategy

6. Do you have a strategy to pursue climate capital? <i>[target existing donors with sustainability goals, target new ESG investors, target capital raise]</i>	☐	☐	
7. Does your organization do impact investing or lending? If so, would you consider climate lending? <i>[PRIs, MRIs]</i>	☐	☐	
8. Is climate integrated into your investment policy statement (IPS)? <i>[For example, does the IPS include responsible investing such as ESG integration, fossil fuel exclusion, or net-zero commitments?]</i>	☐	☐	
8a. Is your endowment majority restricted funds? If possible, please provide a percentage.	☐	☐	



	Yes	No	Notes
8b. If the majority of funds are restricted, has your organization considered new funding models for climate grantmaking? Please describe. <i>[regranting pool funds, donor collaboratives, new designated funds, public-private partnerships, % unrestricted endowment]</i>	☐	☐	
8c. If you have unrestricted funds available, has your organization considered using those unrestricted funds for climate finance? Please describe. <i>[using % of endowment toward climate projects, use other grant funds toward climate projects, etc.]</i>	☐	☐	
9. Has your organization conducted existing donor outreach and education to cultivate existing donors to capitalize a climate finance effort? Please describe.	☐	☐	
9a. Has your organization conducted efforts to attract new climate-interested donors to capitalize a climate finance effort? Please describe.	☐	☐	

Partnerships and Ecosystem Building

10. Do you have partners or affiliates that are interested in climate initiatives? <i>[housing developers interested in climate, city departments with climate goals, philanthropic partners with climate programs]</i>	☐	☐	
10a. Does your organization have relationships with energy stakeholders in your market? If so, who? <i>[utilities, state energy office, green banks, federal energy funding providers]</i>	☐	☐	
10b. Does your organization have relationships with community lenders in your market? If so, who? <i>[Community Development Financial Institutions (CDFIs), housing agencies]</i>	☐	☐	
10c. Does your organization have relationships with community-based organizations focused on climate in your market? If so, who? <i>[environmental justice, public health, housing justice, education nonprofits]</i>	☐	☐	



	Yes	No	Notes
10d. Does your organization have relationships with government actors in your market? If so, who? <i>[local city, state agencies, regional planning agencies]</i>	☐	☐	
10e. Does your organization have relationships with developers in your market? If so, who? <i>[affordable housing, solar, geothermal]</i>	☐	☐	
10f. Does your organization have relationships with other philanthropic actors in your market? If so, who? <i>[community foundations, national philanthropic organizations]</i>	☐	☐	
11. Has your organization conducted a market study to size potential demand for climate projects? <i>[state climate goals, energy regulation and economics, building performance policies, incentive programs, relevant stakeholders]</i>	☐	☐	
12. Has your organization developed a plan to ensure community voices and resident leadership are embedded in climate action efforts? <i>[communication plan for projects, engagement campaigns, educational workshops]</i>	☐	☐	

Impact Measurement and Accountability

13. Does your organization track environmental or climate metrics for reporting? <i>[GHG emission reduction / avoidance]</i>	☐	☐	
13a. Does your organization have a short-term plan, including an initial simple set of metrics to adopt now? <i>[dollar-based targets across portfolio, # projects with green elements]</i>	☐	☐	
13b. Does your organization have a long-term plan for impact measurement as capacity grows? <i>[minimum GHG emissions reductions, building performance standards, minimum energy efficiency requirements]</i>	☐	☐	



	Yes	No	Notes
13c. Has your organization developed a timeline and responsibility for developing a more robust climate impact tracking framework? <i>[6-month to 1-year plan, 1–3-year plan]</i>	☐	☐	
14. Does your organization track co-benefits impact of projects or programs? Please describe in the notes. <i>[health, resilience, energy savings benefits to tenants / residents]</i>	☐	☐	
14a. Do you have a plan to incorporate equity goals with climate commitments? <i>[specific LIDAC targets]</i>	☐	☐	
15. Has your organization considered unintentional consequences of climate work? Please describe. <i>[displacement, higher utility costs, inequitable access]</i>	☐	☐	
15a. Does your climate lending initiative include safeguards or early-warning indicators for equity harms? Please describe. <i>[equity impact assessment, community co-design requirements, minimum set-aside requirements]</i>	☐	☐	

Phased Implementation and Prioritization

16. What are some potential quick wins that would help build credibility and donor / institutional buy-in? <i>[proof of concept project, donor education campaign, partnership network convening]</i>	☐	☐	
17. Based on this exercise, what would a realistic 1–3 year goal look like? <i>[board approval of strategic plan, hiring FTE for climate initiative, impact measurement framework established, young donor recruitment, new partnerships for project pipeline development]</i>	☐	☐	
17a. Which categories would your organization like to prioritize in this 1-to-3-year plan? <i>[capacity and resourcing plan, funding and financial strategy, partnerships and ecosystem building, donor education, impact measurement and accountability]</i>	☐	☐	



	Yes	No	Notes
18. What would an aspirational 1-to-3-year goal look like? <i>[successful climate finance program, new FTE focused on climate impact investing]</i>	☐	☐	
19. What are potential risks or failure points in early implementation? <i>[lack of board approval, lack of funding for FTE hiring, difficult project pipeline]</i>	☐	☐	
20. What are potential mitigation efforts to address these risks? <i>[climate finance strategy, donor fundraising campaign, partnership convening for project origination]</i>	☐	☐	
21. What balance do you plan to pursue among traditional community foundation roles <i>[grantmaking, convening] vs. direct funding for climate projects [impact investing]?</i>	☐	☐	

