FOUNDATION Foundation Operations Worksheet / Use this worksheet to identify gaps or potential areas for refinement in your organization's operational tools and processes. This is the first step in creating an operations playbook.

SOURCE	EXAMPLE	Manage Wealth	Set & Maintain Strategy	>	Foundation Administration	>	Identify Grant Targets	>	Make Grants	Data & Compliance Reporting
What is the main goal of this step?	Manage the foundation's assets and investments									
Who or what department is responsible for doing this?	Outside group									
How many people touch this activity?	We have one dedicated internal person who works with an external team									
What time of year does most of their work happen?	Quarterly adjustments and as needed									
What other groups are they reliant on?	The grantmaking group									
List the software programs used and the task they support.	Custom in-house software									
Wish list—what does the best future version of this process look like?	We could see our portfolio more easily and in the same platform we do our other work.									
What is one task that this group does that does not seem related to their main task?	They end up doing some of our reporting. We keep it in many different folders and it's hard to find it when we need it.									