

	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.						