

## Worksheet 1: Functions of Your Philanthropy

What tasks will you need to accomplish to ensure your philanthropy is meaningful and effective? With which people and organizations will you need to stay in communications? How will you ensure you're meeting legal, tax, and other regulatory and fiduciary duties?

You can use the blank cells in this worksheet to document: what people are performing which tasks, for which tasks you still need to find help, and which you don't see as applicable.

Administrative	Answer calls, emails, mail	
	Maintain an office, including technology	
	Maintain physical and electronic files	
	Operational bookkeeping	
	Budget setting, oversight, reporting	
	Maintain website, publications, press releases	
	Maintain board portal or other internal communications	
	Other	

Compliance	Legal support and filings	
	Paying taxes, filing tax forms	
	Investment management	
	Liaison with investment, legal, tax, finance advisors	
	Other	

Board & Committees	Board and committee communications	
	Meeting coordination and management, minutes	
	Recruitment, orientation, performance review	
	Coordinate ongoing education	
	Other	

Grant or other Social Impact Tools	Build pipeline of eligible applicants/partners	
	Evaluate applicants (paperwork, calls, meetings, site visits)	
	Coordinate decision making with committee and/or board	
	Send award/decline letters, agreements	
	Manage monitoring of awards, ongoing communications	
	Evaluate impact	
	Assess and suggest updates to strategies, policies, practices	
	Other	

Other Strategies to Achieve Purpose	Convening, collaborating	
	Strategic communications to achieve philanthropic purpose	
	Influencing local, state, or national public policy	
	Influence practices of businesses	
	Engaging with residents and others on the frontlines	
	Capacity building, lending pro bono expertise	
	Other	

Stewarding the Family	Maintain, add to family archives and history, legacy documents	
	Liaison with family members or family business members who aren't decision-makers	
	Education of younger family members	
	Ensure donor intent or other family purpose alignment	
	Protect, enhance family brand	
	Other	