

FOUNDRY

Operating Systems Resource Guide

Practical tools for clearer ownership, stronger decisions, reliable execution, and sustainable organizational capacity.

10 PRACTICAL RESOURCES

Designed for executives, operations leaders, boards, program teams, and organizational decision-makers working to make strategy executable.

FOUNDRY / Systems that teams can use, own, and sustain.

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Resource Library

A curated set of planning, assessment, and operating tools from FOUNDRY.

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Use these resources independently or together as part of a broader operating-system review.

Operating Infrastructure Readiness Checklist

A practical checklist for identifying gaps in ownership, workflows, reporting, documentation, and operating routines before they slow execution.

IDEAL FOR

Executive leaders, operations leaders, and organizational decision-makers

Strong strategies need operating infrastructure that can carry them. This readiness checklist helps leadership teams examine whether priorities can move through the organization with clear ownership, reliable information, and repeatable execution.

WHAT THIS RESOURCE HELPS YOU ASSESS

- How clearly priorities translate into owned work
- Whether decision authority is visible
- Where workflows and handoffs create friction
- How progress, risk, and performance become visible
- Which critical practices depend on individual memory

HOW TO USE IT

Use the checklist during planning, a leadership retreat, or before launching a major initiative. The goal is not to add process. It is to identify the minimum structure required for consistent execution.

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RESOURCE 01

Decision Rights Mapping Worksheet

A structured worksheet for defining who decides, who contributes, who implements, and how important decisions are communicated.

IDEAL FOR

Leadership teams, department heads, and governance partners

Collaboration works best when authority is clear. This worksheet helps teams map recurring decisions and establish a practical path from consultation to action.

USE THE WORKSHEET TO DEFINE

- The decision that must be made
- The person or role with final authority
- The contributors whose input is required
- The owner responsible for implementation
- The information, deadline, and communication method

HOW TO USE IT

Complete the worksheet with the people closest to the work. Focus first on decisions that are frequently delayed, escalated, duplicated, or revisited.

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RESOURCE 02

Organizational Capacity Builder

A guided assessment that helps leaders distinguish visible activity from the systems, skills, and routines that sustain organizational capacity.

IDEAL FOR

Nonprofit executives, program leaders, and capacity-building partners

Busy teams can produce a great deal of activity without building the capacity required to sustain results. This guided assessment helps leaders identify where work remains dependent on individual effort and where stronger systems are needed.

AREAS INCLUDED

- Role clarity and ownership
- Repeatable workflows and tools
- Team knowledge and confidence
- Documentation and continuity
- Review routines and adaptation

HOW TO USE IT

Use the findings to choose a small number of capacity priorities that make execution more reliable without overwhelming the team.

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RESOURCE 03

Funder-Ready Reporting Checklist

A checklist for building credible reporting flows that connect activities, outcomes, evidence, risks, and decisions.

IDEAL FOR

Executive directors, program leaders, development teams, and funder-facing staff

Funder-ready reporting is not created at the end of a grant period. It depends on clear measures, reliable collection routines, visible ownership, and a credible explanation of what the evidence means.

THIS CHECKLIST COVERS

- Outcome and performance definitions
- Data ownership and collection frequency
- Evidence quality and documentation
- Risk, variance, and learning
- Connections between findings and management decisions

HOW TO USE IT

Use the checklist to review an existing reporting process or prepare the operating structure for a new initiative.

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RESOURCE 04

Leadership Dashboard Planning Guide

A planning guide for selecting the few measures leaders need to see progress, risk, capacity, and decisions without creating noise.

IDEAL FOR

Executive teams, boards, operations leaders, and performance managers

A useful dashboard does more than display data. It helps leaders understand what is changing, where attention is needed, and which decisions cannot wait.

PLAN A DASHBOARD AROUND

- The decisions the dashboard must support
- A limited set of meaningful measures
- Targets, trends, and material variance
- Named owners and update frequency
- Clear escalation and review routines

HOW TO USE IT

This guide helps teams move from a collection of metrics to a focused leadership tool that supports action.

Key-Person Dependency Risk Assessment

A practical assessment for identifying responsibilities, relationships, approvals, and knowledge concentrated in too few people.

IDEAL FOR

Executives, operations leaders, HR leaders, and succession-planning teams

When essential knowledge or authority sits with one person, ordinary absence, transition, or growth can create operational risk. This assessment helps leaders identify those dependencies before they disrupt results.

REVIEW POTENTIAL CONCENTRATION IN

- Critical relationships and institutional knowledge
- Approvals and decision authority
- Recurring processes and technical tasks
- Access to files, systems, and reporting
- Informal problem-solving routines

HOW TO USE IT

Use the results to prioritize cross-training, documentation, access controls, delegation, and succession actions.

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RESOURCE 06

Operating Cadence Planner

A planning tool for designing meetings, checkpoints, and review routines that create decisions, ownership, and adaptive follow-through.

IDEAL FOR

Leadership teams, project sponsors, program directors, and operations managers

Meetings become useful when each one has a defined purpose, the right participants, reliable inputs, and a clear path to decisions and follow-through.

THE PLANNER HELPS YOU SET

- The purpose and frequency of each cadence
- Required participants and preparation
- Standard agenda and decision points
- Owners for actions and unresolved risks
- Documentation and escalation expectations

HOW TO USE IT

Use this tool to remove duplicative meetings and strengthen the routines that keep work visible, accountable, and adaptive.

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RESOURCE 07

Usable Documentation Starter Kit

A practical starter kit for creating playbooks, process guides, and standard operating procedures that teams can find, understand, and use.

IDEAL FOR

Operations teams, program managers, team leads, and knowledge owners

Documentation only creates value when people can use it during real work. This starter kit helps teams capture the decisions, steps, roles, tools, and exceptions that matter most.

BUILD DOCUMENTATION THAT INCLUDES

- A clear purpose and intended user
- Named owners and required inputs
- Actionable steps and decision points
- Links to the tools and templates used
- Review dates and change ownership

HOW TO USE IT

Start with one high-risk or frequently repeated process. Test the document with someone who did not write it, then improve it based on what they cannot easily follow.

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RESOURCE 08

Scaling With Clarity Diagnostic

A diagnostic for finding the ownership, workflow, communication, and reporting gaps that emerge as organizations grow.

IDEAL FOR

Founders, executive teams, growing nonprofits, and multi-team organizations

Growth changes how work moves. Informal coordination that once felt efficient can become a source of delay, duplicated effort, and inconsistent decisions.

USE THE DIAGNOSTIC TO EXAMINE

- Role and ownership clarity across teams
- Handoffs between functions and locations
- Decision authority at different levels
- Information flow and leadership visibility
- Processes that no longer fit the size of the organization

HOW TO USE IT

The diagnostic helps leaders focus on the structural changes needed to scale while preserving accountability and responsiveness.

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RESOURCE 09

Foundry Operating Standard Scorecard

A leadership scorecard for evaluating whether installed systems are clear, usable, owned, visible, and sustainable beyond outside support.

IDEAL FOR

Executive leaders, boards, funders, and implementation partners

The strength of an operating system is not measured by how polished it looks during implementation. It is measured by whether the organization can use, maintain, and improve it after outside support ends.

THE SCORECARD EVALUATES WHETHER SYSTEMS ARE

- Connected to a real operating need
- Clearly owned and understood
- Practical for the people doing the work
- Supported by useful data and review routines
- Documented, transferable, and sustainable

HOW TO USE IT

Use the scorecard at implementation checkpoints and before closing a consulting engagement to identify what still requires reinforcement.

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RESOURCE 10