



**San Diego Social Venture Partners
Business Operations Resource Team
Menu of Services**

Team Leader: Tony Broad

The San Diego Social Venture Partners Business Ops Resource Team is an interdisciplinary team which enables organizations to improve their capacity in operational management, human resources, financial and operational record keeping and decision making, and management capability, through the involvement of partners with expertise in these areas as well as in leadership and mentoring.

For more information or to schedule a meeting with the team, contact the Team Leader at apbroad@san.rr.com.

	<u>Area</u>	<u>Services</u>
1	Business Operations	<ul style="list-style-type: none"> • Needs analysis: operating systems, database systems, personnel, organizational structure • Make recommendations on needed changes • Assist in developing an action plan • Consult on implementation of the changes required including selecting vendors, outside consultants, etc. • Assist in grant applications for funds to institute new systems if necessary
2	Human Resources	<ul style="list-style-type: none"> • Answer HR questions of a general nature • Review hiring and recruiting procedures as appropriate; make suggestions to improve the process • Review job descriptions • Assist in the interview process for new recruits • Provide referrals to outside HR professionals as appropriate or necessary
3	Financial Management	<ul style="list-style-type: none"> • Review appropriateness and efficiency of existing accounting, donor management, and outcome measurement systems • Review the existing financial reporting formats • Recommend changes as appropriate; assist in the evaluation of new systems if needed • Answer accounting and reporting questions of a general nature • Consult on cash flow management issues • Assist the ED and Board in working with outside consultants and accountants.

	<p>The team does not do systems conversions or installations, or detailed technical training in accounting and financial reporting.</p> <p>However we are happy to assist our investees in working with outside firms to effect this change, including making recommendations as to chart of accounts structure, reporting structure, dashboards, system integration, etc.</p>
<p>4</p> <p>CEO/Senior Management Team Leadership</p>	<ul style="list-style-type: none"> • Coach Board Chair, ED, and Senior management team members in how to be more effective
<p>5</p> <p>Meeting and Board Retreat Facilitation</p>	<ul style="list-style-type: none"> • Several team members are available to facilitate board retreats and meetings. • We are also available to do board and staff educational sessions on various topics of interest.