![ZN Advisory — Achieving Community Resilience Together]

MANAGING YOUR OPERATIONS

Checklist
Managing Your Operations

Why You Should Care

Operations management is the administration of an organization's processes and operations, with its goal being enhancing operational efficiency by improving the quality and duration of an organization's objectives (CFI, n.d.). It involves consistent planning, monitoring, and evaluation. In practice, key details can easily be overlooked by managers therefore a little outside help and maintenance check-up from time to time is always a good idea.

To help your organization ensure it is meeting and exceeding operational standards, we have developed a high-level checklist to streamline your organization's success. Use this checklist to self-diagnose and correct your actions as necessary to stay purposeful, create meaningful impact, and guarantee that you are doing your due diligence.

Checklist

- [ ] **Define Operational Success**
  - [ ] Define what operational success looks like for you
  - [ ] Develop high-level qualitative and quantitative Key Performance Indicators (KPIs) to inform operational success

- [ ] **Enagagement**
  - [ ] Determine community members, groups and organizations, governments, and individuals to engage with
  - [ ] Determine the frequency of engagement needed
  - [ ] Engage with community members, groups and organizations, governments, and individuals on *current* and *desired future conditions*

- [ ] **Define Tasks**
  - [ ] Determine and analyze desired outcomes of the task
  - [ ] Create KPIs to monitor task performance

- [ ] **Staffing**
  - [ ] Determine team members and skillsets needed on the task

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☐ **Resources**

    ☐ Make a list of of materials and other resources needed to complete the task and obtain them

☐ **Environmental**

    ☐ All environmental implications are analyzed

    ☐ Determine ecological trajectory of the surrounding environment

    ☐ Determine how climate change will impact this area

☐ **Risk and Uncertainty**

    ☐ Risk and uncertainty assessment and analysis have been conducted

    ☐ A timeline/schedule for when this analysis should be updated has been created

    ☐ Determine and prioritize risks based on: *risk = likelihood x consequence*

    ☐ Determine both outgoing and incoming risks

    ☐ Determine what regulatory requirements govern or impact this task

    ☐ Compile list of actions needed to meet regulatory requirements

☐ **Timeline**

    ☐ Create a detailed timeline to complete the tasks

☐ **Financials**

    ☐ Create a budget

    ☐ Arrange for sources of finance

    ☐ Track budget status based on timeline

Note

Outgoing Risk: risk to the environment or other beings caused by the institution

Incoming Risk: risk to the institution caused by the environment or other beings