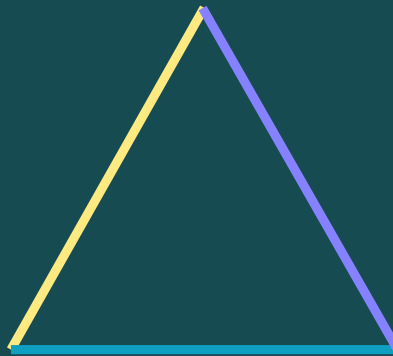


Reactive to Proactive Checklist



**Fortify Your Legal, Finance, and People
Operations for Org Health and Impact**

Based on the AVA 2024 presentation by
Jaclyn Leeds, Aneeha Patwardhan, and Tania Luna

Stage: Forming



Legal:

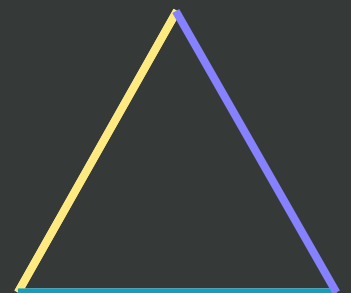
- Build a strong independent board
- Get D&O insurance
- Get governing docs in order (articles of incorporation, bylaws, starter policies)

Finance:

- Open business bank account (or secure a fiscal sponsor)
- Use accounting software and a bookkeeper

People Operations:

- Document – don't let things live inside the founder's head
- Develop a mission, vision, values, theory of change, and metrics



Stage: Growing



Legal:

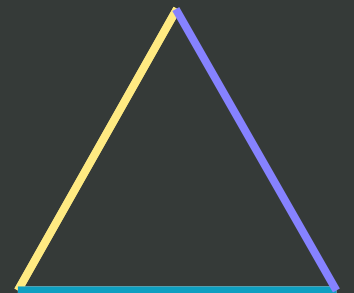
- Draft and adopt an anti-harassment policy and escalation processes for complaints
- Create data use policies
- Avoid IP infringements

Finance:

- Develop a budget
- Schedule monthly financial reviews
- Establish oversight (internal audits by BOD, segregate duties, build internal controls)

People Operations:

- Establish and maintain role clarity
- Focus on a small number of goals
- Create a learning rhythm (e.g., short monthly retrospectives)



Stage: Shrinking



Legal:

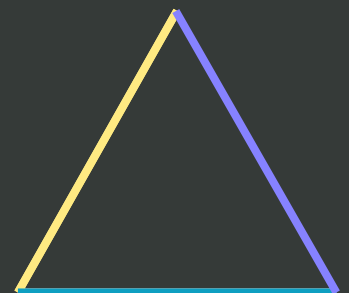
- Use your board
- Understand and document how money is being spent
- Seek counsel

Finance:

- Build reserves (with the finance committee)
- Forecast cashflow
- Have a financial contingency plan

People Operations:

- Create a communication cadence
- Build a learning & development plan (including coverage and succession planning)



Have questions?

Need support?

Get in touch!



AnimalDefensePartnership.org

AneehaPatwardhan.com

ScarletSpark.org