SAMPLE, ILLUSTRATIVE ORGANIZATION

Where the strain is, *and the one job to fix first.*

This is what a diagnostic read looks like. The organization below is a composite built from the patterns we see most, not a client. A real read runs two to three pages, uses your numbers, and is written so it can go into a board packet as is.

The organization

A community nonprofit. Six staff, a board of eleven, a $1.4M budget, four program grants and two foundation grants with quarterly reports. Donor records live in a database the team half trusts and three spreadsheets it trusts more. The executive director writes grant reports at night and assembles the board packet by hand in the two days before each meeting.

The five pillars, scored

PILLAR	READ	SCORE
Strategy	Plan exists, reviewed annually, lives in a slide deck. Ownership by pillar is not written down.	3 of 5
Systems	Nine logins. The donor workflow and the grant calendar each depend on one person. No documented handoff for either.	2 of 5
Data	Donor database and spreadsheets disagree on 140 records. Reports are rebuilt from exports each quarter. This is where the hours go.	1 of 5
People	Roles are clear. Review of outgoing communication is informal and unlogged.	3 of 5
Impact	Outcomes are tracked per grant, not across programs. The board sees activity counts, not results.	2 of 5

What we logged

Two weeks of the reporting workflow as it runs today: 11.5 staff hours per quarterly report cycle, four reports a quarter, 46 hours a quarter. Two of those hours are judgment. The other 44 are gathering, reconciling, and formatting.

The one job to fix first

Grant and donor reporting, drafted from one reconciled record. Gathered once from the database and the finance export, drafted in the organization's voice, reviewed by the director, sent on schedule. The 140 disagreeing records are reconciled as part of the build, not before it.

What it would take

- Focused Build, one workflow on one system, four to six weeks.
- The director as reviewer. About one hour a week during the build.
- Accounts in the organization's name. Running cost near the low end of the published range.

What changes

Reporting drops from 46 logged hours a quarter to the two hours of judgment plus review time. Measured the same way after go-live, and the number goes on the record only if the log confirms it.

What can wait

- The board packet. It draws from the same reconciled record, so it is the natural second build.
- Outcome tracking across programs. Worth a roadmap, not a build, until the data pillar is stable.

For the board

One paragraph the chair can read aloud: the strain is in the data, not the people; the first fix is one workflow at $6,500 with the diagnostic fee credited; the organization owns everything that is built; nothing leaves its accounts.