A PRACTICAL GUIDE TO NONPROFIT LEADERSHIP

What Not to Do in the Nonprofit World

An expanded leadership guide with examples and practical tools.

Protect your mission. Honor the people you serve. Build an organization worthy of trust.

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A resource for nonprofit founders, board members, staff, and volunteer leaders.

LEADERSHIP / STEWARDSHIP / ACCOUNTABILITY

START HERE

Good intentions need good practices

A guide for nonprofit founders, board members, staff, and volunteer leaders.

Nonprofit work often begins with a deep conviction that something should be different. That conviction can open doors, gather people, and help an organization begin. Sustaining the work requires another kind of commitment: creating practices that remain clear when money is tight, needs are urgent, and decisions are uncomfortable.

This guide examines 15 mistakes that can weaken service, trust, and sustainability. Each chapter explains how the mistakes develop, presents two fictional scenarios, and offers practical language and actions. The examples are learning tools; they do not describe specific people or organizations.

Use the chapters as working conversations

Read: Identify the habits that resemble your organization’s current practice.
Discuss: Compare the scenarios with your processes, using de-identified examples.
Act: Choose one change, assign an owner, and decide what evidence will show it is working.
Review: Return to the decision after 30 days rather than assuming that writing a policy changed behavior.

For faith-based organizations

Let faith shape compassion, honesty, stewardship, and how people are treated. Prayer and practical planning can support one another. Staff and volunteers need clear roles, consistent expectations, and respectful supervision even when everyone shares a strong sense of calling.

Read with your role in mind

Founders can examine where personal involvement has replaced a system. Boards can ask whether oversight is informed and independent. Staff can identify promises and procedures that are hard to carry out. Volunteers can use the guide to clarify their role and when to ask for help.

This is a practical leadership guide. It is not a substitute for organization-specific legal, tax, employment, clinical, or accounting advice. Adapt the tools to your governing documents, funding terms, service setting, and professional guidance.

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The pattern in every chapter

Understand the mistakes → examine two scenarios → put the practices to work. Each chapter ends with implementation steps, discussion prompts, and space to plan a specific change.

CHAPTER 01 / UNDERSTAND

Mission & boundaries

Make decisions your organization can responsibly carry out.

A mission is a decision tool. It should help you choose what to do, what to decline, and how to explain the difference.

Do not make the mission about yourself.

Founders often begin with personal conviction and sacrifice. That history matters, but it can become a problem when disagreement feels like disloyalty or every decision needs the founder's personal approval. Staff may stop raising concerns because they believe protecting the leader matters more than improving the service.

Build a stronger practice: Separate your personal investment from the organization's decision process. Ask whose need a proposal addresses, what evidence supports it, and who has the authority to decide. Give other people credit. Invite someone to identify the weak points in your preferred option before the team commits. A useful question is: Would we choose this if nobody knew whose idea it was?

Do not confuse compassion with having no boundaries.

An exception may feel kind in the moment and still create an unfair or unsustainable pattern. If one staff member promises transportation every evening while another follows the published service hours, participants receive conflicting messages and staff inherit obligations they never agreed to carry.

Build a stronger practice: Define service hours, eligibility, communication channels, and what assistance is available. Decide who can authorize an exception and what must be documented. Consider access needs and reasonable flexibility through a consistent review process. Boundaries should help people understand their options; explain the next available step rather than simply ending the conversation.

Do not promise outcomes you cannot guarantee.

Your team can offer an appointment, help complete an application, or make a referral. You may not control a landlord's approval, a funding award, or a participant's timeline. Promising certainty can briefly reassure someone while setting up a deeper disappointment later.

Build a stronger practice: Describe the service, the participant's choices, the outside factors involved, and the next checkpoint. Replace "We will get you housed this month" with "We can help you prepare the application and identify options. Approval and timing depend on the housing provider." Be equally precise with donors about what their support will fund.

CHAPTER 01 / EXAMPLES

Decisions in practice

Scenario 1 | The generous offer that changes the mission

The situation: A nonprofit provides employment support for women. A business offers $15,000 to launch a youth sports program if the nonprofit will begin within six weeks. Leaders want to accept because the organization needs money and the business is influential.

How it goes wrong: The team announces the program before identifying a qualified lead, transportation, space, or continuing funding. Existing appointments are canceled to make the launch happen. The gift appears successful while the original service weakens.

A stronger response: Leadership checks mission alignment, delivery costs, staffing, and the donor's expectations before accepting. The team identifies a youth organization better equipped to operate the program and explores a referral or joint effort with clear responsibilities. If no workable arrangement exists, it declines respectfully.

Language you can use: "We appreciate your confidence in us. Our current capacity is committed to employment services. We would like to connect you with a partner whose program can deliver what you have in mind."

What to document: A written acceptance decision, the assumptions behind it, and a clear explanation of how existing services will be protected.

Scenario 2 | The after-hours promise

The situation: A participant texts a staff member at 10 p.m. asking for a ride the next morning. The staff member has helped before and feels guilty saying no. Other participants begin requesting the same personal access.

How it goes wrong: The staff member keeps agreeing until she is exhausted, then abruptly stops responding. Participants experience an unpredictable service and colleagues do not know what has been promised.

A stronger response: The supervisor clarifies the organization's transport options, approved contact channels, and process for requests. Staff explain those options consistently and avoid making commitments through personal arrangements. Urgent needs are directed through the organization's established response process.

Language you can use: "I can help you review the transportation options during service hours. Please use our office contact so the team can respond consistently. I cannot promise a personal ride."

What to document: Clear service information, an agreed exception process, and a staff review of outstanding promises.

CHAPTER 01 / APPLY

Put the practices to work

Choose a step that fits your role and capacity. Make the change observable.

01 | Write a service promise.

In three sentences, describe who you serve, what you offer, and what you do not control. Ask frontline staff whether those sentences match actual practice.

02 | Review recent exceptions.

Look at five requests that fell outside normal services. Identify who approved them, why, and whether the same reasoning could be applied fairly again.

03 | Build a decision filter.

For each new opportunity, check mission fit, demonstrated need, staffing, full cost, risks, and the effect on existing commitments.

04 | Choose an accountable owner.

Assign one person to update service information and arrange a review date with staff and the appropriate leadership body.

Discuss with your team

1. Where does our public message promise more than our team can deliver?
2. Which boundary is unclear to staff or participants?
3. What opportunity should we pause until we understand its true cost?

Evidence to keep

An updated service description, a documented decision filter, and one example of a request handled consistently.

Our next change / owner / review date

CHAPTER 02 / UNDERSTAND

Dignity & partnerships

Protect the person behind the story and the purpose behind the partnership.

People should experience your organization as a source of respect and choice. Their hardship is never a fundraising asset that belongs to you.

Do not use someone's pain as a marketing tool.

A compelling story can attract support, but a person receiving help may feel unable to refuse a request from the organization helping her. A signature alone does not tell you whether the choice was informed or freely made. Names, workplaces, photographs, and family details can also identify someone even when a surname is omitted.

Build a stronger practice: Explain the exact story or image, intended audience, and publication channels. Offer time to consider the request and make refusal easy. State clearly that services do not depend on publicity. Discuss practical limits on removing copies after publication. Use only the information needed, and avoid sharing another person's story through a participant's account without considering that person's privacy.

Do not turn partnerships into a competition.

Organizations sometimes protect their territory so carefully that people must repeat their story at several offices and still do not reach the right service. Competition can also appear as speaking negatively about another program or promising services you do not provide just to keep the referral.

Build a stronger practice: Learn what partners actually offer, their eligibility criteria, current referral process, and contact person. With the participant's permission, make a warm introduction rather than handing over a phone number and assuming the problem is solved. Agree on roles before a shared event or project, including who communicates with participants, pays expenses, and handles follow-up.

Do not confuse activity with meaningful results.

Attendance tells you that people came. It does not tell you whether the service helped them take a useful next step. A full workshop can still leave participants confused, excluded, or unable to use what was taught. Measuring only what is easy to count can hide those experiences.

Build a stronger practice: Choose a few results that fit your program and ask participants what changed. Pair numbers with feedback, identify the time period, and explain missing information. If you report employment outcomes, distinguish a job application, an interview, and a job actually started. Do not describe an early milestone as a completed outcome.

CHAPTER 02 / EXAMPLES

Decisions in practice

Scenario 1 | The story the participant does not want to tell

The situation: A donor dinner is approaching. A participant agrees to attend but says she does not want to discuss her past abuse. A staff member suggests that a more emotional testimony would help the organization reach its goal.

How it goes wrong: The team drafts a speech about her trauma and tells her how much the nonprofit needs her help. Her attendance becomes an assumed agreement to share intimate details.

A stronger response: A staff member removes the pressure and asks what, if anything, she freely wants to share. She chooses a short statement about learning budgeting skills. The team reviews that statement with her, explains whether recording is planned, and honors her choice. It can describe the program's broader purpose separately without exposing private information.

Language you can use: "You do not owe us your story. You may attend without speaking. If you choose to share, we will agree on the content and how it will be used."

What to document: Specific permission for the agreed content and use, plus a plan for communicating changes before publication.

Scenario 2 | The referral that goes nowhere

The situation: A mother is referred to another agency for childcare support. She calls three times, cannot reach the correct department, and returns believing she did something wrong. Your team recorded the referral as a completed success.

How it goes wrong: Staff repeat the same phone number and say the other agency should have helped. The referral count increases, but the participant's barrier remains.

A stronger response: With permission, a staff member confirms the partner's intake route, helps make the introduction, and checks whether the participant can use the next step. Staff update their referral directory and record the difference between a referral offered, contact made, and service received. The partner is invited to correct inaccurate information.

Language you can use: "Let's confirm the current process together. With your permission, I can introduce you to the intake contact and help clarify what they need."

What to document: An accurate contact, the participant's agreed next step, and a follow-up note that does not overstate the result.

CHAPTER 02 / APPLY

Put the practices to work

Choose a step that fits your role and capacity. Make the change observable.

01 | Review one public story.

Check whether the person understood the audience, content, and channels. Look for identifying details that were unnecessary.

02 | Map a referral journey.

Follow one common referral from the participant's perspective. Identify where instructions, access, or follow-up can break down.

03 | Choose a useful outcome.

Name one change your service can reasonably influence. Decide how to measure it without collecting unnecessary sensitive information.

04 | Close the feedback loop.

Ask participants what worked, summarize the themes, and tell them what the team will change when appropriate.

Discuss with your team

1. Can someone refuse a story or photo request without fearing a consequence?
2. Which referral do we assume is successful without checking?
3. What do our current numbers leave out about participant experience?

Evidence to keep

A specific permission process, a verified referral entry, and one outcome definition that clearly separates activity from results.

Our next change / owner / review date

CHAPTER 03 / UNDERSTAND

Financial stewardship

Build a record that explains where money came from and why it was spent.

Trust is strengthened when transactions can be understood, supported, and reviewed. Personal sacrifice does not replace clear financial records.

Do not treat nonprofit funds like personal money.

Small organizations often begin with a founder paying expenses personally. Without a clear reimbursement process, personal and organizational spending can become difficult to separate. A bank balance alone will not explain whether an expense served the mission or whether a reimbursement was paid twice.

Build a stronger practice: Use organizational accounts for organizational activity and document approved reimbursements. Record the date, vendor, amount, business purpose, funding source, and approval. Keep receipts with the transaction record rather than relying on memory. When an error is discovered, preserve the original information and document the correction. Ask your bookkeeping professional how to record unusual transactions. [2]

Do not let one person control every money step.

A trusted person may receive donations, make deposits, approve purchases, enter transactions, and review the bank statement. That arrangement leaves no fresh set of eyes to catch duplicate charges, missing documentation, or an incorrect payment. Review protects the individual as well as the organization.

Build a stronger practice: Separate responsibilities where possible. If staffing is limited, arrange a practical independent review by an appropriate board member or another qualified person who did not initiate the transactions. The reviewer should see original bank activity and supporting records, ask questions, and document follow-up. A signature without an actual review adds little protection.

Do not accept funding without understanding the commitments.

A grant can appear to solve a financial problem while creating new obligations for staffing, data collection, matching funds, or services. A donation intended for one purpose may not be available for another. Confusing total cash with money available for general use can lead to commitments the organization cannot support.

Build a stronger practice: Read the terms before accepting. Identify allowed purposes, delivery costs, reporting dates, approval conditions, and what happens if the plan changes. Track commitments so the team can distinguish restricted support from general resources. Do not redirect funds simply because another need feels urgent; review the terms and obtain any necessary authorization before proceeding.

CHAPTER 03 / EXAMPLES

Decisions in practice

Scenario 1 | The event that raised less than everyone thought

The situation: An event collects $12,000. Leaders announce that all $12,000 will support the program. Later, invoices arrive for $4,000 in event costs. Separately, $3,000 of the receipts was designated by donors for a specific future project.

How it goes wrong: The team treats the bank deposit as unrestricted program money and approves $12,000 in new spending. The accounting records and donor commitments no longer match the public announcement.

A stronger response: The team reconciles event receipts, costs, and funding restrictions before deciding what is available. In this simplified example, $12,000 less $4,000 leaves $8,000 after event costs; if the $3,000 designation is unaffected and event costs are paid from unrestricted receipts, $5,000 remains available for general use. Actual treatment depends on the gift terms and records. Leadership corrects its communication and checks the figures with its bookkeeper.

Language you can use: “The event brought in $12,000. After $4,000 in expenses, $8,000 remained, including $3,000 designated for the future project.”

What to document: A reconciled event summary, documented restrictions, and an accurate explanation of available funds.

Scenario 2 | The founder’s reimbursement

The situation: A founder purchases supplies for $280 using a personal card. She submits the receipt by text. Another team member later sees the same text and processes a second payment because there is no shared reimbursement log.

How it goes wrong: The team treats the duplicate payment as an embarrassing personal matter and deletes one entry to make the books look correct.

A stronger response: The team preserves the records, verifies the duplicate, arranges the appropriate correction, and documents it. Going forward, each request receives a unique reference, an approver other than the requester where practical, and a payment status visible to the relevant staff. The incident becomes a process improvement rather than a reason to avoid scrutiny.

Language you can use: “We found the same reimbursement was processed twice. Let’s verify the records, correct the payment, and update the log so this cannot happen as easily again.”

What to document: The original receipt, purpose, approval, both payment references, and the documented correction.

CHAPTER 03 / APPLY

Put the practices to work

Choose a step that fits your role and capacity. Make the change observable.

01 | Follow one transaction.

Trace a donation or payment from the original record to the bank and bookkeeping entry. Identify missing documentation.

02 | Assign separate roles.

List who receives, records, approves, pays, and reviews. Where one person fills several roles, name a compensating review.

03 | Create a funding summary.

For each grant or restricted gift, record its purpose, available balance, due dates, owner, and process for proposed changes.

04 | Make review visible.

Schedule a recurring review. Record questions, corrections, and unresolved items with a responsible person and follow-up date.

Discuss with your team

1. Can we explain what part of our cash is available for general operations?
2. Which expense would be hard to justify from its records alone?
3. Who checks the records of the person who makes payments?

Evidence to keep

A complete sample transaction file, a clear role assignment, and a funding commitment tracker reviewed with the appropriate financial professional.

Our next change / owner / review date

CHAPTER 04 / UNDERSTAND

Accountable leadership

Make oversight practical and prepare the organization to function without one key person.

Accountability works when people can ask real questions, disclose relevant interests, and understand how decisions were made.

Do not use a board as a rubber stamp.

A board cannot meaningfully review an issue when members receive only a preferred answer or are asked to approve a commitment after it has already been announced. A meeting full of updates may still leave no time for the decisions that need oversight.

Build a stronger practice: Provide the information needed to judge the issue: the decision requested, alternatives, costs, assumptions, and key risks. Allow questions and record the decision and follow-up. Clarify which decisions belong to the board and which are delegated to staff under your governing documents and approved policies. A board member's operational help should not quietly replace the agreed reporting structure.

Do not ignore conflicts of interest.

A personal or financial interest can affect a decision even when someone has good intentions. A board member may recommend a company she owns, or a leader may participate in a decision involving a family member. Secrecy and informal assurances make the situation harder to evaluate.

Build a stronger practice: Use a written process for disclosure and review. The IRS describes a conflict policy as a way to ensure relevant facts are disclosed and affected individuals are excused from voting on those matters. Have decision-makers without the interest evaluate the proposal and document the process. Disclosure starts the review; it is not automatic approval of the arrangement. [1]

Do not build everything around one person.

When only one person knows how to reach donors, renew a service, or access essential systems, a vacation or unexpected absence can interrupt operations. Team members may create insecure workarounds because nobody knows the approved process.

Build a stronger practice: Identify essential tasks and name both a primary and backup owner. Use organization-controlled accounts, approved secure access methods, and a current inventory of key systems. Write enough instructions for a trained backup to carry out the task. Test the process during a planned absence and update it when roles change. Protect sensitive participant and financial information through role-appropriate access.

CHAPTER 04 / EXAMPLES

Decisions in practice

Scenario 1 | The discounted contract

The situation: A board member's company offers a website package at a discounted rate. The organization needs the work quickly. The board member says that discussing a conflict is unnecessary because the offer will save money.

How it goes wrong: The board votes immediately with the interested member participating. Nobody compares the scope, ownership of accounts, ongoing fees, or whether the discount is meaningful.

A stronger response: The relationship is disclosed and the organization follows its conflict process. Decision-makers without the interest compare suitable alternatives, clarify the full cost and deliverables, and document the choice. They confirm who owns the website content and how the organization will retain access. A low price is considered alongside the full arrangement rather than treated as a substitute for review.

Language you can use: "Thank you for offering. We will use our normal disclosure and independent review process so the decision is clear and protects everyone involved."

What to document: The disclosure, relevant options, scope and pricing, who participated, the decision, and the approved agreement.

Scenario 2 | The director is suddenly unavailable

The situation: The executive director takes unexpected leave. A grant report is due, the donor platform uses her personal email, and staff cannot locate the latest budget. The team spends days trying to reconstruct basic information.

How it goes wrong: Staff share guessed passwords, open duplicate accounts, and send inconsistent requests to funders. People work hard, but the organization loses time and control of sensitive information.

A stronger response: The designated backup follows an authorized continuity plan, obtains approved access, and informs the appropriate leadership contact about deadlines. After immediate needs are addressed, leadership moves essential services to organization-controlled accounts, stores current records securely, and tests backup arrangements. Access is reviewed again when the director returns.

Language you can use: "Let's use the approved backup process, confirm the deadlines, and keep one person responsible for communicating the status."

What to document: A current system inventory, access responsibilities, essential deadline list, and a tested backup procedure.

CHAPTER 04 / APPLY

Put the practices to work

Choose a step that fits your role and capacity. Make the change observable.

01 | Improve one board decision.

Prepare a one-page brief with the decision, options, full cost, risks, and recommended follow-up.

02 | Review disclosures.

Check that people covered by your conflict policy know what to disclose, to whom, and how the review is recorded.

03 | Map key dependencies.

List five essential tasks that depend on one person. Assign a backup and provide role-appropriate training.

04 | Test the handoff.

Have a backup complete one routine task using the documentation. Correct missing steps before a real absence.

Discuss with your team

1. Which board decision was approved without enough information?
2. Would someone feel safe disclosing an uncomfortable relationship?
3. What would stop working if our key person were unavailable for two weeks?

Evidence to keep

One decision brief, a documented conflict review where applicable, and a tested continuity checklist.

Our next change / owner / review date

CHAPTER 05 / UNDERSTAND

Communication & sustainable growth

Follow through with supporters while protecting the people who deliver the work.

Growth is valuable when the organization can sustain the service, support the team, and account honestly for what happened.

Do not mistake exhaustion for commitment.

A team can care deeply and still be overloaded. Warning signs may include missed follow-up, skipped supervision, constant after-hours messages, and volunteers unsure who can make decisions. Praising sacrifice without addressing workload can teach people to hide the very problems leadership needs to see.

Build a stronger practice: Review workload alongside priorities. Clarify the difference between an urgent need, a routine task, and a request that can wait. Decide what will stop or be delayed when new work is added. Provide clear roles, reliable supervision, and appropriate backup. Ask what the team can consistently deliver rather than what it can survive for one exceptional week.

Do not raise money and then disappear.

Supporters need more than another request. A thank-you followed by months of silence can leave them wondering whether a promised program happened. When a plan changes, postponing the update may feel easier than explaining it, but it makes later communication more difficult.

Build a stronger practice: Assign an owner for acknowledgment and reporting. Tell supporters what was funded, what happened, what remains incomplete, and what comes next. Use accurate numbers and protect participant privacy. If there is a significant delay or proposed change, communicate early and review any funder approval requirements. Avoid describing plans as completed accomplishments.

Do not expand before strengthening the foundation.

An exciting event can create pressure to launch another program immediately. Hidden demands include scheduling, staffing, supervision, facilities, administration, data collection, and follow-up. A launch without those supports may pull resources away from work already promised.

Build a stronger practice: Estimate the full cost and define who will deliver each part. Identify the funding assumptions and what happens if support ends. Consider a limited pilot with a review date and clear conditions for continuing, changing, or stopping. Maintain an owner-based calendar for applicable filings, reports, renewals, and program commitments. Growth decisions should include the cost of maintaining quality.

CHAPTER 05 / EXAMPLES

Decisions in practice

Scenario 1 | The successful launch nobody can maintain

The situation: A women's program begins with 30 participants and strong attendance. The founder promises weekly sessions all year. Two volunteers are doing intake, childcare coordination, reminder calls, and follow-up in addition to their regular jobs.

How it goes wrong: Leaders announce another location because demand is high. Volunteers quietly begin missing calls, childcare arrangements fall through, and participants receive last-minute cancellations.

A stronger response: The team pauses expansion and maps the actual workload. It reduces avoidable tasks, confirms volunteer availability, clarifies supervision, and sets a realistic schedule. Leaders define a pilot period before making another year-long promise. They review attendance, participant feedback, staffing stability, and full costs together before deciding whether to expand.

Language you can use: "Interest is strong, and we want to preserve the quality of the experience. We are strengthening staffing and follow-up before opening another location."

What to document: A staffing plan, cost estimate, realistic service schedule, and a scheduled decision about expansion.

Scenario 2 | The update about a delayed program

The situation: Donors funded a fall workshop series. The venue becomes unavailable and two sessions are postponed. Staff worry that supporters will be disappointed, so they wait until the next campaign to mention it.

How it goes wrong: The next appeal celebrates the series as if it were completed. A donor later learns about the delay from a participant and questions the organization's reliability.

A stronger response: The organization sends a timely factual update. It explains what was delivered, what was postponed, and the revised plan. It reviews the gift terms and obtains any required approval for changes before using support differently. The update includes a contact for questions and avoids blaming participants or sharing private circumstances.

Language you can use: "Two of four sessions have taken place. The remaining sessions were postponed after our venue became unavailable. We are confirming a new location and will provide the revised dates by November 15."

What to document: An accurate delivery record, documented funder communication, and a specific owner and date for the next update.

CHAPTER 05 / APPLY

Put the practices to work

Choose a step that fits your role and capacity. Make the change observable.

01 | Make capacity visible.

List recurring services and the real hours they require, including preparation, supervision, documentation, and follow-up.

02 | Close open promises.

Review donor updates and participant commitments. Assign an owner and date to each overdue item.

03 | Design a responsible pilot.

Define the service, duration, staffing, full cost, outcome measures, and conditions for continuing or stopping.

04 | Hold a monthly review.

Review workload, finances, results, deadlines, and feedback together. Record what will change and who will carry it out.

Discuss with your team

1. What work is being sustained by someone’s unpaid exhaustion?
2. Which supporter or participant is waiting for an update?
3. What would make us pause expansion even if demand remains high?

Evidence to keep

A capacity estimate, an up-to-date commitment list, and clear criteria for the next growth decision.

Our next change / owner / review date

ASSESSMENT

Organizational practice review

Use this as a discussion tool, not a compliance score. Ask what evidence supports each answer.

Mission: Our public promise matches the services and outcomes we can responsibly influence.

☐ In place ☐ Needs attention ☐ Not sure

Boundaries: Staff and participants understand service limits and the exception process.

☐ In place ☐ Needs attention ☐ Not sure

Dignity: People can decline publicity without affecting services.

☐ In place ☐ Needs attention ☐ Not sure

Referrals: Partners, contacts, and follow-up responsibilities are current.

☐ In place ☐ Needs attention ☐ Not sure

Finances: Transactions have a clear purpose, supporting records, and review.

☐ In place ☐ Needs attention ☐ Not sure

Funding: Restricted support and reporting commitments are tracked.

☐ In place ☐ Needs attention ☐ Not sure

Governance: Decision-makers have enough information and conflicts are addressed.

☐ In place ☐ Needs attention ☐ Not sure

Continuity: Essential tasks and systems have authorized backup owners.

☐ In place ☐ Needs attention ☐ Not sure

People: Workload, supervision, and service expectations are realistic.

☐ In place ☐ Needs attention ☐ Not sure

Follow-through: Updates, outcome definitions, and expansion decisions are accurate and documented.

☐ In place ☐ Needs attention ☐ Not sure

Select one priority based on its effect on people, resources, or trust. A “not sure” answer is a reason to investigate, not to assume the practice is absent.

IMPLEMENTATION

Your 30-day action plan

One completed improvement is more useful than a long list with no owner.

Days 1-7 | Understand the gap

Choose an issue from the review. Look at a few recent records and ask the people doing the work how the process functions. Separate an individual mistake from a recurring system problem. Describe the gap concretely: “Three reimbursements lacked approval records,” rather than “Our finances are disorganized.”

Days 8-14 | Agree on a workable change

Decide what practice will change, who can authorize it, and who is responsible for implementation. Involve the appropriate leadership body or professional where needed. Define completion before the work begins. A usable reimbursement log with an approver and payment status is clearer than a goal to “improve accountability.”

Days 15-21 | Put the change into daily use

Explain the reason for the change and demonstrate the process. Test it with real routine work. Ask whether the instructions are clear, access is available, and staff can complete the steps within their actual workload. Resolve practical obstacles before assuming people are refusing to cooperate.

Days 22-30 | Review evidence and adjust

Examine the new records and ask the team whether the process helped. Record what improved, what remains unresolved, and what needs another decision. If the change did not work, identify whether the issue was unclear instructions, lack of authority, insufficient time, or a poor process design.

Worked example | Reimbursement control

Gap: Requests arrive through multiple text threads and payment status is unclear.
Change: Use one submission route and a shared log accessible to the relevant staff.
Owner: The designated finance lead, with a reviewer who did not submit the request.
Evidence: The next five requests include purpose, receipt, approval, and payment reference.
Review: At day 30, check for missing fields, duplicate payments, and staff difficulties.

Do not wait 30 days to act on an urgent concern. Use your organization’s established escalation and response process when immediate action is needed.

WORKSHEET

Turn one decision into action

Use this page in a board meeting, staff discussion, or individual leadership review.

1. The specific practice we need to change

2. Who is affected, and what evidence shows the gap?

3. The action owner, approver, support needed, and due date

4. What will show the new practice is working?

5. Review result, remaining barriers, and next review date

WORKING TOOLS

Document enough to follow through

Adapt these record outlines to your systems, privacy needs, and professional guidance.

Expense or reimbursement record

Transaction date | requester | vendor | amount | purpose | funding source | receipt location | approver | payment status and reference | review or correction note.

Example: October 5 | program lead | supply store | $84 | materials for the budgeting workshop | general program funds | receipt R-104 | approved October 6 | paid October 8 | reviewed October 31.

Decision and conflict review record

Decision requested | background and options | disclosed interests | participants and any recusals | relevant comparisons | decision and reason | approval date | follow-up owner.

Record enough to explain the process. Avoid unnecessary sensitive personal information. Follow the organization’s approved policy for access and retention.

Funding commitment tracker

Funder | gift or award | amount | allowed purpose | relevant conditions | planned costs | report due dates | owner | proposed-change approval process | current status.

Referral and participant follow-up record

Participant’s agreed goal | permission for an introduction | referral contact | next step | responsible person | follow-up date | confirmed result | unresolved barrier. Store personal information in the appropriate protected system.

Story or image permission record

Specific content | intended audience | publication channels | recording plans | voluntary choice | permission date | contact for questions | limits on withdrawing material already distributed. Confirm changes in intended use before publication.

Capacity and growth review

Proposed service | staffing and supervision | facilities and access | full operating cost | funding assumptions | outcome measures | pilot period | conditions for continuing, changing, or stopping.

SOURCES & NEXT STEPS

Keep strengthening the work

Use the guide as a recurring review tool as your organization grows.

Source [1] | Conflict of interest practices

IRS, “Form 1023: Purpose of conflict of interest policy.” This source supports the discussion of disclosing relevant financial interests and excluding affected individuals from voting on those matters.

Read the IRS conflict of interest guidance

Source [2] | Financial records

IRS, Publication 4221-PC, “Compliance Guide for 501(c)(3) Public Charities.” Its recordkeeping discussion supports maintaining financial information that can support accurate statements and reporting.

Read IRS Publication 4221-PC

Scope of the examples and tools

The scenarios, sample language, implementation steps, and worksheets are original practical examples. They are not quotations from the IRS and are not complete policies or legal forms. Suggested review routines are management practices to adapt; they are not presented as universal statutory requirements.

A useful recurring conversation

At a regular leadership meeting, choose one chapter and ask: What have we promised? What evidence supports our decisions? Who needs an update? Which person or process needs support? What needs a decision before we add more work?

Final leadership commitment

We will protect the dignity of the people we serve, use resources responsibly, welcome meaningful oversight, and communicate honestly. When a practice falls short, we will correct the process and follow through on the change.

Name / role / date