

Case Study — Nonprofit Stabilization (In Progress)

Human-focused rhythm and metric-driven decisions are rebuilding trust and results.

Client type: Nonprofit

Context: Recent leadership changes and team churn created instability and difficult handoffs.



Before (baseline):

- Slipping deadlines, ad-hoc communications, unclear decision rights
- Limited use of financial signals in day-to-day choices
- Friction across teams; meetings without clear outcomes

Artifacts delivered to date:

- Milestone 0: Launch: ED mandate (summary); staff intro deck; Dev Director monthly goals
- Milestone 1: Strategic Planning prep and completed draft, Strategic priorities document; staff presentation
- Milestone 2: Current State Assessment: Department mandates; JD review (internal); evidence-based playbooks shared (1:1s, meeting hygiene, coaching)
- Milestone 3: BvA & Worksheet: Rolling BvA framework + blank template; account-level budget structure

What we did:

- Implemented a human-focused operating rhythm (weekly 1:1s) led by the ED and Program Director
- Set simple working agreements for key decisions
- Introduced a financial metrics pack for decisions (e.g., variance-to-plan, grant burn vs. schedule)

In-progress outcomes (early indicators):

- Newly hired staff performing at a high level; faster, clearer onboarding with 1:1s and role clarity
- Decisions now reference financial metrics (trade-offs visible; fewer circular debates)
- Stronger team relationships; healthier day-to-day culture and collaboration
- Trust and accountability up as leaders run the cadence consistently

Proof & goals:

- End-of-Engagement goal: 100% of staff can answer, “How do you know you did a good job today?” with a metric, target, source, and cadence
- Org Health Index tracked across Delivery, Decision Speed, Rhythm, and Culture from baseline to end of engagement

Next milestones:

Finalize org & departmental OKRs • Expand dashboard and monthly review • Formalize capacity guardrails • Publish Board-ready Results Summary

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