Clarity Compass

A GUIDE TO HELP IDENTIFY & DEVELOP SYSTEMS

This guide will help to turn scattered ideas, questions, and feedback into focused action. Use it to pause, reflect, and chart the right next steps for your organization and team.

The Clarity Compass Includes:

- Creating Systems Overview Guide
- Clarity at Every Level Guide
- Creating & Assessing Systems Guide & Visuals

Creating Systems Overview Guide

Use the Creating & Assessing Systems visuals as a resource while navigating this overview

1 Identify the Need

- Are there recurring tasks or deadlines (e.g., grant reporting, payroll, board meetings)?
- Are staff spending time "reinventing the wheel" for the same process?
- Is important information housed in one person's head?
- Do bottlenecks or confusion slow things down?

Example: Quarterly reports are due, but no one knows who collects the data or where it lives.

2 Design the System

- Trigger: When does this process start? (e.g., "First Monday of the month")
- Steps: What exactly needs to happen?
- Roles: Who is responsible for each step?
- Tools: What resources or platforms will be used?
- Checks: How will you know it's successful?

Example: Volunteer Onboarding

- *Trigger: New volunteer signs up online*
- *Steps: Send welcome email → Schedule orientation → Assign mentor*
- *Roles: Volunteer coordinator manages process, mentor checks in*
- *Tools: Volunteer database + email template*
- *Checks: More consistent onboarding*

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3 Test the System

- Did staff know what to do without asking you?
- Was the process clear and repeatable?
- Did it save time or reduce errors?
- Did it align with your mission/values?

Success looks like: Tasks happen on time, fewer reminders are needed, and staff/volunteers report less stress.

4 Refine & Communicate

- Share the "why" behind the system
- Gather feedback regularly ("What's working? What's frustrating?")
- Adjust before scaling
- Celebrate when the system makes life easier!

Meta-System Idea: Create a "Feedback Loop" system so staff know how to request changes.

Clarity Compass Quick-Check

- ☐ We've identified a clear need for the system (recurring, confusing, or high-stakes tasks).
- ☐ The system has a defined trigger, steps, roles, tools, and checks.
- ☐ We've tested the system - staff could follow it without someone stepping in.
- ☐ The system reduced confusion, saved time, or lowered stress.
- ☐ Feedback has been gathered and incorporated.
- ☐ The purpose of the system is clearly communicated to staff.
- ☐ There's a simple way for people to suggest improvements.
- ☐ We've identified ways to celebrated the wins the system created.

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Clarity At Every Level

This resource outlines key roles with responsibilities and guiding questions. If your organization lacks a level (e.g., middle management), decide which group should take on those duties.

1 Board of Directors – Clarity of Mission & Oversight

- Sets mission, vision, and very high-level goals.
- Approves strategic plans.
- Holds leadership accountable for results.

- *What is the organization's north star (mission/vision)?*
- *How are the strategic goals measured and time-bound?*
- *How will success will be reported back?*

2 Executive Leadership – Clarity of Priorities & Resources

- Translates board goals into actionable priorities.
- Ensures systems are resourced (people, tech, budget).
- Models alignment across departments.

- *Which goals are top priority this year/quarter?*
- *How will we resource the systems (budget, staff, tools)?*
- *Who owns accountability for each major initiative?*

3 Middle Management / Program Directors – Clarity of Execution

- Design the systems that connect goals to daily operations.
- Allocate staff time and set program-level benchmarks.
- Communicate progress upward and challenges downward.

- *How do department goals connect to the big picture?*
- *What systems (processes, checklists, workflows) are in place to keep staff consistent?*
- *What information needs to flow up (to leaders) and down (to staff)?*

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4 Staff / Frontline Employees – Clarity of Action

- Operate within the systems daily.
- Provide feedback on what's working or breaking.
- Measure and report on metrics directly tied to goals.

- *What does success look like in this role?*
- *How are tasks created within the system?*
- *Where does someone go if a system breaks or a barrier comes up?*

5 Volunteers / Interns – Clarity of Contribution

- Support systems with direct effort (events, admin, outreach).
- Need clarity on how their contribution ties to the larger goals.

- *What exactly is expected during a shift/event?*
- *Who do they report to, and how do they get feedback?*
- *How does their work connect to the mission and outcomes?*

6 Community / Beneficiaries (optional but powerful)

- Not always thought of as part of the "system," but in nonprofits they are.
- Feedback informs whether goals are truly being met.
- Can even act as ambassadors/advocates when systems engage them well.

- *How does someone access services or participate in programs?*
- *How would someone give feedback or voice concerns?*
- *How would someone stay informed or involved beyond being a recipient?*

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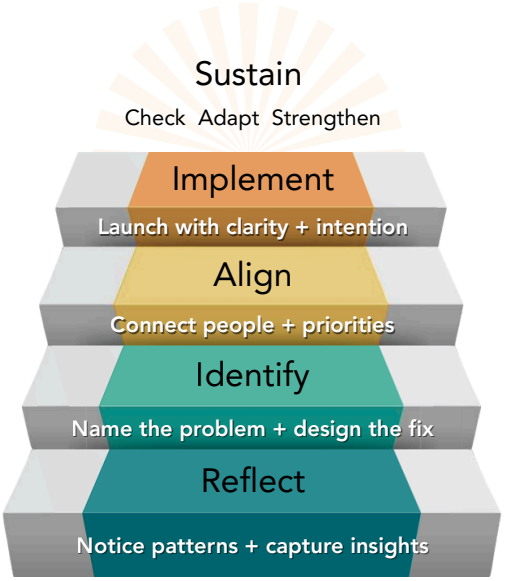
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Creating Systems

When creating systems, it is important to take time to reflect on the organizational areas and current needs, identify the problem, and ensure the system aligns with the need.

Organizational Areas to Consider

- Board governance
- Strategic planning
- Finance and accounting
- Data collection
- Communication (both internal and external)
- Organizational culture
- Facilities and operations
- Team and member development



Considerations

- What goals, expectations, or policies are tied to each of these organizational areas?
- Who's involved, and how do they feel about how things run now?
- What's already working, and why does it work?
- What isn't working, and why not?
- What are potential barriers (technology, funding, etc.)?

Types of Systems

Information & Tracking
Dashboards, trackers, CRMs

Operational
Day-to-day processes that keep things running

Communication
Meetings, project management, messaging

Accountability & Quality
Performance reviews, feedback loops

Decision-Making
Approval processes, prioritization frameworks

Knowledge Management
SOPs, shared drives, training libraries

__Reflect__ on the organizational area and __identify__ the problem and what type of system is needed.

TACEY SOLUTIONS

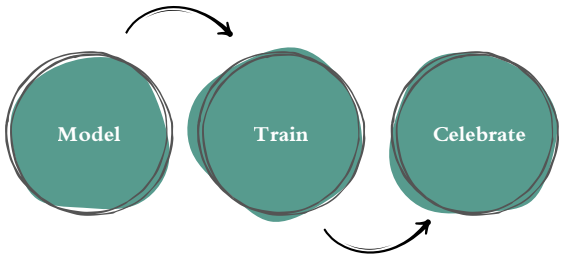
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Introducing a System

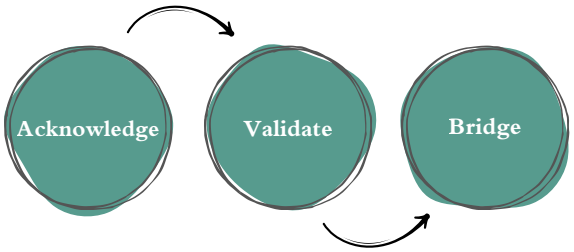
- Include input. If people are part of shaping the system, they're more likely to use it.
- Communicate openly. "This is what we're going to try, and here's how you can provide feedback." (Yes - meta-systems for feedback about systems!)
- Explain the purpose. Share how it will help the team and the organization - not just the compliance piece, but the relief and clarity it will bring.

Implementation of Systems



- How will the new system be modeled? Who will model it?
- What training, support, and resources will be necessary?
- Consider small celebrations recognizing everyone welcoming change.

- "You're feeling overwhelmed by this change. That makes sense. When your plate is already full, a new system can feel like just another thing. Let's pinpoint what feels unmanageable."
- "Your team is pushing back. You're caught in the middle, advocating for them. What training or resources might help them feel supported?"



Navigating Hesitance or Feedback

Signs a System is Working

- **Scalability:** The process holds up even when the workload grows
- **Autonomy:** People start acting without needing constant reminders
- **Relief:** Individuals feel less burdened because expectations are clear
- **Consistency:** Tasks are happening on time, in the same way, every time
- **Data:** You can point to improved performance, fewer errors, or efficiency

When designing a system, consider what you will use to determine success.

__Align__ the system through communication and transparency and __implement__ with a clear plan of support

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Systems Examples

Review the examples and consider what reflections took place, what problem was identified, what type of system was created, and the sign the system is working.

Policy Example

Policy: "All staff must submit expense reports by the 5th."
System: Create a simple online form, send automated reminders, and assign one staff member to review submissions weekly.
Result: Reports are consistent, the finance team isn't chasing people, and reimbursements happen on time.

Question Example

Question: "Why are we always scrambling at the last minute for grant deadlines?"
System: Create a visual grant calendar, color-code grants by effort and priority, assign roles for each stage, and set milestone reminders two weeks before every major deadline.
Result: The team sees what's coming at a glance, tasks are spread out realistically, and proposals get stronger because they aren't rushed.

Feedback Example

Feedback: "We never know who's responsible for what in meetings."
System: Introduce a shared meeting framework with a standardized agenda template, clear owners, a living task tracker, and an automatic recap email to all participants with tasks, owners, and deadlines.
Result: Meetings move from confusing to predictable. Everyone knows their role, accountability is transparent, and progress compounds instead of stalling.

Looking to bring clarity to your organization? I can help you break down complex problems, design efficient systems, and develop stronger teams – resulting in sustainable change.

Let's Chat!



Katie Tacey
Systems & Development Consultant

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