

CASE STUDY

Operational Systems Design for a Growing Nonprofit

Project: Building Operational Systems for a Global Nonprofit **Role:** Director of Finance
Duration: 2023 – 2026 **Organization:** Global volunteer-led nonprofit

OVERVIEW

As Director of Finance for a global volunteer-led nonprofit, I designed and documented the operational systems supporting financial management, governance, fundraising, compliance, and organizational reporting. My goal was to transform institutional knowledge into repeatable, scalable processes that could be sustained beyond individual leadership transitions.

The result was a comprehensive operations manual covering financial workflows, governance procedures, sponsorship management, budgeting, compliance, and reporting, enabling future leaders to maintain organizational continuity while improving operational efficiency.

RESPONSIBILITIES & DELIVERABLES

This project included the design and documentation of systems for:

- Annual budgeting and financial planning
- Expense approval and reimbursement workflows
- Vendor evaluation and payment operations
- Sponsorship and fundraising management
- Nonprofit governance and compliance
- Board reporting and annual impact reporting
- Risk management and operational documentation
- Leadership transition and knowledge transfer

KEY SYSTEMS DEVELOPED

Financial Operations

Designed standardized procedures for budgeting, payment approvals, reimbursements, financial reporting, and vendor management. Established repeatable annual planning processes that balanced organizational priorities with financial sustainability.

Governance & Compliance

Developed decision frameworks and documentation supporting nonprofit compliance, board approvals, charitable registrations, tax reporting, contractor payments, and organizational policies. Created guidance for navigating complex operational scenarios while maintaining regulatory compliance.

Fundraising Operations

Created sponsorship workflows, partnership documentation, grant tracking systems, and standardized agreement processes that improved consistency across fundraising activities while reducing administrative burden.

Reporting & Organizational Learning

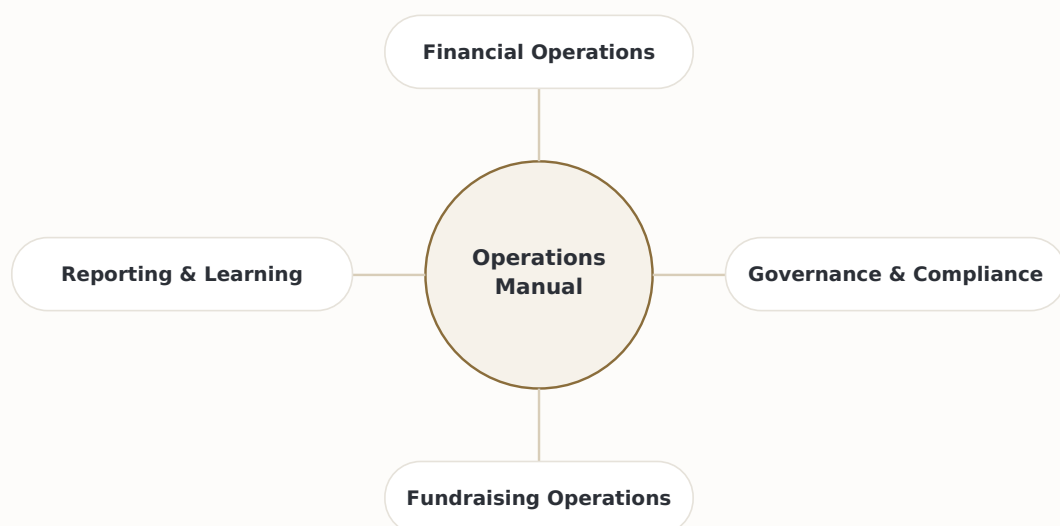
Led development of annual impact reporting processes, internal reporting standards, and structured organizational feedback systems that informed strategic planning and continuous improvement.

TOOLS & METHODS

- Process documentation
- Financial planning and budgeting
- Governance and compliance
- Workflow design
- Knowledge management
- Cross-functional stakeholder coordination
- Microsoft Excel
- Google Workspace
- Notion / project documentation

SYSTEM MAP

The operations manual was organized around four connected functions, each documented so it could run independently of any one leader.

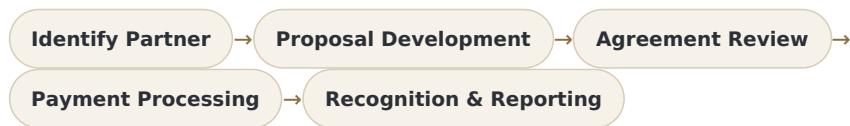


EXAMPLE OPERATIONAL WORKFLOWS

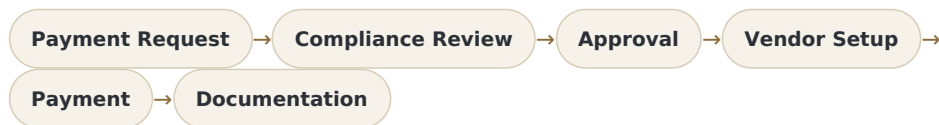
Annual Budget Development



Sponsorship Lifecycle



Payment Operations



SELECTED OPERATIONAL DECISIONS

CHALLENGE	SOLUTION
Ad hoc budget requests	Developed standardized approval policy and documentation requirements
Sponsorship negotiations	Created repeatable agreement workflow balancing partnership goals with nonprofit governance
International payments	Built decision framework for selecting compliant payment methods
Travel support	Designed equitable, application-based funding process
Organizational transitions	Developed comprehensive documentation to reduce knowledge loss between leadership teams

DESIGN PRINCIPLES

The documentation was designed around four principles:

- Standardize recurring processes to reduce ambiguity.
- Balance governance with operational flexibility.
- Preserve institutional knowledge through clear documentation.
- Build systems that future volunteers could sustain independently.

OUTCOMES

- Standardized financial and governance processes across organizational functions
- Reduced reliance on institutional knowledge through comprehensive documentation

- Created repeatable budgeting, sponsorship, and payment workflows used to support leadership transitions
- Established operational guidance supporting nonprofit compliance and long-term sustainability