ORGANIZATIONAL ALIGNMENT

orGANizAtioNAL ALIGNMENT

Clarity, Accountability, and Measurable Impact Across Programs, Development and Operations

Angel L. Sierra
Breaking Cycles Consulting
1234 W. Street Ave | Chicago, IL 60610

☐ 312-801-0260
✉ a.sierra1013@yahoo.com

www.breakingcyclesconsulting.com

Prepared for

SAMPLE

--/--/25

Good enough doesn't change lives.

ORGANIZATIONAL ALIGNMENT

This framework was built to do more than measure activity — it aligns the entire agency around one truth. From frontline staff to the Board, every role, report, and meeting connects through the same structure. By tying daily Push actions to long-term Impact outcomes, the system creates clarity, accountability, and measurable change that can't get lost in translation.

The pages ahead show how daily Push becomes measurable Impact, rolling up through reports and meetings into full agency alignment.

ORGANIZATIONAL ALIGNMENT

Nonprofits fail when programs, operations, and development pull in different directions. **This KPI framework fixes that**. Every role has clear success indicators and thresholds, with data that rolls from staff to supervisors to executives. The result is alignment: no surprises, no drift—just clarity, accountability, and measurable impact.

THE STRUCTURE

Seven domains frame performance for programs and operations:

Mission & Outcomes
- **Drop-In**: How well core services meet immediate guest needs and connect people to stability.

- **Street Outreach**: Effectiveness of outreach in building trust, engaging participants, and linking to resources.

- **Interim Housing Program**: Success in providing safe, structured support and helping people transition into housing.

Financial Health
- Ensures operational stability: month-end close accuracy and timeliness, audit readiness, reserve levels, and on-time vouchers.

Operations & Risk
- Tracks facilities, safety, compliance, preventive maintenance, crisis readiness, and overall risk management.

Equity & Access
- Monitors disparities in outcomes across race, gender, and other demographics, with thresholds that trigger corrective plans if inequities widen.

People & Culture
- Covers staffing stability, supervision cadence, training completion, and workplace culture indicators like retention and engagement.

Revenue & Growth
- Covers fundraising and development health: donor retention, grant reporting timeliness, revenue mix, and diversification.

Data Quality & Reporting
- Checks accuracy and timeliness of HMIS, donor database, and internal reporting ($\geq$98% accuracy standard).

Nothing sits outside the map. Executive accountabilities and Board-level oversight are tied directly to these domains, so leadership is looking at the same truth the frontline produces.

ORGANIZATIONAL ALIGNMENT

KPi

Performance Framework

This is an organization-wide performance framework. Every role, department, and function is tied into the same structure, so performance isn't scattered across spreadsheets or left up to interpretation. The framework is built on nine organizational domains that capture everything an agency must do to succeed. By anchoring performance in these domains, the agency gets a single, consistent map for accountability—one that stretches from the frontline to the Board room.

X DEPARTMENT LEADERS

- Chief Executive Officer
  - Chief Operating Officer

DEVELOPMENT

- Director of Development
  - Development & Communications Coordinator
  - Grant Writer
  - Volunteer Manager

OPERATIONS

- Director of Fin. & Admin.
  - Bookkeeper
  - Culture and Human Resources Coordinator
  - Executive Assistant to the CEO
  - Facilities Manager

PROGRAMS

- Program Director

Interim Housing Program
- **Interim Housing Program Manager**
  - Interim Housing Program Case Manager

Manager of Sites and Guest Experience
- Lead IHC ✕ IHC

Street Outreach Program
- **Street Outreach Program Manager**
  - Street Outreach Worker

Drop-in Program
- **Drop-In Coordinator**
  - IHC (part-time) – Drop-In Support

NO KPI EXISTS IN ISOLATION.

A case manager's service plans, a facilities manager's maintenance, or a bookkeeper's reconciliations all tie into the same nine domains. Job-level metrics are more than tasks—they're the building blocks of organizational performance. Grounding KPIs in job descriptions makes accountability practical and fair, while channeling them into domains makes it strategic. Leadership sees how every role contributes to mission, equity, sustainability, and culture. Whether frontline or CEO, your work is visible in the same framework, keeping alignment tight, performance transparent, and impact measurable at every level.

CULTURE & ACCOUNTABILITY

PROVING WE'RE NOT JUST BUSY

In the end, KPIs are about proving we're not just busy, we're actually moving the mission forward!

ORGANIZATIONAL ALIGNMENT

PUSH, IMPACT & ACTION SIGNALS

Every KPI has a target, but targets alone don't drive accountability. What matters is knowing when to act before small problems turn into crises. Each measure ties to thresholds, tracked through a Red–Amber–Green scheme. With Push and Impact indicators, we see both the work being done and the results it creates—making it clear when support or intervention is needed.

Every role tracks two sides of performance: what we push and the impact that push creates.

Both Push and Impact metrics are tied to clear thresholds, using a simple Red–Amber–Green scheme:

Push indicators

The controllable actions, behaviors, and signals we can influence daily or weekly.

They tell us whether staff and teams are doing the right work in real time — things like shifts completed, encounters logged, intakes processed, service plans updated, equity checks performed, reports submitted on time, or preventive maintenance completed.

These are the levers we can actually pull.

Impact indicators

The outcomes that confirm whether the push translated into change.

They measure results at the participant, program, and organizational levels — engagement in case management, exits to stable housing, reduction of disparities across demographics, financial stability, donor retention, or sustained data quality.

These are the proof points that show if the work is moving the mission.

Action Signals

Green: on target. Stay the course.

Amber: early signs of drift. Supervisor responds with a short corrective plan (usually 14–30 days).

Red: off target or repeated misses. Director steps in, an intervention plan is launched, and the issue appears on the executive dashboard.

This closed loop makes performance visible and actionable. Push without Impact is busywork. Impact without Push is luck. By tying both to thresholds and interventions, we ensure the agency doesn't just measure activity — it uses data to drive action, accountability, and real change.

ORGANIZATIONAL ALIGNMENT

The roll-up process turns daily work into agency-wide accountability. Staff record Push actions, leaders connect them to Impact, and data moves upward through monthly, quarterly, and annual reviews.

This roll-up happens on multiple levels:

THE ROLL-UP + REPORT CADENCE

Daily Capture
Push on the Floor
Frontline staff record daily actions and other KPI-related data. These Push indicators track the real work happening in real time. Captured data rolls into monthly reports, forming the foundation for monitoring performance and connecting effort to outcomes.

Monthly Reporting
Push Reports & Summaries
Staff compile their daily Push into monthly reports. Supervisors review and consolidate them into Push Summaries, capturing department-wide performance. Managers check early Impact signals, flag issues, and escalate as needed. These reports are reviewed in Department Leaders Meetings to align operations and address immediate concerns.

Quarterly Review
Impact Alignment Reports
Directors roll up Push Summaries into Impact Alignment Reports, showing where push is driving outcomes and where it's falling short. These reports guide course corrections, highlight successes, and surface risks. At Executive Meetings, leadership reviews the data, intervenes on red/yellow areas, and ensures agency-wide strategies stay aligned.

Annual Alignment
Board & Public Accountability
The COO and Directors compile the Annual Alignment Report, blending Push metrics with agency-wide Impact. Presented to the Board, it demonstrates organizational health, key outcomes, and equity progress. Externally, it shows funders and the community the agency's results, reinforcing accountability and shaping long-term strategy and trust.

OrGANiZAtioNAL ALIGNMENT
WHAt SCOrEBOArDs ArE

Scoreboards are simple, structured tools — usually in spreadsheet form — that track key performance indicators (KPIs) for programs, departments, and the organization as a whole. They give a snapshot of how the agency is doing, where things are on track, and where intervention is needed.

PROGRAMS 100!

- Each program (Drop-In, Street Outreach, Interim Housing, etc.) has its own one-page scoreboard.
- They show 6–10 KPIs directly tied to daily work: intakes, encounters, case management engagement, meals served, etc.
- Supervisors update these monthly based on staff reports.

DEPARTMENT 100!

- Directors take all the program scoreboards in their area and roll them into a department-level scoreboard (Programs, Development, Finance, Operations, etc.).
- These include broader metrics like budget variance, donor pipeline health, compliance, and staffing stability.

EXECUTIVE 100!

- A top-level landing page that pulls from all departments.
- Shows each domain (Programs, Equity, Finance, Operations, Development, People & Culture, Risk) in one view.
- Uses RAG (Red, Amber, Green) or another alert system to make issues visible at a glance.

ACTION
WHEN A MEtriC SLiPS, it's ViSiBLE iMMEDiAtELY AND LiNKED to tHE riGHt MEEtiNG FOr DiSCVSSiON AND COrrECtiON.

ACCOUNTABILITY
MEtriCS ArE tiED to rOLES, SO it's CLEAr WHO OWNS WHAt.

TRANSPARENCY
EVErYONE CAN SEE WHErE tHiNGS StAND, FrOM tHE FLOOr to tHE BOArDrOOM.

FOCUS
SCOrEBOArDS HiGHLiGHt WHAt MAttErS MOSt WitHOVt DrOWNiNG iN DAtA.

Scoreboards are simple, structured tools — usually in spreadsheet form — that track key performance indicators (KPIs) for programs, departments, and the organization as a whole. They give a snapshot of how the agency is doing, where things are on track, and where intervention is needed.

ORGANIZATIONAL ALIGNMENT

Meetings aren't just calendar fillers — they're the backbone of how data turns into decisions. Each one plays a distinct role in carrying Push and Impact metrics upward, making sure information flows from the floor to the boardroom without getting lost or watered down.

DEPARTMENT LEADERS MEETINGS

Twice Monthly

Role: These meetings are where frontline data (Push Reports) first gets discussed at scale. Supervisors and managers bring program-level scorecards, highlight trends, guest issues, and operational needs.

Purpose: Spot early warning signs, share updates, and coordinate fixes before small problems grow. First meeting of the month is forward-looking (Push data and plans), second meeting is a check-back (are pushes leading to impact?).

EXECUTIVE MEETING

Monthly

Role: Directors and executives step back from day-to-day details and look at the bigger picture. They review Departmental Scorecards and the Executive Dashboard.

Purpose: Align Push activity across departments, analyze whether it's converting into measurable Impact, and make strategic decisions or escalate red/yellow metrics.

PROCESS & PROTOCOL MEETING

Monthly

Role: This is where recurring problems get turned into system changes. Data or issues flagged in the Department Leaders Meetings feed in here.

Purpose: Refine processes, policies, and workflows so breakdowns in the Push → Impact chain don't keep happening. Keeps the agency learning and adapting.
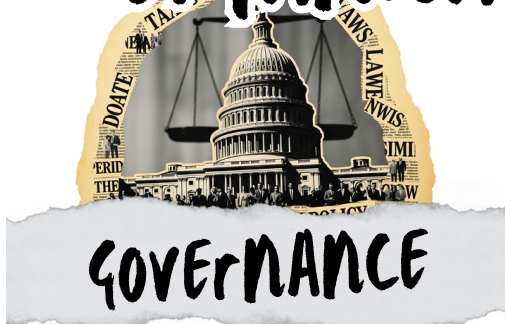
BOARD REPORTING

Quarterly & Annual

Role: The roll-up reaches its highest level here. Leadership brings the quarterly Executive Dashboard and the Annual Alignment Report.

Purpose: Give the Board and funders a clear picture of the agency's overall health, the impact being achieved, and where strategic attention or resources are needed.

Together, these meetings create a steady rhythm: frontline work fuels scorecards, departments turn data into fixes, executives align strategy, and the board sees the full picture. This ensures accountability, clarity, and impact across the agency.

ORGANIZATIONAL ALIGNMENT

GOVERNANCE

Governance is about who owns what and how accountability flows. In the scoreboard system:

- Every KPI has a single owner — the staff role directly responsible for that measure.

- Supervisors ensure staff are reporting consistently and that metrics stay accurate.

- Directors oversee department scoreboards, confirm data quality, and step in when a metric drifts off course.

- Executive leadership (CEO, COO, Directors) aligns the whole agency, making sure departmental scoreboards roll into an executive view that informs board reporting.

- The Board receives quarterly and annual reports that reflect the same KPIs tracked daily — not new or separate numbers.

This chain of ownership ensures that data is reliable, consistent, and actionable at every level.

Governance keeps the system disciplined. Escalation keeps it responsive. Together, they guarantee that every metric has a clear owner, every problem has a path upward, and leadership always sees the same truth as staff on the floor.

ESCALATION

Escalation is the intervention process when a KPI falls below its threshold:

- Green: On track. No action needed beyond routine monitoring.

- Amber/Yellow: Early warning. Supervisor develops a short corrective plan (usually 14–30 days).

- Red: Critical miss or repeated yellow. Director intervenes with a formal corrective plan, and the issue is flagged in the next leadership meeting.

- Executive/Board Level: If red persists or signals a systemic issue, it escalates further for resourcing, policy changes, or strategic adjustment.

This ensures small issues are caught at the right level before they snowball — and that serious risks make their way up to leadership quickly.

ORGANIZATIONAL ALIGNMENT

IMPLEMENTATION CHECKLIST

Define the Metrics

- Confirm KPIs for each program, department, and domain.
- Assign each KPI a single, named owner.
- Write the formula and data source for each metric (e.g., HMIS, donor database, finance system).

Establish Governance & Escalation

- Green = on target, Yellow = supervisor-level corrective plan, Red = director-level intervention.
- Supervisors review reports monthly, directors monitor departmental scoreboards, executives review the dashboard at monthly leadership meetings, board sees quarterly/annual alignment.

Train & Launch

- Train staff on daily Push data capture.
- Train supervisors on compiling Push Reports.
- Train directors on using Department Scorecards to monitor and escalate.
- Review dashboards in meetings to reinforce use.

Build the Scoreboards

- Create a master spreadsheet with tabs for: Program Scorecards, Department Scorecards, Executive Dashboard.
-
- Standardize the layout: KPI, owner, target, actual, RAG/alert level, 3-month trend, next action.
-
- Test formulas so department and executive tabs auto-pull from program tabs.

Connect to Meetings

- Department Leaders (twice monthly): review Push Reports and Program Scorecards.
- Process & Protocol (monthly): fix systemic issues flagged by data.
- Executive Leadership (monthly): review Department Scorecards and Executive Dashboard.
- Board (quarterly/annual): review Impact and Alignment Reports.

Set the Cadence

- Daily: staff log Push data in real time.
- Monthly: supervisors compile Push Reports into Program Scorecards.
- Monthly: directors consolidate Program Scorecards into Department Scoreboards.
- Quarterly: directors prepare Impact Alignment Reports.
- Annual: COO/directors produce Annual Alignment Report for board/community.

Continuous Improvement

- Confirm KPIs for each program, department, and domain.
- Assign each KPI a single, named owner.
- Write the formula and data source for each metric (e.g., HMIS, donor database, finance system).

ORGANIZATIONAL ALIGNMENT

Angel L. Sierra
Breaking Cycles Consulting
1234 W. Street Ave | Chicago, IL 60610

312-801-0260
a.sierra1013@yahoo.com

www.breakingcyclesconsulting.com

Good enough doesn't change lives.