Write Design Group

Fictional Sample Report

Millbrook Family Resource Center Funder Ready Assessment Report

A diagnostic review using the OPTIC² model

March 2026

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What We Heard

Millbrook Family Resource Center is the kind of organization that holds a community together without anyone fully noticing — until it isn't there. For seventeen years, MFRC has been the place families in Millbrook County turn to when the utilities are about to be shut off, the pantry is empty, the kids need somewhere safe to go after school, and the parents need someone to help them figure out what comes next. That work is real, it is trusted, and it is woven into the fabric of a community that doesn't have a lot of other places to turn.

Marcus Webb stepped into the executive director role when Linda Hartman retired last spring after fourteen years at the helm. Marcus came up through the programs — he ran the youth enrichment work for six years before taking the top role — and he knows the organization from the inside. What this conversation made clear is how much of MFRC's infrastructure lived in Linda's head, in her relationships, and in habits that were never written down because Linda never needed to write them down. She knew. Marcus is still learning what she knew.

Diane Rivera joined the conversation as the organization's longest-tenured program manager. Eleven years in, Diane is the institutional memory Marcus is still inheriting. She has wanted a brand guide, approved language, and a shared system for grant tracking for years. She has been improvising without one because that was what the organization required — and she has done it well.

The trigger for this conversation was a United Way reviewer comment that the proposal felt inconsistent with what the organization communicated elsewhere. That stung because Marcus suspected it was true. The website still shows 2019 program descriptions. The Candid profile carries a mission statement that Linda edited informally in 2021 and never propagated. The case for support Diane pulls from was written in 2018.

What this organization needs is not a reinvention. It is a reconciliation — bringing the materials, the systems, and the public presence into alignment with the organization it has actually become. The foundation is strong. The work is real. The gaps are fixable.

Your OPTIC² Snapshot

OPTIC² is the six-layer framework WDG uses to evaluate organizational readiness for institutional funding. Each layer answers a question funders routinely ask. Together, they tell the full picture of whether an organization is ready to pursue, win, and manage funding with confidence.

Layer	Rating	Key Finding
Operations	**Developing**	Processes exist but live in people's heads. The long-tenured program manager, Diane Rivera, carries most of the institutional memory around grant tracking and reporting. No documented workflows, no backup owners, no shared system.
Public Presence	**Developing**	The website is outdated and reflects the organization as it was five years ago, but not as it operates today. Social media is inconsistent. The Candid profile exists but has not been updated since 2021.
Trust	**Functional**	Core legal and financial documentation is in place. The board is active and engaged. Policies exist. Minor gaps around program-level budgets and a formal document retention schedule.
Identity	**At Risk**	The mission statement exists in at least four different versions across organizational materials. Program names have drifted. No canonical document exists that the whole team works from.
Credibility	**At Risk**	Programs are effective and deeply community-rooted, but the evidence lives in spreadsheets, in Diane's memory, and in annual reports that no longer reflect current service levels. No logic model, no formal outcomes framework.
Communications	**Not Present**	No reusable messaging assets. Every grant application and funder conversation starts from scratch. The organization cannot describe itself consistently in writing across staff members.

Layer 1 — Identity

Who are you — and what is the approved truth about your organization?

AT RISK

Identity is the foundation of everything else in this framework. It is not just the logo or the tagline. It is the approved, version-controlled source of truth about who Millbrook Family Resource Center is, what it does, and how the organization talks about it. When identity is solid and documented, every proposal, every grant application, and every public communication draws from the same well. When it is not, drift sets in quietly over years — and funders notice when they triangulate across materials.

What We Found

Millbrook Family Resource Center has a genuine identity. The mission is real, the values are lived, and the programs are well understood by the staff who run them. The problem is not that the identity is weak. The problem is that it has never been formally documented — and after seventeen years of growth, evolution, and staff turnover, it now exists in at least four different versions across different organizational materials.

The mission statement on the website reads differently than the one on the Candid profile, which reads differently than the version in the current grant boilerplate, which reads differently than what Marcus says in funder conversations. None of these versions are wrong. They are all attempting to describe the same organization. But funders who check multiple sources — and experienced funders always do — see inconsistency and read it as disorganization.

Program names have drifted in similar ways. The after-school program is referred to as the Summer Youth Enrichment Program on the website, Youth Summer Enrichment on the Candid profile, and simply the summer program in most grant applications. The parenting skills program has three different names in active use. These inconsistencies are invisible to the people inside the organization and immediately visible to funders outside it.

There is no brand guidelines document. Diane mentioned that she has been making design decisions for flyers and reports based on what she remembers from materials Linda approved years ago. The logo files exist in a shared Google Drive folder, but there are multiple versions with no indication of which is current.

Recommendations

- **Conduct a mission statement reconciliation.** Bring the board and senior staff together for a focused conversation about the current mission statement. Agree on

canonical wording, write it down, and commit to using it everywhere. This is a decision, not a writing exercise.

- **Document the organizational canon.** Produce a single approved document that captures the mission statement, official program names and short descriptions, service area statement, and approved impact claims. This does not need to be long. It needs to be agreed upon and accessible.
- **Create a brand guidelines document.** Identify the current approved logo files, document the color palette and typography, and establish clear rules for usage. This is a half-day project that protects years of brand equity.
- **Establish governed language for program names.** Pick one name for each program, write it down, and use it everywhere consistently. This sounds small. The downstream impact on funder confidence is significant.
- **Bring the canon to the full team.** Once documented, the organizational canon needs to be shared with every staff member and any contractors who produce communications on behalf of MFRC. Diane in particular should have a copy as the primary grant writer.

AT RISK

Identity is the prerequisite for the Communications layer, and Communications is the most direct barrier to funding consistency. Start here. The work is primarily about decision-making and documentation, not creation from scratch.

Layer 2 — Operations

Can you manage the funding once you receive it?

DEVELOPING

Operations is the layer funders rarely ask about directly and the one they evaluate constantly. When a foundation program officer reviews a proposal, they are trying to answer a simple question: will this organization deliver what it promises? The answer lives in systems — how grants are tracked, how reporting is managed, who owns what, and what happens when the person who knows everything is unavailable.

What We Found

Millbrook Family Resource Center has operational instincts that have served it well. Grants have been managed. Reports have been filed. Funders have been retained. The organization has operated reliably for seventeen years, and that track record is real and meaningful.

The challenge is that the operational reliability has depended almost entirely on individuals rather than systems. Linda Hartman managed the grant calendar in her head and in a personal spreadsheet that Marcus has not yet fully decoded. Diane Rivera manages the reporting obligations for her programs through a combination of calendar reminders and email threads. There is no shared pipeline tracker, no pre-award checklist, no documented handoff protocol for what happens when someone is out or leaves.

Marcus is already feeling this. He discovered two grant reporting deadlines in his first month that Linda had been managing personally and that had not been transferred to any shared system. He caught them in time, but the experience made the vulnerability concrete.

The Google Drive structure exists but is inconsistent. Different staff members have organized their program folders in different ways. Finding a prior grant application requires knowing who wrote it and where they stored it — knowledge that currently lives in Diane's memory.

Recommendations

- **Build a shared grant and funder pipeline tracker.** A simple spreadsheet listing active funders, grant amounts, reporting deadlines, assigned owners, and status. Accessible to Marcus and Diane at minimum. Start using it immediately to capture everything currently in people's heads and email inboxes.
- **Document the current reporting obligations.** List every active grant, the reporting requirements attached to it, the deadline, and who owns it. This is the operational foundation Marcus needs to manage the transition from Linda's institutional knowledge to a shared system.

- **Create a pre-award checklist.** A short list of steps from opportunity identification to submission — who identifies, who evaluates fit, who drafts, who reviews, who submits. This prevents last-minute scrambles and makes the process repeatable by anyone on the team.
- **Standardize the Google Drive folder structure.** Choose one structure and migrate everything into it. A one-page document describing the standard folder organization and file naming conventions is enough. The goal is that anyone could find any document without asking Diane.
- **Document staff swim lanes.** A one-page responsibility map that names each staff member, describes their grant-related functions, and identifies backup owners for critical tasks. This is the first step toward an organization that can absorb staff transitions without losing operational continuity.

DEVELOPING

The transition from Linda's tenure to Marcus's is the perfect moment to build the operational infrastructure that should have existed for years. The vulnerability is acute right now. Building even a lightweight system in the next sixty days directly reduces risk.

Layer 3 — Credibility

What do you do — and what demonstrates that it works?

AT RISK

Credibility is the intellectual backbone of the organization's funding case. It is how Millbrook Family Resource Center answers the funder question: why should we believe this approach produces results? For a human services organization with seventeen years of community presence, the answer is compelling — but it is currently locked in spreadsheets, annual reports, and Diane Rivera's professional memory rather than in a documented, accessible system.

What We Found

MFRC has real evidence of impact. The numbers are meaningful: over 800 households served annually through emergency assistance, more than 1,200 individuals accessing the food pantry each month, a youth enrichment program that has served over 400 children since its launch. These are not small numbers for a county of this size, and they represent genuine community need being met.

The challenge is that the evidence lives in too many places in too many formats. The annual reports that Diane pulls from for grant applications are two and three years old. The current service data lives in a tracking spreadsheet that Diane maintains personally and that has never been translated into funder-ready language. There is no logic model. There is no formal outcomes framework. There is no documented description of how any of the programs work at the level of detail that institutional funders increasingly expect.

When asked what outcomes the parenting skills program achieves, Marcus described them thoughtfully and specifically. When asked where that description lived in writing, the answer was that it didn't — not in any form that a grant reviewer could find and evaluate.

The United Way comment about inconsistency is partly an Identity issue and partly a Credibility issue. The materials feel inconsistent partly because the impact claims in different proposals draw from different years of data, are framed in different ways, and sometimes describe the programs at different levels of specificity.

Recommendations

- **Write formal program descriptions for each program**. A current, approved description for each of the four programs — emergency assistance, food pantry, parenting skills, and youth enrichment — that states what the program does, who it serves, how it works, and what it aims to achieve.

- **Update the service data and establish a current baseline.** Pull the most recent twelve months of data from Diane's tracking spreadsheet and translate it into a clean, approved set of impact claims. These numbers need to be current, accurate, and consistently cited across all materials.
- **Develop a simple logic model for each program.** A one-page visual that shows inputs, activities, outputs, and intended outcomes for each program. This does not need to be a sophisticated evaluation framework. It needs to demonstrate that the organization has thought carefully about how its work produces change.
- **Create a past performance summary.** A two to three page document that presents MFRC's track record across all programs — service numbers, funder history, program duration, and key milestones. This becomes the foundational credibility document for proposals and funder conversations.
- **Establish a data collection and reporting calendar.** Decide what gets tracked, how often, and who owns it. The goal is that when a grant report is due, the data already exists in a usable form rather than requiring a retrospective scramble.

AT RISK

The evidence exists. The problem is access and packaging. Translating what Diane knows into documented, funder-ready materials is the core task in this layer.

Layer 4 — Trust

Can a funder trust you with their dollars?

FUNCTIONAL

Trust is the price of admission for institutional funding. Before a funder evaluates your programs or your outcomes, they evaluate whether the organization itself is structured, governed, and managed in ways that reduce their risk. For Millbrook Family Resource Center, this layer is the strongest in the assessment — a genuine organizational strength that creates a stable foundation for the work ahead.

What We Found

MFRC's legal and governance infrastructure is in solid shape. The organization has maintained its 501(c)(3) status in good standing, files its 990 annually and on time, carries appropriate liability insurance, and has an active eleven-member board that meets regularly. The current board includes members with financial, legal, and human services expertise — a meaningful signal to institutional funders that the organization is governed by people who understand their responsibilities.

The core governance policies are in place: a conflict of interest policy, a whistleblower policy, and a basic document retention policy. The board chair, Patricia Osgood, has been in her role for four years and has a strong working relationship with Marcus. The board reviewed and approved the current year budget and receives regular financial reports.

There are two gaps worth addressing. First, program-level budgets do not exist as separate documents. The organizational budget shows overall revenue and expense categories, but a funder asking how much it costs to run the youth enrichment program cannot get a clear answer from existing materials. Second, the document retention policy is general and has not been reviewed or updated since 2018. It does not address digital file management or cloud storage.

Recommendations

- **Develop program-level budgets.** A simple breakdown of what it costs to run each program — staff time allocation, direct program costs, and a proportional share of overhead. This does not need to be elaborate. It needs to exist and to be consistent with the organizational budget.
- **Update the document retention policy.** Revise the existing policy to address digital files, Google Drive, cloud storage, and data privacy. A one-hour conversation with a board member with legal background and thirty minutes of editing will accomplish this.

- **Assemble a funder compliance kit.** A single folder — digital and physical — containing the IRS determination letter, articles of incorporation, bylaws, most recent 990, current insurance certificates, and core governance policies. When a funder asks, the answer should be immediate.
- **Document the board's funder engagement**. Note which board members have relationships with current or prospective funders. This is a meaningful credibility signal that often goes unmentioned in proposals.

FUNCTIONAL

This layer requires maintenance, not reconstruction. The two gaps are fixable quickly. Address them before the next major grant cycle.

Layer 5 — Communications

Can you tell your story clearly and consistently across every format?

NOT PRESENT

Communications is where the organizational canon becomes usable. It is the layer where identity, programs, and evidence get translated into the ready-to-use copy blocks that make proposals faster, pitches stronger, and public messaging consistent. Every time Millbrook Family Resource Center rewrites its organizational description for a new grant application, the staff is doing work that should have been done once. This layer is about doing it once.

What We Found

This is MFRC's most significant communications gap and a direct barrier to funding consistency. There are no reusable communications assets. No canonical organizational description in short, medium, and long form. No program-specific messaging blocks. No current needs statement grounded in Millbrook County data. No case for support. No approved boilerplate for funder acknowledgments.

Diane is effectively the organization's institutional memory for grant language, and she is doing heroic work with inadequate tools. She has built a personal library of proposal language from past applications — a Word document of paragraphs she has used before, organized by program and funder type. This is resourceful and practical, but it is not a system. The language in Diane's personal document is inconsistent with the current mission statement, references programs by names that are no longer in use, and cites impact data from 2021.

When Marcus writes funder communications independently, the language is warm and authentic but not aligned with Diane's boilerplate. When board members describe the organization in community settings, they draw from their own experience and understanding. The result is an organization that sounds like three or four different organizations depending on who is speaking and what they are working from.

The raw material for a strong communications kit exists. The programs are real and well understood. The impact data exists in Diane's tracking systems. The community context is well known to the staff. What is missing is the systematization — packaging what exists into approved, versioned, accessible copy blocks that everyone works from.

Recommendations

- **Build the organizational boilerplate set.** Write three approved versions of the organizational description: one sentence, two to three sentences, and a full paragraph. Agree on the wording, write it down, and use it everywhere.
- **Write program-specific messaging blocks.** A short, approved description for each of the four programs that states what the program is, who it serves, how it works, and at least one current impact claim.
- **Develop a current needs statement.** A two to three paragraph narrative that answers the question: why does Millbrook County need this organization? Ground it in current county-level data on poverty, food insecurity, household instability, and youth outcomes.
- **Assemble a case for support.** A one to two page document that makes the argument for investing in MFRC. Draw from the identity canon, the program descriptions, the updated impact data, and the needs statement.
- **Retire Diane's personal boilerplate document.** Once the official communications kit exists, Diane's personal library should be retired and replaced. The risk of two systems existing in parallel is that the unofficial one continues to be used because it is familiar and immediately accessible.

NOT PRESENT

The most direct bottleneck to funding consistency. The raw material exists across Diane's documents, the current annual report, and Marcus's funder conversations. Building the communications kit is primarily a systematization task, not a creation-from-scratch task.

Layer 6 — Public Presence

Does a funder see a consistent story everywhere they look?

DEVELOPING

Funders do not rely on proposals alone. Before and alongside reviewing any funding request, they search for the organization online. They look at the website. They check social media. They search Candid. They Google the executive director. What they find either reinforces their confidence or creates doubt. For Millbrook Family Resource Center, what funders find right now is a picture of an organization that was strong five years ago and may or may not still be.

What We Found

MFRC has a public presence, and it has a genuine community reputation that precedes any digital footprint. In Millbrook County, the organization is known and trusted. That relational credibility is real and valuable, particularly with local funders who have long-standing relationships with the organization.

The challenge is that MFRC's public footprint does not reflect its current reality. The website was last comprehensively updated in 2020. The program descriptions on the website describe the organization as it operated before the youth enrichment program expanded, before the parenting skills program was restructured, and before Marcus became executive director. His bio does not appear on the website. Linda Hartman's bio still does.

The Candid profile exists, which is meaningful — many organizations at this size and stage have never claimed one. But it was last updated in 2021 and shows financial data from the 2020 fiscal year. A funder checking Candid for a current financial picture will find a four-year-old snapshot and no indication that the organization is actively maintained.

Social media is inconsistent. The Facebook page is active and has a genuine community following, but posts are focused on immediate program announcements rather than organizational storytelling. There is no LinkedIn presence. There is no consistent visual identity across social channels.

The most immediate funder credibility issue is the combination of an outdated website and a stale Candid profile. When a United Way reviewer or a community foundation program officer cross-references MFRC's proposal against its online presence, the gaps create exactly the kind of doubt that the reviewer's comment reflected.

Recommendations

- **Update the website immediately.** At minimum, update the executive director bio, revise the program descriptions to reflect current operations, and ensure the mission statement matches the canonical version once it is established. Accuracy before redesign.
- **Update the Candid profile.** Log in and update the mission statement, program descriptions, leadership information, and financial summary to reflect the current organizational reality. This is a two-hour task with an outsized credibility return.
- **Ensure mission statement consistency across all platforms.** The exact wording of the mission statement should be identical on the website, Candid, Facebook, and any other directory listings.
- **Establish a public presence maintenance calendar.** A simple annual checklist of what gets reviewed and updated after the fiscal year closes, when the 990 is filed, and before each major grant cycle.
- **Consider a minimal LinkedIn presence.** A basic organizational page that mirrors the website mission and program information costs very little and adds a credibility signal for funders who search there.

DEVELOPING

The gaps are fixable and some of them are urgent. Updating the website and Candid profile before the next major grant cycle is the most direct public presence investment available right now.

Priority Action Plan

The following is a sequenced roadmap for Millbrook Family Resource Center, organized around the immediate goal of strengthening funder confidence and the near-term goal of building the infrastructure to pursue and manage funding with consistency.

Immediate — Before Your Next Major Grant Application

These actions most directly affect funder confidence right now. None of them require months. Most require focused hours or a single working session.

- Conduct the mission statement reconciliation. Agree on canonical wording and commit to it.
- Update the Candid profile. Mission statement, program descriptions, current leadership, financial summary.
- Update the executive director bio on the website and remove Linda Hartman's.
- Build the shared grant pipeline tracker. Start capturing deadlines and owners immediately.
- List all current active grants and their reporting obligations in one shared document.

Near-Term — Build Within 90 Days

This is the infrastructure that will make MFRC's next funding cycle materially stronger and reduce the key-person risk that the transition has exposed.

- Complete the organizational canon. Mission statement, program names, approved impact claims, brand guidelines.
- Write formal program descriptions for all four programs.
- Update service data and establish current approved impact claims.
- Build the communications kit. Boilerplate set, program messaging blocks, needs statement, case for support.
- Develop program-level budgets for each of the four programs.
- Document staff swim lanes and operational responsibilities.
- Create a pre-award checklist and standardize the Google Drive folder structure.
- Update the document retention policy to address digital files and cloud storage.
- Assemble the funder compliance kit in a single accessible folder.

Sustain — Ongoing Maintenance

Once the foundation is built, the work shifts to keeping it current.

- Review and update the organizational canon annually, after the fiscal year closes and before the next grant cycle begins.
- Update the communications kit whenever a program changes, a new impact claim is established, or the mission statement is revised.
- Keep public presence consistent. Mission statement, program names, leadership, and financial data should match across all platforms at all times.
- Maintain the service data tracking. Update the impact claims at least annually.
- Share updates with the full team. When the canon changes, everyone who communicates on behalf of the organization needs to know.

On Next Steps

This report belongs to Millbrook Family Resource Center. The findings, the priorities, the recommendations — all of it is yours to use however is most helpful. Share it with your board, use it to structure your own planning conversations, bring it to any collaborator you choose to work with.

What the assessment makes clear is that this organization is not starting from scratch. Millbrook Family Resource Center has seventeen years of community trust, a capable and committed staff, a strong governance foundation, and real evidence of impact that matters to the people it serves. The work ahead is primarily about documentation and alignment — taking what lives in people's heads, in Diane's personal files, and in materials that no longer reflect current reality, and building it into a shared, maintained infrastructure that funders can see and trust.

Marcus, you came into this conversation already understanding that something was off. You were right, and the fact that you could see it clearly after six months in the role is a genuine organizational asset. Diane, the instincts you've been following for eleven years were right. The organization needed a shared system. Now is the moment to build one.

If you'd like to work with Write Design Group to close these gaps — building the identity canon, developing the communications kit, or working through the operational infrastructure — we're ready for that conversation. If you take this report and run with it on your own, that is exactly what it is designed for. Either way, you now have a clear picture of where you are and what to do next.

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