

TOOLKIT #3

The Root of Recurring Problems

The same problems keep coming back because they share a cause. Map how your symptoms connect, and find the one problem worth solving first.

A Lever & Core toolkit

Based on the Current Reality Tree, a Theory of Constraints Thinking Process · Eliyahu M. Goldratt

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Every complex organization is inherently simple.

01 · WHAT IT IS

Many symptoms, one root

Late reports, tired staff, confused donors, programs that fade out. Teams usually treat these as separate problems and fix them one by one, and a few months later they are back. Very often they are branches of the same root. This toolkit helps your team find it.

What it is

A **Current Reality Tree** is a one-page map of cause and effect. At the top are the things the team dislikes about how things are today, the undesirable effects. Below them, linked by simple "if… then…" arrows, are the causes that produce them. Following the arrows down, the branches converge on a small number of causes, usually one: the **core problem**.

Solving the core problem removes many symptoms at once. Solving a symptom removes one, for a while.

When to use it

- The same complaints come up in every staff meeting or review.
- Previous fixes worked briefly, then the problem returned.
- Departments blame each other for the same breakdowns.
- A new director or board wants an honest picture before acting.
- You need to explain to funders or the board why change is needed.

The NGO translation

In mission-driven organizations the core problem is rarely a lazy person or a bad tool. It is more often a **policy, a habit, a measure or a shared belief** that once made sense: "we never turn down funding", "every program must be new", "overhead is bad". The tree makes that visible without blaming anyone.

TIME	WHO	YOU'LL NEED
2–3 hours for a first tree with the core group; a short follow-up to check it with others.	4–8 people who know the work from different angles, including someone who will challenge.	Sticky notes in two colours, a large wall or whiteboard, markers, the worksheet.

Source. The Current Reality Tree is one of the Thinking Processes of the Theory of Constraints (TOC), developed by Dr. Eliyahu M. Goldratt and presented in his book *It's Not Luck* (1994). This toolkit is a simplified, original adaptation for NGO teams by Lever & Core.

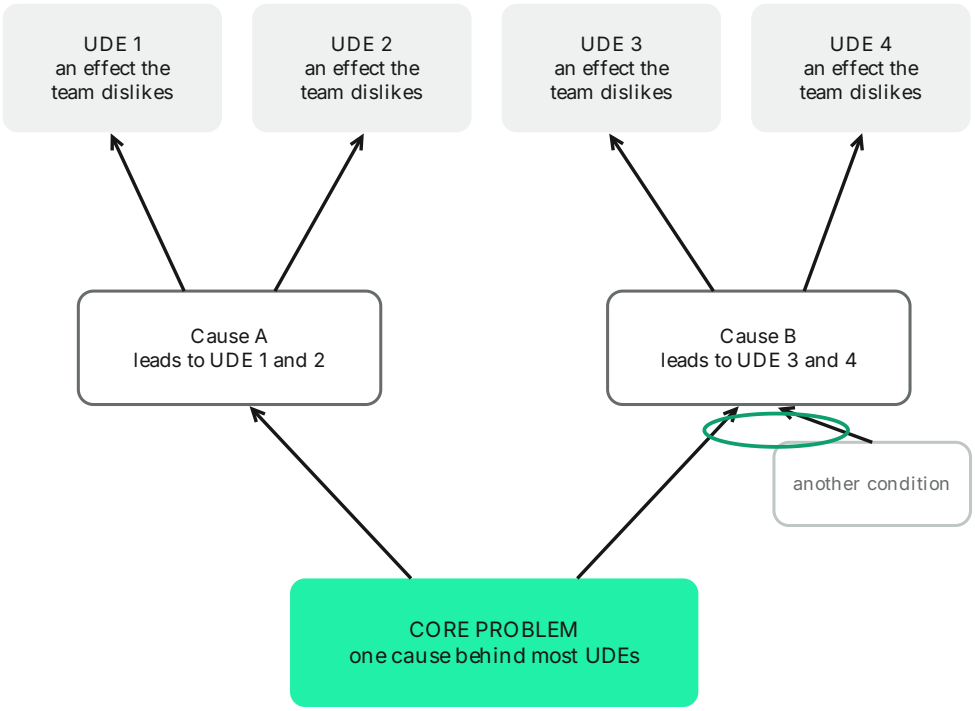
02 · THE FRAMEWORK

A tree you read from the bottom up

WHAT WE SEE
Undesirable effects (UDEs)

WHY IT HAPPENS
Intermediate causes

WHAT DRIVES IT
The core problem



Arrow = "If (bottom), then (top)." Read the tree upward.

Ellipse = both causes are needed together.

Three building blocks

Undesirable effects (UDEs): real, current situations that hurt the goal. They are what people complain about.

Causes: the conditions that produce those effects. Each arrow says: if this exists, then that follows.

Core problem: the cause at the bottom that, directly or through others, leads to most of the UDEs, and that you can influence.

Four checks for every arrow

- **Clear?** Would an outsider understand both statements?
- **Real?** Does the cause actually exist today? What is the evidence?
- **Enough?** Does the cause produce the effect on its own, or is something else also needed? If so, add it with an ellipse.
- **Only cause?** Could something else explain the effect too?

03 · STEP BY STEP

Building the tree with your team

0 **Set the scope and the goal**

Agree which part of the organization you are looking at (the whole NGO, a department, a program) and what it is trying to achieve. Effects only count as undesirable relative to a goal.

1 **List 5–10 undesirable effects**

One statement per sticky note. Each must be **real and current**, clearly **negative** for the goal, and **inside your scope**. Phrase it as a situation, not a missing solution: “donor information is scattered across files”, not “we lack a CRM”. Never name a person.

Ask: What keeps coming back, no matter what we try?

2 **Connect two effects that seem related**

Pick two UDEs and ask whether one causes the other, or whether both share a cause. Write the link as “If… then…”, and read it aloud.

3 **Dig down until branches meet**

For each effect, keep asking “why does this exist?” and add the cause below it. When one cause is not enough alone, add the other condition and draw an ellipse around both arrows. Bring in the remaining UDEs as you go.

Ask: What would have to be true for this to happen?

4 **Read it aloud and test every arrow**

Read bottom-up, “if… then…”, using the four checks on the previous page. Invite challenge; a weak arrow found now saves a wrong decision later.

5 **Name the core problem**

Look for the cause near the bottom from which arrows reach most of the UDEs, and which is within your influence. Mark it. It is often a policy, a measure or a belief, rather than a lack of resources.

6 **Decide what comes next**

A core problem usually persists because it sits inside a dilemma. Take it to an Evaporating Cloud (Toolkit #1) to find a way out, or use it to choose your constraint (Toolkit #2).

Writing good statements

WEAK	STRONGER
“We need a CRM.”	Donor information is spread across several files and inboxes.
“The finance manager is slow.”	Payments to partners often wait weeks for approval.
“Communication is bad.”	Program teams learn about new donor commitments after they are made.

04 · WORKED EXAMPLE

An education NGO that is always firefighting

TYPICAL SCENARIO

A composite of a pattern we often see in the sector. It is not a client and does not describe any real organization.

THE SITUATION

A small environmental education NGO runs school and community programs. The team is committed and capable, yet everyone feels they are always catching up. Each problem has been “fixed” at least once.

UNDESIRABLE EFFECTS

- Staff regularly work evenings and weekends to meet deadlines.
- Grant reports are often submitted late or in a rush.
- Programs end when their grant ends, even when they work well.
- Donors and partners describe the organization in very different ways.
- Experienced coordinators leave after a short time.

HOW THEY CONNECT

If many small programs run at the same time, each with its own budget, reports and partners, **then** staff carry several parallel workloads **and** reports compete for the same few people, so they come late.

If each program is designed around one funder’s timeline, **then** it ends when that money ends.

If every program tells its own story, **then** donors hear different organizations.

If workload stays high **and** there is no clear path to grow inside the organization, **then** coordinators leave.

CORE PROBLEM

WHAT DRIVES MOST OF IT

The organization says yes to almost any funding that fits its broad mission, and designs a new program around each grant.

WHAT THEY DID NEXT

The team took the core problem to an Evaporating Cloud: “accept every opportunity, to survive” versus “focus on a few programs, to deliver quality”. They agreed a short filter for new opportunities and a plan to merge similar programs.

The lesson. Each of the five effects had already been “fixed” on its own: a reporting template, a wellbeing day, a new brochure, an exit interview. None lasted, because none touched the decision that produced them. One change in how opportunities are accepted reaches all five.

05 · WORKSHEET

Map your current reality

Scope (organization / team / program) Goal Date

1 UNDESIRABLE EFFECTS

Real, current, negative for the goal, inside our scope. Situations, not missing solutions. No names.

UDE 1

UDE 2

UDE 3

UDE 4

UDE 5

UDE 6

UDE 7

UDE 8

2 THE TREE

Place UDEs at the top. Add causes below, connected with “if... then...” arrows. Circle pairs of causes that are needed together.

CORE PROBLEM

3 BEFORE WE TRUST THE TREE

- [ ] We read every arrow aloud, bottom-up
- [ ] Missing conditions are added (ellipses)
- [ ] Each cause exists today, with evidence
- [ ] The core problem reaches most UDEs

06 · FOR THE FACILITATOR

Tips and common mistakes

Facilitator tips

Collect effects before causes

Let people list what hurts first, without explaining it. Explanations too early lock the group into one story.

One statement per sticky note

Short, full sentences, present tense. Use one colour for UDEs and another for causes so the wall stays readable.

Read aloud, every time

"If… then…" spoken out loud exposes weak links that look fine on paper. Ask the quietest person to read.

Welcome the skeptic

Challenges to an arrow are gifts. Ask "what would make this not true?" and adjust the tree.

Keep it to one page

Five to ten UDEs are enough. The aim is clarity about the root, not a complete map of everything.

Common mistakes

Writing solutions as problems

"We need a new system" hides the real effect. Ask: what happens today because of it?

Blaming people

A tree with names in it becomes a trial. Describe situations, policies and behaviours, never individuals.

A scope that is too wide

"The sector" or "the economy" cannot be acted on. Stay with what the team can influence.

Stopping at a symptom

If the "core problem" explains only one or two effects, keep digging; there is a deeper cause.

Trying to fix every branch

The point of the tree is to choose. Act on the core problem; many branches will fall with it.

QUESTIONS TO KEEP ON THE WALL

01 What keeps coming back, whatever we try?

02 Is this a situation, or a missing solution?

03 If this is true, does that really follow?

04 Is this cause enough on its own?

05 Which cause sits under most of our effects?

06 Can we actually influence it?

Want help running this with your team?

Lever & Core — Uriel Edery

We help NGOs and mission-driven organizations find the few things that really limit their impact, and build simple, focused ways of working around them.

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THE LEVER & CORE TOOLKIT SERIES

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08 Negotiate on Interests
09 Checklists That Work
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