

TOOLKIT #9

Checklists That Work

Design short, sharp checklists for the work your team repeats: events, campaigns, onboarding and donor care. Fewer dropped balls, calmer launches.

A Lever & Core toolkit

Based on checklist design principles · Atul Gawande, The Checklist Manifesto

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Every complex organization is inherently simple.

01 · WHAT IT IS

Good people, busy weeks, missed steps

Most mistakes in NGO operations don't happen because people don't know what to do. They happen because a capable person, under pressure, forgets one simple step: the thank-you call, the consent form, the backup speaker, the final budget check.

What it is

A method for designing short checklists that catch the few critical steps a skilled team is most likely to skip. These are not manuals or to-do lists. They are tools a team uses at set moments to confirm that what matters most has been done.

A good checklist doesn't replace judgment. It handles the simple things so people can spend their attention on the hard ones. It also gets people talking at the moments that count.

What you need

One recurring process, the two or three people who run it, 60–90 minutes for a first draft, and the next real run to test it.

Source method. The principles here (pause points, do-confirm and read-do formats, short lists of critical items, testing in real use) draw on the work of surgeon and writer Atul Gawande, described in *The Checklist Manifesto* (2009), which studies checklists in aviation, medicine and construction. This toolkit is Lever & Core's own adaptation for NGO operations.

Use it for work that is

- **Recurring:** it happens every month, every campaign, every new hire.
- **Costly when it slips:** a missed step hurts a donor relationship, a beneficiary, the budget or your reputation.
- **Shared:** several people or teams hand work to each other.
- **Done under time pressure:** launch days, event nights, year-end.

Four checklists most NGOs need

EVENTS	Before the day, before doors open, within 48 hours after.
CAMPAIGNS	Before launch: links, audiences, consent, approvals, tracking.
ONBOARDING	First day, first week, first month for staff and volunteers.
DONOR CARE	From gift received to thank-you, receipt, record and report.

02 · THE FRAMEWORK

Pause points, the right format, killer items

TWO KINDS OF CHECKLIST

Do-Confirm

for experienced teams doing familiar work

Do from memory — **Pause** stop together — **Confirm** read and tick

Work as usual, then stop at a set moment and check that nothing critical was missed.

Read-Do

for rare, new or high-risk tasks

Read one item — **Do** that item — **Tick** then the next

Follow the list step by step, like a recipe, doing each item as you read it.

ANATOMY OF A CHECKLIST THAT WORKS

A clear pause point
A named moment to stop: “before doors open”.

Killer items only
About 5–9 steps that are critical and easy to skip.

Plain, short wording
Start with a verb. One line per item. Fits on one page.

An owner and a date
Someone keeps it current; every version is dated.

Which format to choose

Do-Confirm suits experienced teams running familiar work, such as a monthly donor report or a regular event. People work from memory, then stop together and confirm.

Read-Do suits work that is rare, new or risky: the annual audit pack, a crisis statement, a first-time grant portal. People follow the list line by line.

If you can’t decide, ask: “Would a skilled person on this team be insulted by being walked through it?” If yes, use Do-Confirm.

A checklist is also a conversation

Some of the most valuable items are not tasks but **communication checks**: a short huddle where everyone confirms roles, names the biggest risk and says what they need.

Example communication items

- Everyone knows who decides if something goes wrong.
- Each person has named one risk they’re watching.
- We agreed how we’ll reach each other on the day.

03 · STEP BY STEP

Build and test a checklist in eight steps

1

Pick one process that hurts when it slips

Choose something recurring where a missed step has a real cost. Start with one process, not ten.

2

List what has gone wrong before

Ask the people who do the work: “What have we forgotten, delayed or redone in the past?” This failure list is your raw material.

Ask: What step, if skipped, would we only discover when it’s too late?

3

Set the pause points

Name two or three moments when the team will stop and check, for example “two weeks before”, “before doors open”, “before we press send”.

4

Choose the format for each pause point

Do-Confirm for familiar work done by experienced people. Read-Do for rare or high-risk tasks.

5

Keep only the killer items

For each pause point keep about five to nine items that are critical and easy to miss. Cut anything nobody ever forgets.

6

Word it and lay it out

Start each item with a verb. One line each. Large, clean type on a single page. Add the checklist’s name, owner and version date.

7

Test it on the next real run

Use it live, then ask: Where did we hesitate? What was missing? What did nobody need? Expect two or three rounds of changes.

8

Give it an owner and a review date

One person keeps it current, and the team reviews it after each run or each quarter. Retire items that no longer earn their place.

> **Timing.** A first draft takes 60–90 minutes with the people who do the work. Most checklists are stable after two or three real runs.

04 · WORKED EXAMPLE

The annual fundraising evening

TYPICAL SCENARIO

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

THE SITUATION

A community NGO holds a fundraising dinner every year. The team is experienced, yet every year something slips: a major donor's name mispronounced, the payment link not tested, thank-you letters going out weeks late. Each mistake is small, but together they cost goodwill. The team spent half an hour listing past slips and grouped them into three moments where a pause would have caught them.

Two weeks before

Do-Confirm · owner: events lead

- [ ] Confirm guest list with the major-gifts lead
- [ ] Check pronunciation of every name read aloud
- [ ] Test the donation link end to end
- [ ] Confirm accessibility needs and seating
- [ ] Approve the run of show with the director

Before doors open

Do-Confirm · 5-minute huddle

- [ ] Mics, slides and video tested in the room
- [ ] Payment devices charged and online
- [ ] Everyone knows who decides if plans change
- [ ] Photo consent process in place
- [ ] Each person names one risk to watch

Within 48 hours after

Read-Do · owner: donor care lead

- [ ] Personal thank-you to every major donor
- [ ] Receipts issued for all gifts
- [ ] Gifts and pledges recorded in the database
- [ ] Unpaid pledges listed with follow-up dates
- [ ] Team debrief: what to change on the list

What changed. The lists cover only steps that had actually slipped; everything the team never forgets stayed off. After the evening they removed one unneeded item and added one they had missed.

The same method on other processes

New staff onboarding · first week

Read-Do · owner: line manager

- [ ] Accounts and building access working on day one
- [ ] Safeguarding and data-protection briefing done

Before we press send · campaign

Do-Confirm · owner: campaign lead

- [ ] Every link and donation button tested
- [ ] Audience list excludes people who opted out

05 · WORKSHEET

Checklist builder

Process | Checklist owner | Version / date

1 WHAT HAS GONE WRONG BEFORE?

Past slips, delays and redos in this process.

2 PAUSE POINTS

When will we stop and check? Two or three moments.

3 PAUSE POINT A

When | Do-Confirm / Read-Do

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

4 PAUSE POINT B

When | Do-Confirm / Read-Do

- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]
- [ ]

5 COMMUNICATION CHECK

Who decides if something goes wrong? What is the biggest risk? What does each person need?

6 TEST DRIVE

After the first real run, check each item against these questions.

Missing: what did we need? | **Unneeded:** what did nobody use? | **Unclear:** where did we hesitate?

06 · FOR THE FACILITATOR

Tips and common mistakes

Facilitator tips

Build it with the people who do the work

A checklist written by a manager alone gets ignored. Draft it with the people who will use it.

Frame it as a team tool, not control

Say it plainly: this is how a strong team protects itself on busy days, not a sign of distrust.

Make pausing everyone's job

Anyone, including the most junior person, can call the pause and ask for the next item.

Keep it where the work happens

Printed at the venue, pinned in the campaign folder, built into the onboarding calendar.

Celebrate the catch

When the checklist catches a mistake, say so. That is what keeps people using it.

Common mistakes

Writing a manual

Thirty items means nobody reads it. If it doesn't fit on one page, cut it down.

Listing the obvious

Items nobody ever forgets add length without adding safety. Keep only what slips.

Vague items

"Check everything is ready" can't be ticked. "Test the donation link on a phone" can.

Never testing it

A checklist that hasn't been used in a real run is still a draft.

No owner, no updates

Processes change. A list nobody maintains drifts out of date and loses trust.

Confusing it with a to-do list

A to-do list tracks tasks to finish. A checklist confirms, at a set moment, that the critical steps happened.

The one-page test

Before you print it, check: Does it fit on one page? Does every item start with a verb? Would skipping any item cause real harm? Is there a named owner and a version date? If all four are yes, it's ready for a real run.

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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