

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.