

# A 60–90 Day Review Workbook for Nonprofit Finance Teams

Step-by-step exercises to clean up your coding and design dimensions that work.



## Who This Is For

This worksheet is for nonprofit finance teams who have already rolled out dimensions and want to see if they're working — whether you're:

- 60–90 days post go-live and doing a reality check,
- noticing messy coding, duplicates, or workaround values creeping back in, or
- deciding what to keep, simplify, merge, or retire based on real usage.

It's especially useful if you want:

- a clear before/after view of reporting clarity,
- a quick check on what's helping vs. slowing you down, and
- a simple 30-day refresh plan to clean up and tighten governance.

If your dimensions are starting to drift (or you want to prevent it) — this worksheet is for you.

## How to Use This Worksheet



### **Solo pass (20–30 minutes):**

Complete Sections 1–4 with your first honest draft.



### **Team session (45–60 minutes):**

Review Sections 5–7 with your finance team + a program leader if possible.



### **Commit to next steps (15 minutes):**

Identify the top outcomes to improve first and confirm which lenses support it.

**CHAT WITH OUR TEAM**

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## What You'll Get Out of This Worksheet

By the end, you will have:

- ✓ A before/after view of improvements in reporting clarity and consistency
- ✓ A clear picture of what's still slowing you down
- ✓ A refined “dimension set” based on real usage
- ✓ A list of cleanup or governance tweaks based on the first 60–90 days
- ✓ A renewed monthly/quarterly rhythm for keeping dimensions healthy
- ✓ A new 30-day microplan to address what you learned

## What to Do With Your Results

Once you've worked through this worksheet, use your notes to:

- confirm which dimensions and values are earning their keep — and which need adjustment,
- agree on specific cleanups, merges, or retirements based on real usage,
- tighten governance and ownership where breakdowns showed up, and
- set a short 30-day plan to reinforce what's working and fix what isn't.

You don't need to tackle everything at once. Start with the issues that slow down your most important reports, lock the rules that would prevent them from recurring, and build a steady review rhythm from there.



**Write it down and document it — because you'll come back later, see why you decided what you did, and make the next decision with confidence.**

**Kinley Graham, Director of Pre-Sales, Sparkrock**



## SECTION 1 — Before & After Snapshot (Scorecard Revisit)

*Don't overthink this — your first instinct is usually right.*

Rate each statement twice:  
Once for where things started (A) and  
once for where they are after the  
assessment (B).

**Scale:**  
**1 = Not true**  
**2 = Somewhat true**  
**3 = Fully true and consistent**

Statement	A — At the Start	B — 60–90 Day Check-In
We have a clear purpose for each dimension.		
Dimension values are named consistently.		
People code consistently across teams.		
Board reports are faster and easier to trust.		
Funder reports require less cleanup.		
Restricted funds reporting is reliable.		
We can isolate variances quickly.		
Our structure supports program performance.		

## **SECTION 1 — Before & After Snapshot (Scorecard Revisit) Continued.**

**What improved most?**

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**What didn't change as much as we hoped?**

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## SECTION 2 — Real Usage Review (What People Actually Did)

### A) Which dimensions/lenses were used most often?

(From coding, reporting, budget conversations, or system logs.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### B) Which dimensions/lenses were rarely used?

(And might not be needed.)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### C) Which values caused confusion or errors most often?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



## D) Which reports improved noticeably?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

## E) Which reports are still painful?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Why?

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## SECTION 3 — Reporting Reality Check

### A) Is board reporting clearer and faster?

☐ Yes   ☐ Somewhat   ☐ Not yet

What slows you down today:

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### B) Is funder/grant reporting cleaner?

☐ Yes   ☐ Somewhat   ☐ Not yet

Where rework still occurs:

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## **C) Is restricted vs. unrestricted reporting stable?**

☐ Yes   ☐ Somewhat   ☐ Not yet

Confusion still seen here:

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## **D) Are program/budget owners using the dimensions the way you intended?**

☐ Yes   ☐ Somewhat   ☐ Not yet

What they struggle with:

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## SECTION 4 — What Worked (Wins & Improvements)

### A) Wins worth celebrating

(Check all that apply)

- ☐ Faster month-end
- ☐ Cleaner reports
- ☐ Fewer “special case” values
- ☐ Fewer spreadsheet workarounds
- ☐ Easier to explain variances
- ☐ Reduced coding errors
- ☐ Clearer grant tracking
- ☐ Better data for budgeting
- ☐ Other wins: \_\_\_\_\_

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### B) Practices or rules that worked well

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## SECTION 5 — What Didn't Work (Friction Points)

### A) Problems with values or structure

- ☐ Naming rules not followed
- ☐ People still create new values outside the process
- ☐ Duplicate values reappeared
- ☐ Too many values in a single dimension
- ☐ Values don't reflect how programs actually operate
- ☐ Restrictions not coded consistently
- ☐ System limitations made updates difficult
- ☐ Other: \_\_\_\_\_

### B) Where governance broke down

- Approvals took too long
- No one was sure who owned what
- Not enough training
- Process wasn't clear to program teams
- Reporting still required manual mapping

Write your specifics:

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## SECTION 6 — Dimension Structure Adjustments

*Use your findings to refine your dimension set.*

### **A) Dimensions we want to KEEP as-is:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### **B) Dimensions we want to MODIFY or SIMPLIFY:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Why: \_\_\_\_\_

### **B) Dimensions we want to MODIFY or SIMPLIFY:**

1. \_\_\_\_\_
2. \_\_\_\_\_

Plan for mapping history or legacy reporting:

\_\_\_\_\_

## SECTION 7 — Governance Adjustments

### A) What governance rules need refinement?

- ☐ Naming rules
- ☐ Approvals
- ☐ Who can create values
- ☐ Training expectations
- ☐ Retirement process
- ☐ Documentation expectations
- ☐ Review cadence
- ☐ System permissions
- ☐ Other: \_\_\_\_\_

### B) What communication needs improving?

- ☐ People don't know when values change
- ☐ Leaders aren't aware of new rules
- ☐ Program managers need better examples
- ☐ Finance needs a faster way to share updates
- ☐ Other: \_\_\_\_\_

### C) Updated governance owners (if any)

Dimension steward: \_\_\_\_\_

Approver: \_\_\_\_\_

Reviewer: \_\_\_\_\_

Training owner: \_\_\_\_\_

## SECTION 8 — 30-Day Dimension Refresh Plan

*A smaller version of the 30-day plan in Worksheet #2 — perfect for post-implementation tuning.*

### Week 1 — Identify What to Fix First

The highest-value reporting improvement is:

Fixing this requires changes to (check all):

- ☐ Value cleanup
- ☐ Naming rules
- ☐ Governance approvals
- ☐ User training
- ☐ Report structure
- ☐ System setup
- ☐ Other: \_\_\_\_\_

### Week 2 — Cleanup Actions

Top values to adjust/retire/merge:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

Owner: \_\_\_\_\_

Deadline: \_\_\_\_\_

## Week 3 — Governance Adjustments

What rule/process we're updating:

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Why this will help:

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Owner: \_\_\_\_\_

Deadline: \_\_\_\_\_

## Week 4 — Make It Stick

- ☐ Updated documentation shared
- ☐ Quick refresher training delivered
- ☐ Updated cheat sheet posted
- ☐ Monthly/quarterly review scheduled

One thing we will do differently going forward:

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# Why Sparkrock Is Different When It Comes to Dimensions

Sparkrock Impact is an ERP purpose-built for nonprofit finance teams who need clear, reliable data they can stand behind.

Here's what makes dimension management in Sparkrock different:

## Designed for Real-World Nonprofit Complexity

Built around real nonprofit reporting needs

Use the lenses you already think in:

- Programs and services
- Funding and restrictions
- Grants and projects
- Departments and accountability centers

That means less chart-of-accounts gymnastics and far fewer spreadsheet workarounds.

## Built for change, not just implementation

Programs shift. Funding changes. Reporting evolves. Sparkrock supports continuous refinement so your dimensions stay consistent and decision-ready.

### READY TO EXPLORE YOUR OPTIONS?

Want to see these dimension ideas in real finance software? Connect with the Sparkrock team to explore options.

