

Reporting Capacity Build Sample: Diagnosis and Backbone, Fall 2026

Prepared for Sabal Point Community Services (SAMPLE)

SAMPLE REPORT. Sabal Point Community Services is a fictional organization; every figure describing it is synthetic demonstration data. This document exists to show the format and rigor of a real RSC deliverable. Rojas Strategic Consulting has no delivered client engagements behind it, and nothing here is past performance.

SCOPE

5 funded programs, 4 funders, 5 report formats

DATA

35 report builds over 12 months, 312 template fields, 8 builds timed across 88 steps

METHOD

cycle-log analysis, timed observation, field-lineage census, definition audit, parallel run

PREPARED BY

Rojas Strategic Consulting LLC

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Published by RSC as a public sample. Sabal Point Community Services is invented, and so is every figure describing it; the format, the checks and the standard are the ones a real engagement receives.

BOTTOM LINE

RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

THE QUESTION YOU ASKED

If a funder asks me to back up a number we filed, can I do it, or am I the only one who can?

OUR ANSWER

Not reliably. Participant served carries three definitions at once, and the number we filed with one funder sits 42.7 percent above that funder's own rule. Six of eleven filing steps rest on one person, and two already-filed numbers turned out wrong.

WHAT WE RECOMMEND YOU DO

1. **Open every report the day after its period closes.**

The grants and compliance manager runs it; about 3 hours once, then roughly 15 minutes per cycle.

2. **Stop typing figures by hand into the two rebuilt templates.**

The grants and compliance manager runs it with the database administrator; about 6 hours per template.

3. **Decide in writing what participant served means.**

The executive director makes the ruling; one 90-minute session plus an email to each funder.

4. **Name a backup person for every step only one person can do.**

The executive director assigns, the grants and compliance manager trains; about 8 hours in total.

THE FINDINGS, IN PLAIN TERMS

The report and its checks all happen in the same three days. HIGH

The median report takes 2.3 working days of work but stretches across 15 business days before reaching the funder, with no room left to catch a mistake. The chart and the detail: page 3

128 of 312 funder fields are typed by hand, and any one could be wrong. HIGH

128 of 312 required fields, 41.0 percent, are typed by hand out of a system that already holds the value. Every one is a chance to mistype, though the rework we measured came from elsewhere. The chart and the detail: page 4

One person sets the number, checks it, submits it, and files it. HIGH

Six of 11 steps can be done by only one person, the grants and compliance manager, and the organization cannot file four of five reports if that person is out. The chart and the detail: page 5

One number means three things, and we filed the wrong one. MODERATE

Participant served has three definitions in force at once, and the council filing used the internal count, 588, 42.7 percent above the council's own rule of 412. The chart and the detail: page 6

The rebuild caught two figures already wrong, and one of its own. MODERATE

Rebuilding two already-filed reports took 6.4 hours against 52.5 as filed, a drop of 87.8 percent. It also caught two figures already wrong, plus one of its own, caught by its own check. The chart and the detail: page 7

The rest of the file: recommendations, page 19 · data tables, page 8 · analytic basis, page 21 · how we did this, page 25 · the assumptions this report leans on, page 28.

FINDING 01

CYCLE TIME · RSC FOR SABAL POINT COMMUNITY SERVICES
(SAMPLE)

HIGH CONFIDENCE

The report and its checks all happen in the same three days

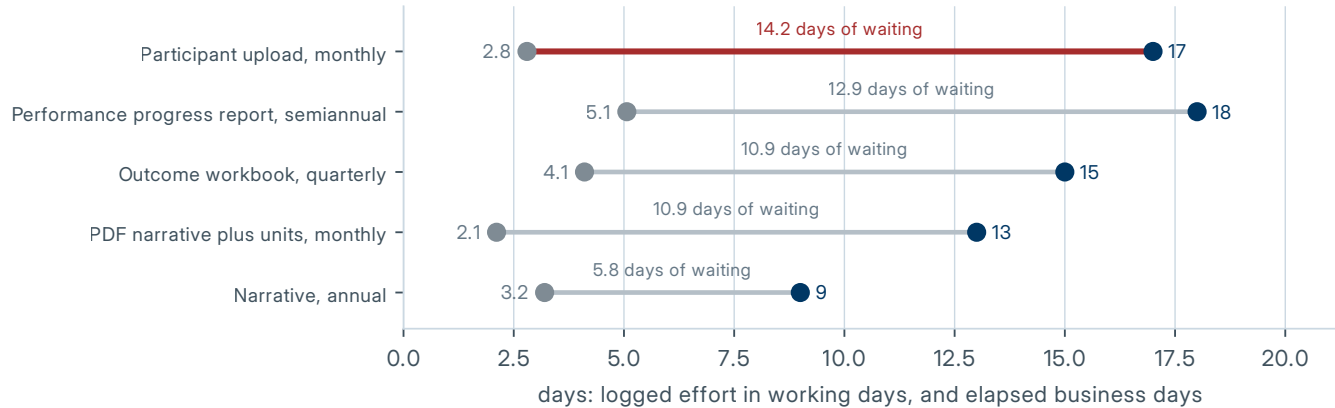


Figure 1. Median logged work converted to working days at 7.5 hours a day (the gray dot) against median elapsed business days from period close to funder receipt (the navy dot), one row per funder format, sorted by the gap. The length of each line is the waiting. Across all 35 builds the median is 2.3 working days inside 15 elapsed business days.

The build and its checks share the same three days, so a check has no room to find anything.

When the work finally starts, everything lands at once: the build and both review touches fall in the same few days at the deadline. A check done on the same day as the work it checks is where a wrong number gets through; the cost of this shape is trust, not time. The numbers: the median build carries 17.2 hours of logged work, which is 2.3 working days at 7.5 hours a day, inside 15 business days from period close to funder receipt. Twelve of those 15 carry no logged touch against the report at all, and the 17.2 hours land on 3 active days. In the 8 builds walked step by step, all 11 steps, both review touches included, fell on 2 or 3 distinct dates. The widest gap is the state portal monthly upload: 2.8 working days of effort inside 17 business days of elapsed time.

Five of the 35 builds reached the funder late, and the median build cleared its deadline by 3 days.

Every late build sits in the same two monthly formats, and each waited more idle days (no logged work on them) than the typical build of its own format, so lateness and waiting show up together here. The typical build clears its deadline by only a few days, which leaves little room to settle a question before the file goes. The numbers: Five builds were received after the funder due date: three state portal uploads and two kinship narratives (KIN-M02, KIN-M04, YWB-M03, YWB-M06, YWB-M07). All five sit in the two monthly formats, and each carries more idle business days than the median build of its own format, 13 to 17 against format medians of 11 and 14. Across all 35 builds the median was filed 3 calendar days before its deadline. 9 of the 35 builds went on to file a post-submission correction and 4 required a full resubmission. Exhibit 6 carries the deadline record in full (page 13).

The full breakdown behind this is in the data tables on page 8.

Analytic basis for this finding (alternatives considered, and what would change it): page 21.

FINDING 02

FIELD LINEAGE · RSC FOR SABAL POINT COMMUNITY SERVICES
(SAMPLE)

HIGH CONFIDENCE

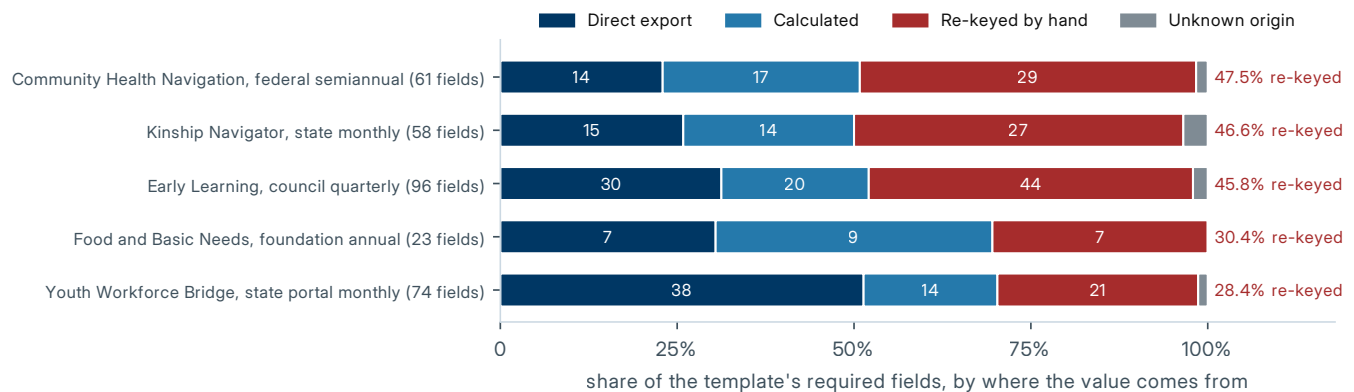
128 of 312 funder fields are typed by hand, and any one could be wrong

Figure 2. Every one of the 312 fields the five funder templates require, classified by where its value comes from, one bar per template, sorted by the share re-keyed by hand. The count prints inside each segment; the figure at the right is the share typed by a person.

Two of every five funder fields are typed by a person out of a system that already holds the value. This is how outcome data moves through the organization today: on foot. People re-type values a system already holds, and that typing eats more measured effort than any other step in the reporting cycle. The numbers: 128 of the 312 required fields across the five templates are re-keyed by hand. Each travels an average of 2.7 hops, the systems and hands it passes through between where it lives and the template cell, and 6 fields trace to no system of record at all: no named system holds their value. Step 5, re-key values into the funder template, carries 51.95 of the 165.1 hours timed across the 8 observed builds, 31.5 percent, more than any other of the 11 steps. At the per-field times recorded in the census the 128 fields cost about 208.5 hours a year, and the cycle log's own re-key hours across the 31 funder builds come to the same 208.5, the cross-check on that estimate.

The template with the biggest annual bill is not the one that re-keys the most. Cadence, not share, decides the cost: a template that re-keys a smaller share of its fields but files every month can carry a bigger annual bill than one that re-keys more and files twice a year. The numbers: the federal semiannual report re-keys 47.5 percent of its 61 fields and runs twice a year, which costs about 20.7 hours annually. The state portal re-keys a smaller share, 28.4 percent of its 74 fields, and runs monthly, which costs about 89.6 hours, the largest annual bill of the five. The two formats rebuilt in week 5 were chosen on a pair of facts: the council workbook carries the most hand-typed fields of any template at 44, the state portal the largest annual re-keying bill, and together they carry 378 of the 720 logged hours across 16 of the 35 builds.

The full breakdown behind this is in the data tables on page 9.

Analytic basis for this finding (alternatives considered, and what would change it): page 22.

FINDING 03

CONTINUITY · RSC FOR SABAL POINT COMMUNITY SERVICES
(SAMPLE)

HIGH CONFIDENCE

One person sets the number, checks it, submits it, and files it

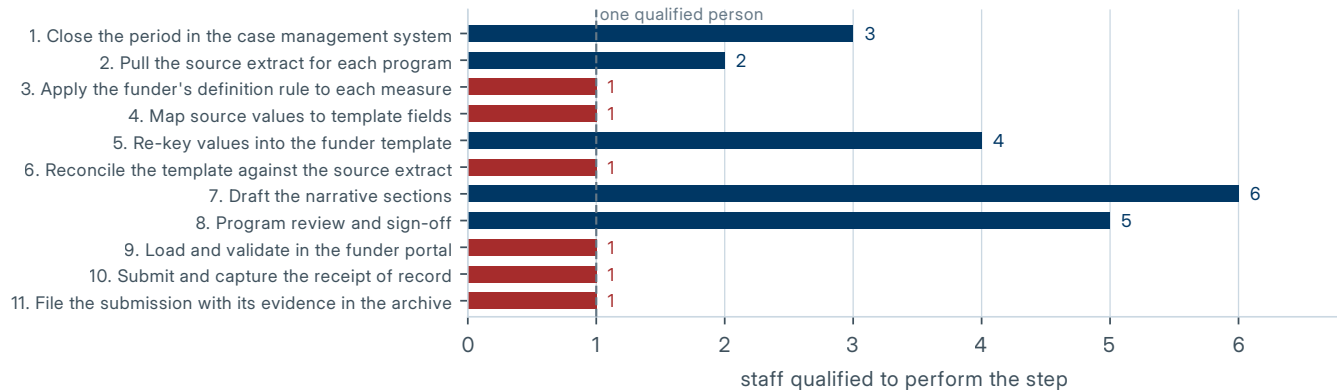


Figure 3. Staff qualified to perform each of the 11 steps in the submission path, with a dashed reference line at one. The six bars at one, steps 3, 4, 6, 9, 10, 11, are all held by the same role, the grants and compliance manager.

Six of the eleven submission steps have exactly one qualified person.

Every road runs through one person. The same role, the grants and compliance manager, is the only qualified holder of all six: applying each funder's definition rule, mapping source values to template fields, checking the template against the extracted data, loading and validating in the portal, submitting and capturing the receipt of record, and filing the submission with its evidence. The numbers: that role is a required touch on 31 of the 35 builds, is the only login holder on 3 of the 4 funder portals, and holds the written definition rule for eight of the 14 derived (computed) measures, including all 6 that carry more than one live definition. All 61 correction hours the definition audit ties to a specific measure sit on measures whose written rule lives with that one role.

72.4 percent of the observed waiting sat in front of a step only one person can perform.

When the observed builds waited, they were most often waiting on the same one person. The numbers: in the 8 builds walked step by step, 71 of the 98 idle business days recorded, 72.4 percent, sat in front of one of the six single-holder steps. The remaining 27 split 14 on review and sign-off, 8 on source data and 5 on narrative drafting. The count comes from the step observation record, one row per step per build, 88 rows, each recording the idle business days ahead of that step, the role waited on and what the wait was on. Those 8 builds cover 4 of the 5 funder formats and are not a random sample, so this is the shape inside the observed builds rather than a rate across all 35.

The full breakdown behind this is in the data tables on page 10.

Analytic basis for this finding (alternatives considered, and what would change it): page 22.

FINDING 04

DEFINITIONS · RSC FOR SABAL POINT COMMUNITY SERVICES
(SAMPLE)

MODERATE CONFIDENCE

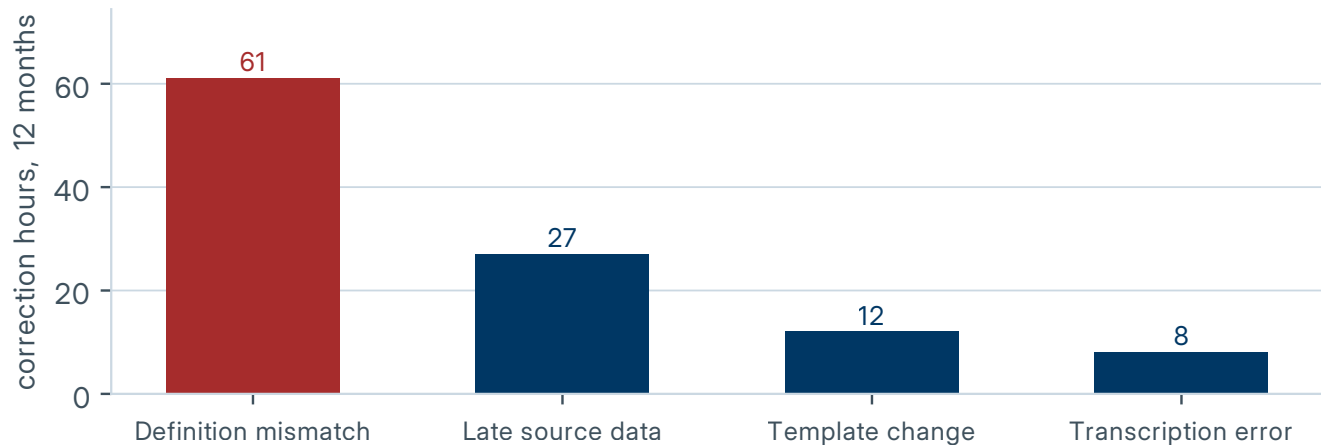
One number means three things, and we filed the wrong one

Figure 4. Correction hours by cause across all 35 builds. 108 hours in total, which is 15.0 percent of the 720 hours logged, not an addition to them.

One measure, three written definitions, and a fourth path through them.

One filed number can mean three different things, and the filed reports take a fourth path of their own. Participant served means an enrolled family with a signed service agreement in force during the quarter in the council workbook, an individual with at least one documented service contact inside the service month in the state portal's rules, and a case carrying an open flag in the case management system at any point in the period in the internal database. The council workbook was filed with the internal count, 588, in a field labeled families served, against a council rule that counts 412: 176 high, 42.7 percent, the first thing a funder's monitor would find. The state portal build was filed with the portal's own count, 1,067, so the council-side exposure above does not carry over to it. The state filing is not cleared here either: the backbone, the reporting system we built, rebuilt the same measure at 1,041, a difference of 26 records, and Exhibit 5 logs the cause as a definition question with the correct figure UNDETERMINED pending the funder's written ruling. Neither figure is called wrong in this report. Definition mismatch is the largest named cause of correction work at 61 of the 108 correction hours, and 34 of those 61 sit on this one measure.

This is what surviving an audit actually means.

An organization that cannot say in writing what its own count means cannot defend that count to an auditor or a monitor. The fix is not more care at the keyboard. It is a written ruling per funder, recorded in the field dictionary, so the next person to build the report inherits the answer instead of deciding it again under deadline.

The full breakdown behind this is in the data tables on page 11.

Analytic basis for this finding (alternatives considered, and what would change it): page 23.

FINDING 05

THE PARALLEL RUN · RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

MODERATE CONFIDENCE

The rebuild caught two figures already wrong, and one of its own

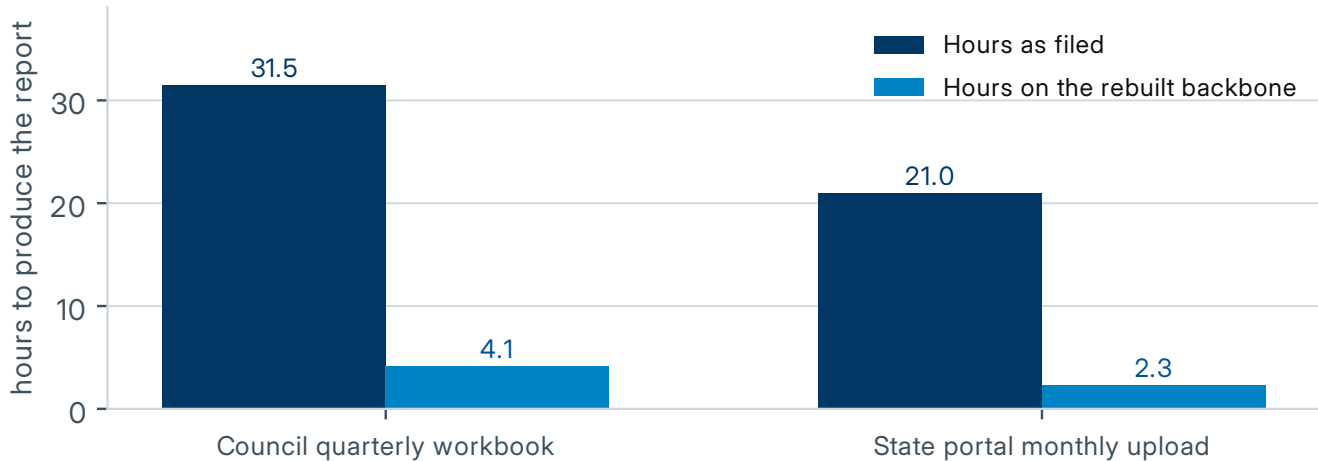


Figure 5. Hours to produce each of the two rebuilt reports: as filed against the week 5 parallel run on the new backbone, 52.5 hours against 6.4. No mark is red, because nothing in this chart is a declared problem.

Both reports were rebuilt in 6.4 hours against the 52.5 they consumed as filed.

The parallel run built the two reports a second way and did two jobs at once: it measured, on one cycle, how much faster they build on the backbone, and it caught wrong figures that had already gone out the door. The numbers: the council quarterly workbook fell from 31.5 hours to 4.1, and the state portal monthly upload from 21.0 to 2.3, a reduction of 87.8 percent measured on one cycle in week 5. Of 47 figures compared against the reports as filed, 43 matched exactly and four differed. All four differences sit on a derived measure that carries more than one live definition: 5 of the 47 compared figures trace to such a measure, 4 of those 5 differed, and none of the other 42 did. All four are printed in Exhibit 5 with their reasons.

The full breakdown behind this is in the data tables on page 12.

Analytic basis for this finding (alternatives considered, and what would change it): page 23.

DATA TABLES

RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

The numbers behind the findings

EXHIBIT 1

The five funder formats and their twelve-month record

PROGRAM (FUNDER TYPE)	FORMAT AND CADENCE	BUILDS	LOGGED HOURS	MEDIAN HOURS PER BUILD	MEDIAN ELAPSED, CALENDAR / BUSINESS DAYS	MEDIAN IDLE BUSINESS DAYS	LATE
Youth Workforce Bridge (state agency)	Participant upload, monthly	12	252.0	21.0	23 / 17	14	3
Kinship Navigator (state agency)	PDF narrative plus units, monthly	12	198.0	15.8	18 / 13	11	2
Early Learning Family Coaching (county children's services council)	Outcome workbook, quarterly	4	126.0	30.8	21 / 15	12	0
Community Health Navigation (federal grant)	Performance progress report, semiannual	2	76.0	38.0	25 / 18	15	0
Food and Basic Needs (private family foundation)	Narrative, annual	1	24.0	24.0	13 / 9	7	0
Board packet (internal, not a funder report)	Board packet, quarterly	4	44.0	11.0	8 / 6	4	0
All builds	five funder formats plus the internal board packet	35	720.0	17.2	21 / 15	12	5

Source and notes: the sources page, page 15.

EXHIBIT 2

Where every required field comes from: a census of all 312

FUNDER TEMPLATE	FIELDS	DIRECT EXPORT	CALCULATED	RE-KEYED BY HAND	UNKNOWN ORIGIN	RE-KEY SHARE	MEAN HOPS, RE-KEYED	RE-KEY HOURS A YEAR
Community Health Navigation, federal semiannual	61	14	17	29	1	47.5%	2.83	20.7
Kinship Navigator, state monthly	58	15	14	27	2	46.6%	2.81	57.4
Early Learning, council quarterly	96	30	20	44	2	45.8%	2.68	38.4
Food and Basic Needs, foundation annual	23	7	9	7	0	30.4%	2.14	2.4
Youth Workforce Bridge, state portal monthly	74	38	14	21	1	28.4%	2.62	89.6
All five templates	312	104	74	128	6	41.0%	2.70	208.5

Source and notes: the sources page, page 15.

EXHIBIT 3

The submission path: who can perform each step

STEP	WHAT IT IS	QUALIFIED STAFF	ROLES THAT CAN PERFORM IT	SINGLE POINT OF FAILURE	TIMED HOURS	IDLE DAYS BEFORE THE STEP
1	Close the period in the case management system	3	Database administrator, finance manager, grants and compliance manager	No	8.2	0
2	Pull the source extract for each program	2	Database administrator, grants and compliance manager	No	12.3	8
3	Apply the funder's definition rule to each measure	1	Grants and compliance manager	Yes	11.8	71
4	Map source values to template fields	1	Grants and compliance manager	Yes	16.7	0
5	Re-key values into the funder template	4	Three program data clerks, grants and compliance manager	No	52.0	0
6	Reconcile the template against the source extract	1	Grants and compliance manager	Yes	12.1	0
7	Draft the narrative sections	6	Five program directors, grants and compliance manager	No	21.7	5
8	Program review and sign-off	5	Five program directors	No	8.3	14
9	Load and validate in the funder portal	1	Grants and compliance manager	Yes	14.2	0
10	Submit and capture the receipt of record	1	Grants and compliance manager	Yes	3.4	0
11	File the submission with its evidence in the archive	1	Grants and compliance manager	Yes	4.5	0

Source and notes: the sources page, page 16.

EXHIBIT 4

Every measure carrying more than one live definition: 6 of 14

MEASURE	FUNDER DEFINITIONS IN FORCE	INTERNAL DATA DICTIONARY	PRACTICE AS FOLLOWED	EFFECT OF THE FILED VALUE	REWORK HOURS
Participant served (M01)	Council guide: an enrolled family with a signed service agreement in force during the quarter, 412. State guide (DCF): an individual with at least one documented service contact inside the service month, 1,067.	a case carrying an open flag in the case management system at any point in the period, 588.	the internal open-case count is entered in the council workbook without translation to the council's own wording, while the state portal export is built from the portal's contact rule, 588.	vs the Council guide: +176, +42.7 percent.	34.0
Service unit (M02)	Council guide: a coaching session of 45 minutes or more delivered to an enrolled family, 1,702.	any calendar entry marked completed by the assigned coach, 2,145.	the internal calendar count is filed, 2,145.	vs the Council guide: +443, +26.0 percent.	9.0
Active case at period end (M03)	State guide (DCF): a case not formally closed in the system on the last day of the month, 631. Federal guide: a case with at least one service contact in the final 30 days of the period, 501.	a case carrying an open flag, 588.	the internal open flag is filed in both the portal upload and the federal report, 588.	vs the State guide (DCF): -43, -6.8 percent. vs the Federal guide: +87, +17.4 percent.	8.5
Documented contact (M07)	State guide (DCF): a contact with a note recording date, mode, duration and purpose, 2,812.	any contact logged, note optional, 3,406.	the internal contact count is filed, 3,406.	vs the State guide (DCF): +594, +21.1 percent.	4.5
Referral closed with a service (M09)	Federal guide: a referral with a documented service delivered inside 60 days, 214.	a referral marked closed, whatever the reason, 389.	the internal closed-referral count is filed, 389.	vs the Federal guide: +175, +81.8 percent.	3.0
Unduplicated individual served, year to date (M10)	Council guide: deduplicated on the family identifier across the program year, 1,199.	deduplicated on the case identifier across the program year, 1,204.	the internal case-identifier count is filed, 1,204.	vs the Council guide: +5, +0.4 percent.	2.0

Source and notes: the sources page, page 17.

EXHIBIT 5

The parallel run: 47 figures compared against the reports as filed

REPORT AND SECTION	FIGURES COMPARED	MATCHED	DIFFERED	WHERE THEY DIFFERED, AND WHY
Council quarterly workbook, Participation	12	10	2	Families served, unduplicated, period: as filed 588, backbone 584. Cause: as-filed error, the as-filed count double-counted 4 participants who re-enrolled inside the quarter. Correct figure: backbone. Families served, unduplicated, year to date: as filed 1,204, backbone 1,199. Cause: as-filed error, the same 4 re-enrollments plus 1 participant carried forward from the prior quarter. Correct figure: backbone.
Council quarterly workbook, Service delivery	9	8	1	Coaching sessions delivered, total: as filed 2,145, backbone 2,145 (first pass 2,301). Cause: RSC build error, the backbone's first pass applied a calendar-quarter filter to a fiscal-quarter field; its own reconciliation check halted the build on the row-count mismatch and the second pass returned the filed value. Correct figure: as filed.
Council quarterly workbook, Expenditure and units	8	8	0	No differences.
State portal monthly upload, Participant records	11	10	1	Participants with at least one service contact in the month: as filed 1,067, backbone 1,041. Cause: definition question, the two figures apply different rules to a documented telephone contact; the funder's written ruling is pending and neither figure is called wrong here. Correct figure: undetermined, pending the funder's written ruling.
State portal monthly upload, Service and activity	7	7	0	No differences.
All sections	47	43	4	two as-filed errors, one definition question awaiting the funder's written ruling, and one RSC error caught by the backbone's own reconciliation check.

Source and notes: the sources page, page 17.

EXHIBIT 6

The deadline record: 5 late builds, and where they sit

PROGRAM	BUILDS	ON TIME	LATE	MEDIAN DAYS FILED BEFORE DUE	MEDIAN IDLE BUSINESS DAYS	LATE BUILD IDS
Youth Workforce Bridge	12	9	3	2	14	YWB-M03, YWB-M06, YWB-M07
Kinship Navigator	12	10	2	2	11	KIN-M02, KIN-M04
Early Learning Family Coaching	4	4	0	9	12	none
Community Health Navigation	2	2	0	5	15	none
Food and Basic Needs	1	1	0	32	7	none
All funder builds	31	26	5	2	12	KIN-M02, KIN-M04, YWB-M03, YWB-M06, YWB-M07

Source and notes: the sources page, page 18.

EXHIBIT 7

The 6 fields no system of record holds

FIELD THE FUNDER REQUIRES	TEMPLATE	TEMPLATE SECTION	DATA TYPE
Emergency department visits reported at follow up	Community Health Navigation, federal semiannual	Performance measures	integer count
Corrective action items open	Early Learning, council quarterly	Assurances and attachments	integer count
In-kind contribution reported	Early Learning, council quarterly	Assurances and attachments	integer count
Caregivers reporting reduced stress on the standard measure	Kinship Navigator, state monthly	Outcomes	integer count
Kinship placements at risk of disruption	Kinship Navigator, state monthly	Caseload	integer count
Participants with a documented barrier to employment	Youth Workforce Bridge, state portal monthly	Participant records	integer count

Source and notes: the sources page, page 18.

EXHIBIT 8

What you keep: the backbone as delivered

COMPONENT	WHAT IT IS	WHERE IT LIVES	WHO RUNS IT	WHAT BREAKS IF IT IS SKIPPED	RUNBOOK PAGE
Source table per program	One table per program holding every value a funder asks for, at the level of detail (the grain) the funder asks for	The organization's own database, five saved views	Database administrator	Every report goes back to hand assembly out of five systems	1 to 3
Field dictionary	Every funder field printed beside its funder definition and the internal definition it maps to	Shared drive, one page per template	Grants and compliance manager	The three-definition problem returns the first time a rule is questioned	4 to 6
Build script per format	One command per funder format that writes the funder's file out of the source tables	The organization's reporting folder, five scripts	Database administrator, grants and compliance manager	Manual re-entry returns for that format	7 to 8
Submission archive	Each filed report stored with its digital fingerprint (a hash of the exact file), submission date and receipt of record	The organization's reporting folder, by funder and period	Grants and compliance manager	An audit request cannot be answered with the exact bytes that were filed	9
Runbook per format	One page per format: the command, the inputs, the checks, and what to do when a check fails	Shared drive, five pages	Any trained staff member	The backbone becomes one person's knowledge again	1 to 11
Reconciliation line	A row-count and total check that halts loudly instead of writing a file	Inside each build script	Runs itself	A wrong number ships quietly, which is how the wrong date filter would have reached the funder	8
Small-cell guard	Hides any participant count under n equals 10 in anything leaving the organization, and hides a second count where needed (complementary suppression) so the small one cannot be worked out by subtraction	Inside each build script	Runs itself	Counts small enough to identify a participant leave the building	10

Source and notes: the sources page, page 18.

Where each exhibit's numbers come from

Every table in this report carries its full provenance here, under the same exhibit number it wears in the document.

Exhibit 1 The five funder formats and their twelve-month record

Source: the twelve-month report-cycle log (report-cycle-log-SYNTHETIC.csv) for the year ending 2026-06-30. 39 build records collected, 35 analyzed. Elapsed dates come from portal submission receipts, funder acknowledgment emails and file modification times; hours are logged by staff.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

The All builds row SUMS the Builds and Logged hours columns and takes the MEDIAN across all 35 builds for the three median columns; it is not the average of the rows above. Because the two monthly formats supply 24 of the 35 builds, the all-builds median sits below the quarterly and semiannual formats.

An idle business day is one carrying no logged touch by any role against that report. Active days are few because up to three roles work the same report on the same day near the deadline: the median build's 17.2 hours fall on 3 active days.

On-time record: 30 of the 35 builds were received on or before the funder due date and 5 were late, all 5 in the two monthly formats. The median build was filed 3 calendar days before its deadline. Exhibit 6 carries the deadline record per program (page 13).

The board packet is inside the 720 hours because staff log it in the same place. It is not a funder report and it carries none of the 312 funder-required fields.

Exhibit 2 Where every required field comes from: a census of all 312

Source: the field-lineage census (field-lineage-SYNTHETIC.csv), one row per funder-required field, 312 rows, built by inspecting every field in every template against the systems of record. A census, not a sample.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

Columns 3 to 6 sum to column 2 on every row, and every column sums to the All row: 104 direct plus 74 calculated plus 128 re-keyed plus 6 unknown equals 312.

Hops counts the systems and hands a value passes through between its origin and the template cell. The all-template mean is weighted by re-keyed field count: 346 hops across 128 re-keyed fields gives 2.70.

Re-key hours a year multiplies each field's recorded re-key minutes by that template's cycles per year: 208.5 hours across the five templates, the same total the cycle log carries as re-key hours across the 31 funder builds. The state portal carries the largest annual bill, 89.6 hours, on the second-smallest re-key count, because it runs twelve times a year. Estimated per-field times are the softest input in this exhibit; the field counts are a census.

What a script can retire: of the 128 re-keyed fields, 77 are held today by a named system and can be pulled without a person retyping them. The other 51 have no system source, their value living in a shared-drive workbook or the grant agreement file, so the value has to enter a system before any script can fetch it. On the two rebuilt templates the same split is 47 and 18 of the 65.

Unknown origin means no system of record holds the value. The 6 such fields are counted and disclosed rather than dropped, and each is named in Exhibit 7.

Reliability: client staff independently re-coded a 60-field sample without seeing our coding. 54 of 60 agreed, 90 percent. All six disagreements were resolved by tracing the field back to its system rather than by discussion.

Exhibit 3 The submission path: who can perform each step

Source: the 88-row step walk-through, which records for every step of every observed build the role that performed it, the number of staff qualified to perform it and the roles that qualify, across the 8 observed builds. Timed hours and idle days are the totals across those 8 builds. The portal-credential counts in the notes come from the credential inventory and the access-control exports, which are engagement working papers, records kept during the engagement itself, rather than one of the five source files.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

This is a continuity finding about how the work is designed, not a performance finding about any person. Every holder is stated by ROLE. No individual is named anywhere in this report, and none of these counts describes how well a step is done.

Bus factor on the observed path: every one of the 4 programs observed rides at least one step with a single qualified holder, so its bus factor (the number of people who can carry a step) is 1. The 11-step path covers the programs whose reports ride the case management extract. The foundation annual narrative is written by the executive director and the grants and compliance manager together, does not use this path, and closed no build inside the observation window.

The grants and compliance manager is a required touch on 31 of the 35 builds; the four exceptions are the internal board packets. Sole portal credentials on 3 of the 4 funder portals; the council grantee portal carries a second holder, a program director. Sole holder of the written definition rule for eight of the 14 derived measures, including all 6 that carry more than one live definition. The other rules sit with program directors (3), the finance manager (1), the database administrator (1) and the executive director (1).

Waiting, from the 88-row step observation: 98 idle business days across the 8 observed builds, 71 of them (72.4 percent) ahead of one of the six single-holder steps, 14 on review and sign-off, 8 on source data, 5 on narrative drafting.

Effort, from the same observation: 165.1 hours across the 8 builds. The largest single block is step 5, re-key values into the funder template, at 51.95 hours, 31.5 percent. It is not a single-holder step, which is why Finding 02 and Finding 03 are separate findings with separate fixes.

Exhibit 4 Every measure carrying more than one live definition: 6 of 14

Source: the definition audit (definition-audit-SYNTHETIC.csv), 14 derived measures across 49 definition records and 3 kinds of definitional source, with each conflict's effect computed on the most recent closed quarter, the quarter ending 2026-06-30.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

The audit covered 14 derived measures. Six carry more than one live definition and all six are printed here (M01, M02, M03, M07, M09, M10): this table is the whole population, not a chosen illustration. The other measures return the same count under every rule in force.

Effect is the filed value minus the value that funder's own written rule generates, on the close of 2026-06-30. A positive number means the filed figure is higher than the funder's rule would produce. A measure with two funder rules therefore carries two effects, in opposite directions where the rules disagree.

Rework by cause across all 35 builds: definition mismatch 61 hours, late source data 27, template change 12, transcription error 8. Total 108 hours, which is 15.0 percent of the 720 logged hours rather than an addition to them.

Corrections: at least 9 of 35 builds required a post-submission correction and 4 required a full resubmission. Two of the nine were reconstructed from email rather than from a logged flag, so the count is a floor, a minimum: the true count cannot be lower. The 108 hours are not confined to those 9 builds: 27 of the 35 carry rework hours inside the build itself, before anything is filed.

Correction hours attributable to a measure, all 61 of them on these 6 measures: participant served 34.0; service unit 9.0; active case at period end 8.5; documented contact 4.5; referral closed with a service 3.0; unduplicated individual served, year to date 2.0. The written rule for all 6 sits with one role.

Exhibit 5 The parallel run: 47 figures compared against the reports as filed

Source: the week 5 parallel run (parallel-run-SYNTHETIC.csv), 47 compared figures. Build hours were logged by client staff on their own timesheets; the comparison ran against the client's own as-filed reports.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

Hours: the council quarterly workbook fell from 31.5 hours as filed to 4.1 on the backbone, and the state portal monthly upload from 21.0 to 2.3. Together 52.5 to 6.4, a reduction of 87.8 percent, on one cycle with RSC present.

Annual exposure of these two formats: 378 of the 720 logged hours across 16 of the 35 builds. At half the observed reduction, 378 times 0.439, they would return about 166 hours a year. That is a projection, not a measurement, and it is printed at half strength on purpose.

Interest disclosure: this exhibit measures work RSC performed. That is why the badge is MODERATE, why the timing was logged by client staff rather than by RSC, and why every mismatch is printed individually, including the one the backbone got wrong.

Who caught what: the two as-filed errors and the open definition question were found by the figure comparison, and the RSC error by the backbone's own reconciliation check. The council build carrying the two as-filed errors had passed 2 review passes and was filed 9 days before its deadline; the post-submission correction logged against it is coded to a different cause, definition mismatch.

Concentration: 5 of the 47 compared figures trace to a measure carrying more than one live definition. 4 of those 5 differed. None of the other 42 differed.

Exhibit 6 The deadline record: 5 late builds, and where they sit

Source: the same twelve-month report-cycle log, funder builds only: 31 of the 35 analyzed builds. The internal board packet has no funder due date and is excluded.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

Every late build sits in one of the two monthly formats, which are also the formats carrying the highest median idle days. Lateness and idle days move together here; on this evidence that is an association across 35 builds, not a demonstrated cause.

Days filed before due is the funder due date minus the receipt of record, so a negative median would mean the typical build lands late. The median funder build is filed 2 calendar days early.

Exhibit 7 The 6 fields no system of record holds

Source: the field-lineage census, the 6 rows coded unknown origin out of 312. These are counted and named rather than dropped.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

A field lands here when no system of record holds its value: it is assembled at build time from a working note, an email, or memory. Each one is a figure the organization files and cannot currently trace to a system, which is the narrow, checkable form of the question this report exists to answer.

Exhibit 8 What you keep: the backbone as delivered

Source: the engagement's week 6 handoff register. This page is an inventory of what was delivered, not a judgment about the organization, so it carries no confidence badge.

SYNTHETIC DEMONSTRATION DATA. Sabal Point Community Services does not exist, and no figure in this exhibit describes a real organization or a real engagement.

Handoff register at close: 3 staff trained on the runbook, 11 runbook pages written, one per step, and a second named holder recorded for each of the 6 single-person steps in Finding 03, with a 90-day review date.

The small-cell guard and the data-handling rules it implements come from the engagement's data-sharing agreement, not from RSC's judgment about what the funders require.

RECOMMENDATIONS

RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

Four moves, in order. Two of them need nothing from RSC.

RECOMMENDATION 01 OF 4

Start the clock on time: open every report at period close plus one business day, and book both review touches in advance

Who and how: The grants and compliance manager runs it; about 3 hours once, then roughly 15 minutes per cycle.

1. Pull the due rule out of each of the five grant agreements and write the actual due date for every cycle in the next twelve months onto one calendar. Exhibit 1 lists the cadences.
2. For each cycle, set the build open date at period close plus one business day, and put it on that calendar as a task with a named owner.
3. Book the two review touches, program sign-off and the finance cross-check, as calendar holds at build open plus 5 and plus 8 business days, before anyone needs them.
4. At the first cycle, record the actual open date and the receipt date in the cycle log. That is the re-measure, and it costs about two minutes per build.

What we expect: Likely removes the largest block of idle days in the cycle, since the median build shows twelve of its 15 business days with no logged work on it. It does not reduce work hours, and it should not be expected to.

How we will know it worked: Elapsed business days from period close to funder receipt, the same measure Figure 1 shows, over the next two cycles.

RECOMMENDATION 02 OF 4

Retire the manual re-entry on the two rebuilt templates first, using the build scripts already delivered, before touching the other three

Who and how: The grants and compliance manager runs it with the database administrator; about 6 hours per template.

1. With the database administrator (0.4 FTE, a part-time role of about two days a week), run the delivered build script for the council workbook beside the normal hand-built copy for one full cycle, and compare the two files figure by figure before anything is filed.
2. File whichever copy the comparison clears, and log the build hours for both paths in the cycle log.
3. Repeat the same parallel cycle for the state portal upload.
4. When a template has cleared its parallel cycle, retire the hand-typed path for it and record the change in that format's runbook page.
5. Leave the other three templates alone until these two have each survived an unassisted cycle.

What we expect: Likely removes the hand-typing on 47 of the 65 re-keyed fields on these two templates outright, the ones a named system already holds. The other 18 have no system source today, their value sitting in a shared-drive workbook or the grant agreement file, so the value has to enter a system before a script can fetch it. The 65 fields carry about 128 of the 208.5 estimated re-key hours a year, 44 fields on the council workbook and 21 on the state portal. On the observed cycle those two builds fell from 52.5 hours to 6.4, and at half that reduction the two formats return about 166 hours a year. The first unassisted run will very likely be slower than the observed one.

How we will know it worked: Manual-entry count per template from the same field-lineage inventory, plus logged hours per build, over the next two cycles.

RECOMMENDATION 03 OF 4

Settle the definition of participant served in writing, funder by funder, and record each ruling in the field dictionary before the next quarter closes

Who and how: The executive director makes the ruling; one 90-minute session plus an email to each funder.

1. Write down, in one line each, the three definitions of participant served that are in force today. Exhibit 4 prints them, beside every other measure carrying more than one live definition.
2. Decide which count is the organization's own answer and say so in writing. The executive director makes this call: it is a policy question, not a data question.
3. Send each funder one email stating the definition you will report against and asking them to state in writing whether it matches theirs. Attach the one-line definition, not the whole table.
4. Enter each answer in the field dictionary beside the field it governs, with the date and the funder contact who gave it. If a funder does not answer within 30 days, record the non-answer and the assumption you are proceeding on.

What we expect: Likely removes the largest named cause of correction work, which accounts for 61 of the 108 correction hours. Every one of those 61 hours sits on one of the six measures carrying more than one live definition, and 34 of them on participant served alone. It does not touch the 27 hours caused by late source data, which is a different problem with a different fix.

How we will know it worked: Correction hours by cause, and post-submission corrections per build, over the next two quarters, from the same cycle log.

RECOMMENDATION 04 OF 4

Name and exercise a second holder for each of the six single-person steps

Who and how: The executive director assigns, the grants and compliance manager trains; about 8 hours in total.

1. Pick a second holder by name for each of the six single-person steps, from the roles Exhibit 3 lists as able to qualify.
2. Have each second holder walk the step once from its runbook page with the current holder watching, then once unaided.
3. Request a second named account on each funder portal that today has a single credential holder; a shared login does not count.
4. Record each pairing and its walk-through dates in the continuity register, and set the 90-day review date.

What we expect: Likely raises the bus factor, the number of people who can carry a step, from 1 to 2 on the six exposed steps. The effect on cycle time is uncertain: 71 of the 98 idle business days recorded across the 8 observed builds sit in front of a step only one person can perform, so a second holder may take some of that back, but the observation records what the wait was on and cannot separate one person's availability from the way the work is scheduled.

How we will know it worked: The continuity register re-run at 90 days: does a second named holder exist for each of the six steps, and has each performed the step once unaided.

We keep this list short on purpose: a report with ten recommendations has no priorities. We also keep the recommendations on their own page, so you can set one aside and still trust the findings, which stand on their own evidence. Recommendations 01 and 03 require nothing from RSC: one is a calendar and one is a written decision, and both are yours to make.

ANALYTIC BASIS

RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

Findings are covered in order across the pages that follow.

WHAT THE CONFIDENCE LABELS MEAN

They describe the strength of our **evidence**, not the size of the finding. A HIGH-confidence finding is not a bigger problem than a MODERATE one; it just means we are surer of it.

HIGH

Measured directly, for everyone. We would be surprised to be wrong.

MODERATE

The evidence points this way, but it has a known weakness we name below (self-logged hours, rework flags recorded after the fact, a single observed cycle, or a measurement RSC took of its own work).

LOW

Suggestive only. Treat it as a question to test, not a fact to act on.

Finding 01 • Cycle time **HIGH**

The finding: The report and its checks all happen in the same three days. Its page: 3

ALTERNATIVES CONSIDERED

The gap could be measurement rather than queue: staff may simply fail to log hours they actually work, so the calendar is full while the log is empty. Two things argue against that reading. Idle days are counted from each build's own dates, period close to funder receipt, checked against the days that carry a logged touch, rather than worked backward from the hours total; and in the 8 timed builds the idle days sit against specific waiting steps instead of spreading evenly, 71 of the 98 waiting on a step only one person can perform, 14 on review and sign-off, 8 on source data and 5 on narrative drafting. A second reading is that funder due dates, not internal queueing, set the pace, and staff start when the deadline is near. That reading is partly right, and it is a queue by another name: the recommended fix, opening the build at period close plus one business day, is the same either way.

WHAT WOULD CHANGE THIS JUDGMENT

Run the close-and-build calendar for two cycles. If elapsed business days do not fall while logged hours stay flat, the queue reading weakens and the constraint sits somewhere the cycle log cannot see, most likely waiting on data owned outside the reporting office. Watch the hours as well: if they rise sharply once the work is scheduled early, the log was understating the work, and this finding's level, though not its direction, was wrong.

CAVEAT

The bound that keeps this standing on a soft number. The hours are self-logged, so they are the soft side of this finding. Double them and the judgment holds: 34.4 hours is 4.6 working days, and the median build still leaves roughly 10 of its 15 business days with no work against it. The elapsed side is not self-reported. It comes from portal submission receipts, funder acknowledgment emails and file modification times: across the 31 funder builds, 18 receipts of record from a portal, 12 funder acknowledgment emails, and 1 that rests only on the sent timestamp of an outgoing email.

CAVEAT

Idle days for all 35 builds come from the cycle log, which dates each build from period close to funder receipt and counts the business days carrying no logged touch by any role. What comes from the 8 timed builds is the CAUSE of each idle day, and those 8 are the builds that closed inside the two-week diagnosis window rather than a random sample of the 35. They cover 4 of the 5 funder formats: no foundation annual build closed inside the window, and the window leans toward the two monthly formats.

Finding 02 • Field lineage HIGH

The finding: 128 of 312 funder fields are typed by hand, and any one could be wrong. Its page: 4

ALTERNATIVES CONSIDERED

A re-keyed field is not automatically a wasteful one. Some values genuinely require a person: a narrative judgment, a figure that exists only on a signed document, a number a funder requires the organization to attest to. Those were coded separately and counted as calculated or unknown origin rather than as re-keyed, so the 128 covers only fields whose value already sits in a system in the form the template asks for. A second reading is that the re-keying is cheap even where it is frequent. The timed observation answers that one: step 5 carries 51.95 of the 165.1 timed hours, 31.5 percent, the largest share of any of the 11 steps. A third question is why so much typing produces so little coded rework. The observation records the performing role on all 88 steps, and it shows a check that a mapping error does not get: the typing at step 5 is done by program data clerks and reconciled at step 6 by a different role, while the definition rule at step 3 and the field mapping at step 4 are applied and then reconciled by the same role. That is a reading of the gap between 8 transcription hours and 61 definition hours, not a measurement of it.

WHAT WOULD CHANGE THIS JUDGMENT

Export two of the re-keyed fields from each template and compare them against what a person typed. If the exported values differ from the typed ones on more than a handful of fields, the systems do not hold what the census says they hold, the count of genuinely automatable fields falls, and the recovery estimate falls with it. A funder template revision would also move the count, in either direction, which is why the census is dated and rerun each cycle.

CAVEAT

It is where the hours go. It is not where the report's own ledger puts the errors. The correction ledger attributes 8 of its 108 hours to transcription error, the smallest of the four coded causes, against 61 for definition mismatch. So the honest statement is narrower than the volume suggests: hand-typing is the largest measured drain on effort and it is the mechanism a script can retire, while the largest measured source of rework is a definitions problem no script can fix. Those 8 hours also count only the typing errors somebody caught, and the ledger records no independent re-check of typed values outside the reconcile step, so it is a floor on what was caught, not a measured rate of error.

Finding 03 • Continuity HIGH

The finding: One person sets the number, checks it, submits it, and files it. Its page: 5

ALTERNATIVES CONSIDERED

The pattern could reflect an efficient specialist rather than a fragile design: one person does these steps because that person is fastest at them, and others could learn them quickly. That reading has some support, since three of the six steps are procedural and their runbook pages run under two pages each. It does not remove the exposure. This finding is about who can perform the step today, evidenced by credentials and a walk-through, not about how hard the step is to learn. A second reading is that the risk is nothing new: the organization has never lost the role, and has lived with the exposure so far. But never having had the accident is not evidence the design survives one, when the number of departures observed is zero.

WHAT WOULD CHANGE THIS JUDGMENT

Re-run the continuity register at 90 days. If a second named holder exists for each of the six steps and each has performed the step once unaided, the bus factor moves to 2 and this finding closes on its own terms. If the credential inventory instead shows shared logins rather than individual accounts, the finding changes character: the exposure becomes an access-control problem rather than a continuity one, and the fix is a different one.

CAVEAT

This is a risk finding, not a performance finding. Nothing here says a step is done badly, and no individual is named anywhere in this report. It says the organization cannot produce four of its five funder reports if one role is unavailable for a cycle, and it says the answer to a funder's question about a filed number is held by the same person who produced it.

Finding 04 • Definitions MODERATE

The finding: One number means three things, and we filed the wrong one. Its page: 6

ALTERNATIVES CONSIDERED

The correction hours could be driven by the calendar rather than by definitions: work compressed into two days near a deadline produces mistakes, and the cause coding would then be recording a symptom. Finding 01 makes that reading plausible, and it is the reason the cost side of this finding carries MODERATE. What argues for the definition reading is that the conflicts are documentary, sitting in the written rules themselves, and independent of the log: three written definitions of one measure exist, the filed reports take a fourth path through them, and the largest correction blocks sit on the measures that appear in more than one template. A third reading, that funders changed their requirements mid-year, is separately coded and accounts for 12 of the 108 hours.

WHAT WOULD CHANGE THIS JUDGMENT

Settle the definition of participant served in writing and watch correction hours by cause for two quarters. If definition-mismatch hours fall toward zero while total correction hours stay flat, the cause coding was mislabeling deadline compression and Finding 01 owns the rework too. If both fall together, the definition reading holds. A funder that answers with a definition different from all three in force today would raise the cost rather than lower it in the first cycle, and that is the expected shape of a real ruling.

CAVEAT

The definition conflict itself is documentary and would carry HIGH on its own. The COST attached to it rests on rework flags staff record after the fact, and two of the nine corrections were reconstructed from email rather than from a logged flag. The count is therefore stated as a floor, at least 9 of 35, and the badge follows the weakest evidence the finding stands on rather than the strongest. One line of evidence does not depend on those flags at all: of the 47 figures rebuilt in the parallel run, the 5 that trace to a measure carrying more than one live definition account for all 4 differences, and none of the other 42 differed. 5 figures is a small base, so it is a second line of evidence pointing the same way rather than a second measurement of the cost.

Finding 05 • The parallel run MODERATE

The finding: The rebuild caught two figures already wrong, and one of its own. Its page: 7

ALTERNATIVES CONSIDERED

The reduction could come from RSC being in the room rather than from the backbone: a consultant present for one cycle speeds up work that will slow again when the room empties. That reading is live, and it is why the annual projection is capped at half the observed effect. A second reading is that the rebuilt reports are easier because they were built to reproduce a known answer, which is a real risk in any parallel run. The figure-agreement grid is the check on that: the backbone ran before the comparison and its own reconciliation check halted the build on a figure it had gotten wrong, which is not the behavior of a process reverse-engineered to match. A third reading is selection: the two rebuilt formats are the two the diagnosis had already named as the heaviest hand-typing load, so their reduction is a best case rather than an average.

WHAT WOULD CHANGE THIS JUDGMENT

Watch the first two unassisted runs, with RSC absent. If the two rebuilt builds land above roughly 12 hours combined, the observed 6.4 was assistance rather than architecture, and the annual projection should be withdrawn rather than argued. Watch the reconciliation halts as well: a backbone that never halts is not being exercised, and a backbone that halts on most runs is set up wrong rather than protective.

CAVEAT

RSC is grading its own work here, and one of the four mismatches is ours. The backbone's first pass returned 2,301 coaching sessions against the 2,145 that were filed, because it applied a calendar-quarter filter to a fiscal-quarter field, one whose quarters follow the budget year rather than the calendar year. Its own reconciliation check halted the build on the row-count mismatch, and the second pass returned 2,145. We print it because a sample showing only the parts that went well is evidence of nothing. The badge is MODERATE for the same reason: one cycle, two of five formats, and the measurer is the builder.

CAVEAT

Timing was logged by client staff on their own timesheets rather than by RSC, and the comparison ran against the client's own as-filed artifacts, which is what keeps this at MODERATE rather than LOW. The 166-hour annual projection is capped at half the observed reduction and remains an estimate rather than a measurement. The first unassisted run will very likely be slower than the observed one.

HOW WE DID THIS

RSC FOR SABAL POINT COMMUNITY SERVICES (SAMPLE)

About this sample report

Sabal Point Community Services does not exist. Every organization, funder, program, figure and role in this document was invented to demonstrate the format and the rigor of a real RSC deliverable. Rojas Strategic Consulting has no delivered client engagements behind it, and nothing here is past performance. The five source files are made-up data, produced by a script from a fixed starting value so that every rebuild gives the same numbers; each file says SYNTHETIC in its name and opens with a line saying so. Every figure printed here is computed from those files by the same command that renders the document, which is why the arithmetic still adds up even though the organization is fictional.

What we looked at

The subject is the machine that produces reports, not the programs themselves: nothing in this engagement evaluates whether a program works, and the unit of analysis, the thing we count and compare, is the report build. We looked at one organization, five funded programs, four funders and five report formats, over the twelve months ending 2026-06-30. Five sources: the organization's own report-cycle log of 35 analyzed builds, a timed observation of 8 builds covering 88 step records, a census of all 312 fields the five funder templates require, a definition audit of 14 derived measures across 49 definition records, and a parallel run comparing 47 rebuilt figures against the reports as filed.

How we defined a report build

A build opens at period close, the first calendar day after the period the funder is asking about, and ends at funder receipt: a portal receipt of record, a funder acknowledgment, or the sent timestamp on the email carrying the file. A touch is any logged work against that report by any role, including review and correction. Elapsed time is measured in both calendar and business days and both are printed, because the complaint is stated in calendar weeks while the work happens on business days. A business day carrying no touch by any role is an idle day.

How consistent the coding was

Field lineage was double-coded on an independent 60-field sample by client staff who did not see our coding: 54 of 60 agreed, 90 percent, and all six disagreements were resolved by tracing the field back to its system rather than by discussion. Two of the 8 observed builds (EL-Q4 and KIN-M10), the council quarterly workbook and one kinship monthly narrative, were timed independently by a second observer: 47.3 hours against 49.2, a difference of 4 percent, with the second observer's total the higher of the two. The rework flags carry no such reliability check, because staff record them after the fact, which is why Finding 04 carries MODERATE.

What we corrected, and what we dropped

Cycle log: 39 build records collected, 35 analyzed. Two were duplicates created when a build was reopened after a correction, and were merged into their parent build. Two were in-progress builds whose period had not closed at the census date, and were held out of the analysis. Field lineage: 312 fields collected, 312 analyzed, none dropped; 6 traced to no system of record and are reported as unknown origin rather than removed, each named in Exhibit 7. Timed observation: 8 builds collected, 8 analyzed, 88 step records, one per step per build, covering 4 of the 5 funder formats. Definition audit: 14 measures, 49 definition records, none dropped. Parallel run: 47 figures collected, 47 analyzed, 4 mismatches printed individually in Exhibit 5.

What this cannot tell you

One organization, one year, one parallel cycle. The hours are self-logged, so the level is soft even where the pattern is not, which is why Finding 01 is defended by a bound rather than by trusting the log. The 8 observed builds are the builds that closed inside the two-week diagnosis window, which is not a random sample, leans toward the two monthly formats and covers 4 of the 5 funder formats. Nothing here measures whether the funders are satisfied with these reports, or whether the programs work. It measures how the reports are produced and where each number comes from.

What you keep when we leave

Six components and a written handoff: one source table per program, a field dictionary printing each funder definition beside the internal one, a build script per funder format, a submission archive holding each filed report with its hash and receipt, a one-page runbook per format, and a reconciliation line inside each script that halts loudly on a row-count mismatch. A seventh component, a small-cell guard, suppresses (hides) any participant count under n equals 10 in anything leaving the organization. At close: 3 staff trained, 11 runbook pages, one per step, and a second named holder recorded for each of the 6 single-person steps, with a 90-day review date.

What is outside this engagement's scope

This is a reporting-capacity engagement, not an evaluation and not a compliance audit. Where participant-level data is involved, the backbone is built to the data-handling rules in the engagement's data-sharing agreement: minimum-necessary fields, named-user access, small-cell suppression at n equals 10, and destruction of working copies within 60 days of close. RSC does not give legal advice, does not rule on whether a funder's own requirement is lawful, and does not certify compliance with FERPA, HIPAA or 42 CFR Part 2. Where a funder's definition is in dispute we state the conflict and its effect; the ruling belongs to the funder.

How you can check our work

Every number in the findings and in the exhibits is computed from the five source files by one command, so anyone holding those files can recompute it; the one exception is the three spots whose figures come from the four working papers named at the end of this paragraph. Nothing is typed by hand. Where a number belongs, the text carries a placeholder, the build fills it in from the computed results, and the build stops if a placeholder has no result behind it or if a number was typed in instead. The five source files are the report-cycle log (39 builds collected, 35 analyzed), the cycle-timing observations (88 rows), the field lineage (312 rows), the definition audit (49 rows) and the parallel run (47 rows). Two short companion files travel with them, a manifest listing the 7 rules used to code the lineage census, and a build log recording how the files were made, with a fingerprint for each, so a reader can tell that the files are the ones this report was built from. In this published sample the data is made up, built to show the method. On an engagement, the source files and their companions are delivered with the report as part of the engagement record. The build never reads the clock or the internet, so two runs give identical files, and each stage prints a count of what went in and what came out; if the counts disagree, the build stops. Four inputs are engagement working papers rather than one of the five files, and they are named where they are used: the credential inventory and the portal access records behind the portal-credential counts in Exhibit 3, the handoff register behind the delivery inventory, and the second observer's own timesheet behind the second-observer hours on the timing page. The timing file records whether a step was second-observed, not how long the second observer took, so that one total comes from the timesheet rather than from the five files. If a number in this report and a number in the files disagree, the files are right and the report is wrong.

The assumptions this report leans on

Every report stands on assumptions. The one marked LINCHPIN carries the most weight: if it is wrong, the findings that lean on it fall with it. We list them here, in plain sight, so a skeptical reader can check them instead of taking our word.

LINCHPIN

Staff logged their reporting hours in the same place and to the same standard across all twelve months. If hours were under-logged more heavily in the busy months, the hours side of Finding 01 moves, which is why that finding is defended by a bound (the judgment survives doubling the logged hours) rather than by the log alone.

LINCHPIN

The five funder templates in hand are the templates actually in force for the current cycle. The whole 312-field census, the 41.0 percent re-key share and both build scripts rest on that. A funder template revision between the census and the next cycle changes the field counts and can change which fields are re-keyed.

- Systems of record hold what their documentation says they hold, so a field marked direct export can in fact be exported without a person retyping it. Every re-key classification was traced, but whether an export truly works end to end was tested on the two rebuilt formats only.
- The 8 observed builds are representative enough of build STRUCTURE, the order and kind of steps, even though they are not a random sample. They cover 4 of the 5 funder formats: no foundation annual build closed inside the diagnosis window. The step-level hours, the wait-cause split and the single-holder idle share lean on this. The hour totals and the idle-day counts do not, because those come from all 35 builds in the cycle log.
- The organization keeps the same four funders and five formats through the next two cycles, so the re-measure plans compare like with like. A new funder or a retired program breaks the comparison rather than the finding.

Changelog

v1.5 public sample

v1.5 · 2026-08-28. PRESENTATION only, no figure or judgment changed. Each section opens with its colored label, and every later page of that section carries a rule in the same color at the top, so a page holding a continued recommendation, data table, or basis block says where it belongs in a reader's hands or on a screen; the report title moved to the top right; every figure unchanged. (the section label opens each section and a colored rule marks its later pages; nothing analytic moved)

v1.4 · 2026-08-27. plain-language pass; nothing analytic moved

v1.3 · 2026-08-27. presentation only: every exhibit's notes moved whole to the sources page under its exhibit number, leaving one short pointer per table.

v1.2 · 2026-08-27. presentation only: plain page 2, short instruction boxes with steps, plain-pass callouts; no figure changed.

v1.1 · 2026-08-11. an analytic judgment changed: the state-side exposure was withdrawn after the rebuilt report showed the state filing used the state's own count; the council-side exposure stands.

v1.0 · 2026-08-10. initial draft; synthetic public sample, versioning shown as part of the standard.

Only the newest change is printed in full; every prior version is one line here, and the complete change log for this document is retained with the engagement record.