

Stabilizing Systems and Strengthening Capacity During Transition

client snapshot

- Regional nonprofit organization in Oregon, supporting families of children experiencing developmental disabilities.
- \$900K annual budget
- 18 employees
- Multiple government funded projects & programs
- Minimal community fundraising

overview

Creating Opportunities is a regional nonprofit in Oregon supporting families of children experiencing developmental disabilities. In 2024 and 2025, the organization expanded rapidly as new federal and state funding streams allowed them to reach more families than ever before. With that growth came the need to scale internal systems quickly—often relying on temporary solutions to keep services moving during an extraordinary moment of opportunity.

When several major funding sources were scheduled to sunset at the start of 2026, the organization recognized the need for clearer financial systems, stronger workflows, and more sustainable infrastructure to support the next phase of their work. Synchronicity Workflow Solutions stepped in for a six-month interim leadership engagement to help stabilize operations and strengthen internal capacity.

how synchronicity helped

Working closely with the team, Synchronicity focused on strengthening systems, improving clarity, and reducing manual work—always honoring the organization’s culture, capacity, and community commitments.

Key improvements included:

- Cleaning up QuickBooks Online and redesigning the chart of accounts for clearer grant reporting
- Implementing a transaction approval workflow to support accuracy and accountability
- Moving grant tracking from classes to projects and building custom budgets and reports
- Expanding use of the organization’s database and integrating it with the website and QBO
- Creating automated event registration and donation forms to eliminate manual data entry
- Developing an Accounting Handbook and training staff on daily bookkeeping tasks
- Building a grant calendar and funder follow-up system to support ongoing revenue building efforts
- Designing and documenting a new workflow for event planning
- Creating checklists and training staff to manage a new corporate sponsorship program

The focus throughout was on clarity, sustainability, and reducing overwhelm—ensuring the team had the tools and confidence to move forward.

what they needed

The team at Creating Opportunities had been working at full speed to meet community needs. As the organization grew, many processes were built quickly and creatively—effective in the moment, but not designed for long-term sustainability. Heading into a funding transition, the organization needed:

- Reliable financial systems to support planning and decision-making
- Grant tracking tools aligned with their expanded funding portfolio
- A database that could support both program and community engagement needs
- Clear workflows for website inquiries, events, and donor interactions
- Documented processes that reduced staff stress and supported continuity

These needs reflected the natural growing pains of a mission-driven organization scaling quickly to serve more families.

services provided

- Interim Strategic Finance & Resource Development Leadership
- QBO Cleanup
- Workflow & Systems Design
- Grant Tracking & Reporting Infrastructure
- Staff Training & Capacity Building

impact

By the end of the engagement, Creating Opportunities had stronger systems, clearer workflows, and more reliable financial information to guide them through a challenging funding transition. Staff gained confidence in their daily processes, leadership had the clarity needed for strategic planning, and the organization emerged with a stronger operational foundation.

Creating Opportunities continues to serve families with dedication and heart—and now with systems that support their mission for the long term.