

The Day One Record

What to write down now, so you never have to reconstruct your impact later.

Three years from now, someone who controls money is going to ask you a question about this year.

You will go looking for the answer. It will not be there.

Not because the work did not happen. It happened. You were in the room. You remember the family, the class, the night it turned around. But memory is not evidence, and the person asking needs evidence.

| This is not a data problem. It is a timing problem.

Every organization eventually builds the record. The only real question is whether you build it **while the work is happening**, or rebuild it from inboxes, old sign in sheets, and three people's recollections the week a report is due.

The second way costs more, takes longer, and produces a number nobody in the room is confident defending.

Who this is for

An organization in its first few years. Fewer than a hundred people in your entire universe, counting everyone: participants, volunteers, donors, board, partners. One or two people doing most of it. No budget for software, and no real need for it yet.

You do not need a database. You need three lists and the discipline to keep them.

A spreadsheet is fine. Paper is fine. What matters is that the same three things get written down every time, by someone whose job it is.

The three records

Keep these three and almost every question a funder, a board member, or a partner will ever ask you becomes a matter of looking something up instead of reconstructing it.

RECORD ONE	
People	
One row per human being who has ever touched the organization. You never delete a row and you never start a second list.	
FIELD	WHY IT EARNS ITS PLACE
Name and how to reach them	Obvious, and still the one most often kept in someone's phone instead of the record.
Who brought them	The single most valuable field on this page. See below.
First date of contact	Lets you say how long a relationship has run, which is most of what makes it sound like a relationship.
What they are to us now	Participant, volunteer, donor, board, partner, staff, vendor. A person can be several at once, and the ones who are several are your most important people.
Who here knows them best	One name. This is the person who calls when something matters.
Last real contact, and what it was	Tells you who has gone quiet before they are gone.

RECORD TWO

What happened

One row per thing that occurred. A session delivered, a gift received, a milestone reached, a referral made, a person served.

FIELD

WHY IT EARNS ITS PLACE

Date

Almost every funder question has a date range inside it.

Who it involved

Points back to Record One. This link is what lets you count people instead of events.

What happened, from a fixed list

Decide on ten or so words once, then only ever use those ten. Free typing cannot be counted, and counting is the entire point.

How much of it

Hours, sessions, meals, dollars, miles. Whatever the unit of your work actually is.

Who on our side did it

Credit, and also the person to ask when a detail is missing.

Where the proof sits

A photo of the sign in sheet, a receipt, an email. One line saying where it lives is worth more than a filing system nobody maintains.

RECORD THREE

Promises

Every commitment made, in either direction. Yours to them, theirs to you.

FIELD	WHY IT EARNS ITS PLACE
What was promised	In plain words. "Send the impact summary." "Introduce us to the foundation."
Who promised it, and to whom	A promise with no name attached belongs to nobody and happens to no one.
When it is due	A date, even a rough one. Without it there is nothing to be late against.
Done, or not yet	Two states. This is the whole system.

Record Three looks the least impressive and tends to change the most. Most of what people experience as an organization being disorganized is simply promises nobody wrote down.

The field that pays for itself

Almost nobody records **how a person found them**. So almost nobody can answer the one question that would change where they spend their time: which handful of people generate everything?

Write it down from the very first person. Then in two years, sort by that column. You will find that a very small number of names are quietly responsible for most of your volunteers, most of your participants, and most of your money. Some of them have never given you a dollar.

Those are the relationships to protect, and until you write this field down, you are guessing about who they are.

Somebody gave is not a giver

A first gift is a transaction. A giver is somebody who gave twice.

What turns one into the other is what happens in the ninety days after that first gift, and whether a specific person owns it. Not the organization. A person, by name.

WHEN	WHAT HAPPENS
Within 48 hours	Thanked by a human, not a receipt. It can be four sentences. It cannot be automatic and it cannot ask for anything.
Around 30 days	One specific thing their money touched. Not a newsletter. One story, one number, one photograph.
Around 90 days	A reason to talk that is not a request. An invitation, an update, a question about them.

Three entries in Record Three. That is all this is. Organizations that do it keep people for years, and the ones that do not spend every season looking for strangers.

The six questions

These are the standard ones. They are not traps, and the people asking are not trying to catch you. Every one of them is answerable in a few minutes if you kept Records One and Two, and answerable in no amount of time if you did not.

01 How many people did you serve?

Served, not reached. The difference is the first thing an experienced funder listens for.

02 Who were they?

Describe the people without naming any of them.

03 **What did they actually receive, and how much of it?**

The unit of your work, counted.

04 **How many finished, and how many did not?**

The second half of that question matters more than the first, and honesty about it reads as competence.

05 **What changed, and how do you know?**

Something you observed or measured, not something you believe.

06 **Can you show it rather than tell it?**

This is the one that separates organizations that get funded twice from organizations that get funded once.

Four rules that keep it alive

Any template can be filled in for six weeks. These are what make it survive a year.

1 **Capture while it happens, never at reporting time.**

If a record is only touched when something is due, it is not a record. It is a reconstruction, and it carries all the errors of one.

2 **One person owns each record.**

Not the team. One name, written at the top. Shared ownership of a list means nobody notices when it stops.

3 **Decide your words once.**

Ten activity types, chosen deliberately, then frozen. Adding an eleventh is a decision somebody makes on purpose, not something that happens because a volunteer typed it differently.

4

Never delete a row.

Mark it closed, corrected, or withdrawn and leave it where it is. The history of what you thought was true is itself worth something, and deleted rows are how counts quietly stop matching.

When you outgrow this

You will, and that is the good outcome. The signals are specific:

- Two people need to write to the same list at the same time, and one of them keeps overwriting the other.
- You are copying the same person's details from one sheet into another.
- You cannot tell who owns the next step without asking somebody.
- You are answering the same funder question by hand more than once a quarter.
- Someone new joined and the only way to learn how things work here was to ask you.

None of that means the lists failed. It means the organization grew past what a list can hold. That is the point where what you have becomes a system, with the work moving through it on its own, and that is a different kind of build.

It is also much easier to do for an organization that kept these three records than for one that did not. Everything above is what a real system gets built on top of.

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Ecrof Media studies how work actually moves through an organization, then builds the operating systems behind it, so work moves, impact gets captured, and reporting does not require reconstructing what happened.

ecrofmedia.com/day-one-record

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