WHITE PAPER

The one-person risk

In most associations and nonprofits, the way the systems really work lives with one staff member or one contractor. That person is usually the reason things still run. This paper is about how to see the risk, write the knowledge down before anyone leaves, and share it in a way that honours the person who holds it.

01 Why it happens, and whose fault it is not

02 Six signs you already have it

03 Mapping who knows what

04 The conversation, and how to open it

05 Writing it down so others can use it

06 Spreading it without a reorganization

07 The knowledge-capture plan

08 When someone has already given notice

For
Anyone who depends on how their systems really work

Time to read
About 25 minutes

Use it
Before anyone gives notice

A NOTE BEFORE YOU START

The most valuable thing your organization owns may be in one person's head.

Almost every association and nonprofit I have worked with has a name that comes up whenever something breaks. "Ask Maria, she knows how renewals work." "Only Dev can fix the event sync." "The contractor set that up in 2019."

That person is almost never the problem. Usually they are the reason the organization still works. They stayed late when the import failed. They learned the old database because nobody else would. They built the spreadsheet that holds the board report together. Over years, the organization quietly handed them more and more of how things run, and never asked anyone else to learn it.

The risk is not the person. The risk is that the knowledge exists in exactly one place, and that place has a life, a career, a family and a notice period. People retire, get promoted, fall ill, move cities, and take better offers. Contractors close their practice. None of that is a failure. It is just life, and the organization should be built to survive it.

This paper is about doing that kindly. How to see where the knowledge sits, how to write it down while the person is still here and happy, and how to spread it in a way that makes them feel valued rather than replaced. It ends with a plan you can start this month.

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The short version

- Name the risk as a property of the organization, never of the person.
- Map who knows what before you write anything.
- Start with the processes where a mistake reaches members, donors or money.
- Make the expert the author and the teacher, not the subject.
- Test the writing: someone else does the task from the page.
- Put it in job descriptions, contracts and the calendar, so it lasts.

How long it takes

A first map takes an afternoon. Capturing the five most critical processes usually takes one to three months of a few hours a week, alongside normal work.

Worth remembering. You are not protecting the organization from this person. You are protecting this person from being the only one who can ever take a holiday.

01 · WHY IT HAPPENS

Nobody plans it. It grows one favor at a time.

No executive director sits down and decides that renewals will depend on one person. It happens gradually, and almost always for good reasons. A small team has more work than people. Someone is good with the database, so the database questions go to them. They fix a problem quickly, so the next problem goes to them too. Within a few years they are the only person who knows why the dues calculation has a special case for chapter members, or which grant codes the finance export expects.

Contractors follow the same path from the other side. An organization brings in a capable freelancer to build an integration or a set of reports. The work is good, so the next piece of work goes to them. Nobody asks for documentation because the contractor is always reachable. Until one day they are not.

Three conditions make it worse, and most small organizations have all three:

Lean teams

There is no second person to learn the work. Cross-training feels like a luxury when everyone is already doing two jobs.

Custom systems

Years of small changes, workarounds and exceptions. The logic is real but it is written nowhere except in the setup itself.

Quiet success

When things work, nobody asks how. The knowledge only becomes visible when the person is away and something stops.

Why it is not anyone's fault

It is tempting, once you see the risk, to look for someone to blame: the person who did not write things down, or the manager who let it happen. Resist that. The person who holds the knowledge was rarely given time to document it, and was usually rewarded for fixing things fast rather than for making themselves replaceable. The organization asked for speed and got it.

That framing matters, because how you name the problem decides how the person hears it. "We depend too much on you" sounds like criticism. "The organization has put too much on your shoulders, and we want to fix that" is the same fact, and it is the honest one.

> The person who holds the knowledge is usually the hero of the story. The risk is that the story has only one hero.

02 · HOW TO SEE IT

Six signs you already have it

Most organizations recognize at least two. None of them shows up on a dashboard, which is why the risk stays hidden.

01

Holidays get scheduled around one person

Renewal season, the annual conference, year-end giving or the audit cannot happen without them, so their time off is negotiated rather than taken.

02

The same name answers every "how does this work?"

New staff are told to "ask Sam". After a year, they still ask Sam, because nothing they could read would give them the answer.

03

Only one person has the admin password

Or the only admin account belongs to a contractor, or the integration runs under someone's personal login. Access is the plainest form of the risk, and the easiest to check.

04

Reports are rebuilt by hand, and only one person knows the steps

The board pack, the funder report, the membership count. If the numbers depend on a spreadsheet only one person can refresh, the board's view of the organization depends on that person too.

05

Questions about the system get "it depends" and a story

Exceptions explained from memory, such as "lifetime members are coded differently because of the 2017 merger", are knowledge that should be written down. Each story is a rule nobody else knows.

06

Nobody can say what would break if they left tomorrow

This is the real test. Ask the leadership team the question directly. If the answer is a long pause, the risk is there, even if nobody can yet name it.

A quick check. Look at the last three times something important went wrong with a system. Who fixed it? If it was the same person each time, you have found your starting point.

03 · MAPPING WHO KNOWS WHAT

Before you write anything down, find out where it lives

The first instinct is to ask the expert to "document everything". It never works. Everything is too big, and the person ends up writing for weeks about the things they find interesting rather than the things the organization most needs. Start with a map instead: a single page that lists the work that matters and who can do it today.

Sit with your leadership team for an afternoon. List the processes that keep the organization running, then for each one ask three questions.

QUESTION ONE

Who can do this today, without help?

Not who has seen it done. Who could do it on their own next week.

QUESTION TWO

What happens if it goes wrong?

Does a mistake reach members, donors, funders, money or the board? Or is it an internal annoyance?

QUESTION THREE

Is any of it written down?

Somewhere a colleague could find it and follow it, not in an old email thread.

Where to look

Most of the critical knowledge sits in a handful of places. For an association: the renewal cycle and dues rules, member types and their exceptions, event registration and badge printing, certification and CE credit tracking, chapter rosters and rebates, and the board membership report. For a nonprofit: gift entry and acknowledgment, recurring gifts, grant tracking and funder reports, restricted funds, volunteer records, and the year-end tax receipts.

Then the parts underneath, which are easy to miss because nobody touches them until they break: the integrations between systems, the scheduled jobs and imports, the admin accounts, the domain and email settings, and who holds the contracts and renewal dates for each tool.

Score it simply

Give each process a mark for each question. A process that only one person can do, that reaches members or money when it fails, and that is written nowhere, goes to the top of the list. You will usually find five to eight of them. That is your plan for the next quarter, and it is a much smaller job than "document everything".

Include the contractors. The map is incomplete if it only lists staff. Any outside person who has built or maintains part of your systems belongs on it, with the same three questions. Often they hold the most undocumented work of all, simply because nobody inside ever needed to understand it.

04 · THE CONVERSATION

How to open it without insulting the person who holds it

This is the part most organizations put off, and it is the part that decides whether the rest works. Ask clumsily and the expert hears "we are preparing to replace you". Some will quietly hold back, not out of malice, but because their knowledge has become their security. Ask well and most people are relieved. Being the only one who knows is tiring, and many have been waiting for someone to notice.

Four things that make it go well

Start with thanks, and mean it

Name what they have carried, specifically. "Renewals have run for six years because of you" lands better than a general compliment.

Name it as the organization's problem

"We have put too much on one person" is honest and it is not about them. Avoid "what if you got hit by a bus". It makes the conversation about their absence.

Make them the author

They decide what goes in, they review what others write, and their name is on it. Knowledge capture should add to their standing, not reduce it.

Give them the time

Take something off their plate. Writing on top of a full job, in the evenings, tells them the work is not really valued.

WHAT IT CAN SOUND LIKE

"I want to talk about something that is my responsibility, not yours. Over the years we have leaned on you for more and more of how the membership system works, and you have carried it. That is not fair to you, and it is a risk for us. You cannot take a proper holiday, and if anything ever changed, we would be lost."

"I would like you to lead a small project to get the most important parts written down and to teach one or two people. You decide what matters most. I will take the event reports off your list for the next three months so you have the time."

With a contractor

The conversation is simpler, and it should be. Documentation and handover are part of good professional work, and the best contractors are glad to be asked. Make it a paid, scoped piece of work with a clear output, not a favor. If the existing agreement says nothing about it, add it at the next renewal. Our paper *Owning your systems after the build* has a checklist for exactly that.

05 · WRITING IT DOWN

Write for the person who will do the task, not for the person who knows it

Experts write notes for themselves. They skip the steps that feel obvious, use their own shorthand, and leave out the reasons. The fix is to change who the writing is for: a capable colleague who has never done this task, reading it on a day the expert is unreachable.

For each critical process, aim for one page in plain English, with the same five parts every time.

PART	WHAT GOES IN IT	EXAMPLE: MONTHLY RENEWAL RUN
1. What and why	What the process does and who depends on it, in two sentences.	Sends notices to members expiring in 60 days. Members, finance and chapters rely on it.
2. When	The trigger or date, and how long it takes.	First working day of the month. About two hours.
3. Steps	Numbered, in order, with where to click or what to run. Screenshots help.	Run the expiring list, check the exceptions, send the batch, log the count.
4. Exceptions	The rules that live in people's heads. This is the most valuable part.	Lifetime members are skipped. Chapter-paid members go to the chapter contact, not the member.
5. When it goes wrong	The usual failures, how to spot them, and who to call.	If the count is far below last month, the expiry dates did not import. Check before sending.

Three ways to get it out of someone's head

Record the task, then write it up. The expert does the work while sharing their screen and talking it through. Someone else turns the recording into the page. This takes far less of the expert's time than writing from scratch, and catches the steps they no longer notice they do.

Ask for the exceptions directly. "Is there ever a member this does not apply to?" draws out the rules a normal month will miss.

Test it. The only real check is someone else doing the task from the page while the expert watches and stays quiet. Every question the learner asks is a gap in the writing. Fix it, then test again next cycle.

Keep it where people work. A page that lives in someone's personal drive is still one-person knowledge. Store it in a shared place the organization owns, with an owner and a "last checked" date on each page.

06 · SPREADING IT

Writing it down is half the job. The other half is a second person.

Documentation reduces the risk. It does not remove it. A page tells someone what to do; it rarely gives them the judgment to know when something looks wrong. For the processes at the top of your map, the goal is a second person who has actually done the work, more than once, with the expert nearby. In a small organization that does not mean a new hire or a restructure. It means a few deliberate habits.

A named backup for each critical process

One person, written on the map, who does the task with the expert at least twice a year. Choose someone who will still be close to the work in a year.

Swap the driver

Once a quarter the backup runs the process and the expert watches. It feels slower. It is the only way to know the backup can really do it.

Use the holiday

The expert's next real time off is a gift: a planned, low-stakes test. Prepare the backup the week before and treat what goes wrong as material for the documentation.

Share access properly

At least two named admins on every critical system, each with their own login. No shared passwords, no integrations running under one person's account.

Change what the organization rewards

If the expert is still praised mainly for heroic rescues, the habit will return. Put knowledge sharing into their objectives and their review. Mention it to the board. A line in the annual report to the board such as "renewals can now be run by three people, not one" is a real achievement, and it belongs to the person who taught the others.

Some experts worry that sharing their knowledge makes them less needed. The honest answer is that it frees them for work only they can do: improving the system rather than keeping it alive. Most people, offered that trade with sincerity, take it.

Make it last

Write documentation and handover into job descriptions and into every contractor agreement. Add "who else can do this?" to the questions asked before any new system or integration goes live. The one-person risk is not solved once. It is kept small by habit.

> You know it is working when the expert takes two weeks off, and nobody notices.

07 · COPY THIS

The knowledge-capture plan

One row per critical process from your map. Score each column 1 to 3, add them up, and work from the highest total down. The first row is an example.

PROCESS	WHO CAN DO IT	ONLY ONE PERSON (1 TO 3)	REACHES MEMBERS OR MONEY (1 TO 3)	NOT WRITTEN DOWN (1 TO 3)	TOTAL	BACKUP	TESTED BY
Monthly renewal run	Maria	3	3	2	**8**	James	End of March
Board membership report							
Gift entry and receipts							
Event registration sync							
CE credits or grant reports							
Integrations and scheduled jobs							
Admin accounts and licenses							

Scoring: **Only one person** 3 = one person, 2 = two but one is unsure, 1 = two or more confident. **Reaches members or money** 3 = a mistake reaches members, donors, funders or money, 2 = reaches the board or staff, 1 = internal only. **Not written down** 3 = nothing, 2 = partial or out of date, 1 = a tested page exists.

The first ninety days

WHEN	WHAT HAPPENS	DONE WHEN
Week 1	Leadership builds the map in one afternoon. The executive has the conversation with each expert, and takes something off their list.	The plan above is filled in and agreed.
Weeks 2 to 4	Two admins on every critical system. Integrations moved off personal accounts. Contracts and renewal dates listed in one place.	No system has a single admin.
Weeks 3 to 10	The top three processes are recorded and written up using the five-part page. Backups named.	Three pages exist, reviewed by the expert.
Weeks 8 to 12	Each backup runs their process from the page, with the expert watching. Gaps fixed.	Three processes tested by someone else.
Then, quarterly	Swap the driver once. Work down the list. Report progress to the board in one line.	The map gets greener every quarter.

08 · WHEN SOMEONE HAS ALREADY GIVEN NOTICE

Two to four weeks is enough, if you spend it well

Sometimes the plan starts too late. The person who knows everything has accepted another role, or a contractor has said they are winding down. The instinct is to ask for everything at once. Do the opposite: narrow it down, protect their remaining time, and part on good terms. A departing expert who feels respected will answer an email in three months' time. One who feels squeezed often will not.

01

Access first, on day one

List every system, account, password vault, domain, integration and vendor contact they hold. Move each to an organizational owner while they are still there to help. This is the one thing that cannot wait.

02

Pick the three processes that matter most

Use the map, or build a quick one with them. Record each process being done, with commentary, even if nobody has time to write it up yet. A recording now is worth more than a perfect page later.

03

Ask for the calendar of the year

What happens in each month that only they would remember? The renewal batch, the audit file, the chapter rebate, the year-end receipts, the license that auto-renews in June. Calendars are quick to write and prevent the surprises that do the most harm.

04

Agree how you can reach them afterwards

A few paid hours over the following months, agreed before they leave, is often the best value in the whole handover. Make it a formal arrangement, not a favor you hope for.

05

Thank them in public

Tell the team, and the board, what this person carried and what they handed over. It is the right thing to do, and the people who stay are watching how the organization treats those who leave.

WHAT TO DO NEXT

Two steps, this month

01 Ask your leadership team one question

"If one person left tomorrow, what would stop working?" Write the answers on a single page. That is the start of your map, and it takes less than an hour.

02 Have the first conversation, with thanks

Pick the person whose name came up most. Thank them for what they carry, name the risk as the organization's, ask them to lead the capture of the top three processes, and take something off their plate so they can.

None of this needs new software. It needs a little time, a shared place to keep the pages, and a leader who treats knowledge as something the organization owns and is responsible for. The people who have been holding it for you will be glad you asked.

Why this matters before any systems change

If you are considering a new CRM or membership system, this work comes first. Every new system is built on the rules of the old one, and if those rules live in one person's head, the project depends on that person's calendar. Writing them down first protects the person, the project and the budget.

IF YOU WANT A SECOND PAIR OF HANDS

The Digital Readiness Blueprint

Over four to six weeks we talk to each of your teams, map how your systems and processes actually work, and write it down in plain English, so the organization owns the knowledge rather than depending on who happens to still be in the building. You keep everything we write.