

**Brian Rojas Business Consulting Services**  
**123 Main Street**  
**New York, NY 10033**

John Jay Smith  
456 Main Street  
New York, NY 10002

Dear Mr. Smith,

Per your request, I conducted a preliminary report about Organization X. Based on my findings; I believe that purchasing X will prove to be a great investment. Ownership of X will allow you to dismiss the leadership without trouble as the membership is extremely unhappy with the direction the organization has taken and welcomes the opportunity to start anew.

Below, you will find a preliminary report of my investigation. Once I have conducted my follow up, I will provide you with additional information.

Should you have any questions or concerns please feel free to contact me by phone at (917) 777-7777 or by email at [brojas@rojas.com](mailto:brojas@rojas.com).

Sincerely,

Brian Rojas

**Brian Rojas Business Consulting Services**  
**123 Main Street**  
**New York, NY 10033**

Organization X was formed to provide its members with a space in which they could meet other individuals who shared their interests and wished to explore them further. As with other organizations, there are expenses which have to be paid by the group as a whole. In order to accomplish this, the members agreed to pay dues on a monthly basis. The money collected from members was to be used to pay rent, utility bills and miscellaneous supplies. The treasurer collects dues and keeps track of all the expenses that are paid out on behalf of the membership. The president and secretary are responsible for other tasks which include keeping the membership informed about the financial health of the fraternity, reaching out to potential financial backers, and collaborating with other organizations to attract potential members.

When X was formed, it was comprised of a small group of members. Membership meetings were held on a quarterly basis and the leadership encouraged members to participate in the management of X as much as their schedules allowed them to. Leadership was highly receptive of any suggestions and when any ideas were conceived, a vote was held to determine if the group could a) afford it b) had enough man power and, if so, c) distribute responsibilities among members. Most ideas were geared toward organizing events through which revenue could be earned and be applied to expenses. Whatever money was left over was deposited into a savings account which members agreed would be used to buy property to which X would be relocated.

Organization X uses mail chimp to send out mailings to members and potential donors; members created a website where everyone can read about X and its mission; members are able to pay dues and make additional donations through PayPal; X also uses services free advertising available through The Village Voice, Yahoo, Google +, Facebook and other social media websites.

As X grew, more members joined and although participation and revenue should have increased the exact opposite happened. While a small group of members continued to participate and contribute to X, the newer members were not interested in spending an inordinate amount of time working for X and did not pay dues on a regular basis. They seemingly lacked the enthusiasm and energy that the founding members when they formed X. As a result, the treasurer was forced to continually remind members to pay dues. The president and secretary also reminded members of their responsibilities to participate in the planning and execution of events. The situation became progressively worse as the organization continued to grow. Members who contributed their time and money to help support X were tired and were not getting any more out of their members than those who didn't participate or contribute financially. Management of X was increasingly being handled by the leadership without the input of its members. Financial decisions were made without the approval of the membership which helped breed mistrust amongst members. This led to a further decrease in participation from members.

Many felt as though they were only being sought out to pay dues. Otherwise, they were largely ignored by the leadership.

In order to begin to remedy the situation, X must consider halting expansion. The most important goal is to build a steady foundation for the organization. Buying property should be the ultimate goal as it will eventually lead to a decrease in expenses. Finances must once again be made transparent in order to regain the trust of its membership. X must also find new ways to reengage its members. As long as members feel as though they're only being used for money they will not enthusiastically participate and will be less willing to contribute financially.