

JDK CAPITALS AI LLC

ENTERPRISE WORKBOOK 1

LEADERSHIP, GOVERNANCE
AND ORGANIZATIONAL DESIGN

Executive strategy, governance, organizational structure, AI leadership,
accountability, risk, and performance management.

Helping Other People Excel | You Cannot Be What You Cannot See

Prepared For	JDK Capitals AI LLC Executive Leadership
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Workbook Use and Control

This workbook is designed for executive planning, team facilitation, implementation tracking, and organizational documentation.

Document Control: Store the master copy in the approved Microsoft 365 or SharePoint enterprise library. Create working copies for departments, meetings, and planning sessions. Review the workbook at least quarterly and update the version number after major changes.

- Use the blank fields, tables, and checklists to document decisions and assign accountability.
- Mark unfinished actions with [] and completed actions with [X].
- Attach supporting policies, budgets, diagrams, and evidence behind the related section.
- Do not place banking credentials, passwords, Social Security numbers, or private keys in this workbook.
- Legal, tax, financial, cybersecurity, and regulatory decisions should be reviewed by qualified professionals.

Workbook Owner Approval

Name / Title	
Signature	
Date	

Workbook Contents

Each chapter combines guidance, decision prompts, templates, and implementation checklists.

Chapter	Topic	Primary Deliverable
01	Enterprise Identity and Strategic Foundation	Approved mission, vision, values, and strategic priorities
02	Executive Command Center	Executive rhythm, decision calendar, and command dashboard
03	Governance and Board Oversight	Governance model, board roles, committees, and decision rights
04	Organizational Design	Department structure, reporting lines, and role clarity
05	AI Super Agent Leadership Network	Agent charters, human oversight, and escalation rules
06	Leadership Standards and Culture	Leadership expectations, conflict practices, and ethics
07	Performance Management and KPIs	Enterprise scorecard and accountability cadence
08	Risk, Continuity and Strategic Review	Risk register, continuity plan, and 90-day roadmap

Recommended Sequence: Complete the chapters in order during the first enterprise setup cycle. After launch, revisit the scorecards and action registers monthly and the strategic sections quarterly.

01

ENTERPRISE IDENTITY AND STRATEGIC FOUNDATION

Establish the organization's identity, direction, promise, and measurable priorities before building systems around them.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Enterprise Identity Card

Legal Name	JDK Capitals AI LLC
Primary Brand	JDK Capitals AI LLC
Associated Initiatives	Helping Other People Excel; You Cannot Be What You Cannot See; Global Talent Academy
Primary Stakeholders	Customers, students, veterans, communities, partners, funders, investors, volunteers, and international collaborators
Planning Period	_____ through _____

Mission statement: What does the organization do, for whom, and why does it matter?

Vision statement: What future condition will exist because JDK Capitals AI LLC succeeds?

Enterprise promise: What consistent value should every customer, partner, learner, and community receive?

Core Values Definition Matrix

Value	Behavior We Expect	Behavior We Reject	Evidence
Integrity			
Excellence			
Service			
Innovation			
Respect Across Cultures			
Accountability			
Faith / Purpose Alignment			

Strategic Priority Planner

Priority	Why It Matters	12-Month Result	Executive Owner	Quarterly Measure
1. Enterprise Launch				
2. Revenue and Funding				
3. Global Talent Academy				
4. AI and Technology				
5. Brand and Media				
6. Community / International Impact				

Chapter Completion Checklist

Done	Action	Owner / Date
☐	Mission, vision, values, and enterprise promise are approved by executive leadership.	_____
☐	The planning period and top six priorities are documented.	_____
☐	Every strategic priority has one accountable executive owner.	_____
☐	The strategic foundation is reflected in public messaging and internal policies.	_____

Action Register

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02

EXECUTIVE COMMAND CENTER

Create a disciplined executive system for priorities, decisions, reporting, and cross-department coordination.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Executive Operating Rhythm

Meeting / Review	Frequency	Participants	Primary Questions	Output
CEO Daily Focus	Daily	CEO / Chief of Staff	What must move today? What needs escalation?	Top 3 priorities
Executive Huddle	Weekly	Executive team	What changed? What is blocked? What requires a decision?	Decision and action log
Performance Review	Monthly	Executives / department heads	Are KPIs on target? What corrective action is needed?	Scorecard update
Strategy Review	Quarterly	Executive team / advisors	Are priorities still correct? What should stop, start, or scale?	Updated strategic plan
Board Review	Quarterly or scheduled	Board / CEO / counsel	Are governance, financial, and risk duties being met?	Board resolutions / minutes

Executive Dashboard Design

Dashboard Area	Leading Indicator	Lagging Indicator	Target	Data Owner
Revenue				
Cash and Runway				
Sales Pipeline				
Grant Pipeline				
Programs / Learners				
Customer Satisfaction				
Media Reach				
Risk / Compliance				
People / Capacity				

What are the five decisions that only the CEO can make?

What decisions should be delegated to department leaders or AI-assisted workflows?

Executive Command Center Setup

Done	Action	Owner / Date
☐	A weekly executive huddle is scheduled.	
☐	The executive dashboard has defined data owners.	
☐	A single decision log is maintained.	
☐	Red, yellow, and green status definitions are standardized.	
☐	Unresolved risks have escalation deadlines.	

Action Register

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#	Action / Decision	Owner	Due Date	Status
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Executive Decision Notes

03

GOVERNANCE AND BOARD OVERSIGHT

Define fiduciary oversight, advisory support, committees, meeting standards, and decision authority.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Governance Body Design

Body	Purpose	Authority	Membership	Meeting Frequency
Board of Directors / Managers				
Executive Leadership Team				
Advisory Council				
Finance and Audit Committee				
Legal, Ethics and Compliance Committee				
Programs and Impact Committee				
Technology and AI Governance Committee				

Decision Rights Matrix

Decision	Board	CEO	Executive Team	Department Head	Advisor / Counsel
Annual strategy	A	R	C	I	C
Annual budget	A	R	C	I	C
Banking / debt authority	A	R	C	I	C
Major contract threshold	A	R	C	I	C
Hiring executives	C	A/R	C	I	C
Department operations	I	A	C	R	I
AI policy and high-risk use	A	R	C	C	C
Crisis response	I	A/R	C	R	C

RACI Key: R = Responsible; A = Accountable; C = Consulted; I = Informed. Adapt this matrix to the organization's legal structure and governing documents.

Governance Readiness Checklist

Done	Action	Owner / Date
[]	Governing documents and legal structure have been reviewed.	_____
[]	Board and committee charters are drafted.	_____
[]	Conflict-of-interest disclosures are collected annually.	_____
[]	Meeting agendas, minutes, votes, and resolutions are retained.	_____
[]	Financial and compliance reporting responsibilities are assigned.	_____

Governance Model Approval

Name / Title	_____
Signature	_____
Date	_____

04

ORGANIZATIONAL DESIGN

Translate strategy into a practical structure with clear departments, leaders, responsibilities, and reporting lines.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Enterprise Department Map

Division	Primary Purpose	Executive Owner	Key Departments / Units
Executive Office	Enterprise direction and governance		CEO Office; Chief of Staff; Strategy
Operations	Delivery, quality, logistics, and SOPs		Program Operations; Quality; Facilities
Finance and Administration	Financial stewardship and administrative control		Accounting; Budget; Procurement; Administration
Legal, Risk and Compliance	Legal review, risk management, privacy, and compliance		Contracts; Compliance; IP; Risk
People and Culture	Workforce, contractors, volunteers, and culture		HR; Talent; Volunteer Services
Growth and Revenue	Sales, customer success, partnerships, and fundraising		Business Development; CRM; Partnerships
Grants and Impact	Grant development, evaluation, and reporting		Research; Proposals; Program Evaluation
Technology and AI	Platforms, cybersecurity, data, automation, and AI governance		IT; AI Agents; Data; Security
Global Talent Academy	Curriculum, instruction, credentials, and learners		Programs; Faculty; Student Success
Media and Communications	Brand, television, podcast, social, and public relations		Media Production; Marketing; PR
International Humanitarian	Global partnerships, missions, and cultural coordination		International Programs; Logistics; Partnerships

Role Charter Template

Role Title	_____
Reports To	_____
Purpose	_____
Top Five Responsibilities	1. _____ 2. _____ 3. _____ 4. _____ 5. _____

Decision Authority	_____
KPIs	_____
Required Credentials / Experience	_____
AI Agent Support	_____
Backup / Succession	_____

Staffing Priority Matrix

Role / Capability	Needed Now	Next 90 Days	Later	Employment Model	Budget
Chief of Staff					
Finance / Accounting					
Legal / Compliance					
Grant Development					
CRM / Sales Operations					
Technology / Cybersecurity					
Instructional Design					
Media Production					
International Programs					

Action Register

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Organizational Design Notes

05

AI SUPER AGENT LEADERSHIP NETWORK

Establish role-based AI agents that expand capacity while preserving human approval, legal responsibility, and data protection.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

AI Agent Charter

Agent Name / Role	Mission	Approved Tasks	Prohibited Tasks	Human Owner	Escalation Trigger
Atlas - Enterprise Strategy					
Aurelia - Grants and Funding					
Solomon - Legal and Compliance Support					
Nia - People and Culture					
Mateo - GrowthHub 365 and Sales Operations					
Amina - Global Talent Academy					
Hiro - Microsoft 365 and Automation					
Imani - Media and Communications					
Kwame - International Programs					
Clara - Finance and Administration					

Human Approval Rules

Risk Level	Examples	AI May Draft	Human Review Required	Authorized Approver
Low	Internal outlines, agendas, formatting	Yes	As assigned	Department owner
Moderate	External communications, proposals, budgets	Yes	Yes	Department head
High	Contracts, legal claims,	Support only	Mandatory	Qualified professional /

Risk Level	Examples	AI May Draft	Human Review Required	Authorized Approver
	tax positions, banking, sensitive data			executive
Prohibited	Password storage, impersonation, unauthorized commitments, discriminatory decisions	No	Not applicable	Escalate immediately

AI Governance Checklist

Done	Action	Owner / Date
[]	Each agent has a named human owner.	_____
[]	Approved data sources and prohibited data are documented.	_____
[]	No AI agent can commit funds, sign contracts, or represent legal advice without authorized human action.	_____
[]	Outputs are reviewed for accuracy, bias, confidentiality, and brand consistency.	_____
[]	Agent changes are documented and version controlled.	_____

List the first five repeatable workflows to assign to the AI Super Agent Network.

Action Register

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AI Workflow and Approval Notes

06

LEADERSHIP STANDARDS AND CULTURE

Define how leaders communicate, resolve conflict, make decisions, coach people, and protect the organization's culture.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Leadership Standard

Standard	Expected Practice	Evidence / Measure
Purpose and Direction	Leaders explain the mission, priorities, and desired outcome.	
Prior Planning	Leaders prepare resources, risks, roles, and contingencies before execution.	
Adding Value	Leaders improve people, programs, partnerships, and decisions.	
Character and Integrity	Leaders tell the truth, protect trust, and accept accountability.	
Camaraderie and Respect	Leaders build belonging across generations and cultures.	
Conflict Competence	Leaders address concerns early, listen, mediate, and document agreements.	
Commitment and Willingness	Leaders follow through and model disciplined service.	
Learning and Innovation	Leaders use feedback, data, and responsible AI to improve.	

Conflict Resolution Worksheet

Issue	Facts	Interests / Needs	Options	Agreement	Follow-Up Date

What behaviors must leaders model every day?

What cultural behaviors will not be tolerated, regardless of position or performance?

Culture Implementation Checklist

Done	Action	Owner / Date
[]	Leadership standards are included in onboarding and evaluations.	
[]	A respectful complaint and escalation path is documented.	
[]	Managers receive conflict resolution and coaching training.	
[]	Recognition practices reward service, teamwork, improvement, and results.	

07

PERFORMANCE MANAGEMENT AND KPIS

Create a practical measurement system that connects strategy, daily activity, accountability, and improvement.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Enterprise Balanced Scorecard

Perspective	Strategic Objective	KPI	Target	Actual	Status	Owner
Financial						
Customer / Partner						
Programs / Impact						
People / Capacity						
Technology / AI						
Compliance / Risk						
Brand / Media						

Department KPI Builder

Department	Outcome	Leading Indicator	Lagging Indicator	Frequency	Source
Executive Office					
Operations					
Finance					
Grants					
Growth / CRM					
Academy					
Media					
International					

Measurement Rule: Every KPI should have a clear definition, formula, data source, reporting frequency, owner, target, and corrective-action threshold.

KPI Quality Checklist

Done	Action	Owner / Date
[]	KPIs measure outcomes, not only activity.	_____
[]	Data owners understand how and when to report.	_____
[]	Targets are realistic, time-bound, and connected to strategy.	_____
[]	Corrective actions are documented when a metric is off target.	_____
[]	The executive scorecard is reviewed monthly.	_____

Action Register

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08

RISK, CONTINUITY AND STRATEGIC REVIEW

Identify threats and opportunities, protect continuity, and convert the workbook into a focused 90-day implementation cycle.

Chapter Outcome: By the end of this chapter, the organization should have clear decisions, named owners, measurable expectations, and documented next actions.

Enterprise Risk Register

Risk	Category	Likelihood	Impact	Current Control	Owner	Next Action

Business Continuity Priorities

Critical Function	Maximum Downtime	Backup Process	Data / System Needed	Responsible Leader
Executive communications				
Customer / partner response				
Financial access and payments				
CRM and contact records				
Teaching / program delivery				
Media communications				

Critical Function	Maximum Downtime	Backup Process	Data / System Needed	Responsible Leader
Legal / compliance response				

90-Day Enterprise Roadmap

Phase	Days	Priority Outcomes	Executive Owner	Success Evidence
Foundation	1-30	Approve governance, identity, department map, and core policies		
Build	31-60	Configure systems, role charters, dashboards, and priority SOPs		
Launch	61-90	Begin operations, track KPIs, test controls, and correct gaps		

The three greatest risks to successful launch are:

The three highest-leverage actions for the next 30 days are:

Workbook 1 Executive Approval

Name / Title	
Signature	
Date	