

MAS Annotated Resource List for Volunteer Consultants

June 2023

Over the years volunteers working with MAS have compiled an excellent set of on-line tools, articles and other resources in our MAS Resource Library. They have been organized mostly along the Practice areas of MAS: governance, strategic planning, finance, fundraising etc.

Because by this point there are so many resources and because a quick look into the many Libraries and Folders doesn't really tell you what's in there without having to open each item, we have decided to put together this listing of titles with VERY brief descriptions.

Although VCs are organized into Practice areas you may find helpful resources for your various projects in other areas; we'd recommend you scan this whole listing as there may be resources in different Libraries that can help you (or your client).

What's great about the MAS Resource Library is that our VCs have done an amazing job of curating a wide range of items. In future if and when you discover helpful tools, information, articles etc. it would be great if you could send us a copy so we can upload it. This slightly veers away from the previous process where any VC could insert a document directly.

Moving forward we will continue to track new resources as they come in and maintain this annotated list. The list itself will be kept on the VC page of the website and of course be available to send out on request. We also often get requests from people needing various kinds of help or information about not-for-profit life. Now being able to put our hand quickly onto a resource we can share will be invaluable to our ability to respond.

If you have any comments or questions please don't hesitate to contact me, or Nina (Client Services Manager).

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Strategic Planning

Articles and Papers

Are You Doing the SWOT Analysis Backwards? by Laurence Minsky and David Aron, 2021

Interesting article from the Harvard Business Review.

Roles in Strategic Planning

Quick 2-page rundown of roles of Board, consultant, staff etc.

Charting a New Path Forward, Boardsource, 2017

A piece produced by Boardsource when they engaged in their own Strategic Planning process; includes six “Insights” that are interesting to ponder.

Two Signs that Your Strategy Needs a Refresh, Meera Chary, 2018

4-page discussion on when/why a new SP could be called for.

How to Brainstorm — Remotely, by Art Markman, 2020

From the Harvard Business Review – very helpful think piece on some of the challenges – and benefits – of working remotely.

FACILITATING REMOTE WORKSHOPS; THE DEFINITIVE GUIDE TO Insights, tools, and case studies from digital-first companies and expert facilitator

Very detailed (76 pages) document filled with discussion, strategies, tips and guides for working remotely as a leader or facilitator.

The Best Time to Say Yes: How Strategic Planning Can Help, Bridgespan Group Vlad Nedelea July 29, 2019

Two-page think piece on reasons to embark of SP.

Strategic Thinking: How to Do Strategic Planning Like a Futurist, by Amy Webb, 2019

An argument for longer-term strategic planning i.e. a ten year ‘vista’...

Making Strategic Planning (Relatively) Painless, by Tanya Ishikawa, 2021

Six “quick tips” for SP.

Market Research for Strategic Planning T. Hodapp 2018

Great little 2-page guide written for MAS by one of our Marketing Practice VC’s.

Merging Nonprofit Organizations: The Art and Science of the Deal by John A. Yankey, Ph.D. Barbara Wester Jacobus, M. N. O., Kelly McNally Koney, M. S. S. A., 2001

Although this is an older book it's an exhaustive analysis of everything you'd need to think about before and during an NFP merger process.

Ontario Nonprofit Network Shared Platform Guide, 2016

This guidebook provides good practices, for the implementation of shared platforms. "The shared platform approach supports collaboration, leadership, governance and project development for a diverse range of sector-specific work, neighbourhood work, networks and time-limited initiatives. The approach fosters social innovation, providing the opportunity for experimentation and the testing of new ideas".

Strategic Planning Amidst Uncertainty, The Bridgespan Group, 2021

Power point format – great overview of questions you might pose to a Board before embarking on an SP.

What It Takes to Run a Great Virtual Meeting, by Bob Frisch and Cary Greene, 2020

Good little tips documents – basic but helpful.

How Nonprofits and NGOs Can Get Real Value from Strategic Planning, The Bridgespan Group, 2023

Excellent article at the Bridgespan Group website. They are a global company that provide consulting help and guidance to NGO's. The article found by clicking this link covers the following:

"Strategic planning is about making decisions that provide clarity and alignment to best put critical resources to use to achieve your nonprofit's goals. It sounds simple, yet many organizations struggle with the process, not knowing why, where, or how to start. This article can help. It shares four vital elements common to most strategic planning approaches and a number of common pitfalls to avoid."

By: Lindsey Waldron, Preeta Nayak, Teni Lanre-Amos, Bradley Seeman, for Bridgespan, June 2023

Tools and Templates

Strategic Planning Key Questions to Ask

A very helpful little guide to the homework you can do as a VC BEFORE you start off on a Strategic Planning process with an NFP. Written by MAS VC Sue Pulfer, 2014.

Strategic Plan Template

Easy to copy little format that shows how you might lay out a goal, beside indicators of success.
Developed by MAS VC Chris Govern.

Strategic & Action Planning Steps

A 3-point summary developed by Dorothy Aaron, VC, in 2014.

Strategic Planning Process Template

Developed by Chris Govern (2014): “I use this when talking to a client about strategic planning. I customize to the steps we agree to, add dates, etc. I find this is a useful way to make sure we all know what we need to do by when. I can update this as plans change.”

KEY INFORMANT QUESTIONS RE: STRATEGIC PLANNING

Six questions you may choose to address to “key informants” external to the organization doing a Strategic Plan.

Environmental Scan Template Small Organization

Nice little guide providing the questions you can use while doing an environmental scan with a smaller NFP.

SHORT TERM SCENARIO PLANNING SAMPLE (FRAMEWORK)

Very helpful template showing how an NFP might work through different future scenarios by topic, based on 3 possible futures i.e. optimistic, most likely, pessimistic.

Sample SWOT and Survey Results prepared by S Pulfer 2017

Excellent example of a SWOT report back to an organization (this is based on a real case but made anonymous here).

Sample Operational Plan template (Sue Pulfer, 2018)

Easy to adapt model of how an annual operational plan can be laid out.

Sample Strategic Plan – S Pulfer/2017

Easy to use format – six goals over four years – this document is an example of a one-year plan of action against the goals.

Sample of a visual depiction (chart) of a five-year strategic plan

Operational Plan Template (Chris Govern, 2014)

Easy to cut and paste...

ICEBREAKER EXERCISE: Coat of Arms (Chris Govern developed)

Neat way to get a session going asking participants to work in small groups to create their organizations 'coat of arms'. Gets them thinking about goals and succinct descriptions etc.

Presentations and Workshops

Slide presentation on OGSM method of Strategic Planning

Use as both a guide for you, the VC and as a presentation to your client. OGSM=

Objectives - what we want to achieve, in words

Goals - what we want to achieve, in numbers

Strategies – the choices we make for how to achieve the objectives & goal

Measures – how to measure progress for each strategy (assess if working to achieve the goal)

What is Strategic Planning – deck

Simple overview (27 slides)

Introduction to Strategic Planning

Similar kind of overview (28 slides)

Essentials of Strategic Planning, by VC Mark Ellwood, 2018

Another overview presentation – bit longer at 40 slides

Governance

Editors Note: The Governance Library has amassed a LOT of great resources. As you'll see there are four discrete folders (Articles, Workshops/Presentations, Templates/Tools and Incorporation Information). Because the MAS libraries and folders have not been 'managed' in any way there are resources in one folder that could as easily be in another, depending on where the contributor of the resource put it. For example, you might see workshop presentations in Articles and think pieces in Presentations etc. For now, please scan the contents of all four folders when you're looking for governance information. A future project for us at MAS will be to move things around for more consistency. Happy reading!

Articles and Papers

7 Ideas to Build a Healthy Board Nomination Process

Helpful resource to share with ED's and Boards

360-degree Governance and Where are the Directors in a World in Crisis

A 55-page examination from a practical and scholarly standpoint what good governance in the 21st century should be. Produced by the Rotman School and written by Peter Dey and Susan Kaplan and with input from a huge Advisory Committee of Canadian corporate Who's Who. It's from a very corporate perspective so lots is not applicable to NFP's, however the 13 principals outlined in the 360-degree governance model would be very interesting for any Board – including not-for-profit, to adopt.

2017 Social and Demographic Trends by Jim Russell

An interesting short (3 page) discussion that explores a variety of issues and poses a number of questions for NFP Leaders such as "Despite your best efforts to master and deal with the new world of social media, how else might your business model be challenged in the era of the disappearance of context and attention spans?". Could form the basis of an interesting Board discussion session.

Imagine Canada's Standards Program for Canada's Charities and Nonprofits

This resource touches on all areas of MAS work and provides the baseline standard of practice in five areas: A. board governance B. financial accountability & transparency C. fundraising D. staff management and E. volunteer involvement. The Standards Program is first and foremost a capacity-building initiative and Imagine Canada encourage organizations to use the standards to improve and monitor their

practices. They also run a vigorous accreditation program based on the Standards but it is neither required or in fact used very much as there is no widespread expectation among funders, the public etc. that NFP's should be accredited.

CCA (Canadian Centre for Accreditation) Standards Manual for Community- Based Primary Health Care Organizations, Edition Date: May 11, 2020

Another accreditation guide, the standards outlined in this manual have been grouped especially for the Community-Based Primary Health Care organizations. The Organizational Standards in Section 2 apply to all organizations. Section 3 is sector specific, such as community-based primary care, child and youth mental health or credit counselling. Contact CCA to ensure you are using the correct manual for your sector.

Peering into the Future: Reimagining Governance in the Non-Profit Sector, BY LISA LALANDE, funded by Ignite NPS.

This paper focuses on how non-profit organizations can adapt to an increasingly complex environment by reimagining governance. It addresses how boards, leaders, staff and key stakeholders can work together to contribute to effective organizational governance from a strategic perspective. Specifically, this paper will: » Explore the current state of governance in the sector, including the legislative, regulatory and policy environment. » Identify emerging trends and challenges that impact governance at both the organizational and sector level. » Discuss promising practices and key considerations to improve the current state of governance. » Provide recommendations to improve the sector's capacity for "future-oriented governance."

Slide presentation: "Beyond Boards: Reimagining Governance, Disrupting the Status Quo" by Erin Kang - Ontario Nonprofit Network and Linda Mollenhauer - Ignite NPS

Covers: Overview of the Reimagining Governance Initiative and results of some of their consultations. The Reimagining Governance, convened by the Ontario Nonprofit Network in partnership with Ignite NPS who produced the paper (above). Reimagining Governance is an initiative designed to spark dialogue and new approaches to the way that nonprofit organizations are governed. This slide presentation provides a glimpse of some interesting alternative views on NFP governance but wouldn't likely be something MAS VCs would use with clients – at this point.

Restoring Trust in Nonprofits, ONN, 2019

23-slide presentation with some interesting statistics and information. Good to review if you're interested in the topic of trust but otherwise not likely a tool many VCs would use.

Board Recruitment and Selection - Imagine Canada blog 2018

Short discussion by Suanne Miedema, President of [Miedema's Board Consulting Inc.](#) where she helps nonprofit boards improve their governance.

BOARD RECRUITMENT MATRIX

This matrix can be adapted to assist an organization's recruitment efforts by assessing current board composition and identifying opportunities to diversify and/or expand the board.

Guide to Good Governance: Not-for-Profit and Charitable Organizations, 2013.

276-page guide produced by The Governance Centre of Excellence (GCE), an initiative of the Ontario Hospital Association. An excellent "primer" on every topic related to governance you could think of.

Ontario NFP Update on new ONCA Legislation

With a note from VC Bill Sparks describing the content here: "A very comprehensive update from Carol Jackson on ONCA and the need for our VCs to advise caution before changing Provincial NFP corporations' by-laws".

MAS Governance Framework Issues and Elements

This is an excellent little resource to get you thinking about Boards from different perspectives. It includes a very brief overview of various models of Board leadership (Carver, the Pragmatic Approach etc.) as well as "the four questions to be asked when you're serving on a Board".

Merging for Good: A Case-Based Framework for Supporting Effective Nonprofit Amalgamations

Written in 2021 after a pandemic induced merger of two NFP's in Calgary. This excellent 30 page report outlines the imperatives and challenges of nonprofit mergers and uses this case study to walk through the process.

20 Questions Directors of Not-for-Profit Organizations Should Ask about Mergers by Mark Blumberg • Andrea Cohen Barrack of CPAC (Chartered Professional Accountants of Canada)

Very thorough 56-page document: "Determining whether an organization should explore or proceed with a merger is one of the most important strategic and governance questions a board of directors can face. This document addresses the major elements directors should consider when contemplating a merger, grouped into the following areas:

1. Evaluating merger as a strategic option
2. Exploring a merger
3. Negotiating a merger
4. Implementing a merger"

Nine Lessons from a Nonprofit Advocacy Win, Posted by [Danielle M. Henry](#) on Boardsource, Jul 13, 2016

An informally written case study of a small local organization's experience with an advocacy project.

Board Essentials, produced by the Ontario Nonprofit Network,

This is an absolutely key document for general reference for any VC working with a Board. A quick, 7-page, summary of the key responsibilities of a Board. Could be used as a handout as well.

“Board Essentials describes the requirements and responsibilities that must be fulfilled by the board of directors, and which no other person or entity can perform. This core work of the board is based on what the law and regulations state are the requirements and responsibilities they must meet. While the board might play a significant role in fulfilling other governance functions, these are the essential ones.”

Policy Statements (example) based on the Carver Board Governance Model

Produced by John Howard Society in 2014. This is a helpful tool just to give you an idea of what a Board policy document, using the Carver Policy governance model, could look like. For example, the short but easily used elsewhere Executive Limitation policy illustrates the Carver approach where the ED does everything, EXCEPT what the Board limitation policy explicitly states.

Pro's and Con's of Charitable Status

Great little (3 page) discussion piece by MAS VC Graham Boyce.

Top 10 Compliance Issues for Canadian Registered Charities. Presentation to the Sustainability Network, January 26, 2017, Mark Blumberg (mark@blumbergs.ca), Blumberg Segal LLP

Super helpful and clear 63-slide power point presentation, laying out exactly what the title indicates. A must read for all Governance VC's.

Voices of Board Chairs: A National Study on the Perspectives of Nonprofit Board Chairs, By Judy Freiwirth, Mary Hiland, Michael Burns, Gayle Gifford and Debra Beck | October 12, 2016

Very interesting discussion paper (17 pages). An American perspective although that likely doesn't change the perspective dramatically. From the authors: “As a group of practitioner researchers, we decided to find out what preparation is done by board chairs and how they see their role in relationship to the board and other stakeholders. What we found was a pretty glaring picture of neglect, in that this is an area of organizational leadership succession that is often insufficiently thought through. What follows are our findings from a survey of 635 self-identified nonprofit board chairs representing local, regional, and national organizations in forty-two states, and the recommendations to nonprofits we make in light of these findings.”

Tools, Templates and Samples Folder

The Effective Board Manual: The Manual as an Orientation Tool and Guide

An excerpt from Board Development materials. This is an excellent (19-page) review of everything to do with creating and using a Board manual.

Imagine Canada's Standards Program for Canada's Charities and Nonprofits

In case you missed it in the Articles/Resources Folder (above) there is another copy of this fundamental document here.

This resource touches on all areas of MAS work and provides the baseline standard of practice in five areas: A. board governance B. financial accountability & transparency C. fundraising D. staff management and E. volunteer involvement. The Standards Program is first and foremost a capacity-building initiative and Imagine Canada encourage organizations to use the standards to improve and monitor their practices. They also run a vigorous accreditation program based on the Standards but it is neither required or in fact used very much as there is no widespread expectation among funders, the public etc. that NFP's should be accredited.

Tools/Templates Sub Folder: Starting Up a Not-for-Profit

Federal Not-for-Profit Incorporation via Corporations Canada (Guide)

Table of Contents

What documents must be filed to create a not-for-profit corporation?

Related Information

What do I need to do once the corporation has been created?

Where can I find information on registering as a charity under the Income Tax Act?

Is an NFP Act corporation automatically considered a non-profit organization under the Income Tax Act?

Other Resources

NON-PROFIT CORP REQUIREMENTS -A CORPORATION IS A LEGAL ENTITY-v6 2015

MAS document (10 page) that lays out all the requirements and step for creating an NFP in Ontario.

HANDOUT: There is also a two-page hand-out version of this document in this Folder.

REGISTERING AN INCORPORATED NON-PROFIT AS A REGISTERED CHARITY

HANDOUT: Done by MAS, 2015. A one-page little guide with a number of places to get more help listed.

STARTING A NOT-FOR-PROFIT CORPORATION AND REGISTERED CHARITY

HANDOUT: 1-page guide similar to the others ie with referral information

Presentations and Workshops Folder

Board Evaluation and Development

40 slide PP presentation, developed for MAS by Diane MacFarlane, 2021 (includes MAS overview page).

Purpose: to provide an overview of how NP Boards can improve the effectiveness of their governance and create greater benefit for their organizations by evaluating their own performance.

Content: 1) Introduction to Board Self-Evaluation (BSE) 2) Purpose and Benefits of BSE 3) BSE Tools/Templates 4) McKinsey & Co Nonprofit BSE Tool 5) Selecting and Using a BSE Tool/Template 6) Main Messages

Creating an Effective Board Management Structure

7 slide presentation (by D. MacFarlane) providing an overview for Board structure re: committees.

Legal Roles and Responsibilities Board of Directors

39 slide presentation prepared for MAS VC Jawad A. Kassab, MBA, LLB, MDiv.

Purpose: Introduction to the legal context of non-profits and charities, Exploration of the Board's Role and Responsibilities, Clarification of the Director's Role and Responsibility, Discussion of some key challenges facing Not for Profits.

Creating an Effective Board Management Structure

MAS mini-presentation by Diane MacFarlane, 7 slides, overview on Board Committee's.

A Framework for Effective Governance

Short think piece by Diane MacFarlane (so good to use for VC 'orientation' to the issues laid out in the PowerPoint presentations Diane has developed, as above). Provides an excellent set of what could almost be checklists – good for review with a client.

The Process of Integration Planning

An extremely thorough (37 page) review, by Diane MacFarlane (for MAS, in 2020) of the challenges and process of planning a merger/integration between two NFP's: "The process of planning a voluntary integration of two or more non-profit organizations is complex and labour-intensive. It can be viewed as encompassing four phases. Appendix A provides an overview of the phases, including the purpose of each phase, the resulting documentation and the submission of this documentation to each Board for review and approval".

Non-Profit Mergers: A Strategic Option

Relatively short (15 slides) presentation providing an overview to get a Board thinking about how a merger might work, things to consider before moving forward etc. Created by Diane MacFarlane, 2020.

Maximizing Governance: Governance 101

42 slide PP presentation, prepared for MAS in 2020 by VC Susan Tremblay:

Module 1: Context for Nonprofit Governance, Emerging trends in non-profits; organizational tensions
Current Governance Landscape,

Module 2: Definition of governance & role and functions of the Board, What is governance, Reimagining governance – how is it changing, Role & Functions of the Board

Module 3: Conditions and practices for good governance, Board Code of Conduct

Module 4: Duties, expectations and responsibilities of a Director.

MAS mini-governance presentation

15 slides. Developed in 2015 by VC Norm Kondo. Good quick overview.

Effective Board Governance – short presentation

16 slides. Developed in 2020 by Diane MacFarlane. Similar to above. Excellent overview.

Presentation to Management Advisory Services of Ontario on the Ontario Nonprofit Corporations Act (ONCA), January 25, 2022, by Laurie Turner, Partner, Fasken Law

There are two resources here; a 1.5 hr recorded presentation with slides (moderated by VC Mark Ellwood) and a copy of the slide deck. NOTE: All Ontario NFP's MUST be compliant with ONCA by 2024.

RISK MANAGEMENT: HOW TO IDENTIFY, ANALYZE AND MONITOR RISK

40 slide PP presentation prepared by VC Chris Govern in 2020:

MODULE 1: DEFINE RISK & RISK MANAGEMENT

MODULE 2: HOW TO IDENTIFY, ANALYZE & MONITOR RISK
MODULE 3: RISK MANAGEMENT FRAMEWORK
MODULE 4: ROLE OF BOARD/STAFF IN RISK MANAGEMENT

CONSIDERING GOING INTO BUSINESS? THE SOCIAL ENTERPRISE SPECTRUM FOR CHARITIES AND NPOS

27 slide presentation done in 2021 By Terrance S. Carter, B.A., LL.B., TEP, Trademark Agent:

Why “Going into Business” Matters for Charities and NPOs

- The Social Enterprise Spectrum
- What Does “Business” Mean?
- Revenue Generating Charitable Programs
- Program Related Investments
- Related Business Income for Charities
- Business Income for NPOs
- Utilizing a For-Profit Subsidiary
- Conclusion

Excellent and helpful reference for an NFP thinking of starting a “social enterprise”.

Board of Directors Recruitment/Marketing

23 slide presentation good for use with Boards heading into recruitment phase.

Information Technology

Articles and Papers

Gifting Tech Brochure

Contains basic information about this very interesting/helpful not-for-profit service.

Internet Trends 2018

Very interesting PP presentation slide deck, from an American perspective. Covers the following (numbers refer to slide #):

- 1) Users 5-9
- 2) Usage 10-12
- 3) Innovation + Competition + Scrutiny 13-43
- 4) E-Commerce 44-94
- 5) Advertising 95-99
- 6) Consumer Spending 100-140
- 7) Work 141-175
- 8) Data Gathering + Optimization 176-229
- 9) Economic Growth Drivers 230-237
- 10) China (Provided by Hillhouse Capital) 237-261
- 11) Enterprise Software 262-277
- 12) USA Inc. + Immigration

Tools and Templates

Technology Assessment Tools Sub-folder

Choosing a Volunteer Management System presentation

10 slide overview of the process for choosing VM Software. Also included here is a six-slide review of similar material (clearly an extension of the same session); **Volunteer Management Discussion Panel**.

Tech Soup Canada Technology self-assessment for charities (2014)

“The goal of this self-assessment tool is to help a wide range of types of organizations to structure their thoughts around technology in a way that is practical and actionable.

Note that this document isn't a technology plan – it's the first step to using technology to meet your Mission”.

Strategic Technology Plan Template

Super helpful template developed by MAS VC Sue Pulfer. Useful when working with Boards/staff needing to analyze and articulate their needs and plans vis a vis technology.

IT Tools sub-folder: Backup and Disaster Recovery Tools

Sample Disaster Recovery Template, Pulfer 2014

Useful as a guide for organizations wanting to create a plan or policy.

Disaster Recovery Planning Questionnaire, Pulfer 2014

Very helpful set of questions for an organization to have on file and use to help them identify tech management strategies.

The Resilient Organization: A Guide for Disaster Planning and Recovery, Version 2.0, August 18, 2009

Produced by Tech Soup. Clearly out of date but a great and detailed guide which you can use as an outline.

Essential Security Policies

10 policies that an organization should adopt vis a vis security of data and tech systems.

Disaster Recovery Template, Sue Pulfer, 2014

Extremely detailed and technical 23 page guide developed by MAS VC Sue Pulfer. For further information on these matters you may be able to contact Sue (through MAS).

Backup Strategy, Pulfer, 2014

Simple to follow, detailed, extremely helpful guide on developing a data/tech backup strategy.

Presentations

IT Plan Template

Prepared for MAS by VC Paul Fong. 11 slides you can walk through to end up with an IT strategy/plan. Simple but so helpful.

Fundraising

Articles and Papers

“Ditch the List” (Patricia Ayres Crawford, National Director of Philanthropy, Compass, Washington DC).

Excellent 2-page article outlining reasons for Fundraisers to cease creating/using donor lists.

Engaging Board Members: AAA Then and Now” (Kay Sprinkel Grace, Transforming Philanthropy, PO Box 475578)

This article introduces and describes the AAA method of involving Board members in fundraising. The Ambassador/Advocate/Asker method was developed by the author in 2009 and this article provides a bit of a refresh as well as a survey you can use with Boards to help them identify their baseline commitment in the three areas.

AFP (American Fundraising Professionals) Resource Guide

An extensive list of resources initially created to help fundraisers respond to Covid. At this point it ends up providing an excellent guide to a number of resources that can help NFP Boards, staff and consultants navigate working on-line which in many ways appears to be ‘here to stay’, at least in part.

A Non-Profits Guide to Hosting a Hybrid Event (www.frontstream.com)

Exactly as the title suggests this is an 11-step process for NFPs/fundraisers putting on a hybrid event.

Twenty Questions Non-Profit Directors Should ask about Marketing and Fundraising (prepared for MAS by Lelia MacDonald, 2015)

As noted in the Introduction: Does your Board talk more about cost containment and less about revenue generation? In a recent survey on Board performance, Board members graded themselves lowest on their role in fundraising. This e-booklet helps address this need for improvement.

The resource will be extremely helpful for MAS VC’s with Marketing backgrounds as it utilizes traditional, formal Marketing approaches and language and provides guidance on their application to the NFP sector and in particular to what the role of the Board should be vis a vis this aspect of fundraising.

The Guide to Non-Profit Storytelling (www.classy.org)

A comprehensive and easy to read discussion of the use of storytelling to enhance marketing of Not-for-Profit organizations.

Crowdfunding 101 (written for use by MAS Volunteer Consultants, by Sue Pulfer)

A great little article and list of further reading on “crowdfunding”/ fundraising via social media. Augments the “E-philanthropy” section of the MAS Fundraising Workshop presentation.

Ultimate Guide to Peer-to-Peer Fundraising (www.causevox.com)

A detailed guide and 'how to' for fundraisers pursuing the ideas of crowdfunding, "friendraising", on-line and one to one connecting etc.

Fundraising Articles "Boardsource" Sub-Folder

Measuring Fundraising Effectiveness: Why Cost of Fundraising Isn't Enough

Presents a summary of a new model for measuring fundraising effectiveness.

UNDERSTANDING & EVALUATING YOUR FUNDRAISING STRATEGY

A Toolkit & Conversation Guide for Boards and Leadership Teams

Tools and Samples

You're Better at Fundraising than you Think

A set of 10 common objections people make about not being a fundraiser, and answers to each. Also 8 scenarios' to be used in role playing exercise. This resource would be a good addition to any fundraising presentation, especially for Boards or senior staff in an NFP.

Storytelling Toolkit

An excellent resource to guide presentation and discussion on "how to" utilize storytelling in fundraising.

A Guide to Nonprofit Storytelling

A very thorough (64 page) guide on the why and how to engage in storytelling to raise awareness and prove value, for NFP's.

Presentations and Workshops

The Seven Faces of Philanthropy

Very interesting discussion/presentation on understanding different kinds of donor groups. Susan Howlett, a consultant defined seven donor types in a supplement to her book, Boards on Fire! Inspiring Leaders to Raise Money Joyfully. They are shared in this presentation as well as some communication dos and don'ts tailored to type.

So, You Want to Fundraise

2016 slide presentation with an overview on giving in Canada, common fundraising tactics, grant writing strategies.

Fundraising: An Overview for Non-profit Boards. There are four documents in this folder related to this: A Leaders Guide, Participants Workbook, Power Point slide deck, a short pre-workshop survey.

Developed for MAS in 2014 by Rita Daniel. This MAS fundraising workshop was developed to provide directors of non-profit organizations with an overview of fundraising. The workshop design has two components: A 2 hour presentation and question and answer session and a 1 hour session on role playing on how to “make the ask”. The objectives of the workshop: to provide a general knowledge of fundraising and the various techniques available; to make participants comfortable with asking donors for money.

How to Make Successful Grant Proposals

Prepared for MAS by Rita Daniel in 2014. This slide presentation covers: What You Need Before Applying; Finding the Right Organizations to Approach; Presenting Your Case; What’s in a Good Proposal; Follow-up.

Using on-line Tools to Uplevel Your Live Fundraising Event

33 slides prepared by a company called Mobile Cause. While the ultimate purpose is to get users to consider their product the presentation provides a good overview of tools and approaches to fundraising using on-line technology.

Key Wyman Folder

Ken Wyman is a well-known Toronto based fundraiser who has uploaded a number of documents he feels would be helpful to MAS VCs. Ken started teaching for Humber in the mid-Eighties, in the part-term Certificate in Fundraising, run jointly with The Canadian Centre for Philanthropy, with classes held at OISE on Bloor Street. He has written or contributed to eight books on fundraising, including Excellence in Fundraising in Canada.

Internal Attitudes to Fundraising

Brief checklist to help identify comfort levels at the Board or senior levels.

Donor Records Assessment

8-point checklist to ensure appropriate record keeping.

Everything you Need to Know to Get Started in Direct Mail Fundraising

Full book – 284 pages. 2022 updated by Ken Wyman, based on his successful 1995 book of the same name. Content is pretty much what the titles says – a real “bible” on direct mail fundraising.

Fundraising Evaluation Form

A quick review to be done after every fundraising initiative completes.

Fundraising Assessment: Fundraising Planning Checklist

44 question self-assessment for Boards/staff reviewing how well the organization manages its fundraising program and its readiness to carry out fundraising strategies.

Fundraising History Assessment

A template for quick review of past fundraising efforts looking at methods used, money raised, costs and net income.

In-Kind Donations Wish List

Template (basically an empty page) to be used in brainstorming what non-monetary gifts the organization could use.

Check Lists and Score Sheets 2019

Very detailed set of materials designed for use in self-assessment (organizational) on the success of direct mail campaigns. Includes background and evaluation of “readability” among other things. You could use these lists and sheets as a direct mail campaign is being developed as they provide an excellent glimpse into best practice and what not to do.

Documents as above (check lists/score sheets) in PDF format

Planning Successful Fundraising Programs

Full copy of 1991 book (189 pages).

Public Good Will Assessment

11 question self-assessment on how public views/understands the organization.

Research Previous Donors

8 pages lifted from other Wyman materials that could be used if doing a review of the organizations fundraising history.

What are your Plans?

Little two-page template to shape setting out a fundraising plan.

Who Has Given...

Quick breakdown chart by gift amount.

Marketing/Communication

Articles and Publications

The State of Social Media in Canada in 2020. A Canada-wide survey about social media adoption and use.

This report was produced by the Social Media Lab at Ted Rogers School of Management, Ryerson University. It is based on a census-balanced online survey of 1,500 online Canadian adults (18+). The survey was conducted between April 9–17, 2020.

MAS Sources and Resources 2021

An informal and detailed listing of helpful resources related to NFP's and marketing.

Interesting Links for MAS Marketing Practice VCs – updated October 2020

Another in-house listing of websites providing information and tools of interest re: NFP Marketing.

Tools, Templates and Resources

Guide to Writing a Great Press Release (1 page)

Request for Information (RFI)/Request for Proposal (RFP) Template (re: seeking Marketing/PR firm help)

List of free training (on-line) available for NFP's

Basic Search Visibility Checklist (1 page)

STUDENT LEARNING EXPERIENCES & NFP WORK

This is a list of schools who offer work experience as part of their educational programs. (Programs can be called work placement, co-op, internships, work-integrated learning or other titles and are so are not easily searched on google.) MAS clients have had success in working with post-graduate / experienced students who are looking to advance their learning and enhance their resume/skills in the NFP sector.

Words that Work E Book

By Russell James, J.D., Ph.D., CFP® is a professor at Texas Tech University where he directs the on-campus and online graduate program in Charitable Financial Planning and also teaches Charitable Gift Law at the Texas Tech University School of Law.

22-page overview goes through the following: What words generate interest (inspire people to educate); How do we ensure that we meet their expectations with information and content that is relevant once they have become engaged; What words lead supporters to take action?

Student Learning

A list of schools who offer work experience as part of their educational programs. (Programs can be called work placement, co-op, internships, work-integrated learning or other titles are so are not easily searched on google.) MAS clients have had success in working with post-graduate / experienced students who are looking to advance their learning and enhance their resume/skills in the NFP sector.

Basic Search Visibility Checklist

One page Google resource – set of questions to consider.

List of Free Training for NFP's

A sampling of the types of free training available to charities and non-profits.

Request for Information (RFI)/Request for Proposal (RFP) Template

GUIDE TO WRITING A GREAT PRESS RELEASE

Presentations and Workshops

What is Social Media and When to Consider it

12-slide MAS powerpoint introducing ideas related to using social media in NFP marketing.

MAS_BOD_Recruitment - L Graham-Prentice 2019

23-slide presentation deck using a marketing approach to Board recruitment

Human Resources/Coaching

General Topics

Downsizing Principals – Power Point Deck by Peter Armstrong (for MAS)

A good quick overview of what to think about when considering downsizing. Could be used with a Board too.

20 Questions Directors of Not-For-Profit Organizations Should Ask About Human Resources,

Written by Adrienne Campbell, II.b Outlines the ways the BOARD needs to oversee and ensure best practice HR standards.

HR Audit Checklist

A simple listing of all the HR standards/requirements that an NFP should have. Good for use by an ED, HR Director, consultant.

Employer guides to responding the caregiver needs of their employees (from Ontario Caregiver Organization).

Reference information provided in this short message from MAS Volunteer Consultant Cindy Dunn

Change Management

Change Management Power Point Deck – MAS

Great overview for use by Board, staff, consultants. Includes a review of Kottler's 8 step Change Management Process.

Team Charter Guidelines Checklist – MAS

A short outline/checklist for creating a "Team Charter" which can be used by ED's or HR staff.

Performance Management

55 Competency-Based Ideas for Professional Development, The Bridgespan Group

Outlines The 70-20-10 approach which indicates that 70 percent of learning and development comes from on-the-job training; 20 percent from coaching and mentoring; and 10 percent from formal training through conferences, classes, etc. Also includes 10 example core and leadership competencies; for each

competency there are suggestions for ways to engage direct reports in developing particular competency while on the job.

Performance & Development Cycle for the Executive Director

Very helpful overview for Board of Directors vis a vis ED evaluation.

Performance and Development Cycle

Overview document for use by external or internal Coaches

Leadership Development

Myers Briggs Overview Power Point Deck

Conflict Resolution Model

3 slides depicting the model. Would require notes/detail for use by anyone not familiar with the methodology. MAS HR Practice Leader could provide more information.

Coaching

Coaching for Development slide deck

An overview to be delivered to managers on taking the role of “coach” within their team.

Coaching for Development Participants Handbook

Companion piece to be used when delivering the coaching workshop as above. Includes self-assessment, discussion guides and exercises for the session.

Policies and Practices

Integrated Accessibility Standards Regulation

A training booklet that applies to NFP's with 1-49 employees. It can be used by the organization looking to provide employees with the Ontario government required training on: • accessible service, and • work-related training on the other accessibility requirements. The booklet is fairly long and detailed (40 pages) and would require some familiarity with AODA. It would be used primarily by HR professionals or senior management. Conforming to AODA is law in the province.

Employee Information Form

One-page fillable form with basic employee information (contact, SIN, OHIP etc.). Could be used for volunteers as well.

Health and Safety at Work poster

One pager with employer and employee rights and responsibilities outlined.

Health and Safety at Work Supervisor Handbook

Helpful guide to share with anyone designated within and organization as the H/S lead.

Health and Safety at Work Worker Handbook

A four-step description for any employee on the basics of H/S – what they need to know, do, have a right to etc.

A Guide to the Legislation: Workplace Hazardous Materials Information System (WHMIS), 2017

Developed by government to help the workplace parties understand some of their obligations under the Occupational Health and Safety Act (OHSA) and regulations. It is not legal advice. It is not intended to replace the OHSA or the regulations. Also available on-line at Ontario.ca/labour.

Generic HR Policies Manual for NFP's

Provided by MAS VC Sue Pulfer, updated October 2022. Excellent tool that could easily be worked through with a Board HR Committee or agency senior staff. All they need to do is insert organization specific information in each section (hiring, benefits, confidentiality etc.) Includes a section on volunteers which is helpful.

Example Workplace Harassment and Violence Policy and Complaint Form

HR Policy Development Tool Kit

Developed by Michael J. Landa, CHRP in 2012, For Exclusive Use by MAS Volunteer Consultants. Contains: Core Policy Inventory; Generic Employee Information and Policy Manual ; Policy Template for Larger Organizations and Draft Recruitment and Selection Policy following the Suggested Template; Manager's Guide to the Application of Draft Policy on Recruitment and Selection.

Recruiting and Interviewing

Recruiting for Emotional Intelligence Interview Questions

Developed by MAS Volunteer Consultant. The questions have been divided into the four traits based on Daniel Goleman, Psychologist research on emotional intelligence. He has written a number of books on Emotional Intelligence, one being [Leadership: The Power of Emotional Intelligence](#).

Compensation and Benefits

2019 Charity Village Salary and Benefits Survey and,

2021 Charity Village Salary and Benefits Survey

This bi-annual survey provides a definitive analysis of salary ranges within the not-for-profit sector, referencing provinces/cities, types and sizes of organizations etc. Excellent resource to use when working with MAS clients on HR strategy and salary comparables etc.

Summary for MAS Volunteer Consultants of the Non-Profit Salary Survey 2019

Prepared by VC Sue Pulfer. Even though it relates only to the 2019 version of the study, the summary is worth a quick glance.

Succession Planning

NOTE: Nothing in this folder right now (June 2023)

Finance

Articles and Papers

Charter and Work Plan for Board Finance Committee

Example document prepared Authenticity Consulting LLC. Provides and excellent lay out of how a Board Committee Work Plan can look, and be used.

Make Good Use of the Treasurer and Finance Committee

Great outline usable for VC's and organization staff and Boards (there is a copy in Governance Library also) on more roles for the Treasurer and Finance Committee than strictly statements review.

Non-Profit Auditor Selector Guide

This guide is a compilation of tools and templates designed to provide guidance throughout the process of selecting an auditor for your nonprofit organization. These tools and templates should be used as guidelines and can be modified to meet your specific needs.

MAINTAINING NONPROFIT OPERATING RESERVES: An Organizational Imperative for Non-profit Financial Stability

Written by the The Nonprofit Operating Reserves Initiative Workgroup out of the US (member list included) in December 2008. This is an excellent paper arguing for something that in Canada Not-for-Profits are expected to do by the majority of government or Foundation funders.

How to Simplify Your Non-Profit's Year-End Process, Charity Village, 2018

Simple and straightforward 17 slide Power Point Deck.

Tools and Templates

Finance Committee Review Template

Useful tool for a Finance Committee that wants to self assess and/or set a work plan.

Presentations and Workshops

Board Fiduciary Responsibilities PP presentation

Developed and delivered by MAS VC Brian Traquair in 2019. 104 Slides with notes – very detailed and definitive.

Budgeting Workshop PP presentation

Developed and delivered by MAS VC Brian Traquair in 2019. Covers: Understanding Financial Reporting; The Role of Budgets; Budget Preparation Workshops; Building a Budget (Analyzing Trends, Handling Good and Bad News); Presenting the Budget; Designing a Budget Process for your Organization; Connecting Budgets to Decision Making. 80 slides, with notes – a 3 hours presentation.

GST/HST overview presentation for charities, June 2021, Prepared by Revenue Canada

48 slides, states “For Discussion Purposes Only”. Good resource for VC’s. though it’s very technical and detailed – no overview included etc.

Program Outcome and Evaluation

Articles and Papers

The Guide to Meaningful Non-profit Metrics

To help you measure your organization's performance and find areas for improvement, each chapter in this guide offers...

- Useful metrics for evaluating your organization.
- Insight around what these metrics tell you about your performance.
- Key industry benchmarks.

At the end of each section, click the link to the worksheet to apply these metrics to your organization.

Ontario Museum Outcome Based Planning and Evaluation (Workbook)

Although designed as a workbook related to a 2013 conference presentation the resource has lots of great background discussion on outcome evaluation as well as lots of exercise and tools that could be used by our client organizations.

E book: Outcome Metrics; Measuring What Matters in the Nonprofit World

Good quick overview (15 pages) covering: The Age of Transparency and Accountability, Outcome Metrics: What Are They and Why do They Matter? Monitoring Performance and Linking Metrics to the Mission, The Best Path to Success: A Balanced Approach, Set Up Your Plan and , The Right Financial Software System Matters

Discussion Paper: THE STATE OF EVALUATION - MEASUREMENT AND EVALUATION PRACTICES IN ONTARIO'S NONPROFIT SECTOR

Written in 2018 by a consortium including the Ontario Nonprofit Network and Imagine Canada.

Demonstrating Value and Impact: Program Outcomes and Evaluation, Toronto Public Library's Journey

51 slide presentation from a 2019 conference. Content covers:

"To share our journey in developing program outcomes

To provide example of a logic model and program development outcomes and evaluation

To describe how outcomes will be developed for our new strategic plan

To share resources we have used and learn from your experience"

Using Logic Models to Bring Together Planning, Evaluation, and Action. Logic Model Development Guide

Very comprehensive resource developed by the Kellogg Foundation in 2019.

A GUIDE TO STRATEGIC AND SUSTAINABLE NONPROFIT STORYTELLING, Meyer Foundation, 2019

Very detailed discussion and methodology for using storytelling to raise awareness and particularly in the context of grant-seeking.

Tools and Templates Folder

This folder contains 15 examples, charts and quick overviews related to Outcome Based Program Evaluation including:

Template: The Community Nutrition Education (CNE) Logic Model ñ Overview

Template: Logic Model Worksheet/Flowchart

Template: Logic Model Worksheet

Slide: Overview of Logic Model

Example: one page program evaluation summary (there are two of these for different programs).

Template: one-page blank version of the above summary form. There is also a MAS version of this (same format just with logo etc.)

MAS – Logic Model Checklist

How to Use note: “Review your logic model by answering the following questions. If the answer to any question is “unsure” or “no,” go back to the model. Consider revising the model. Please note that often it takes multiple revisions of the logic model before it reaches its final form”.

2 Examples: Developing Youth Leaders and Strengthening 4H Club Leadership - Logic Model charts.

The Basics of Implementing Outcomes-Based Program Evaluation (OBPE)

Five-page mini guide developed for MAS by Diane Macfarlane in 2017.

Template: Data Collection Worksheet

Presentation and Workshops

An Introduction to OUTCOMES-BASED PROGRAM EVALUATION

An 18 slide PP presentation developed by VC Chris Govern in 2018.

Outcome Measurement

15 slide PP presentation developed by Chris Govern based on the approach and material developed by the United Way. Covers the following:

WHERE DOES MEASUREMENT FIT?

WHERE DID OUTCOME MEASUREMENT COME FROM?

WHAT IS OUTCOME MEASUREMENT & WHY DO IT?

WHAT IS A LOGIC MODEL?

HOW TO DEVELOP LOGIC MODELS, OUTCOME STATEMENTS AND OUTCOME MEASURES

High Quality Performance Measures

34 slide PP presentation from a 2017 American conference held by Corporation for National and Community Service